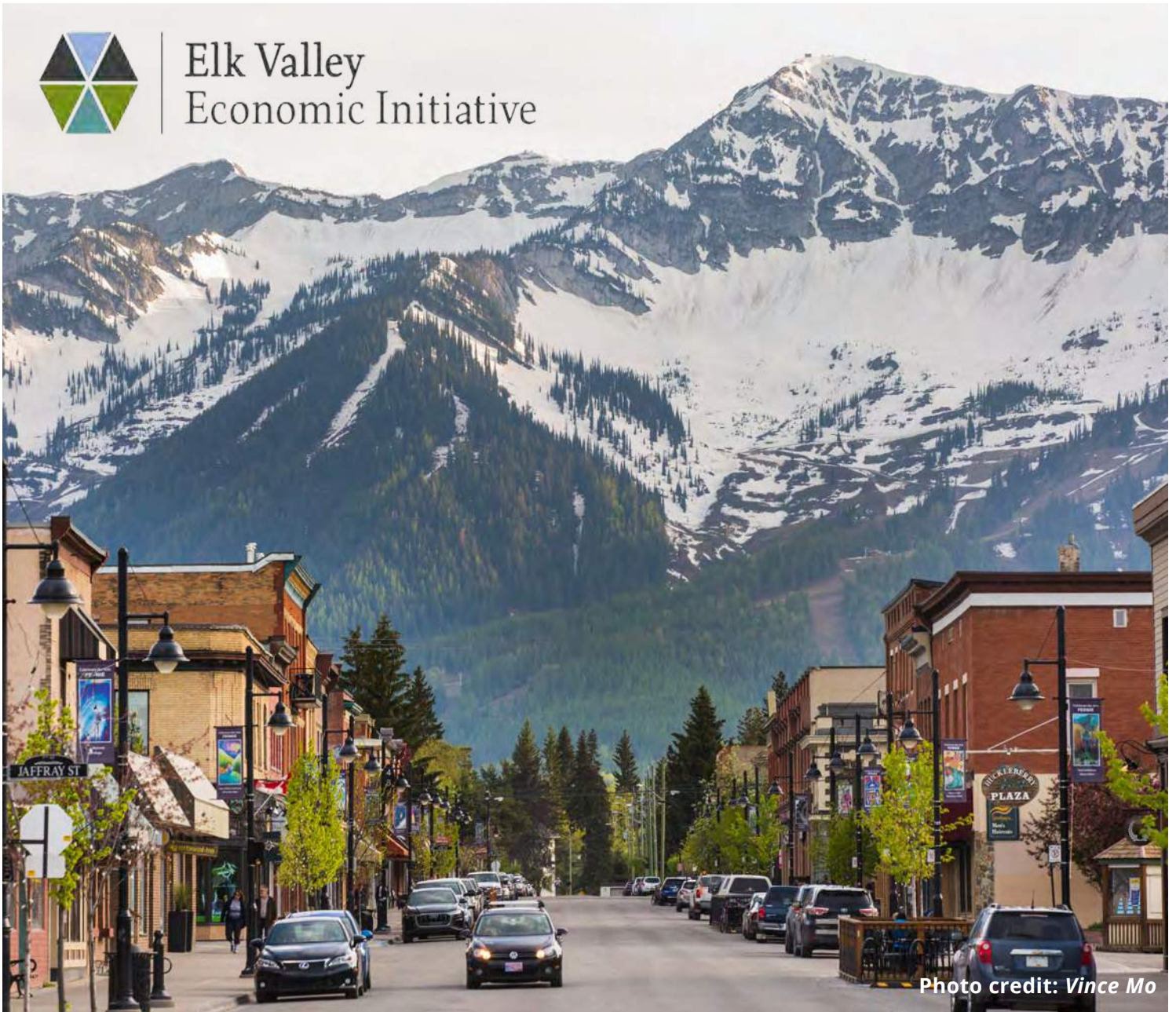




Elk Valley  
Economic Initiative



# Fernie Business Retention & Expansion Report

SPRING 2022



# ABOUT THE EVEI

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The EVEI has eight voting seats representing the District of Elkford, the Elkford Chamber of Commerce, the District of Sparwood, the Sparwood Chamber of Commerce, the City of Fernie, the Fernie Chamber of Commerce, Yaqit ʔa·knuq̓i 'it (Tobacco Plains) First Nation, and Teck as the industry partner. We are supported by representatives from the BC Ministry of Jobs, Economic Recovery and Innovation, Community Futures East Kootenay, Columbia Basin Trust, and the Economic Trust of the Southern Interior.

The purpose of the Initiative is to collaboratively pursue regional economic development projects and initiatives in the Elk Valley, striving to expand opportunities for existing businesses, attract new ones and diversify the types of businesses. In addition, we aim to increase the number of permanent, full-time residents who spend their money locally thereby contributing to the region's sustainability.

The Elk Valley Economic Initiative will champion, support and articulate opportunities for projects and initiatives while creating a network and increasing communications among individuals and organizations involved in economic development.

## PARTNER ORGANIZATIONS

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# EXECUTIVE SUMMARY

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This report describes findings from a business retention and expansion (BRE) survey conducted online via Survey Monkey from October 22nd to December 22nd, 2021, by the Elk Valley Economic Initiative for businesses operating in the Elk Valley. 318 individual business responses were received, amounting to approximately 1 out of 3 licensed businesses in the Elk Valley. 245, or 77% of these business responses identified as operating in Fernie. This report is focused exclusively on these businesses and was written in tandem with the Elk Valley BRE report which encompasses all business responses.

BRE is an effective economic development tool that encourages local businesses to stay and grow in the community through identifying and responding to their needs. The key research findings below summarize the data obtained in the BRE survey, then the next steps and potential action items outline recommendations partner organizations could use to improve the business climate of Fernie. The appendix section showcases the full quantitative data obtained from Fernie businesses in the BRE survey.

Challenges identified in this report are not necessarily unique to the Fernie, however it is important that specific supports and action items are developed for the community's businesses to stimulate a strong economic climate.

# KEY RESEARCH FINDINGS

(n = 245)

## Company Information

**50.3%**

of businesses identified as operating **only in Fernie**

**29.7%**

of businesses identified as operating in **all three communities** (Elkford, Sparwood & Fernie)

**38.5%**

of businesses reported an average gross **revenue of under \$250,000**

**15%**

of businesses are classified as **"Construction"**, followed by

**10%**

as **"Professional, Scientific, & Technical Services"**, **"Arts, Entertainment & Recreation"**, and **"Retail"**

**Cost of doing business**

was identified as the biggest challenge facing Fernie businesses **other than labour**

**29.3%**

of businesses in Fernie have **been in operation for over 20 years** compared to

**31.4%**

of businesses that have **been in operation from 0-4 years**

**5.4%**

of businesses listed themselves as **"emerging / start-up"** compared to

**4.2%**

of businesses listed as **"declining"**

# KEY RESEARCH FINDINGS

(n = 245)

## Workforce

**50.7%**

of businesses stated **employee recruitment** has been a problem in the last 3 years while

**30.1%**

of businesses stated **employee retention** has been a problem in the last 3 years

**47.2%**

of businesses expect their number of employees to **increase** over the next 3 years, while

**4.7%**

of businesses expect their number of employees to **decrease**

The **average entry level wage** (median range) in Fernie is

**\$18.00-\$20.99**

**Lack of skilled staff**

was listed as a **major barrier of expansion** by

**42.1%**

of businesses

The **top strategies / factors** that businesses employed to make employee retention not a problem were

*“Competitive wages”, “Company culture”, and “Flex time”*

**69%**

of businesses experiencing employee recruitment issues stated that **“lack of applicants”** was an underlining issue and

**49.1%**

stated **“attracting the right candidates”** was an underlining issue

The average number of **full-time employees** at a business is

**5.5\***

(mean calculation)

*\*Teck has been removed from the data to avoid skewing the results*

# KEY RESEARCH FINDINGS

(n = 245)

## Housing

**55.3%**

of businesses listed housing as **“Very to extremely important”** to their business success

**Housing** was listed as both an underlining issue regarding **employee recruitment (54.3%)** and **employee retention (55.9%)**

**43.3%**

of businesses listed housing as a **top community weakness** as a place to do business

**Lack of housing**

was selected as the **second biggest challenge** facing businesses (other than labour) tied with **“Supply chain”** and behind **“Cost of doing business”**

## KEY RESEARCH FINDINGS

(n = 245)

# Business Expansion & Growth

44.2%

of businesses listed their current **state of business as growing** (customers know about your product / services and revenue is increasing)

88.1%

of businesses stated they have at least **one barrier of growth**

The highest ranked major barriers to growth were "**Lack of skilled staff**", and "**Finance**" at

42.1%

and

26.2%

respectively

58.6%

of businesses stated they **plan to expand their business** in the next 3 years

Lack of staff

was listed by

20.2%

of businesses as to **why they are not expanding**



# KEY RESEARCH FINDINGS

(n = 245)

## Tourism

### Tourism

was the **second highest ranked community strength**, behind "Outdoor activities & Recreational opportunities".

Tourism was ranked as "**Extremely important**" to their business success by

**41.4%**

of businesses

### Tourism

was the **highest ranked sector** to attract to Fernie that would benefit businesses

## Additional Findings

### Cost of living

was listed as the **top underlining issue** impacting employee retention at

**69.1%**

and the top community weakness at

**49.3%**

The **average lease rate** (based on triple net lease) in Fernie is

**\$12.20 per square foot**

(weighted average calculation)

**22.4%**

of businesses stated that they plan to **retire or sell their business** within the next 3-5 years

The **top desired business supports** that are currently not available are

**"Leadership / management training"**  
then **"Human resources"**



# NEXT STEPS AND POTENTIAL ACTION ITEMS

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Business Retention and Expansion (BRE) is a highly effective economic development approach if there is an ongoing cooperative effort between business, local government, and support organizations. Economic development is defined by programs, policies, or activities that seek to improve the economic well-being and quality of life for a community.

The results of this survey can be used by the EVEI, its support organizations, and local member organizations (the City of Fernie and Fernie Chamber of Commerce) to make well informed and data driven decisions focused on supporting local businesses retention and expansion.

Through data analyzation, and based on the key research findings, the following action items have been identified to have the greatest impact on improving Fernie's business climate:

# Workforce Attraction

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51% of businesses operating in Fernie stated employee recruitment has been a problem in the last 3 years. Businesses experiencing employee recruitment issues have an average of 8 full time employees, while businesses not experiencing employee recruitment issues have an average of 3 employees. The major underlying issue affecting employee recruitment was identified as “Lack of applicants”. 42% of Fernie businesses stated “lack of skilled staff” is a major barrier to expansion. With 47% of businesses expecting their number of employees to increase over the next 3 years, this issue will only continue to worsen unless specific action items are implemented to address the workforce shortage.

While increasing workforce housing, covered in the next section, will greatly help workforce attraction to Fernie, it is not a single solution. To help address the shortage of workers, especially skilled workers, the City of Fernie should:

## DEVELOP A COMMUNITY WIDE LABOUR FORCE STRATEGY

The emphasis of this strategy would be on attracting and retaining a skilled workforce. A coordinated workforce strategy will create a positive impact on the community of Fernie by working towards the business challenges identified in the survey data. For reference, two examples of completed labour market strategies would be the “Cariboo Chilcotin Labour Market Strategy” and “BC’s Northeast Region Labour Market Strategy.” There are opportunities, including funding grants, for the EVEI to develop an official Elk Valley wide labour market strategy, supported by the City of Fernie, and broken down by community. A regional approach removes duplication, strengthens the findings, and decreases the cost and work burden for the communities. The labour market strategy can be multi-faceted, and the two recommendations below highlight the first steps towards a successful strategy:

### **1) Focus on barriers to labour market participation**

The top three barriers identified for labour market participation were cost of living, housing, and transient population. Cost of living was also identified as the community’s greatest weakness.

Addressing these issues will increase labour force participation and applicants for jobs openings at businesses. The City of Fernie may consider that addressing these barriers should be an identified priority in their core values or strategic objectives. Action items listed throughout this report will be instrumental in reducing the labour market barriers identified above.

### **2) Begin developing a data-driven out-of-market labour recruitment strategy**

Developing a recruitment strategy through a regional approach by supporting the EVEI and working closely with the Chamber should be one of the main pillars of the labour market strategy. The Chamber of Commerce has already begun work on this recommendation by developing [workinfernie.com](http://workinfernie.com) in 2019, a “workforce attraction website and online job board that aims to address the ongoing labour shortages experienced by many businesses in Fernie.” In the future, producing a digital marketing package is expected to be the most beneficial for local business workforce attraction, allowing businesses to utilize the package themselves, and delivering a greater marketing reach.

# Workforce Attraction

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However, there are four initial action items listed below that the City of Fernie can do that would ensure a streamlined and effective recruitment strategy.



## **ATTEND “WORK IN FERNIE” SESSION FOR WORKFORCE RECRUITMENT**

The City should attend the information session to discuss the job marketing site “Work in Fernie” and whether this website should be expanded to market the Elk Valley as a whole. Organizations can obtain more information on the recruit efforts produced from the website and discuss if a regional approach, spearheaded by the three Chambers of Commerce, is the best solution to actively recruiting a workforce.



## **BUILD RELATIONSHIPS WITH POST SECONDARY INSTITUTIONS BY SUPPORTING AND UTILIZING ADDITIONAL LABOUR FORCE DATA**

Further data on the Fernie labour market and the classification of workers required by businesses would be beneficial to a concise labour force strategy and create a baseline for further workforce attraction work. The BRE survey contains data that could be broken down by industry and the EVEI could lead this effort, with support from the City of Fernie, in obtaining and analyzing this data. The City of Fernie could build relationships with post secondary institutions, identify who is researching labour force requirements and advocate for their action in this space. Through this data, relationship building, and advocacy, specific training and development programs could be created by relevant associations that support staff development as identified by industry needs.



## **ENSURE LABOUR MARKET INFORMATION AND WORKFORCE ATTRACTION MARKETING IS READILY AVAILABLE ON THE CITY WEBSITE**

The labour market information should communicate relevant business information, occupations in demand, and available workforce training. The marketing should focus on attracting skilled workers and families to move to Fernie. The EVEI’s Fernie investment profile will support this effort, with a focus on highlighting data that promotes Fernie as a place to live, work, and play, as well as producing cost of doing business metrics. The Chamber of Commerce should also ensure this information is available on their website. Once developed, this online information can be expanded to include relevant business retention & expansion and investment attraction material, with the support of the EVEI and Chamber. This recommendation correlates with Fernie’s Official Community Plan policy 3-A.9 which states, “Continue to refresh and keep current Fernie’s existing website as part of a communications and branding campaign to make critical business information easier to find and to highlight Fernie’s high quality of life and other competitive advantages and strengths.” Community strengths identified in this report can be a strong guideline for the type of marketing material the City would want to highlight.



# Workforce Attraction

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## PROMOTE AND SUPPORT EMPLOYMENT PROGRAMS

There are a wide variety of employment programs that focus on workforce attraction and development offered through the BC Government, Kootenay Employment Services, and Columbia Basin Trust. The City of Fernie and the Fernie Chamber of Commerce should support these programs and share them with local businesses, with the aim to decrease the number of employees struggling with employee recruitment. Workforce skill development and training programs have been identified to lessen the cost of doing business in addition to reducing employee recruitment and retention issues. This action item correlates with Fernie's Official Community Plan policy 3-B.4 which states, "Continue to work with the College of the Rockies and other partners in providing educational services to help ensure that there is an educated local workforce that meets local industry needs...".

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For workforce attraction, the Fernie Chamber of Commerce, in addition to hosting the "Work in Fernie" information session with Tourism Fernie and sharing & supporting employment programs with local businesses, should:



## PROVIDE HUMAN RESOURCE TRAINING

Human resources (recruitment, retention, polices etc.) was identified as the 2nd highest business support currently not available to businesses. The Fernie Chamber of Commerce should host a training session, with a human resource professional, focused on employee retention and recruitment. Strategies and factors identified in the BRE survey data that have reduced the issue of employee recruitment and retention for businesses should be highlighted in this session.



## CALCULATE FERNIE'S LIVING WAGE

The Chamber should support the EVEI in partnering with Interior health and Living Wages for Families BC Health to calculate the living wage in Fernie. Highlighting the living wage could lead to increased affordability for workers and therefore decreasing their cost of living. Living Wages of Families BC states that 97% of businesses that become a living wage employer reported a benefit from the program and that paying a living wage reduces employee turnover, recruitment issues, and training costs.

# Workforce Housing

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The lack of housing in Fernie was listed as a top three biggest challenge facing business and housing was identified as an underlining issue regarding both employee recruitment and retention. 55% of businesses listed housing as “Very to extremely important” to their business success. For strong business retention and economic growth in Fernie, an increased supply of housing is crucial.

It must be noted the City of Fernie is currently working on three projects related to making improvements to the housing supply issue in Fernie, work that is supported by the BRE survey data. The first is creating an affordable housing reserve as outlined in action 3.1 of the City of Fernie’s 2017 Affordable Housing Strategy. This reserve can be used to “provide a capital grant to a non-profit housing provider that is renovating, or renewing existing housing, or building new units.” Secondly, the City of Fernie is working on overhauling their short-term rental licencing and compliance program. Ensuring there are no illegal or unlicensed short-term rentals will increase the rental market supply, where stakeholders highlighted an “...acute shortage of rental availability for all types and sizes of homes” in the 2020 Housing Needs Report and it was noted that, “Rental rates have increased prohibitively for many temporary seasonal workers...”. Third, the City of Fernie has an active RFP (request for proposal) out for development approvals enhancement. This enhancement aims to “improve the City’s development application and approval process, bylaws, policies, and communication tools with the goal of increasing housing diversity and number of attainable housing units in Fernie.” This was a key issue highlighted in the qualitative data from the BRE survey and is touched on further in the second action item below.

In addition to the work the City of Fernie is currently enacting, the following actions items are made to help increase the workforce housing supply:



## UTILIZE PARTNERSHIPS TO SUPPORT AFFORDABLE HOUSING AND A REGIONAL APPROACH TO HOUSING IN THE ELK VALLEY

The City of Fernie, through a designated housing representative, would benefit from attending the roundtable discussion, as outlined in the Elk Valley BRE Report, on how the EVEI can help organizations in creating solutions for affordable housing. The City should also come to the table in a regional matter, to share data and ideas, as well as discuss a regional approach to housing, an issue affecting all communities in the Elk Valley. Presenting their new affordable housing reserve and how it will be utilized to support non-profit housing providers would be a welcome addition to the discussion. Taking a regional approach to housing could create a greater chance of obtaining funding grants that support the development of workforce & affordable housing.

# Workforce Housing

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## **REVIEW & CONSIDER WAYS TO IMPROVE DEVELOPMENT PROCESSES BASED ON THE EVEI QUALITATIVE DATA PROVIDED TO THE PLANNING DEPARTMENT**

In the Elk Valley BRE report, it was recommended that the EVEI bring forward qualitative data obtained in the BRE survey about housing barriers in local government regulations and overall developmental constraints. This data should be included in the City's development approvals enhancement, ensuring local business feedback is involved in the enhancement. Reviewing and modifying these processes could stimulate the development of new housing construction.



## **UTILIZE HOUSING DATA AND RECOMMENDATIONS IN FERNIE'S AFFORDABLE HOUSING STRATEGY AND HOUSING NEEDS REPORT TO INCREASE WORKFORCE HOUSING SUPPLY**

As noted in the 2020 Housing Needs Report, Fernie has limited housing options for renters. As such, there are inadequate opportunities for temporary and seasonal workers to rent in Fernie. This affects local businesses, impacting employee recruitment & retention and decreasing their customer base. With 47% of businesses expecting their number of employees to increase over the next 3 years, ensuring availability of workforce housing is critical. It must be noted that the Fernie Alpine Resort, who employees approximately 800 seasonal workers in the winter and 200 in the summer, does not provide employee accommodation. Policy 3-E.5, outlined in the City of Fernie's Official Community Plan as, "Use available incentives, including density bonusing and other zoning tools, to encourage the development of affordable, short-term rental housing for employees" will also be beneficial in increasing the supply of workforce rental housing.



## **FEES REDUCTION FOR NON-PROFIT AND AFFORDABLE HOUSING PROPOSALS**

A fees reduction here will ensure the City of Fernie continues to encourage affordable housing by supporting partnerships such as the Fernie Family Housing Society and the Elk Valley Family Society and could also incentivize creative proposals for affordable housing. This action item aligns with the recommendation outlined in Fernie's Affordable Housing Strategy "Consider reducing the application fees for rezoning, development permits, and building permits for non-profit housing, as well as affordable, innovative market housing proposals." If the City does offer these reductions, they should provide clear communication on the incentives and supports available to businesses.

# Business Retention and Expansion

87% of businesses stated they have at least one barrier to growth. Responding to these barriers will be the most efficient way to improve business retention and expansion. Lack of skilled staff was the highest ranked barrier, which has been addressed in the previous section, with finance and availability of buildings for lease and purchase the second and third highest ranked barriers.

## FINANCE

In addition to the action item outlined in the Elk Valley BRE report, “Assistance exploring financing options”, where Community Futures East Kootenay will host an online financing options workshop, in which the Fernie Chamber and members should attend, there are two recommendations the City of Fernie could do to improve the business finance barrier.



### REVIEW CITY FEES AND CHARGES RELATED TO BUSINESS DEVELOPMENT

Cost of doing business was identified as the biggest challenge facing Fernie businesses (other than labour). While most costs accrued by businesses are not applicable to municipal government, the City of Fernie can review their fees and charges that specifically affect business retention & expansion. Identifying where reductions in these fees could result in minimizing the financial barrier to growth businesses are facing. Special consideration should be put on micro & home-based businesses, where a reduce in costs would make a greater difference and may be a catalyst for their business expansion.



### ENHANCE UNDERSTANDING AND AWARENESS OF BUSINESS LOAN OFFERINGS.

A City representative could meet with a local credit union to gain a better understanding of their business loan offerings. This recommendation could help the City gain further understanding of the financial barrier to growth businesses are experiencing, as well as build awareness of the business loan environment.

The Chamber can build awareness, through their network and communication with the City, of the business loan offerings available from community organizations, including Community Futures East Kootenay, Small Business BC, and Woman’s Enterprise BC. In the future there could be opportunities for the Chamber of Commerce to enact programs with local financial institutions to support local business expansions. A focus should be on loans for small businesses where micro-loans could minimize the financial barrier to growth and support small business development in the community.



# Business Retention and Expansion

## AVAILABILITY OF BUILDINGS FOR LEASE AND PURCHASE



### WORK WITH THE EVEI TO ENSURE THE REGIONAL LAND INVENTORY IS UP TO DATE

In 2020 an employment lands inventory research project was conducted by Selkirk College and is available online. The goal of the project was to address the issue of “access to land to accommodate existing business expansion and future investment and economic growth”. The EVEI is exploring creating a webpage to highlight this resource and the City of Fernie should ensure all relevant information is up to date on the land inventory, as well as identifying an appropriate contact for businesses that are looking to expand or secure a new business site. The City should build awareness of publicly available commercial and industrial sites in Fernie through the land inventory and public communication with local business. If the City believes that publishing their own inventory of public lands is more efficient than the land inventory, that would be an effective replication of this action item.



### SUPPORT AREAS FOR COMMERCIAL / INDUSTRIAL EXPANSION THROUGH RE-ZONING AND BUILDING COMMUNICATION WITH LOCAL BUSINESS

Supporting areas for commercial / industrial expansion would reduce the barrier to growth of “availability of buildings for lease and purchase” experienced by businesses. Selkirk Innovates, in Fernie’s previous BRE report, recommended that the City of Fernie work with local business to “understand existing and future business needs and assess land planning at a micro level. Issues around the lack of available land may be addressed through communication strategies between local government, local business, and the community.” This communication with business could create opportunities for land use designations and zonings that would benefit both local business and the community at large. This recommendation is closely correlated with the City of Fernie’s Official Community Plan policy 3-B.9 which states, “Support rezonings to supply adequate land suitable for office space development.

# Business Retention and Expansion

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## REDUCE BARRIERS TO BUILDING DEVELOPMENT AND IMPROVEMENTS

30% of businesses stated they had a barrier to updating their building, if needed. The top barriers were listed as “City permitting and regulations” and “Finance”. The work the City is doing with their development approvals enhancement should greatly reduce the building development barrier. Enacting specific development cost charge (DCC) incentives could help reduce the financial barrier experienced by businesses. Two policies in Fernie’s Community Plan lend an insight to what these specific DCC incentives could be. Policy 3-B.14 and 3-D.5 state the City of Fernie should “Explore the establishment of a Revitalization Tax Exemption Program for designated commercial areas outside of the Historic Downtown (B.14) and designated light industrial areas (D.5) to encourage new investment and foster economic growth by providing an opportunity to owners of eligible commercial lands (B.14) and eligible property owners (D.5) to invest in improvements to their lands in order to increase capacity, productivity and employment levels.”

# Additional Findings

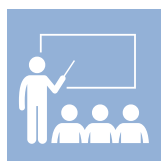
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The following action items outline work the Fernie of Chamber should do, in addition to the above recommendations, to improve local business retention and expansion.



## TAKE A PRO-ACTIVE APPROACH TO SUCCESSION PLANNING AND TRAINING

22% of businesses stated that they plan to retire or sell their business within the next 3-5 years. In the Elk Valley BRE it was recommended that the EVEI support by providing resources on their new website with detailed succession planning resources. However, with such a large percentage of businesses planning to retire or sell, the Chamber should take a pro-active approach to this issue by talking to businesses and collecting qualitative data on why so many business owners are planning to retire or sell within the next 3-5 years. In addition, working with Community Futures East Kootenay and the Basin Business Advisors would be a beneficial resource to improving succession planning by providing a one-on-one assistance program for businesses in need. In addition, there is currently no official hub for business sales in Fernie, and the Chamber should work with the EVEI to explore opportunities for an online “business for sale” section to improve business succession



## PROVIDE BUSINESS PLANNING AND MANAGEMENT / LEADERSHIP TRAINING

These were the top two desired business supports identified by Fernie businesses. As identified in the Elk Valley BRE Report, the Fernie Chamber of Commerce, through a joint chamber initiative, should host two workshops with industry experts to provide training and knowledge for Elk Valley businesses and record the sessions for future use. These supports can help improve business retention and expansion, as well as employee retention for local business.

# PROJECT OVERVIEW

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This report showcases BRE survey responses by businesses operating in Fernie. The BRE survey was conducted online from October 22nd to December 22nd, 2021, for registered businesses in the Elk Valley. Survey responses by businesses that do not operate in Fernie were removed for this report, as reflected in the appendix data. The BRE survey and reports came to fruition via a funding grant from ETSI-BC (Economic Trust of the Southern Interior) with support from the Province of British Columbia. The Fernie Chamber of Commerce received full funding on behalf of the EVEI to hire an Elk Valley Economic Recovery Advisor based on the EVEI's 2021 strategic plan that identified the need for Elk Valley wide data and a better understanding of business needs to enhance business retention and expansion. The Elk Valley Economic Recovery Advisor was responsible for the project and was supported by the EVEI committee and its partner organizations.

## PROJECT OBJECTIVES

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1. Identify business development needs / challenges
2. Create goal-oriented action items to allow the EVEI committee to respond to a business development need / challenge
3. Complete Elk valley wide market research & data collection to increase investment preparedness
4. Build awareness and connections between EVEI and Elk Valley business





# EVEI COMMITTEE

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## VOTING MEMBERS

- **Shawna Bryant**  
CEO, Founder of EV Ergonomics (Elkford Chamber of Commerce Representative)
- **Michael Boronowski**  
Chief Administrative Officer, City of Fernie
- **Sharon Strom**  
Coordinator Sustainability, Teck Coal Limited
- **Sheila Byers**  
Sales Representative, Royal Lepage East Kootenay Realty (Sparwood Chamber of Commerce Representative)
- **Jeremy Johnston**  
Director, Planning & Development Services, District of Elkford
- **Andy Cohen**  
General Manager, Fernie Alpine Resort (Fernie Chamber of Commerce Representative)
- **Patrick Sorfleet**  
Director of Planning and Development, District of Sparwood

## SUPPORTING PARTNERS

- **Robyn Peel**  
Community Economic Development Coordinator, Community Futures East Kootenay
- **Gerri Brightwell**  
Regional Manager Central/East Kootenay of Rural Development Unit, Ministry of Jobs, Economic Recovery and Innovation
- **Brad Parsell**  
Executive Director of Fernie Chamber of Commerce, EVEI Coordinator
- **Kaylyn Gervais**  
Manager, Community Relationships East, Columbia Basin Trust
- **Paul Wiest**  
Business & Economic Development Consultant, ETSI-BC



# BRE SURVEY CREATION

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The survey was developed through a variety of methods to ensure the qualitative data captured would be accurate, relevant, and effective for long term economic development in Fernie and the Elk Valley. The methods were as follows:

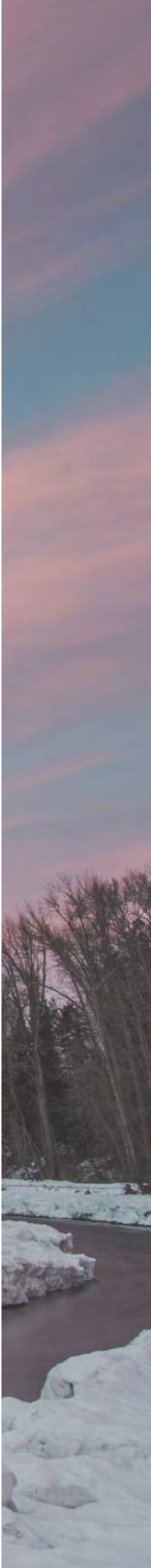
- The core of the BRE Survey was generated through material from Selkirk Innovates (formally the Columbia Basin Research Development Institute) and their 2015/16 BRE surveys on Fernie and Sparwood to ensure standardized data collection with additional material from more recent business surveys completed in Creston, Cranbrook, and Golden
- Meetings with 41 Elk Valley businesses to identify their current key issues and barriers to growth
- Meetings with individual EVEI committee members to discuss the current business climate and BRE survey to ensure the data obtained is beneficial for each community and the Elk Valley as a whole
- Meetings with Community Futures East Kootenay to consolidate all information sources into a working BRE survey, workshopping Elk Valley specific questions, and reviewing the overall goals of the survey to ensure each question was quantifiable and a building block for future economic development
- Meeting with Selkirk Innovates to certify all questions were non-leading, the answers were unbiased and quantifiable, and that the data captured was analytics based.
- Skip logic, through advanced branching, was built into the survey to increase the efficiency and completion rate of the survey. This allowed the survey to send businesses to different questions depending on their responses, skipping specific questions that were identified as non-applicable to certain businesses.

# DATA COLLECTION

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Survey data was obtained online via survey monkey. The Elk Valley Economic Recovery Advisor was solely responsible for the data collection and a focus was put on trying to contact every licensed business in the Elk Valley for a comprehensive data set. Methods used to contact businesses and obtain responses were as follows:

- Direct email to 715 businesses operating in the Elk Valley
- 196 businesses called to request email addresses to send the survey link and to provide additional information about the EVEI and the BRE survey
- Direct Facebook messages to 29 businesses
- Working with each Chamber of Commerce to send the survey to their members via email distribution lists
- 400 EVEI marketing postcards mailed to business PO boxes in the Elk Valley
- Facebook ad campaign targeting businesses, seen by 3,250 people in the Elk Valley
- Advertising and articles in the Fernie Free Press, Fernie Fix, and on local radio
- Additional email marketing specifically to Inter-Community business license holders



# CONFIDENTIALITY

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All data collected is stored in a password protected electronic format and only the paid contractor of the EVEI has access to the individual business answers from the BRE survey. All data released in each of the four BRE reports are quantitative and no individual business responses are used.

# DATA ANALYSIS

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The Elk Valley Economic Recovery Advisor, as the paid contractor of the EVEI, was responsible for the quantitative and qualitative data analysis of the BRE survey data. Quantitative data was analyzed using data software programs and descriptive statistics were obtained to summarize given data sets. To ensure robust and accurate data, with the support of Selkirk Innovates and Community Futures East Kootenay, statistical average calculations were utilized and data outliers were reviewed. Based on the results of the initial quantitative data, key research findings were presented to the EVEI committee, then recommendations based off these findings were written and compiled into four regional BRE reports (the Elk Valley, Fernie, Sparwood, and Elkford) by the Elk Valley Economic Recovery Advisor.

There is opportunity to conduct further data analysis on the survey data, broken down into a wide variety of business classifications. If there are any questions about the data, or an organization has identified a data point that could help with their economic development, please contact the EVEI at [coordinator@theelkvalley.ca](mailto:coordinator@theelkvalley.ca) for further discussion.



# SOURCES

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- **Elk Valley Business Retention & Expansion 2021 Report:**  
<https://theelkvalley.ca/wp-content/uploads/2022/04/Elk-Valley-BRE-Report-2021.pdf>
- **Fernie's 2020 Housing Needs Report:**  
<https://fernie.civicweb.net/document/122420>
- **Fernie's 2017 Affordable Housing Strategy:**  
<https://fernie.civicweb.net/document/71414>
- **Fernie Business Retention & Expansion 2016 Survey and Report:**  
<https://theelkvalley.ca/wp-content/uploads/2022/03/2016-Fernie-Business-Retention-Expansion-BRE-Survey-and-Report.pdf>
- **Fernie's 2014 Official Community Plan:**  
<https://fernie.civicweb.net/filepro/documents/19401>
- **Living Wage for Families BC:**  
[https://www.livingwageforfamilies.ca/myths\\_and\\_facts](https://www.livingwageforfamilies.ca/myths_and_facts)



# LIST OF FIGURES

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- **Question 2:** Please select which communities in the Elk Valley that you operate in.
- **Question 3:** Is your business 51% or more owned by any the following groups?
- **Question 4:** What is your business industry?
- **Question 5:** What is the current state of your business?
- **Question 6:** How many years has your business been in operation?
- **Question 7:** If you think about the last 2-4 years, what is the average annual gross revenue of your company?
- **Question 8:** What is the typical number of employees at your business? (the owner classifies as an employee)? - with Teck Coal Limited removed
- **Question 9:** Do you expect the number of employees to change over the next 3 years?
- **Question 11:** What is the average hourly wage of your employees? Entry Level
- **Question 12:** What is the average hourly wage of your employees? Semi-Skilled
- **Question 13:** What is the average hourly wage of your employees? Skilled / Professional
- **Question 14:** Has employee recruitment been a problem in the last 3 years?
- **Question 15:** What are the underlining issues impacting employee recruitment for your business?
- **Question 16:** What strategies / factors have you employed that make employee recruitment not a problem?
- **Question 17:** Has employee retention been a problem in the last 3 years?
- **Question 18:** What are the underlining issues impacting employee retention for your business?
- **Question 19:** What strategies / factors have you employed that make employee retention not a problem?
- **Question 20:** What are the biggest challenges facing your business, other than labour? (Please select top 3)



# LIST OF FIGURES

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- **Question 22:** On a scale of 1-5, with 1 being not important and 5 being extremely important, please rate how important the following categories are to your business's success.
- **Question 23:** What are the community's strengths as a place to do business? (Please select 1-3 answers)
- **Question 24:** What are the community's weaknesses as a place to do business? (Please select 1-3 answers)
- **Question 26:** Do you plan to expand your business in the next 3 years?
- **Question 27:** What are the major barriers for your expansion?
- **Question 28:** Why do you not plan on expanding?
- **Question 30:** Do you plan to retire or sell your business within the next 3-5 years?
- **Question 31:** How do you intend to exit the business?
- **Question 32:** What is the status of your business's building?
- **Question 33:** What is your current lease rate, based on triple net lease? (Lease agreement on a property whereby the tenant or lessee promises to pay all the expenses of the property, including real estate taxes, building insurance, and maintenance)
- **Question 34:** Do you have any barriers to updating your building, if needed?
- **Question 35:** If an effort was made to attract a business, sector, or industry to the Elk Valley, which options below would benefit you? (Please pick up to 2 answers)
- **Question 36:** What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?
- **Question 37:** Do you have any desired business supports that are not currently available to you?



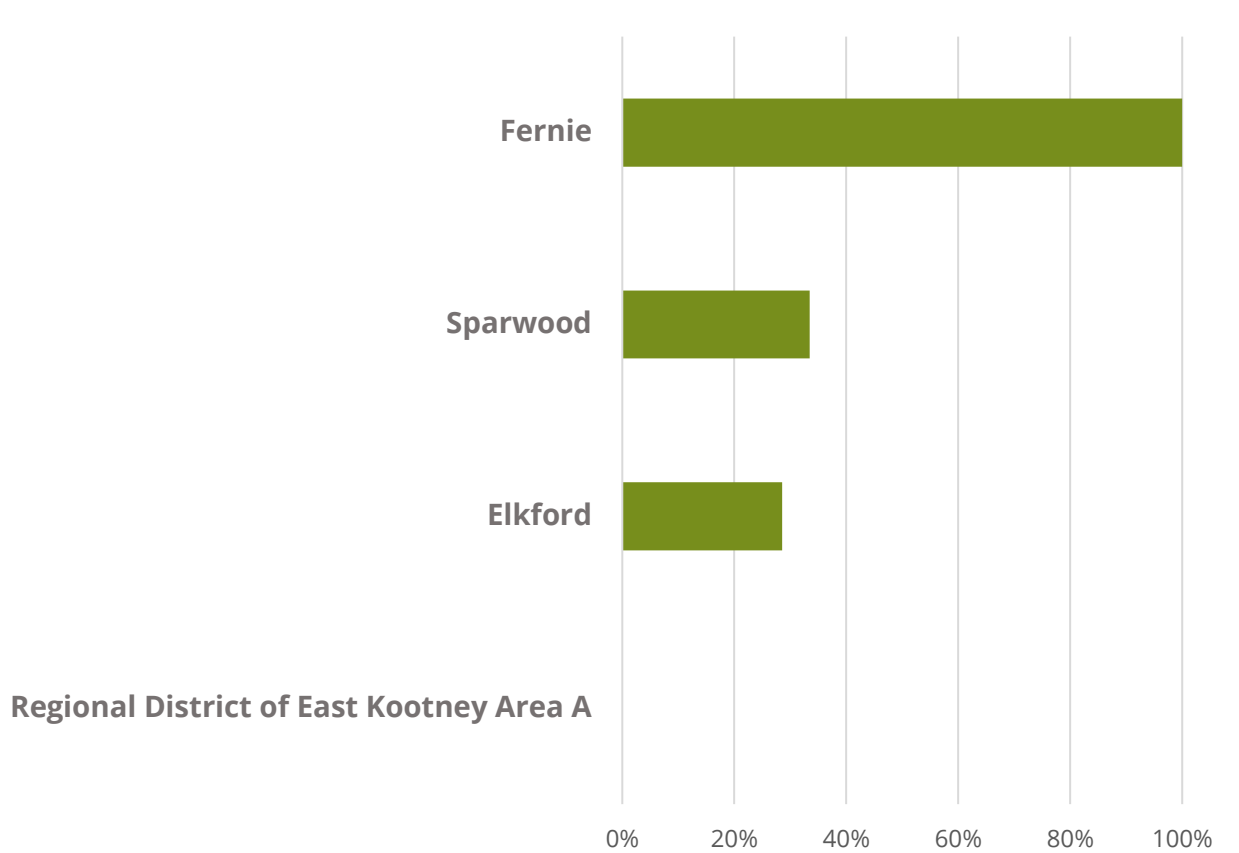
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# APPENDIX

A scenic view of a mountain town street. The foreground shows a paved road with several cars, including a dark sedan in the center and a white SUV on the right. The street is lined with brick buildings and streetlights. In the background, there are large, snow-capped mountains and dense evergreen forests. The sky is clear and blue.

**Q2 Please select which communities in the Elk Valley that you operate in**

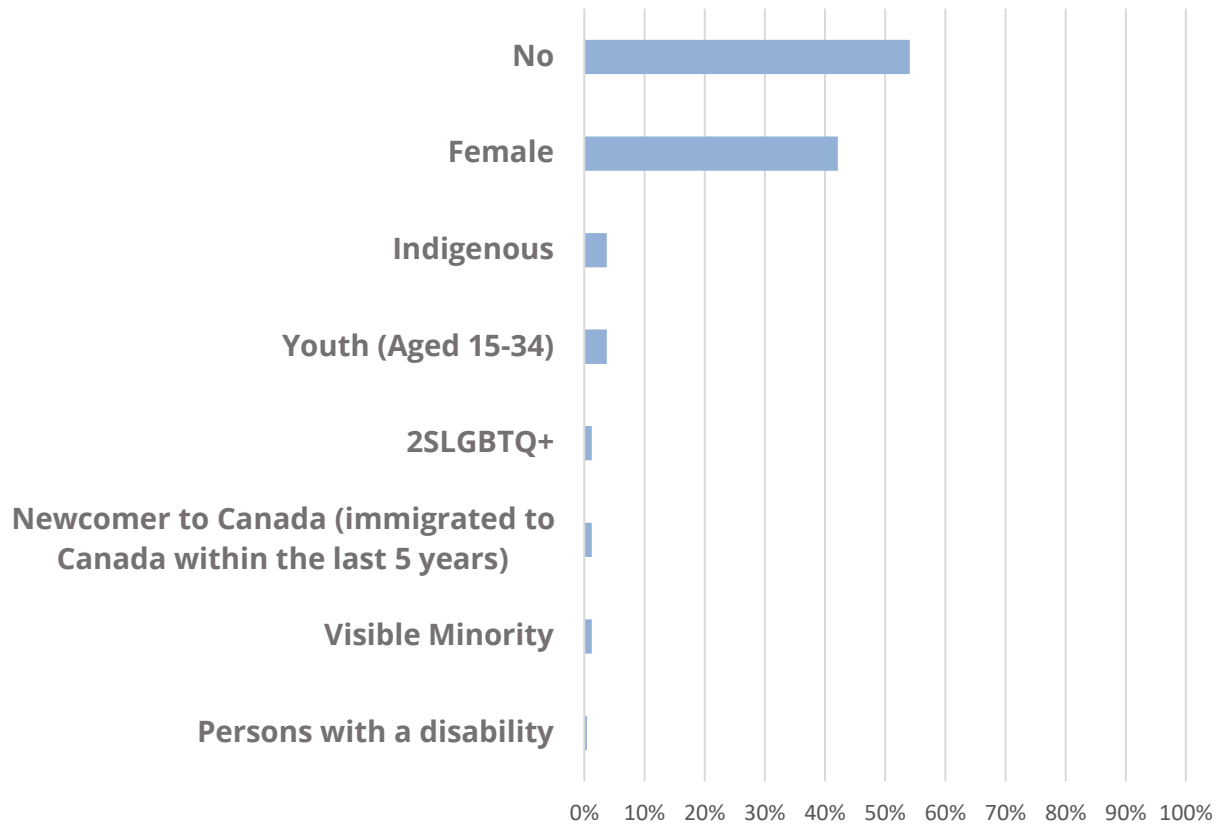
Answered: 245 Skipped: 0



ANSWER CHOICES	RESPONSES	
Fernie	100.00%	245
Sparwood	33.47%	82
Elkford	28.57%	70
Regional District of East Kootney Area A	0%	0
<b>Total Respondents:</b>		<b>245</b>

### Q3 Is your business 51% or more owned by any the following groups?

Answered: 242 Skipped: 3

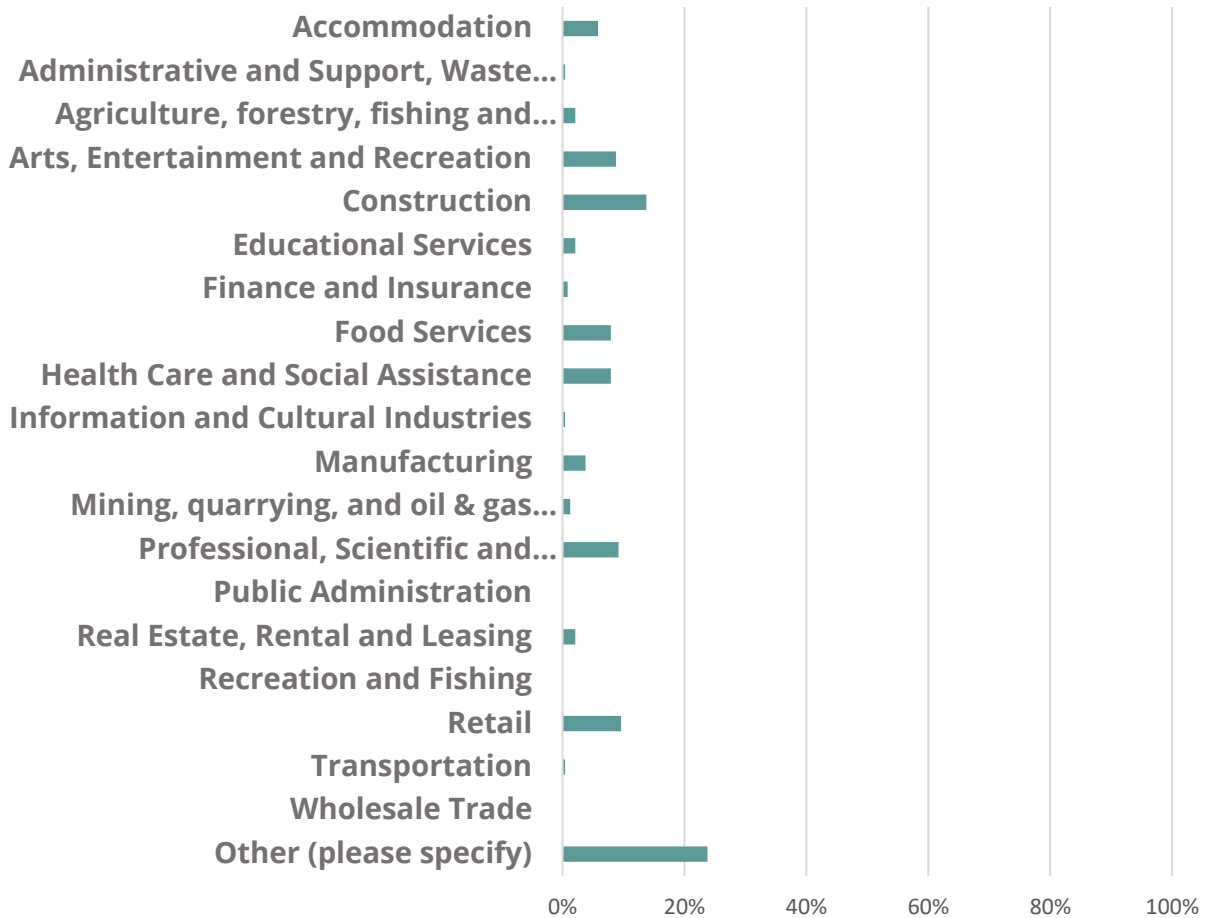


ANSWER CHOICES	RESPONSES	
No	54.13%	131
Female	42.15%	102
Youth (Aged 15-34)	3.72%	9
Indigenous	3.72%	9
Visible Minority	1.24%	3
Newcomer to Canada (immigrated to Canada within the last 5 years)	1.24 %	3
2SLGBTQ+	1.24%	3
Persons with a disability	0.41%	1
<b>Total Respondents:</b>		<b>242</b>



## Q4 What is your business industry?

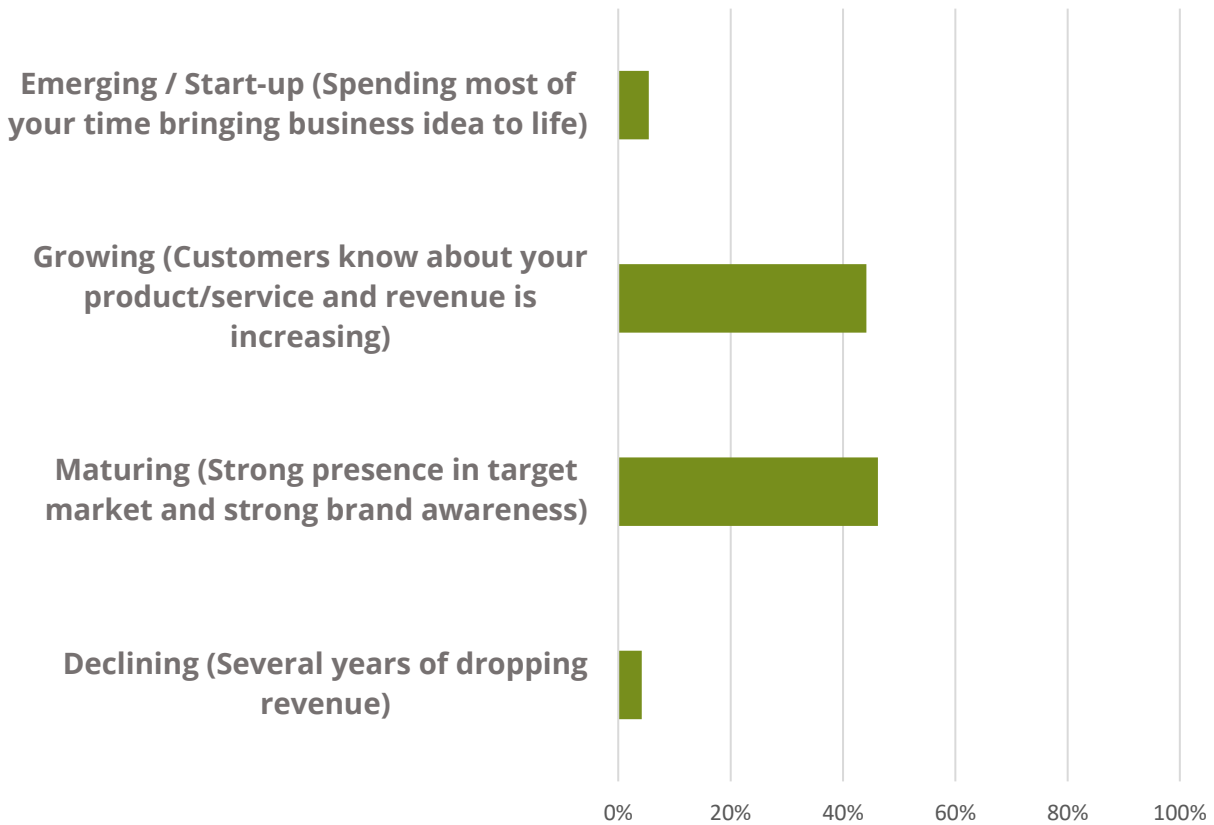
Answered: 240 Skipped: 5



ANSWER CHOICES	RESPONSES	
Accommodation	5.83%	14
Administrative and Support, Waste Management and Remediation Services	0.42%	1
Agriculture, forestry, fishing and hunting	2.08%	5
Arts, Entertainment and Recreation	8.75%	21
Construction	13.75%	33
Educational Services	2.08%	5
Food Services	7.92%	19
Finance and Insurance	0.83%	2
Health Care and Social Assistance	7.92%	19
Information and Cultural Industries	0.42%	1
Manufacturing	3.75%	9
Mining, quarrying, and oil & gas extraction	1.25%	3
Professional, Scientific and Technical Services	9.17%	22
Public Administration	0.00%	0
Recreation and Fishing	0.00%	0
Real Estate, Rental and Leasing	2.08%	5
Retail	9.58%	23
Transportation	0.42%	1
Wholesale Trade	0.00%	0
Other (please specify)	23.75%	57
<b>Total Respondents:</b>		<b>240</b>

## Q5 What is the current state of your business?

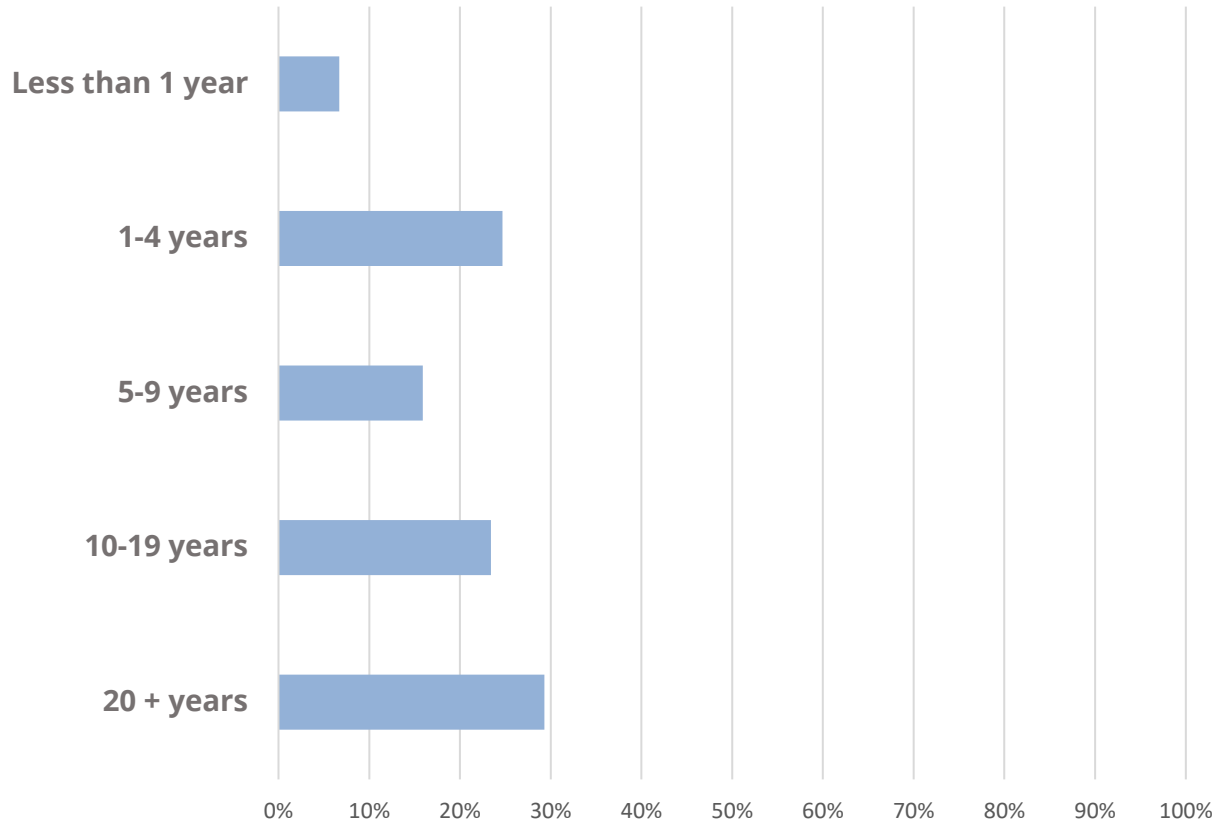
Answered: 240 Skipped: 5



ANSWER CHOICES	RESPONSES	
Emerging / Start-up (Spending most of your time bringing business idea to life)	5.42%	13
Growing (Customers know about your product/service and revenue is increasing)	44.17%	106
Maturing (Strong presence in target market and strong brand awareness)	46.25%	111
Declining (Several years of dropping revenue)	4.17%	10
	<b>Total Respondents:</b>	<b>240</b>

### Q6 How many years has your business been in operation?

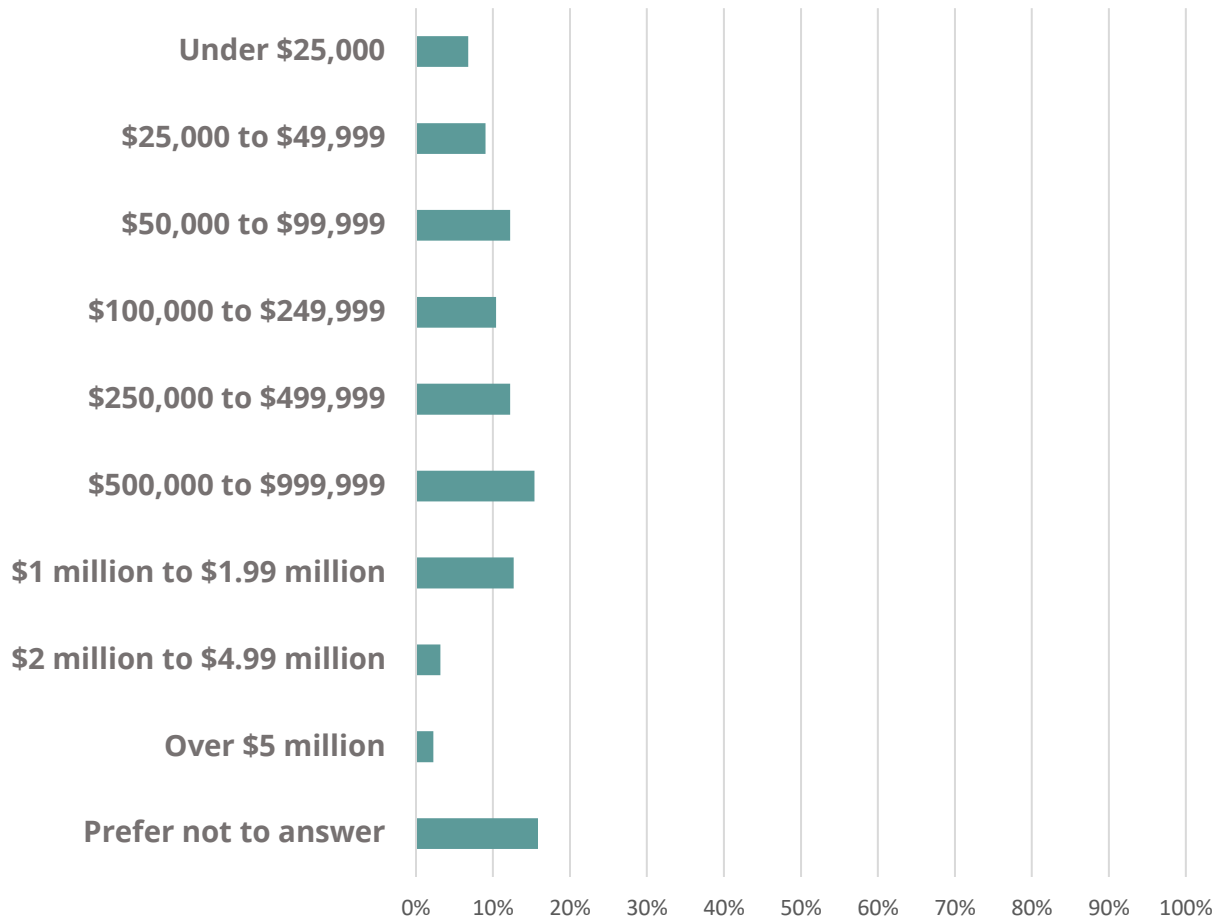
Answered: 239 Skipped: 6



ANSWER CHOICES	RESPONSES	
Less than 1 year	6.69%	16
1-4 years	24.69%	59
5-9 years	15.90%	38
10-19 years	23.43%	56
20+ years	29.29%	70
<b>Total Respondents:</b>		<b>239</b>

### Q7 If you think about the last 2-4 years, what is the average annual gross revenue of your company?

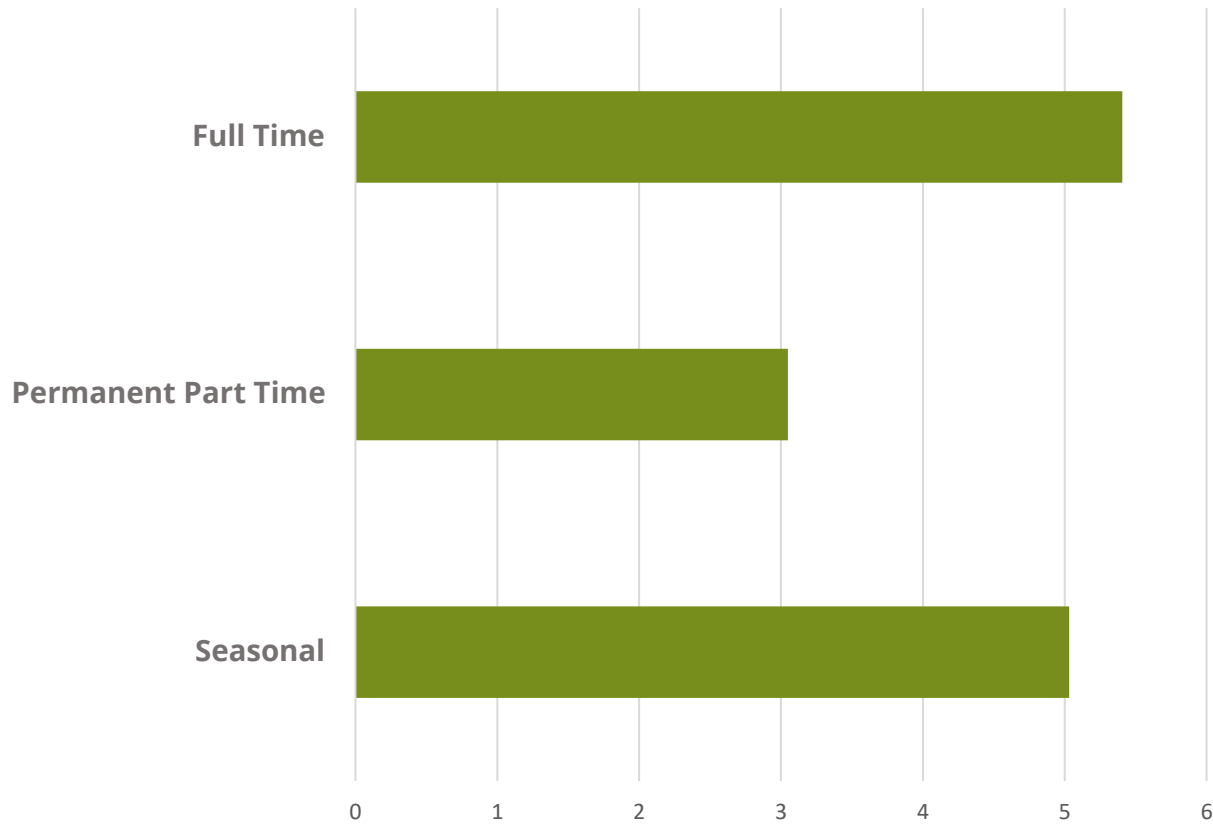
Answered: 221 Skipped: 24



ANSWER CHOICES	RESPONSES	
Under \$25,000	6.79%	15
\$25,000 to \$49,999	9.05%	20
\$50,000 to \$99,999	12.22%	27
\$100,000 to \$249,999	10.41%	23
\$250,000 to \$499,999	12.22%	27
\$500,000 to \$999,999	15.38%	34
\$1 million to \$1.99 million	12.67%	28
\$2 million to \$4.99 million	3.17%	7
Over \$5 million	2.26%	5
Prefer not to answer	15.84%	35
<b>Total Respondents:</b>		<b>221</b>

**Q8 What is the typical number of employees at your business? (the owner classifies as an employee)? - with Teck Coal Limited removed**

Answered: 212 Skipped: 0



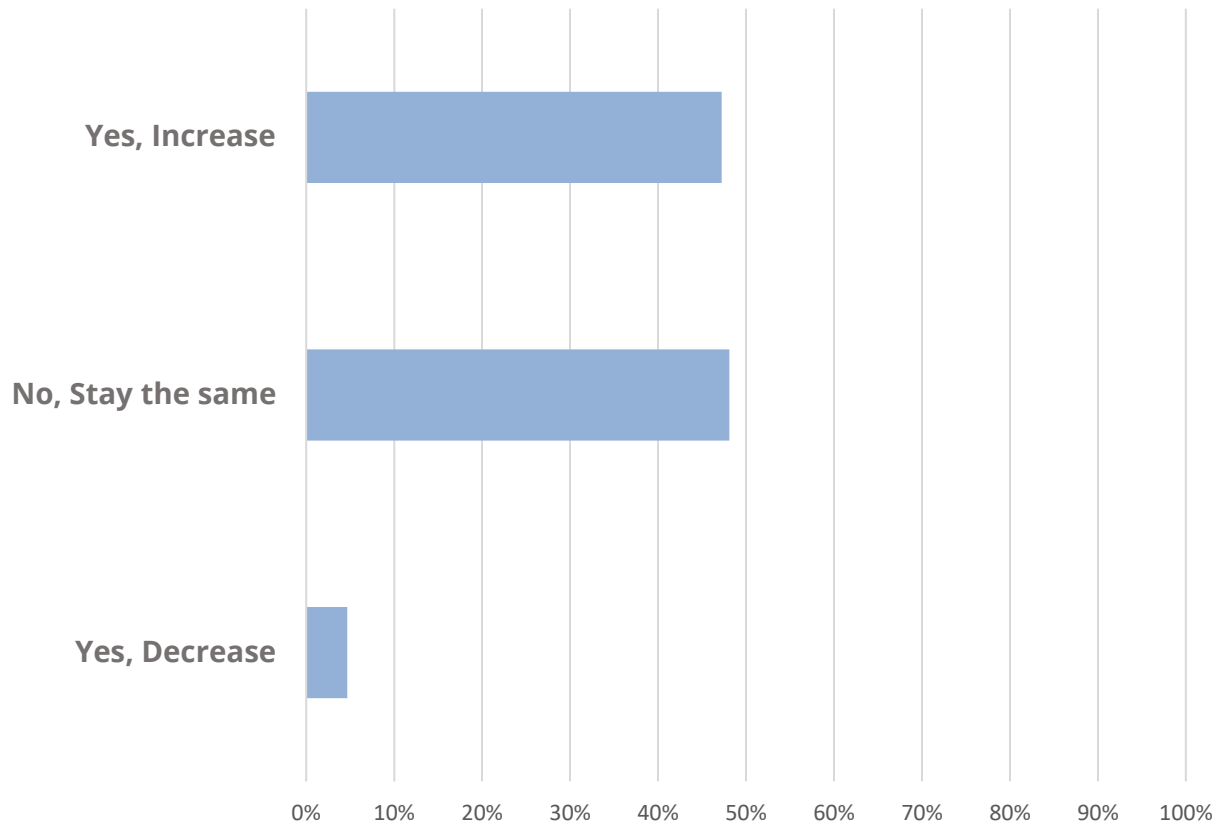
ANSWER CHOICES	AVERAGE NUMBER	TOTAL NUMBER	RESPONSES
Full Time	5	1,146	212
Permanent Part Time	3	369	121
Seasonal	5	463	92
<b>Total Respondents:</b>			<b>212</b>

ANSWER CHOICES	MINIMUM	MAXIMUM	MEDIAN	MEAN	STANDARD DEVIATION
Full Time	0.00	120.00	3.00	5.41	10.29
Permanent Part Time	0.00	80.00	2.00	3.05	7.61
Seasonal	0.00	70.00	1.00	5.03	10.11



### Q9 Do you expect the number of employees to change over the next 3 years?

Answered: 235 Skipped: 10



ANSWER CHOICES	RESPONSES	
Yes, Increase	47.23%	111
No, Stay the same	48.09%	113
Yes, Decrease	4.68%	11
<b>Total Respondents:</b>		<b>235</b>

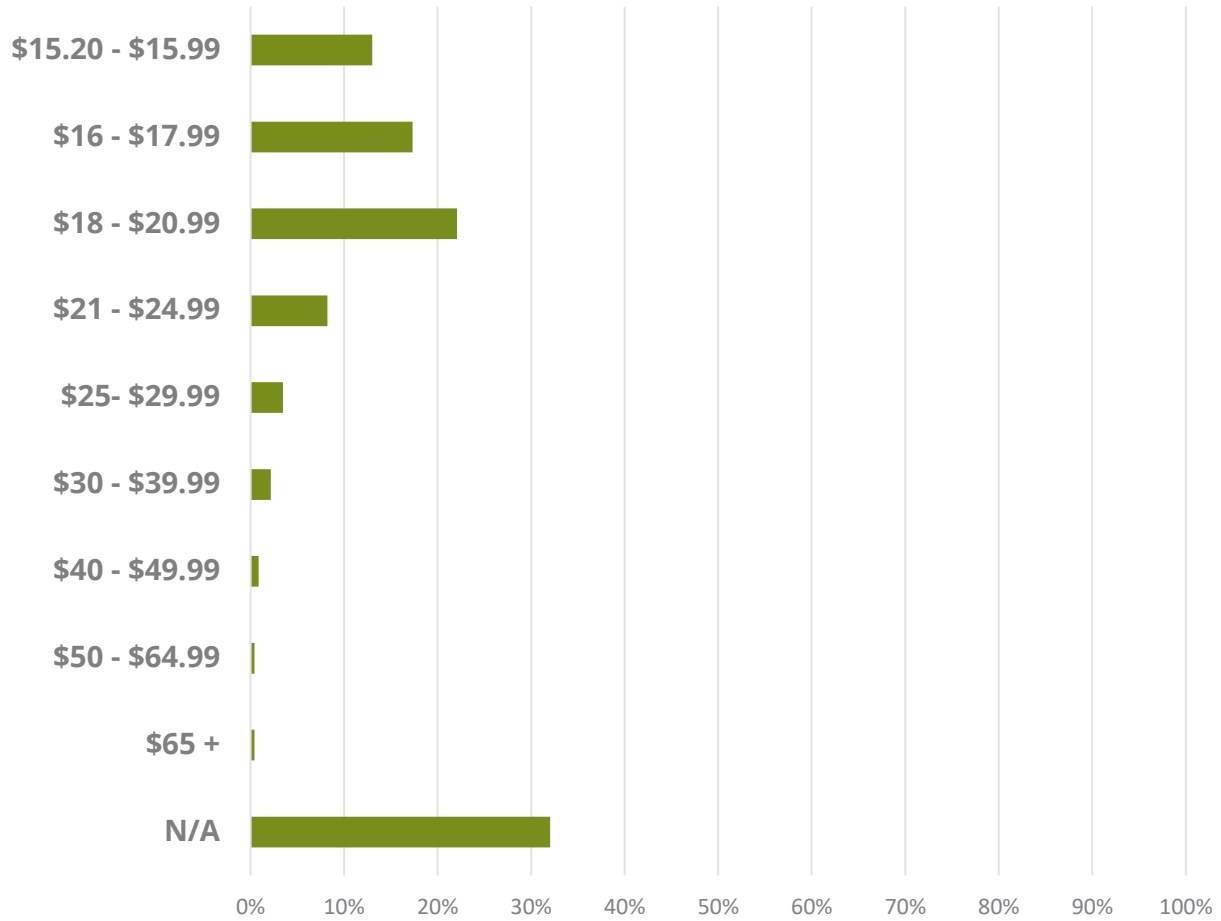
## Q10 Why do you expect this?

Answered: 211 Skipped: 34

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## Q11 Entry Level

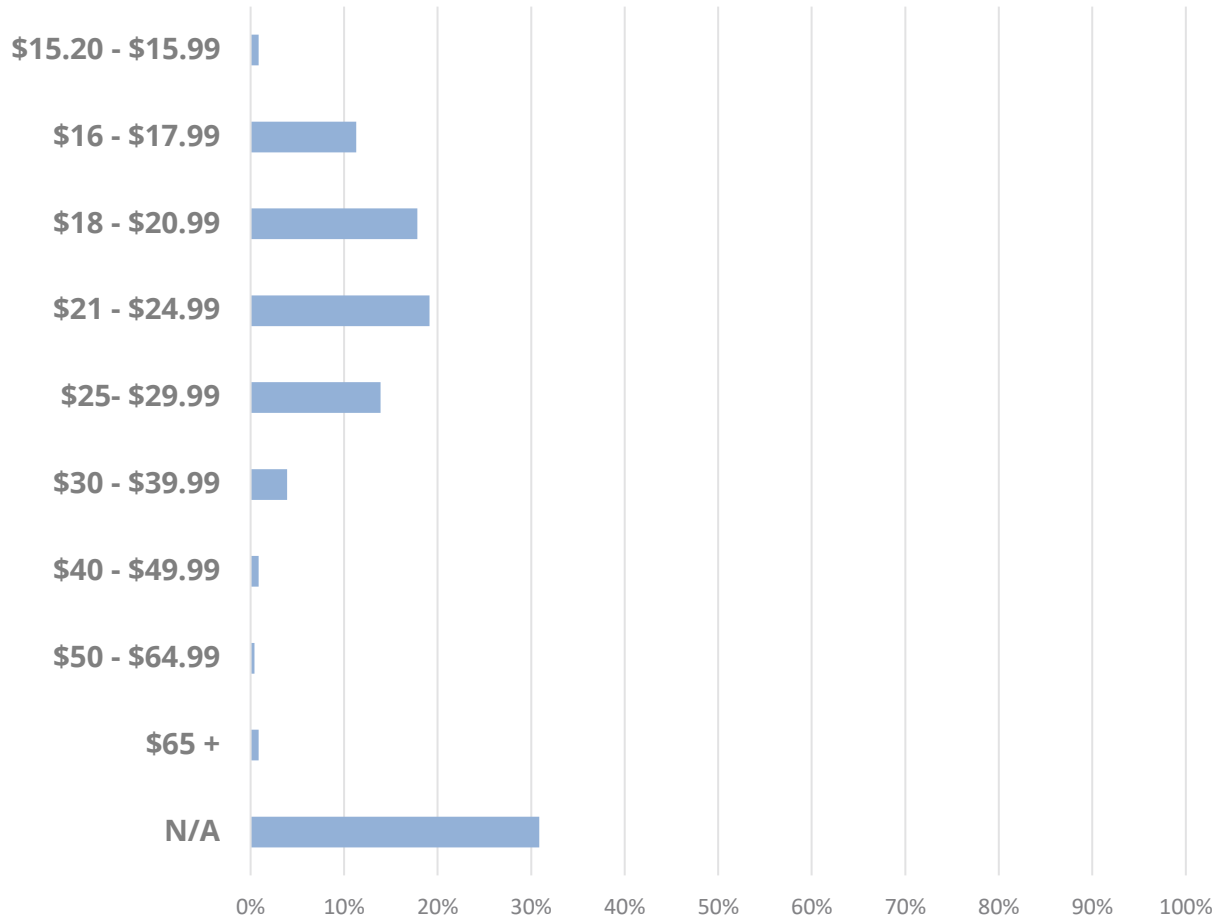
Answered: 231 Skipped: 14



ANSWER CHOICES	RESPONSES	
\$15.20 - \$15.99	12.99%	30
\$16 - \$17.99	17.32%	40
\$18 - \$20.99	22.08%	51
\$21 - \$24.99	8.23%	19
\$25 - \$29.99	3.46%	8
\$30 - \$39.99	2.16%	5
\$40 - \$49.99	0.87%	2
\$50 - \$64.99	0.43%	1
\$65 +	0.43%	1
N/A	32.03%	74
<b>Total Respondents:</b>		<b>231</b>

## Q12 Semi-Skilled

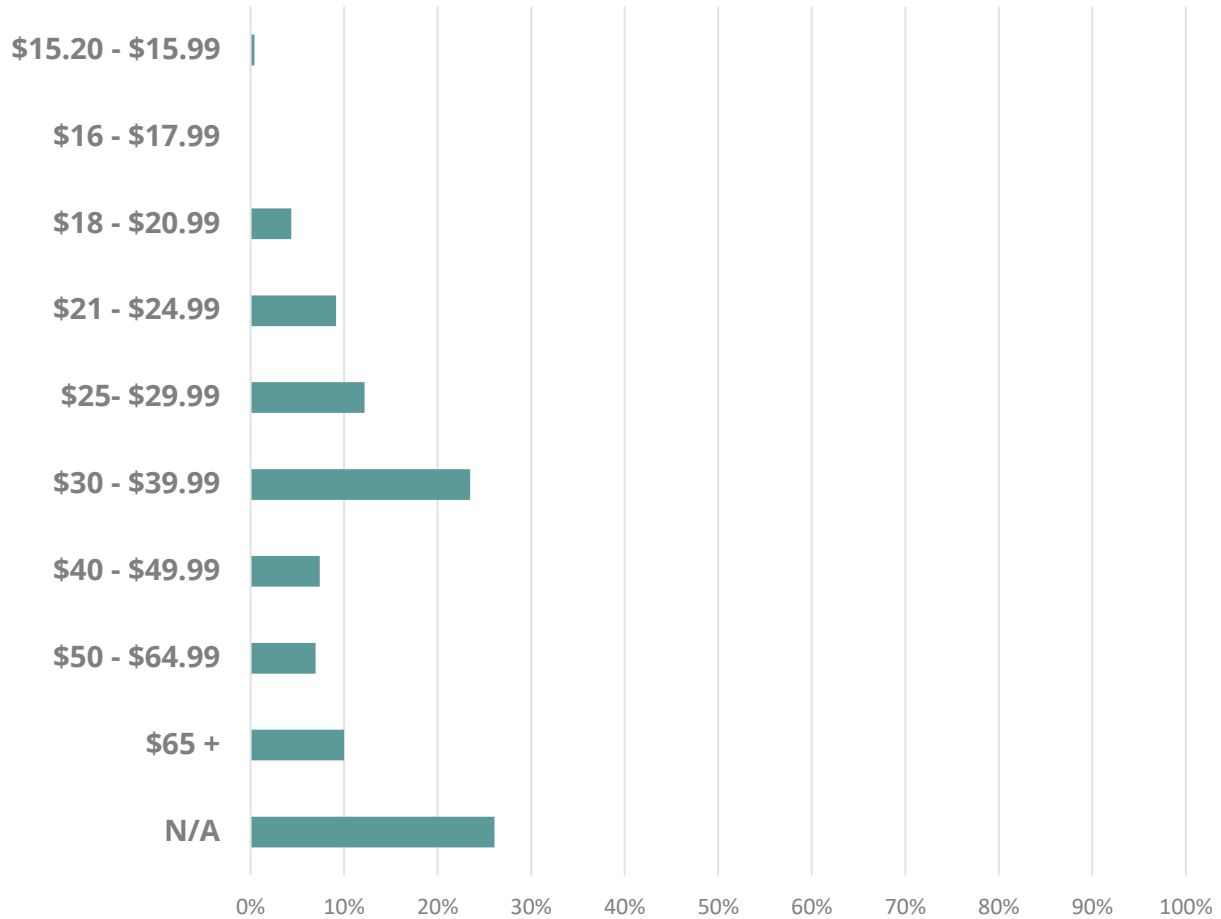
Answered: 230 Skipped: 15



ANSWER CHOICES	RESPONSES	
\$15.20 - \$15.99	0.87%	2
\$16 - \$17.99	11.30%	26
\$18 - \$20.99	17.83%	41
\$21 - \$24.99	19.13%	44
\$25 - \$29.99	13.91%	32
\$30 - \$39.99	3.91%	9
\$40 - \$49.99	0.87%	2
\$50 - \$64.99	0.43%	1
\$65 +	0.87%	2
N/A	30.87%	71
<b>Total Respondents:</b>		<b>230</b>

### Q13 Skilled / Professional

Answered: 230 Skipped: 15

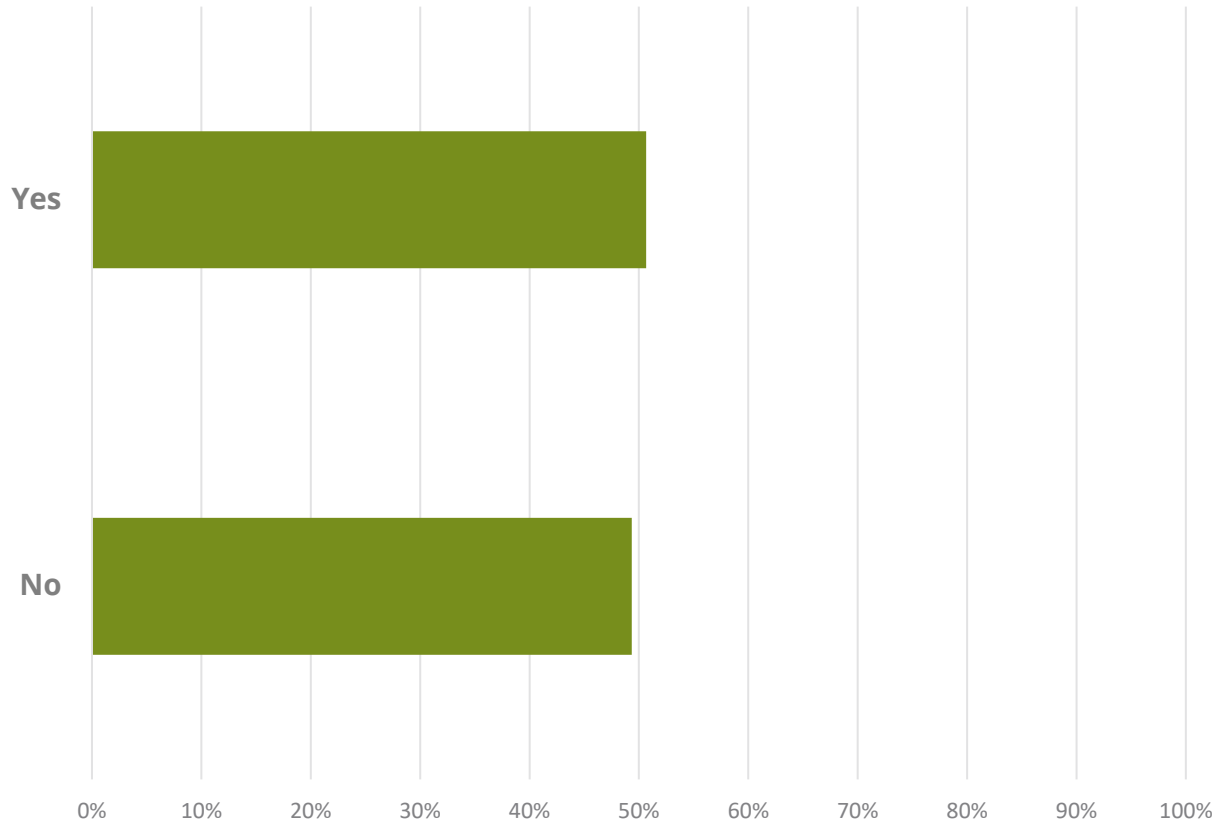


ANSWER CHOICES	RESPONSES
\$15.20 - \$15.99	0.43% 1
\$16 - \$17.99	0.00% 0
\$18 - \$20.99	4.35% 10
\$21 - \$24.99	9.13% 21
\$25- \$29.99	12.17% 28
\$30 - \$39.99	23.48% 54
\$40 - \$49.99	7.39% 17
\$50 - \$64.99	6.96% 16
\$65 +	10.00% 23
N/A	26.09% 60
<b>Total Respondents: 230</b>	



### Q14 Has employee recruitment been a problem in the last 3 years?

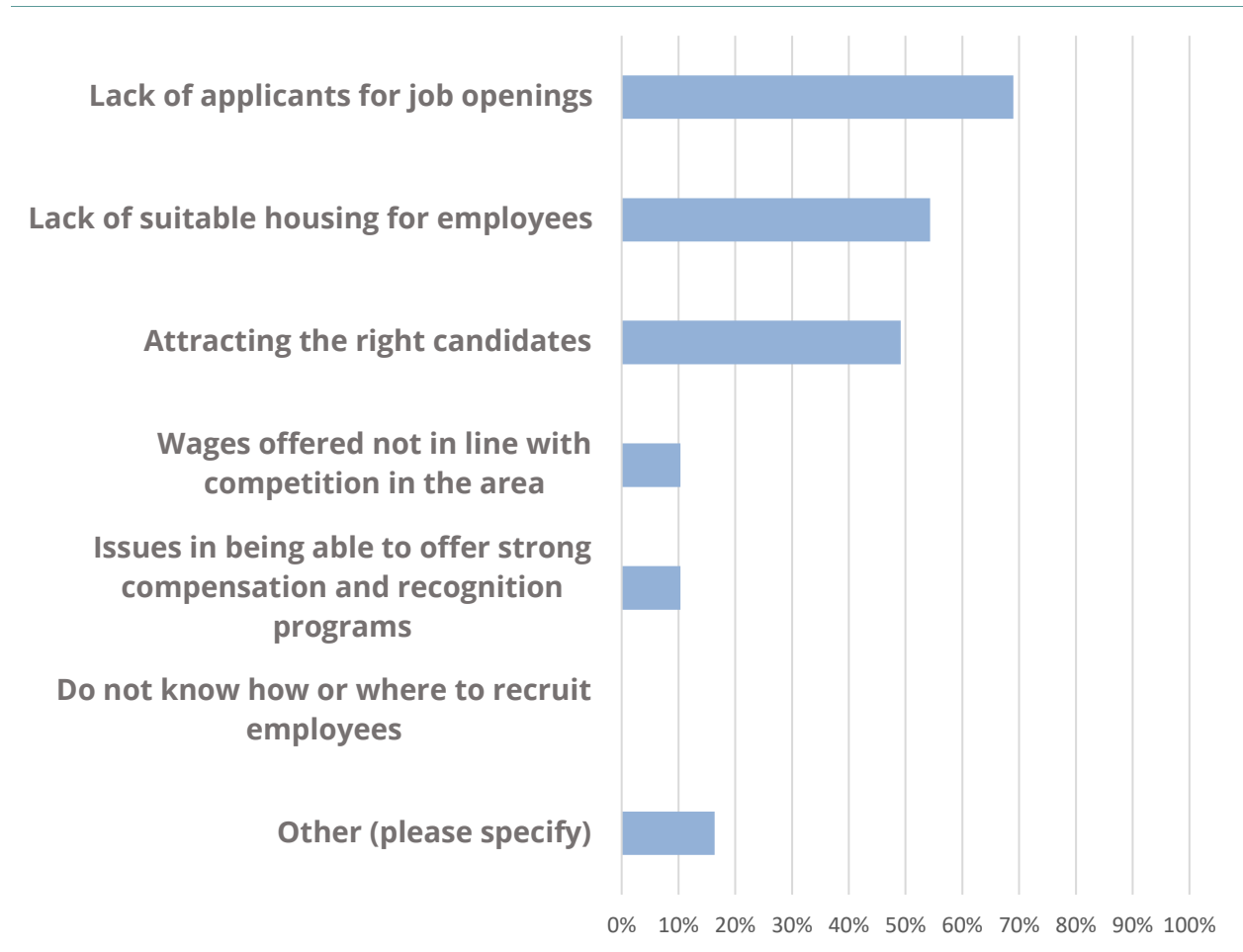
Answered: 229 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	50.66%	116
No	49.34%	113
<b>Total Respondents:</b>		<b>229</b>

## Q15 What are the underlining issues impacting employee recruitment for your business?

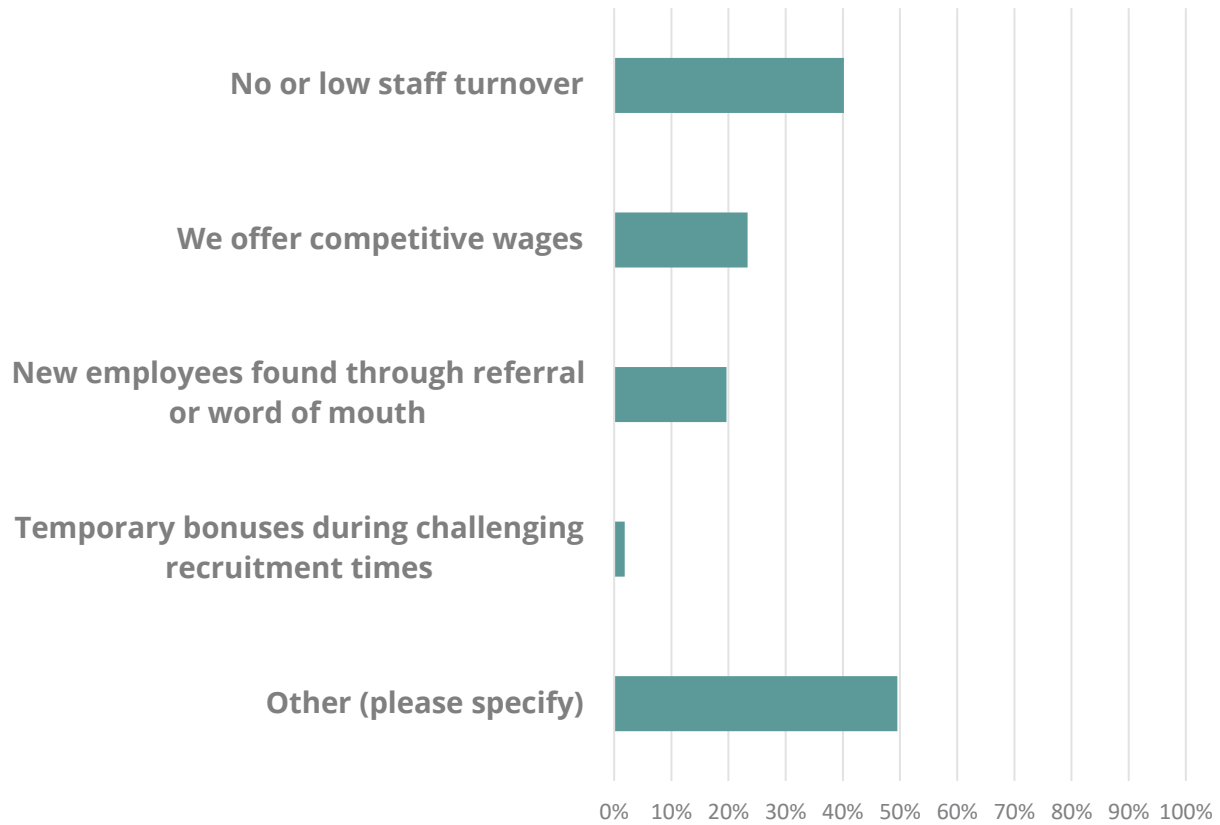
Answered: 116 Skipped: 129



ANSWER CHOICES	RESPONSES	
Lack of applicants for job openings	68.97%	80
Lack of suitable housing for employees	54.31%	63
Attracting the right candidates	49.14%	57
Issues in being able to offer strong compensation and recognition programs	10.34%	12
Wages offered not in line with competition in the area	10.34%	12
Do not know how or where to recruit employees	0.00%	0
Other (please specify)	16.38%	19
<b>Total Respondents:</b>		<b>116</b>

### Q16 What strategies / factors have you employed that make employee recruitment not a problem?

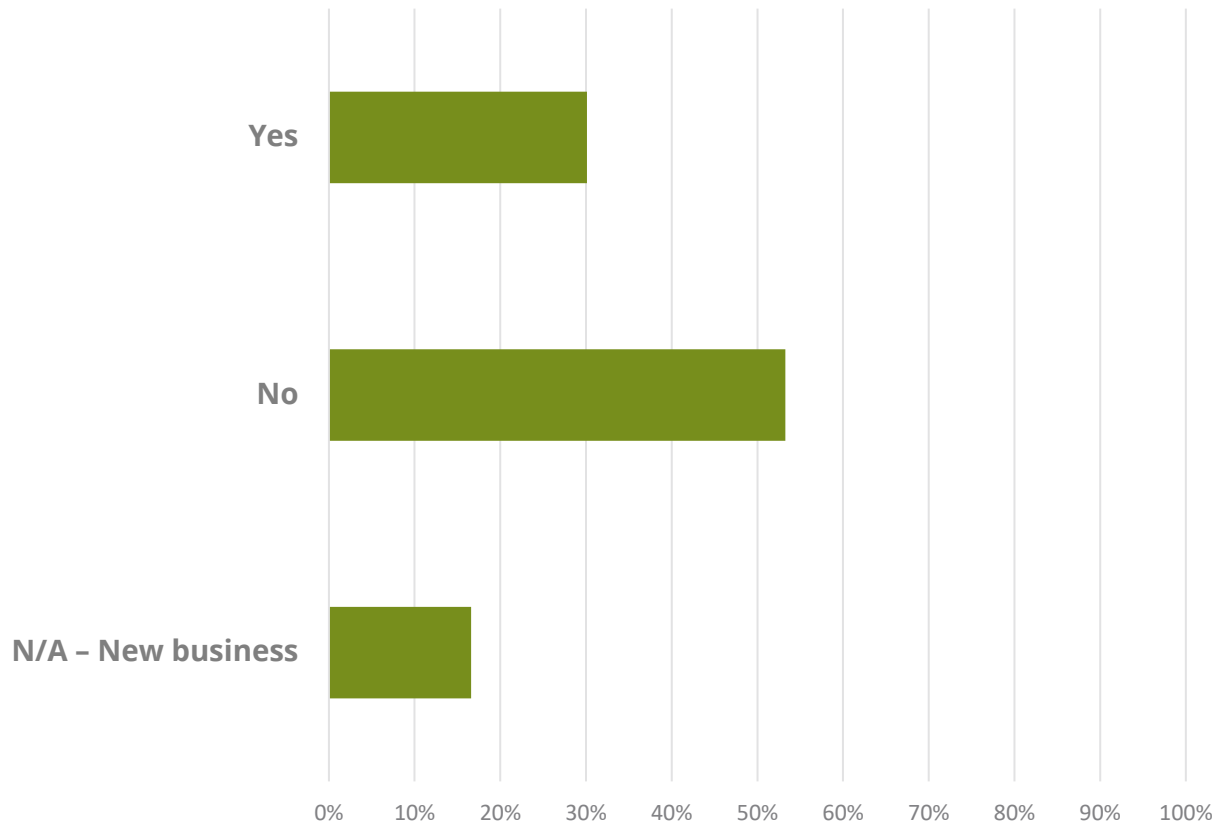
Answered: 107 Skipped: 138



ANSWER CHOICES	RESPONSES	
No or low staff turnover	40.19%	43
We offer competitive wages	23.36%	25
New employees found through referral or word of mouth	19.63%	21
Temporary bonuses during challenging recruitment times	1.87%	2
Other (please specify)	49.53%	53
<b>Total Respondents:</b>		<b>107</b>

### Q17 Has employee retention been a problem in the last 3 years?

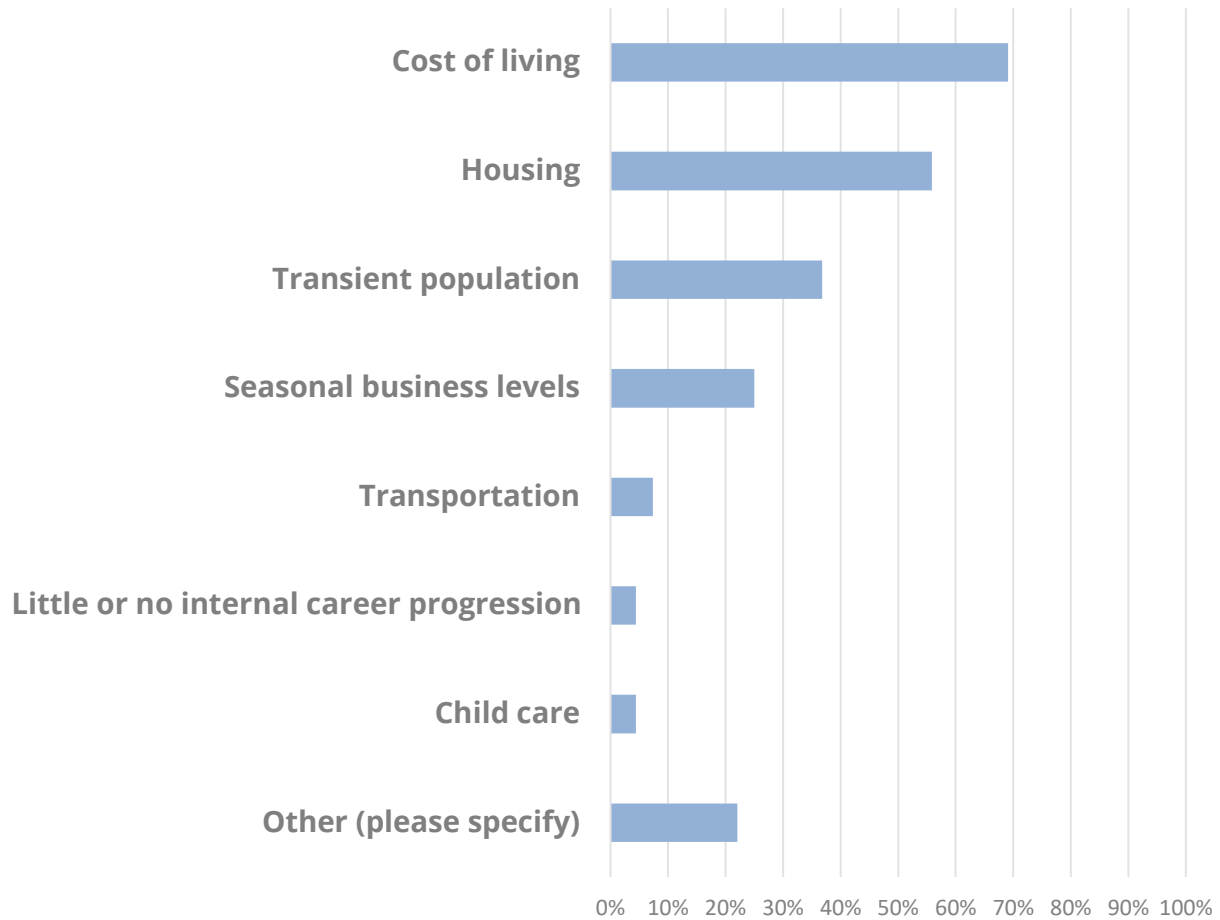
Answered: 229 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes	30.13%	69
No	53.28%	122
N/A - New business	16.59%	38
<b>Total Respondents:</b>		<b>229</b>

## Q18 What are the underlining issues impacting employee retention for your business?

Answered: 68 Skipped: 117

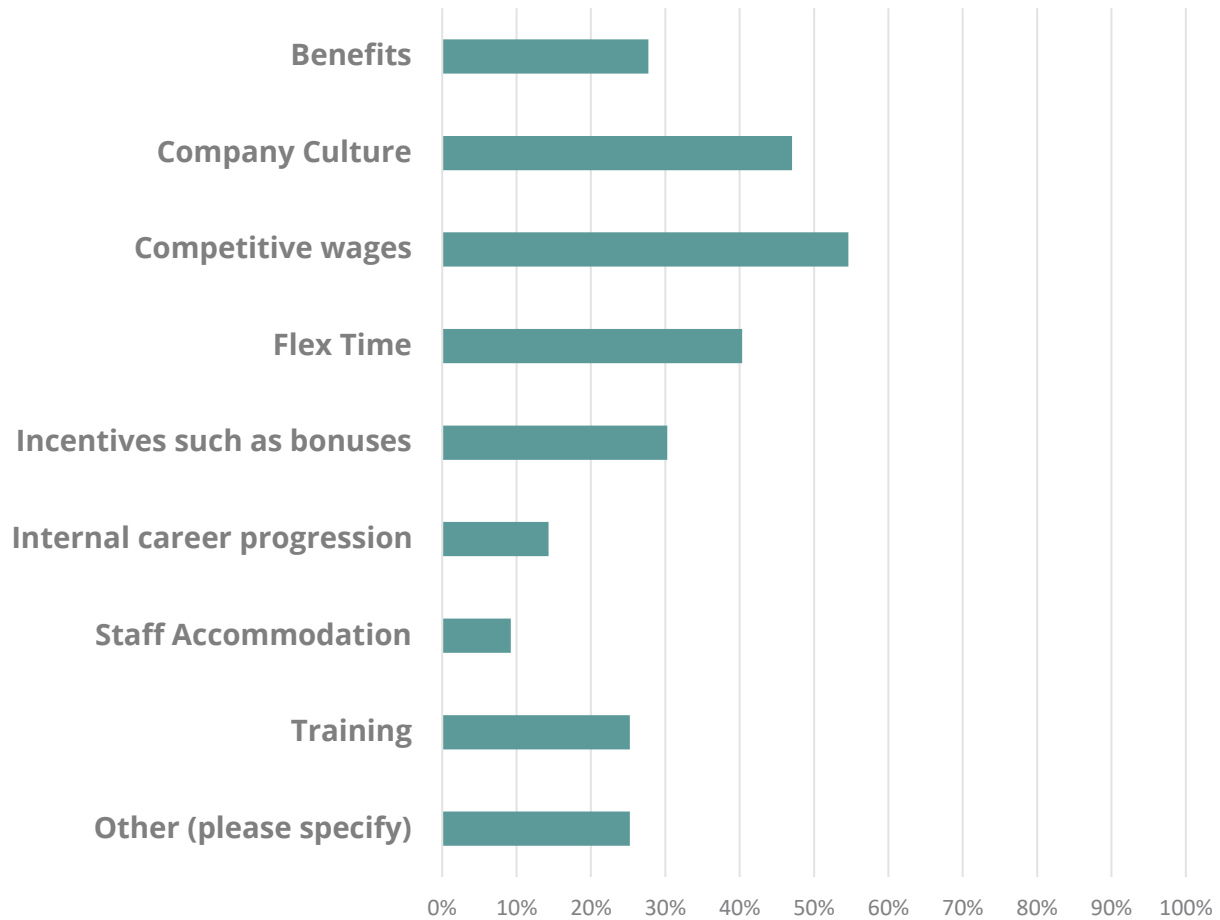


ANSWER CHOICES	RESPONSES	
Cost of living	69.12%	47
Housing	55.88%	38
Transient population	36.76%	25
Seasonal business levels	25.00%	17
Transportation	7.35%	5
Child care	4.41%	3
Little or no internal career progression	4.41%	3
Other (please specify)	22.06%	15
<b>Total Respondents:</b>		<b>68</b>



### Q19 What strategies / factors have you employed that make employee retention not a problem?

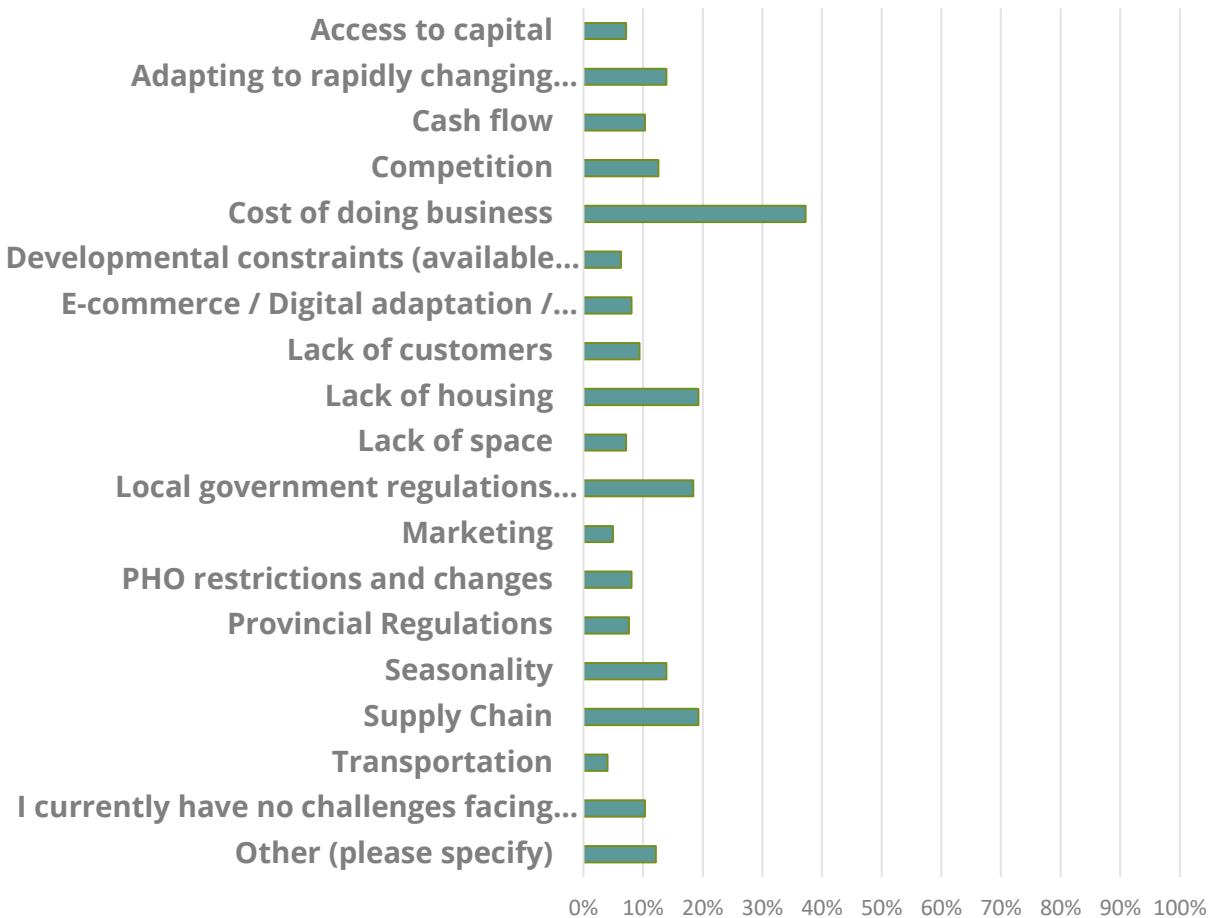
Answered: 119 Skipped: 126



ANSWER CHOICES	RESPONSES	
Benefits	27.73%	33
Company Culture	47.06%	56
Competitive wages	54.62%	65
Flex Time	40.34%	48
Incentives such as bonuses	30.25%	36
Internal career progression	14.29%	17
Staff Accommodation	9.24%	11
Training	25.21%	30
Other (please specify)	25.21%	30
<b>Total Respondents:</b>		<b>119</b>

## Q20 What are the biggest challenges facing your business, other than labour? (Please select top 3)

Answered: 223 Skipped: 22



ANSWER CHOICES	RESPONSES	
Access to capital	7.17%	16
Adapting to rapidly changing business landscape	13.90%	31
Cash flow	10.31%	23
Competition	12.56%	28
Cost of doing business	37.22%	83
Developmental constraints (available land, financing, building age)	6.28%	14
E-commerce / Digital adaptation / Online presence	8.07%	18
Lack of customers	9.42%	21
Lack of space	7.17%	16
Local government regulations (approval process, inspections, licensing, bylaw, "red tape")	18.39%	41
Marketing	4.93%	11
PHO restrictions and changes	8.07%	18
Seasonality	13.90%	31
Supply Chain	19.28%	43
Transportation	4.04%	9
Lack of housing	19.28%	43
Provincial Regulations	7.62%	17
I currently have no challenges facing my business	10.31%	23
Other (please specify)	12.11%	27
	<b>Total Respondents:</b>	<b>223</b>

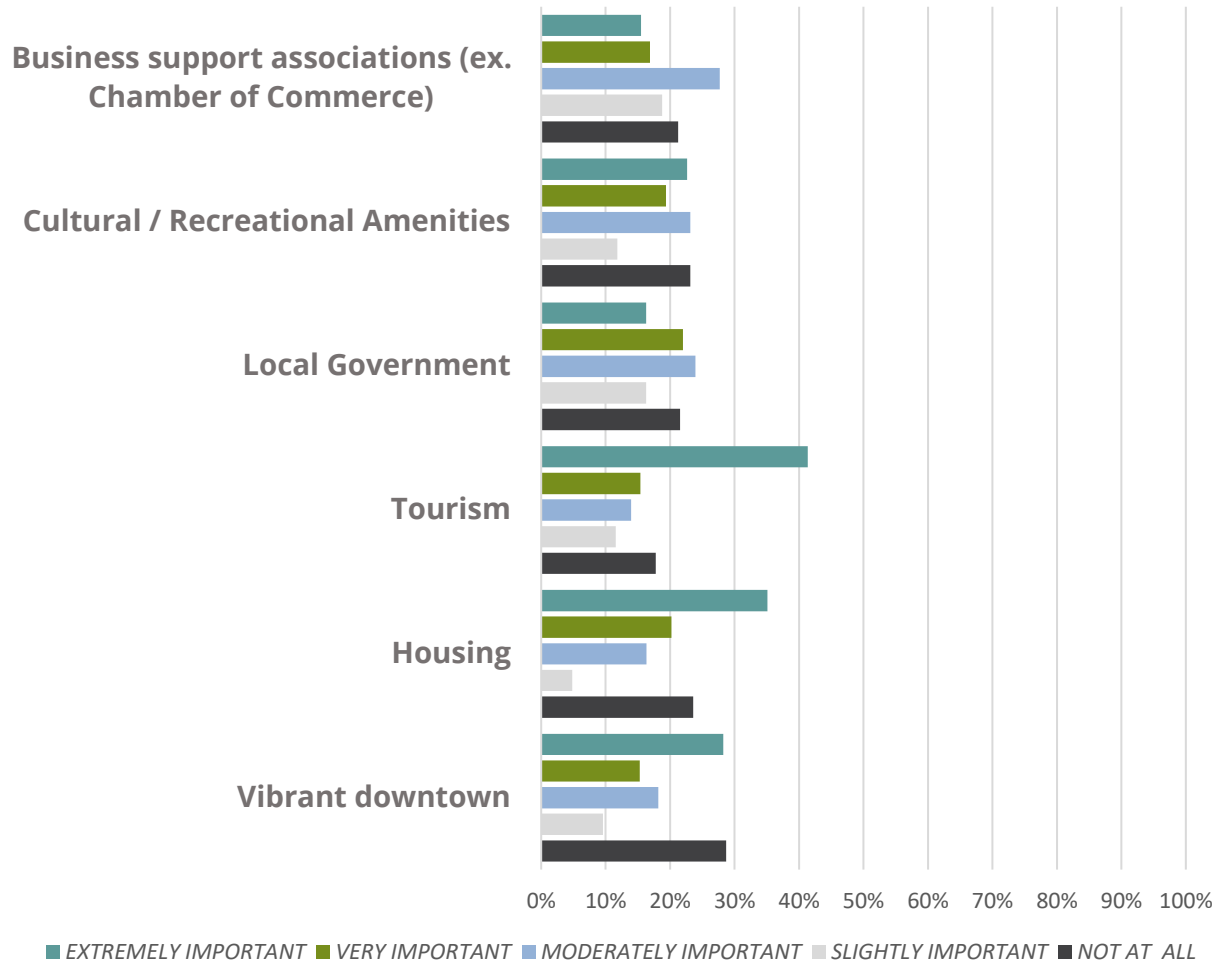
**Q21 What specifically about "Development constraints" or "Local government regulations" are a challenge for your business? Please feel free to provide as much detail as wanted.**

Answered: 23    Skipped: 222

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**Q22 On a scale of 1-5, with 1 being not important and 5 being extremely important, please rate how important the following categories are to your business's success.**

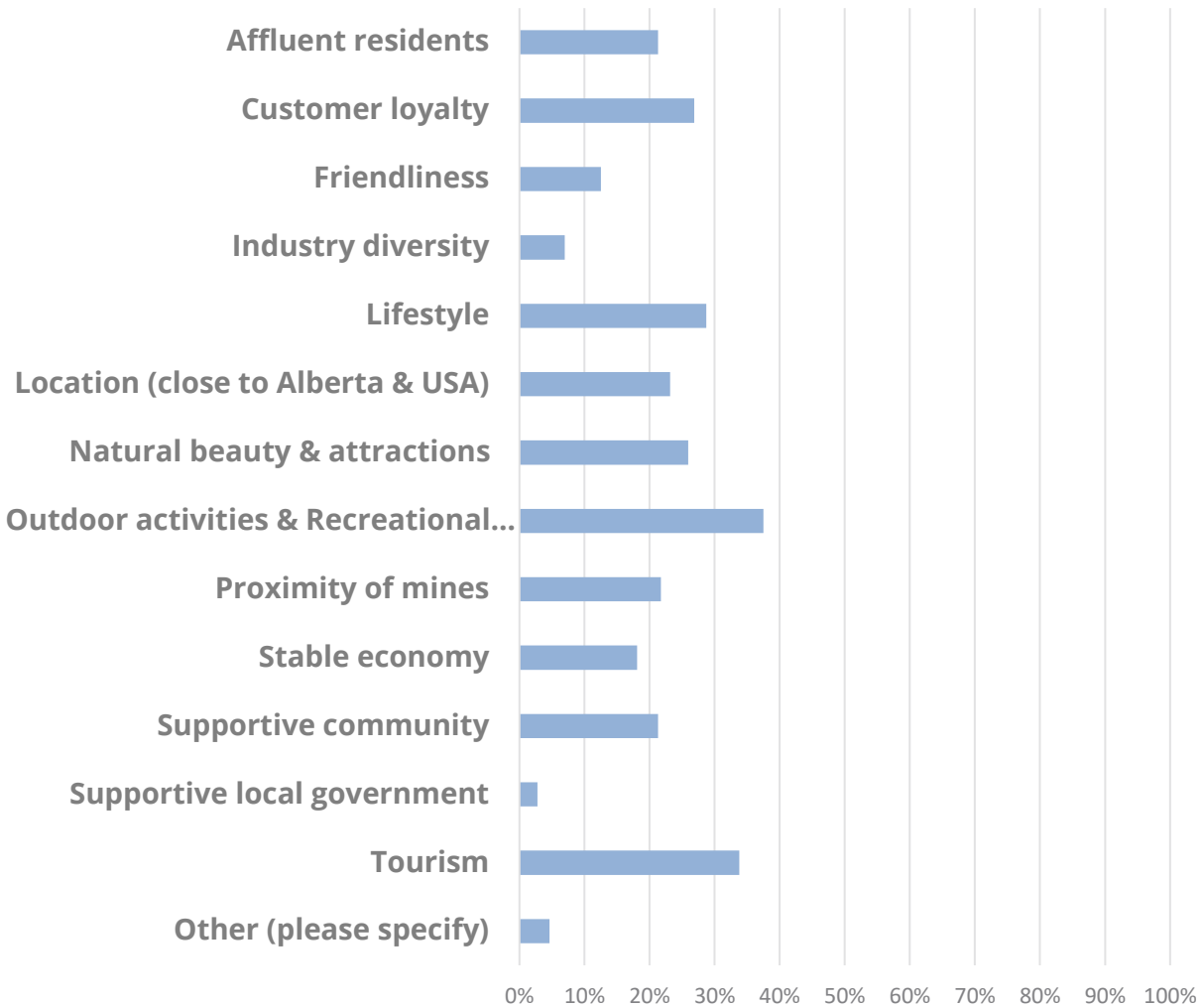
Answered: 216 Skipped: 29



	NOT AT ALL	SLIGHTLY IMPORTANT	MODERATELY IMPORTANT	VERY IMPORTANT	EXTREMELY IMPORTANT	TOTAL
Business support associations (ex. Chamber of Commerce)	21.23%	18.78%	27.70%	16.90%	15.49%	213
Cultural / Recreational Amenities	23.11%	11.79%	23.11%	19.34%	22.64%	212
Local Government	21.53%	16.27%	23.92%	22.01%	16.27%	209
Tourism	17.79%	11.54%	13.94%	15.38%	41.35%	208
Housing	23.56%	4.81%	16.35%	20.19%	35.10%	208
Vibrant downtown	28.71%	9.57%	18.18%	15.31%	28.23%	209

**Q23 What are the community's strengths as a place to do business? (Please select 1-3 answers)**

Answered: 216 Skipped: 29

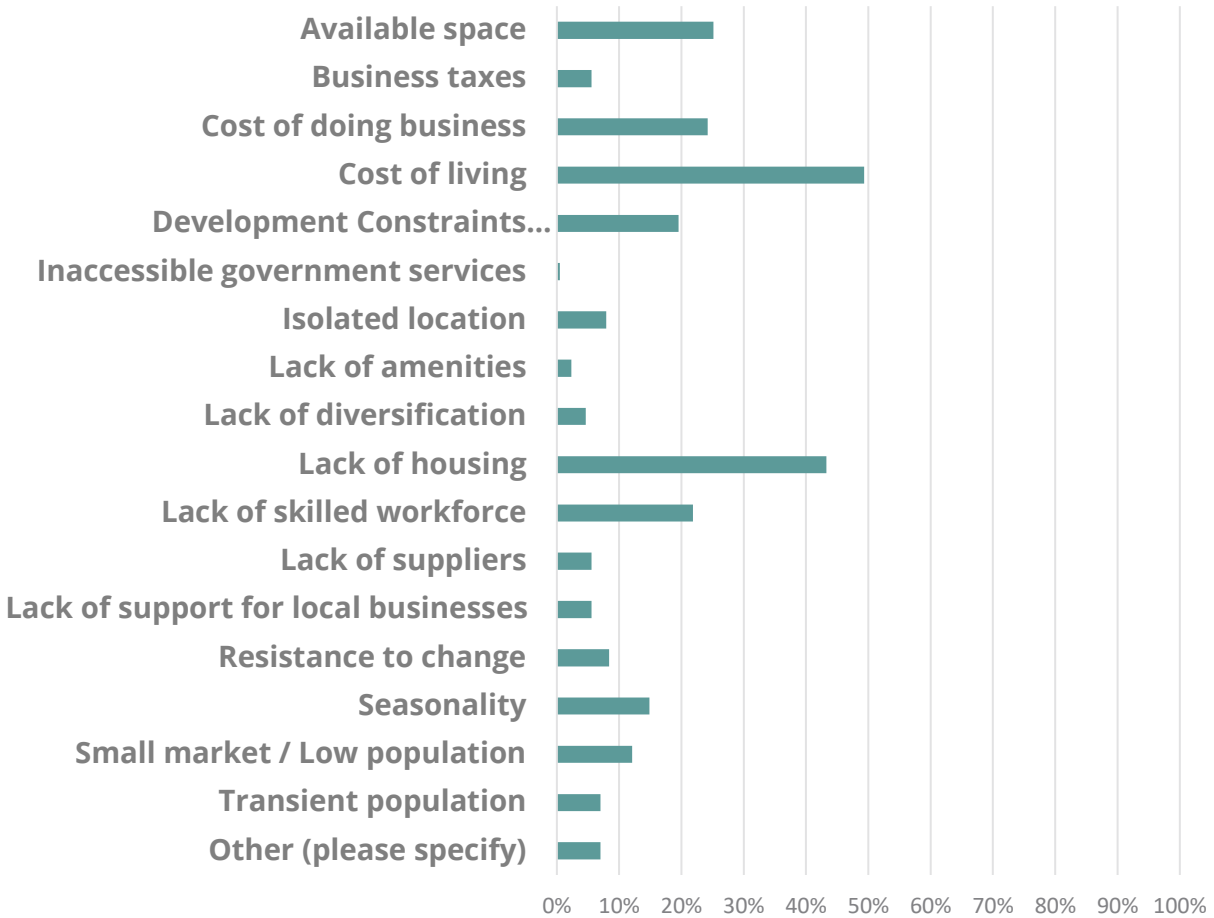


ANSWER CHOICES	RESPONSES	
Affluent residents	21.30%	46
Customer loyalty	26.85%	58
Friendliness	12.50%	27
Industry diversity	6.94%	15
Lifestyle	28.70%	62
Location (close to Alberta & USA)	23.15%	50
Natural beauty & attractions	25.93%	56
Outdoor activities & Recreational Opportunities	37.50%	81
Proximity of mines	21.76%	47
Stable economy	18.06%	39
Supportive community	21.30%	46
Supportive local government	2.78%	6
Tourism	33.80%	73
Other (please specify)	4.63%	10
<b>Total Respondents:</b>		<b>216</b>



**Q24 What are the community's weaknesses as a place to do business? (Please select 1-3 answers)**

Answered: 215 Skipped: 30



ANSWER CHOICES	RESPONSES	
Available space	25.12%	54
Cost of doing business	24.19%	52
Development Constraints (Zoning/Bureaucracy/Permits)	19.53%	42
Business taxes	5.58%	12
Cost of living	49.30%	106
Inaccessible government services	0.47%	1
Isolated location	7.91%	17
Lack of housing	43.26%	93
Lack of amenities	2.33%	5
Lack of diversification	4.65%	10
Lack of skilled workforce	21.86%	47
Lack of suppliers	5.58%	12
Lack of support for local businesses	5.58%	12
Resistance to change	8.37%	18
Seasonality	14.88%	32
Small market / Low population	12.09%	26
Transient population	6.98%	15
Other (please specify)	6.98%	15
<b>Total Respondents:</b>		<b>215</b>

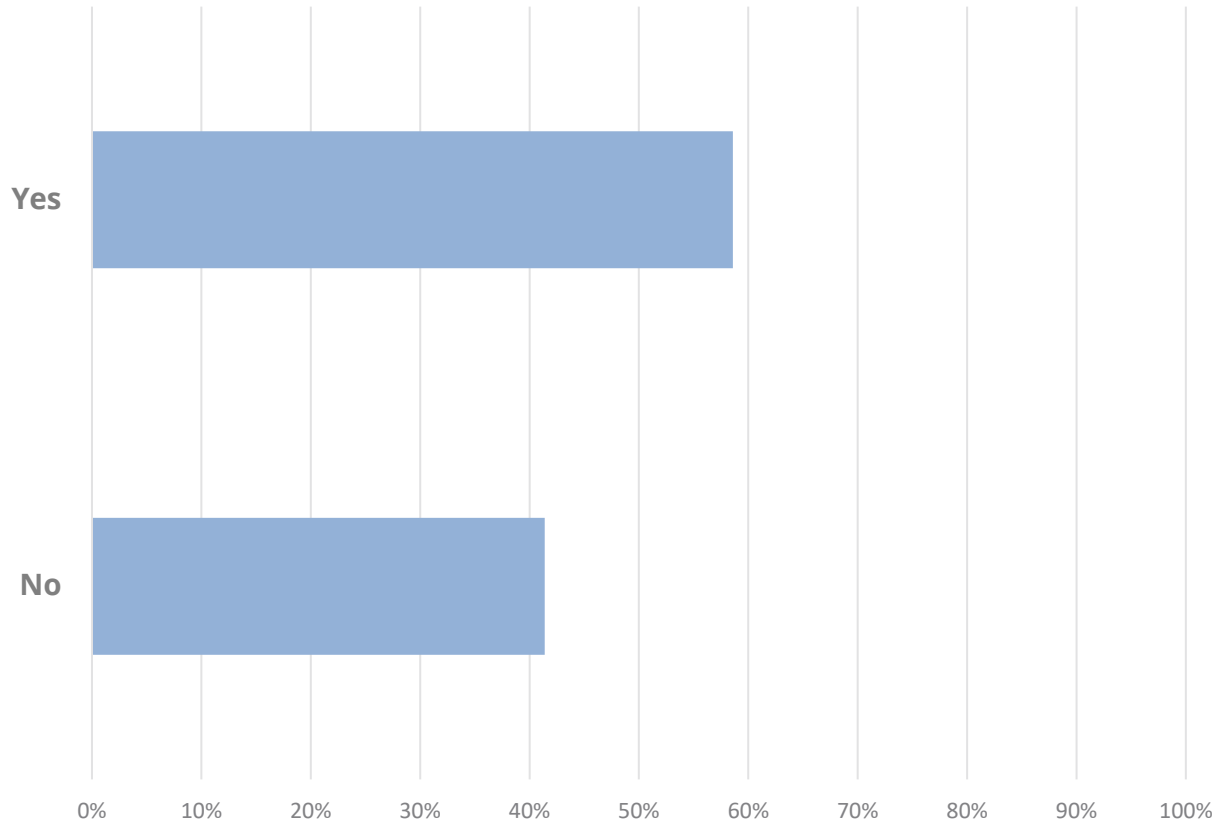
**Q25 If you would like to expand on the community weakness's you identified above, please enter your comments below.**

Answered: 58    Skipped: 187

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### Q26 Do you plan to expand your business in the next 3 years?

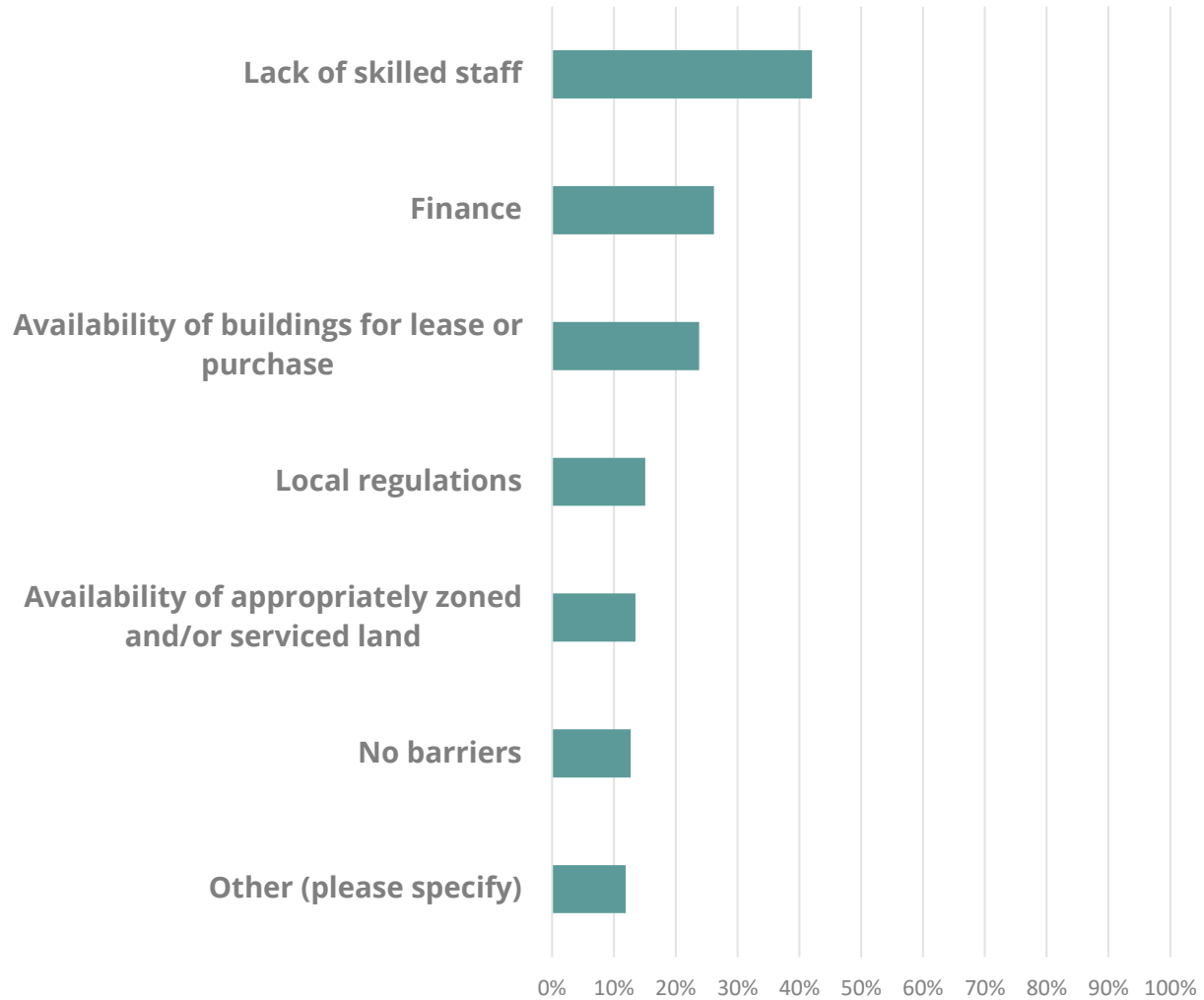
Answered: 215 Skipped: 30



ANSWER CHOICES	RESPONSES	
Yes	58.60%	126
No	41.40%	89
<b>Total Respondents:</b>		<b>215</b>

## Q27 What are the major barriers for your expansion?

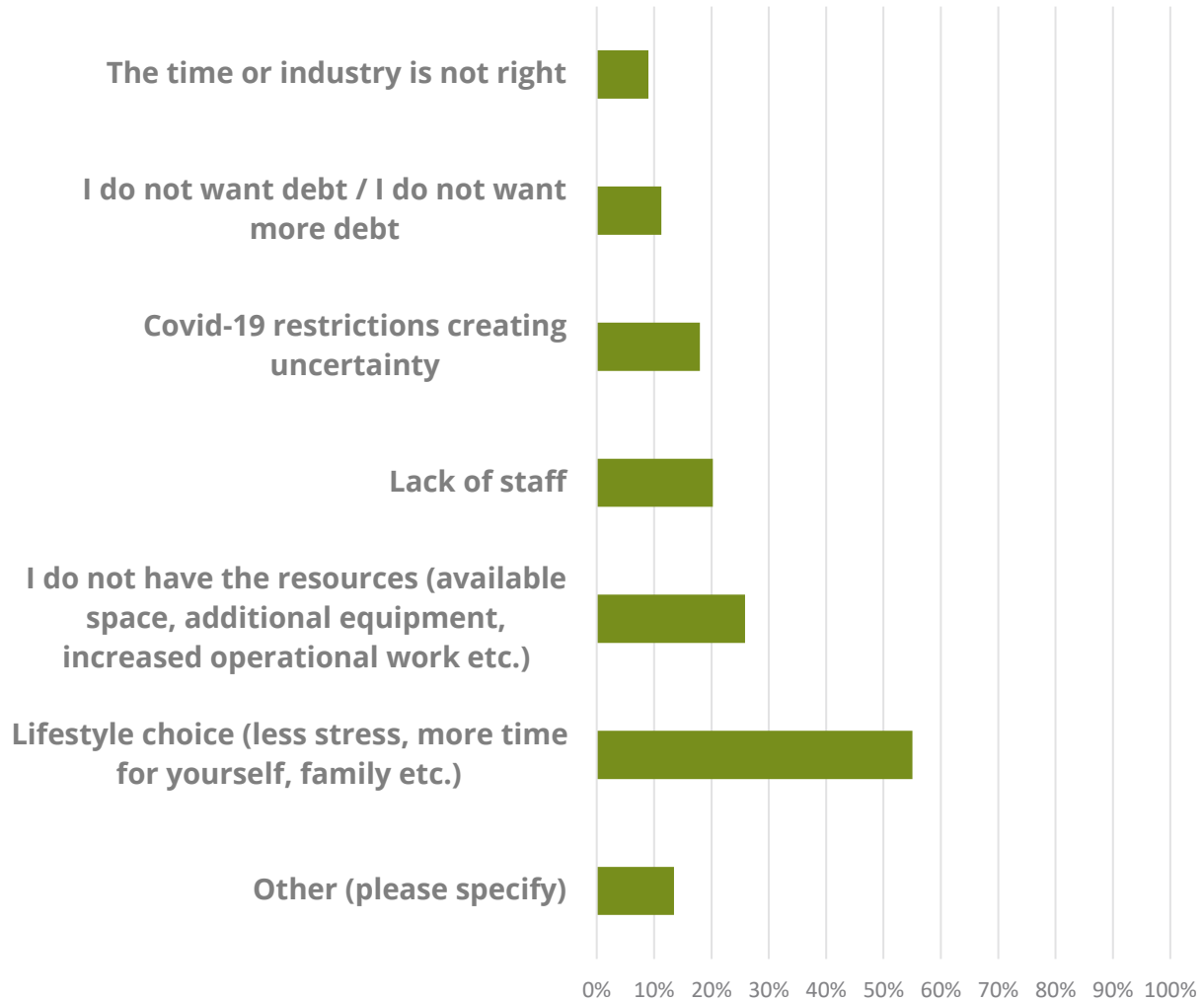
Answered: 126 Skipped: 119



ANSWER CHOICES	RESPONSES	
Lack of skilled staff	42.06%	53
Finance	26.19%	33
Availability of appropriately zoned and/or serviced land	13.49%	17
Local regulations	15.08%	19
Availability of buildings for lease or purchase	23.81%	30
No barriers	12.70%	16
Other (please specify)	11.90%	15
<b>Total Respondents:</b>		<b>126</b>

## Q28 Why do you not plan on expanding?

Answered: 89 Skipped: 156



ANSWER CHOICES	RESPONSES	
The time or industry is not right	8.99%	8
I do not want debt / I do not want more debt	11.24%	10
Covid-19 restrictions creating uncertainty	17.98%	16
Lack of staff	20.22%	18
I do not have the resources (available space, additional equipment, increased operational work etc.)	25.84%	23
Lifestyle choice (less stress, more time for yourself, family etc.)	55.06%	49
Other (please specify)	13.48%	12
	<b>Total Respondents:</b>	<b>89</b>

**Q29 What specifically about "Local regulations" are a barrier to your expansion? Please feel free to provide as much detail as wanted.**

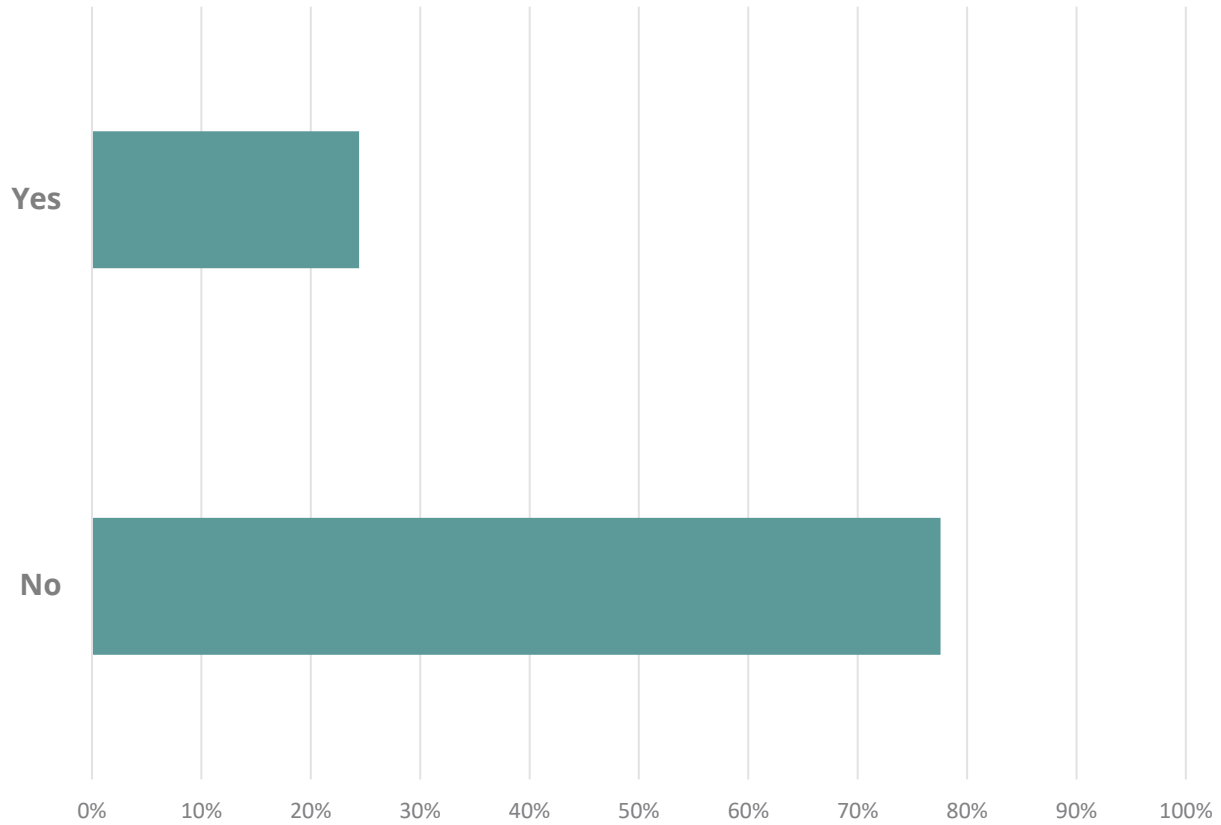
Answered: 14    Skipped: 231

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### Q30 Do you plan to retire or sell your business within the next 3-5 years?

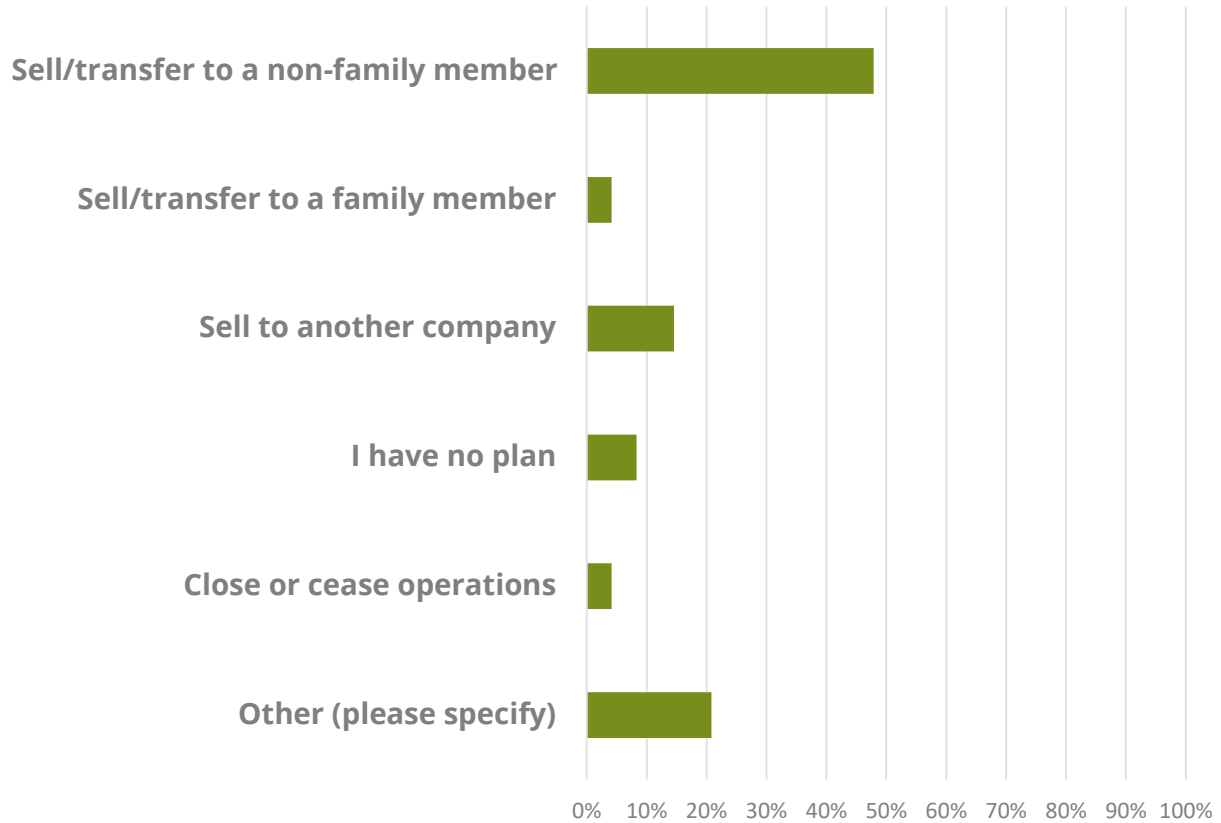
Answered: 214 Skipped: 31



ANSWER CHOICES	RESPONSES	
Yes	24.43%	48
No	77.57%	166
<b>Total Respondents:</b>		<b>214</b>

### Q31 How do you intend to exit the business?

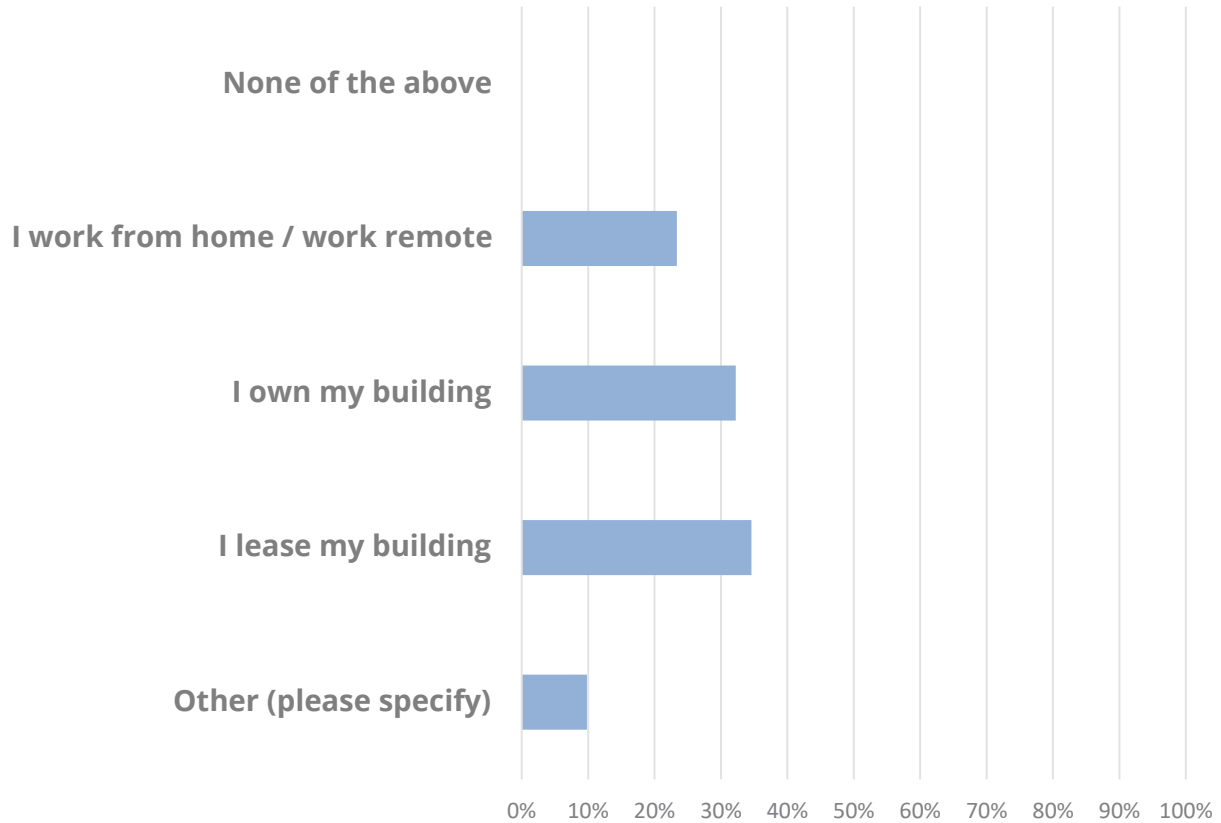
Answered: 48 Skipped: 197



ANSWER CHOICES	RESPONSES	
Sell/transfer to a non-family member	47.92%	23
Sell/transfer to a family member	4.17%	2
Sell to another company	14.58%	7
I have no plan	8.33%	4
Close or cease operations	4.17%	2
Other (please specify)	20.83%	10
<b>Total Respondents:</b>		<b>48</b>

### Q32 What is the status of your business's building?

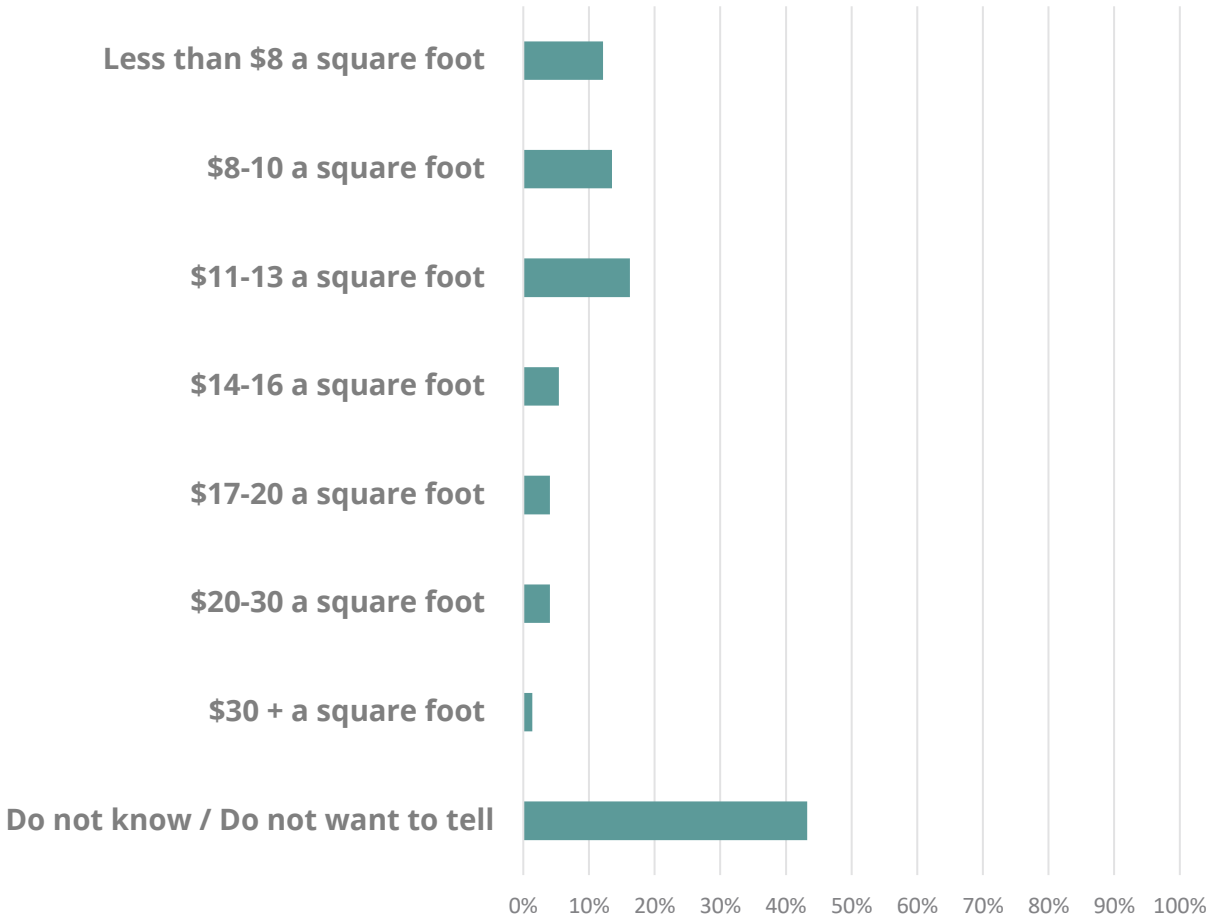
Answered: 214 Skipped: 31



ANSWER CHOICES	RESPONSES	
None of the above	0.00%	0
I work from home / work remote	23.36%	50
I own my building	32.24%	69
I lease my building	34.58%	74
Other (please specify)	9.81%	21
<b>Total Respondents:</b>		<b>214</b>

**Q33 What is your current lease rate, based on triple net lease? (Lease agreement on a property whereby the tenant or lessee promises to pay all the expenses of the property, including real estate taxes, building insurance, and maintenance)**

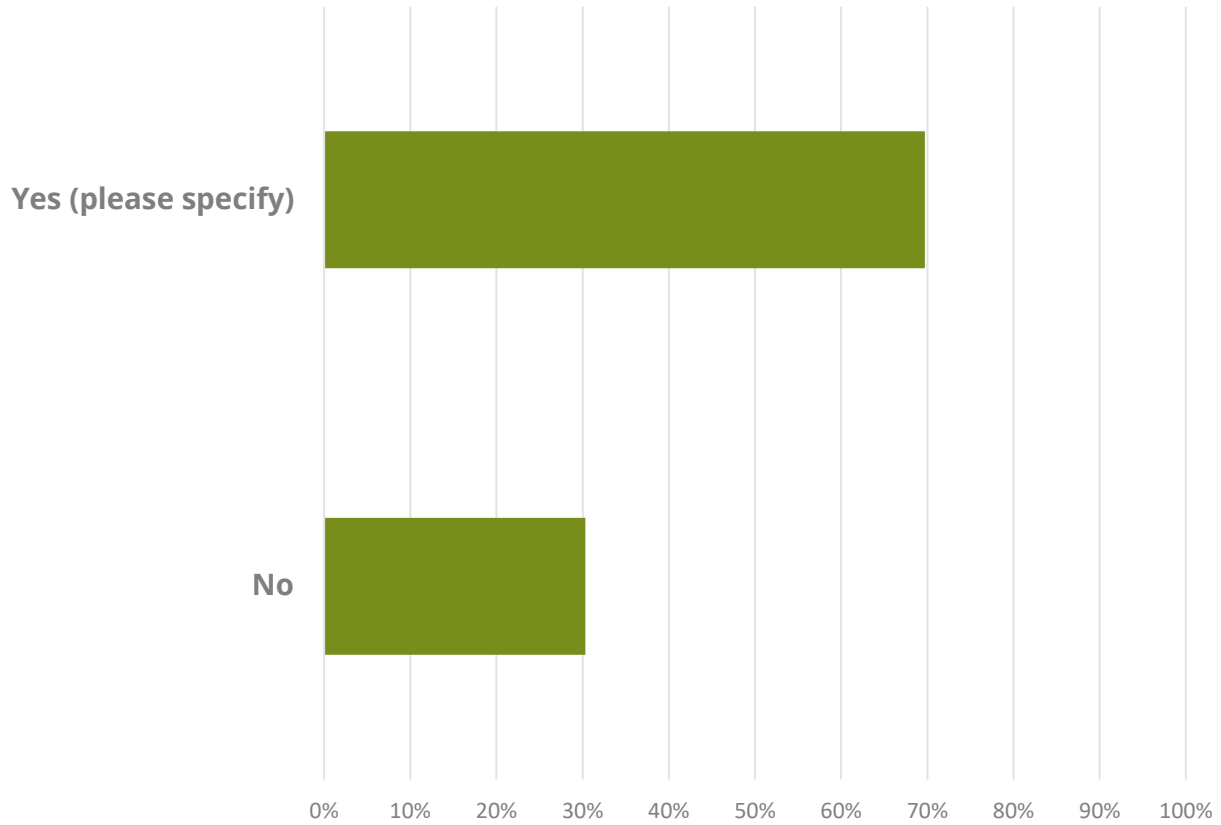
Answered: 74 Skipped: 171



ANSWER CHOICES	RESPONSES	
Less than \$8 a square foot	12.16%	9
\$8-10 a square foot	13.51%	10
\$11-13 a square foot	16.22%	12
\$14-16 a square foot	5.41%	4
\$17-20 a square foot	4.05%	3
\$20-30 a square foot	4.05%	3
\$30 + a square foot	1.35%	1
Do not know / Do not want to tell	43.24%	32
<b>Total Respondents:</b>		<b>74</b>

### Q34 Do you have any barriers to updating your building, if needed?

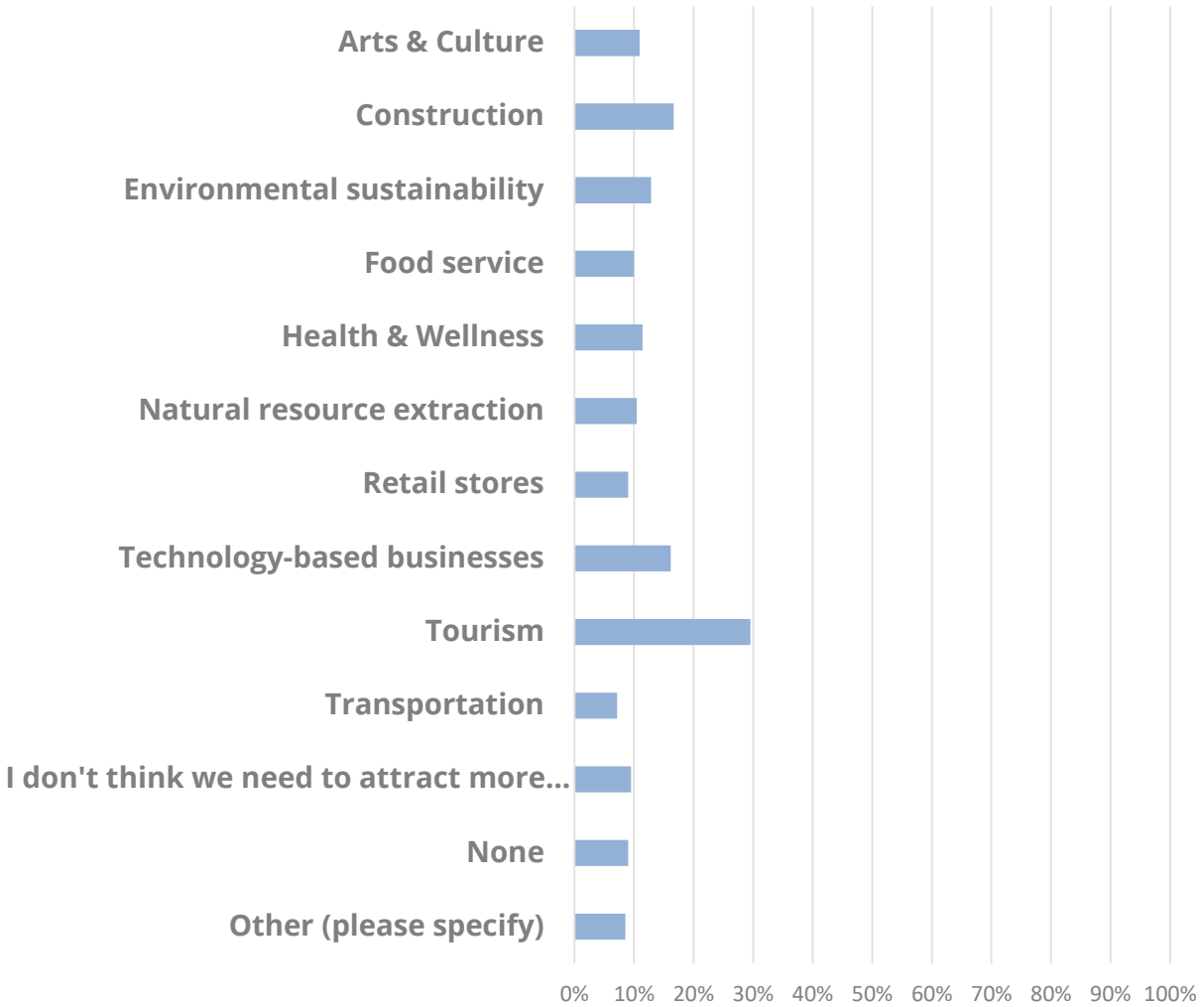
Answered: 99 Skipped: 146



ANSWER CHOICES	RESPONSES	
Yes (please specify)	69.70%	69
No	30.30%	30
<b>Total Respondents:</b>		<b>99</b>

**Q35 If an effort was made to attract a business, sector, or industry to the Elk Valley, which options below would benefit you? (Please pick up to 2 answers)**

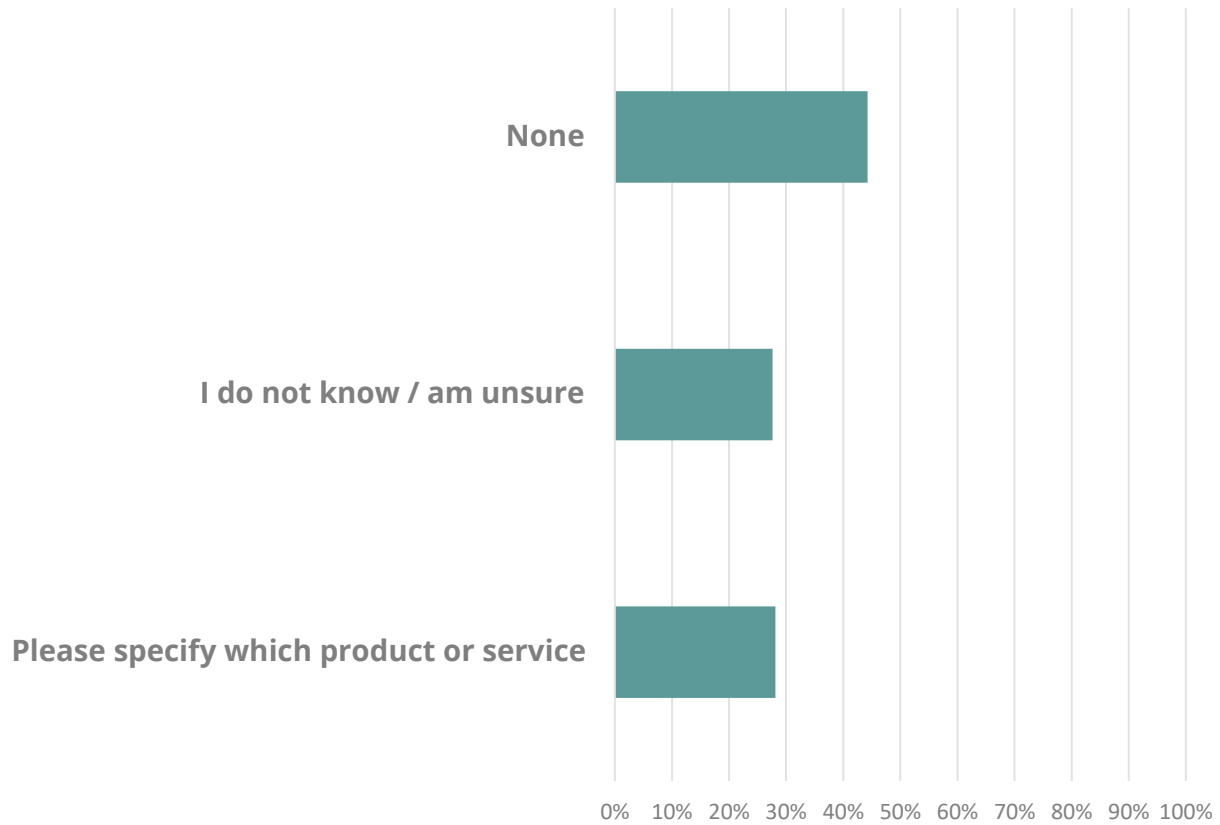
Answered: 210 Skipped: 35



ANSWER CHOICES	RESPONSES	
Arts & Culture	10.95%	23
Construction	16.67%	35
Environmental sustainability	12.86%	27
Food service	10.00%	21
Health & Wellness	11.43%	24
Natural resource extraction	10.48%	22
Retail stores	9.05%	19
Technology-based businesses	16.19%	34
Tourism	29.52%	62
Transportation	7.14%	15
I don't think we need to attract more business	9.52%	20
None	9.05%	19
Other (please specify)	8.57%	18
<b>Total Respondents:</b>		<b>210</b>

**Q36 What products or services, if any, are you purchasing from outside the area for which you would like to have a local supplier?**

Answered: 210 Skipped: 35

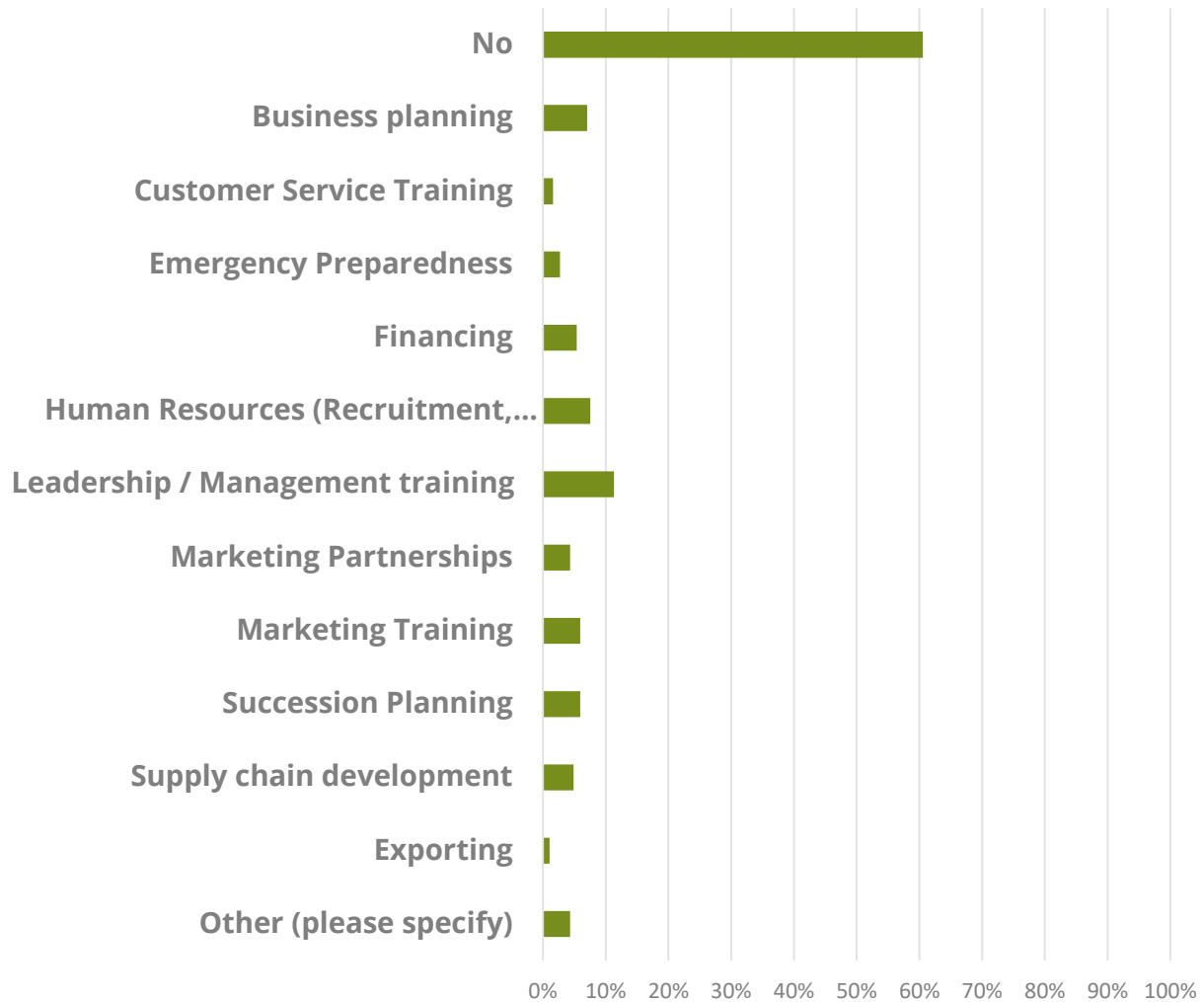


ANSWER CHOICES	RESPONSES	
None	44.29%	93
I do not know / am unsure	27.62%	58
Please specify which product or service	28.10%	59
<b>Total Respondents:</b>		<b>210</b>



### Q37 Do you have any desired business supports that are not currently available to you?

Answered: 185 Skipped: 60



ANSWER CHOICES	RESPONSES	
No	60.54%	112
Business planning	7.03%	13
Customer Service Training	1.62%	3
Emergency Preparedness	2.70%	5
Exporting	1.08%	2
Financing	5.41%	10
Human Resources (Recruitment, Retention, Policies etc.)	7.57%	14
Leadership / Management training	11.35%	21
Marketing Partnerships	4.32%	8
Marketing Training	5.95%	11
Succession Planning	5.95%	11
Supply chain development	4.86%	9
Other (please specify)	4.32%	8
<b>Total Respondents:</b>		<b>185</b>

**Q38 Is there something you would like to add, that we did not ask?**

Answered: 55    Skipped: 190

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