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MUNICIPALITY OF TRENT HILLS
BUSINESS RETENTION & EXPANSION SURVEY
FINAL REPORT
2005/06

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EXECUTIVE SUMMARY

The Business Retention & Expansion (BR&E) Survey was developed by the Ontario Ministry of Agriculture, Food and Rural Affairs. The BR&E survey is a rural economic development tool. It involves a four step process of gathering local data through interviews with local business owners/managers, analyzing the data, providing recommendations for action to address issues and creating a proactive approach to business and community development.

The BR&E survey explores a variety of factors including:

- Profile of the business, type, time in operation, # of employees
- Future plans
- Factors impacting operations
- Current and future human resource issues
- Current and future technology needs
- Rating of local services and organizations
- Information assistance requirements
- Expansion, retention and relocation needs and assistance

It is important to note that the Municipality of Campbellford/Seymour was pilot project in 1999 for the original survey. The survey has been modified since that time. However, it has been useful to compare some of the results of the 1999 survey with the 2005 survey.

The Business Retention & Expansion Survey was conducted by the Municipality of Trent Hills, in partnership with the Trent Hills Economic Development Committee, between April 2005 and January 2006. 57 businesses, out of 70, participated in the project representing a cross-section of our business community. The BR&E project also included active support and involvement from the Campbellford Business Improvement Area, Hastings Business Association, Warkworth Business Association and Trent Hills & District Chamber of Commerce.

The Economic Development Committee recommended to Council the following objectives in conducting the survey:

- To gather direct feedback from a cross section of Trent Hills businesses regarding the strengths, weaknesses, opportunities and challenges that exists in furthering economic prosperity for our community.
- To engage our local business community in our economic development efforts.
- To better understand the needs and issues of our local businesses.
- To identify successes and gaps in services delivered to our businesses by government agencies and organizations.
- To provide recommendations for action that Council and the community could take to assist in the attraction of new business and to support the growth of existing business.

Highlights of the BR&E survey:

- 74% rated Trent Hills as good place to do business.
- 42% of the business interviewed have 1-4 employees
- The top barriers to business expansion/attraction: 44% Health & medical services, 43% Public transit, 40% Serviced land, 38% Business taxes, 35% Availability of skilled labour.
- The highest rated factors (advantages) for the community: 55% Quality of life, 35% Support from local residents, 28% Support from municipality & local business, 26% Development charges, 23% Availability of utilities.
- 64% of the businesses are completely satisfied with the location of their business.
- The businesses indicated a high use of technology: 93% use email, 69% have their own website, & 77% use cellular telephones.
- The businesses indicated a high interest in collaboration: 64% interest in joint marketing, 77% interest in networking/information sharing, and 74% interest in being a business community ambassador.
- 88% of the businesses indicated an expected growth in employees over the next 3 years.
- Employee needs are: 45% Unskilled trades, 34% sales, 34% skilled trades, and 30% business administration.
- 86% of the businesses train employees in-house.
- Identified skill development in the workforce: 43% Customer service, 40% Computer software, 36% Oral communication.
- Less than half of those interviewed believe the Economic Development Strategic Plan is being effectively implemented.
- Issues that are the Economic Development Office & Business Associations can assist with: 69% Joint marketing, 55% trade shows, 49% Marketing seminars, 47% Business networking sessions, 45% attraction of related supply/service businesses
- 45% of the businesses plan to expand operations in the next 3 years, 50% plan to remain the same, 6% plan to downsize, and 6% plan to relocate.
- 1 business indicated a possibility of closure due to high costs of operating the business.
- Of those expanding, 55% indicated the following difficulties with expansion plans: 50% Financing, 38% Labour availability, 31% local bylaws
- Top factors to ensure businesses will remain competitive in the future: 77% Labour market development, 70% Availability of labour, 68% Energy cost, 67% Workplace skill development
- Top 4 suggestions to improve retail business: repair eyesore buildings, more accommodators, more niche market specialty shops, more restaurants & entertainment facilities, more and better signage
- Top 4 community assets that retail businesses would like to see improved: public washrooms, waterfront development, directional signage, sports & recreation facilities
- Suggestions for how local government can assist agriculture businesses: streamlining of local regulatory and permitting processes, 78% review of taxes and fees, infrastructure maintenance and improvement, database of local farm labour

The Economic Development Committee has summarized the results of the survey and identified the key issues that need to be addressed. In some cases, remedies have already been put into place or are in process. The Action Plan reflects these issues and also includes those that have not yet attempted to be resolved and require an effort to resolve. The Action Plan will be incorporated into the

Economic Development Strategic Plan to ensure that the issues are addressed as part of the ongoing Economic Development Committee role.

Key findings of the study indicate that Action Plans should be focused on the follow areas:

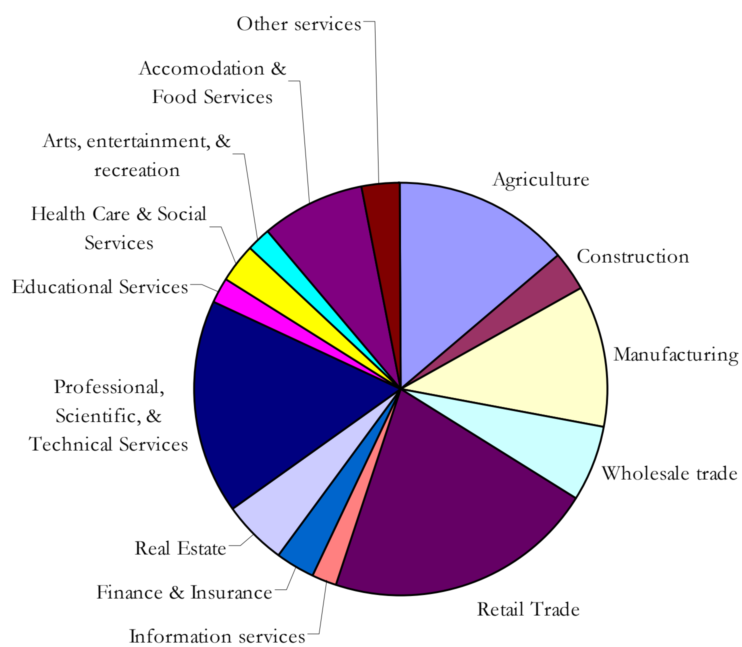
- Human Resources
- Improved technology infrastructure
- Transportation
- Medical services
- Business Development
- Business Taxes
- Serviced Land
- Cooperative Marketing
- Signage
- Parking
- Façade/Building Improvement
- Retail Recruitment
- Improved Recreation and Cultural Infrastructure

The development of specific action plans may lead to alternative and effective ideas from community partners more directly involved in addressing a specific issue.

OVERVIEW OF THE SAMPLE

- The sample of seventy businesses representing a cross section of those which make up the business community in Trent Hills were contacted to participate in the survey. Fifty seven businesses completed the survey - 81% response.
- The businesses interviewed were located in the following areas of Trent Hills: Campbellford/Seymour (63%), Hastings (14%), and Warkworth/Percy (23%)
- **Primary Business Activity**
  - The primary types of businesses were highly fragmented except retail trade (21%), professional/scientific/technical (17%), agriculture (14%), and manufacturing (11%).
  - Agriculture, Retail Trade, Manufacturing and Government Service industries represent 3 of the top 4 employers in Trent Hills. Health Care and Social Services is the second highest employer.

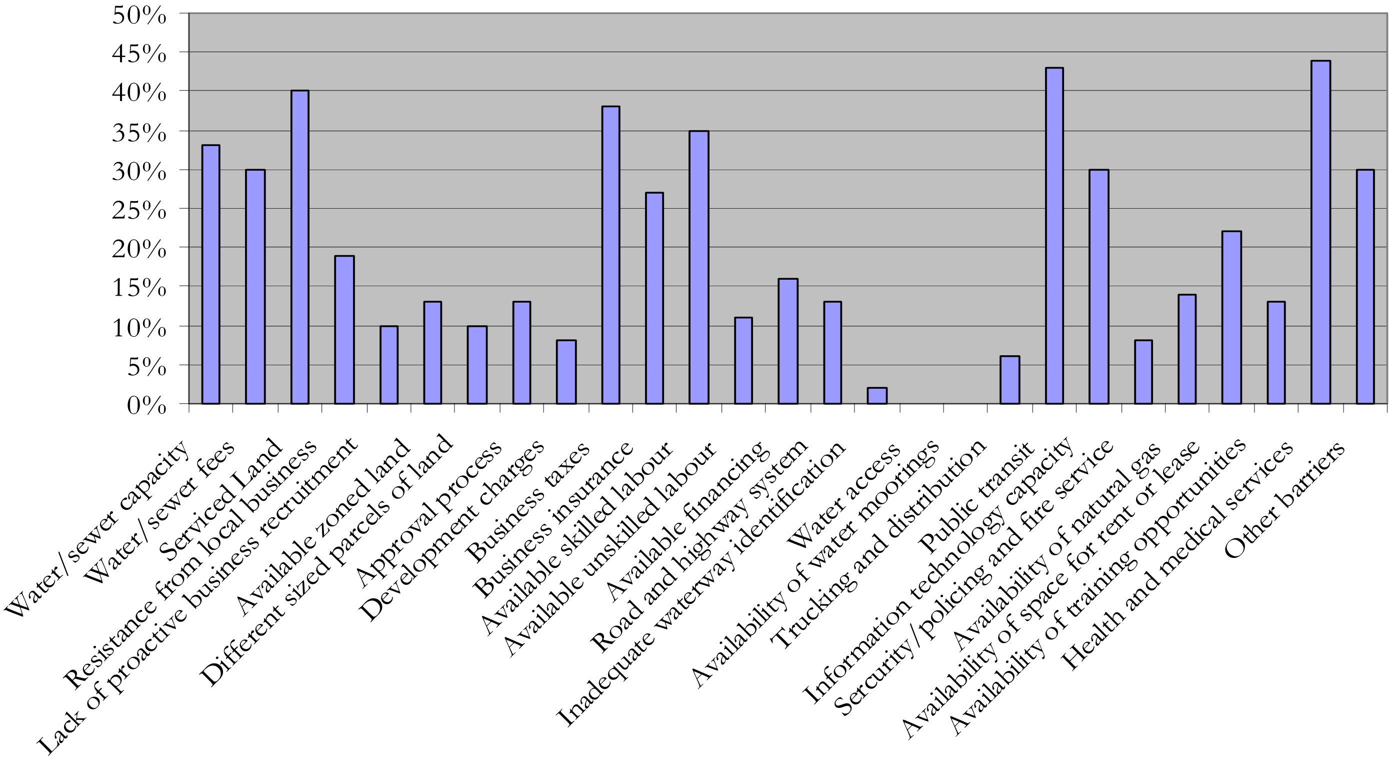
Primary Business Activity



- **Legal Form of the Business**
  - Corporation (52%), Sole Proprietorship (30%), Partnership (8%), Non-profit (5%), and Cooperatives (5%). 8% of the businesses interviewed were franchises.
- **Years in Operations**
  - 11 to 25 years (30%), over 35 years (25%), 4 to 10 years (19%), 1 to 3 years (19%), and less than 1 year (2%).
- 42% of the businesses interviewed employed 1-4 people.
- 95% of the businesses interviewed are non-unionized.

- **Impressions of Trent Hills as a place to do business**
  - 74% rated Trent Hills as a good place to do business.
  - Half of those interviewed have changed their attitude about Trent Hills in the past 3 years.
  - Of those that have had an attitude change - 73% are more positive about Trent Hills.
  - Recommendations made by the businesses surveyed to improve the business climate:
    - Effective Business Associations in each community
    - Downtown Improvement
    - Develop more support for shopping locally
    - Continue to improve Tourism & Marketing efforts
    - Workforce skill development programs
    - Support for the hospital and physician recruitment
    - Recreation service improvement and facility development
    - Creation of public transit
    - Building department doesn't support joint ventures with private developers
    - Be much more competitive with hard costs – water and sewer, taxes. Businesses should not pay education portion of taxes
    - More attention to the businesses in the community (versus attracting new business)
    - Extend municipal services to Tanner Industrial Park
    - Change in attitude will attract businesses, create a positive community atmosphere
    - Provide garbage and recycling pick up for all businesses
    - More focus on streets and road repair for safety reasons
    - An improvement in the newspaper advertising for Trent Hills
    - Should develop a plan for self-sufficiency with increasing transportation costs
    - Decrease government bureaucracy
    - Schools need to be more open to community use
    - Schools are not providing enough graduates
    - More child care services are need
    - Need to improve accessibility to community facilities
    - Develop and implement a plan to improve the social, health, educational, and recreational well being of the community.
    - Plan of action for the whole business community – who are we and what do we want to accomplish
    - Technology and communication upgrades

- **Barriers to the expansion of business and the attraction of new business**



- The top barriers to business development and business attraction noted were: Health and medical services (44%), Public transit (43%), Services land (40%), Businesses taxes (38%), Availability of skilled labour (35%).
- In the 1999 BR&E survey the top barriers were: Resistance from local business (30%), lack of proactive business recruitment (27%), slow approval process (25%), land availability (15%), and properly zoned/designated land (15%).

- **Factors in doing business with the community**

Factor	Poor	Fair	Good	Excellent
Availability of skilled labour	22%	33%	41%	4%
Labour costs	6%	17%	75%	6%
Transportation costs	18%	43%	34%	5%
Availability of transportation	33%	29%	31%	7%
Availability of appropriately zoned land	15%	39%	41%	5%
Land costs	4%	33%	50%	13%
Cost of construction	4%	28%	62%	6%
Cost of leasing space	10%	30%	50%	10%
Local permit process	5%	28%	51%	16%
Availability of utilities	11%	25%	42%	23%
Access to local markets/customers	4%	35%	46%	15%
Access to suppliers	2%	37%	49%	12%
Municipal taxes	29%	42%	25%	4%
Quality of life	0%	4%	42%	55%
Water and sewer capacity	7%	17%	61%	15%
Development charges	9%	22%	43%	26%
Support from municipality	4%	19%	50%	28%
Support from local business	2%	13%	57%	28%
Support from local residents	2%	15%	48%	35%
Municipal bylaws	7%	30%	49%	14%
Telecommunications infrastructure	20%	30%	33%	17%
Size of local market	9%	53%	34%	17%
Access to R&D	11%	37%	42%	11%
Access to training facilities	15%	43%	38%	5%

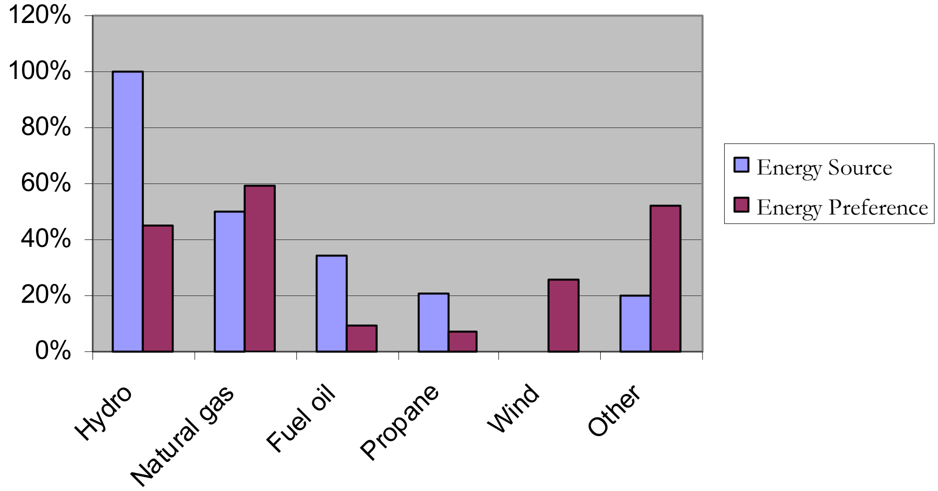
  - The lowest rated factors for the community were: Availability of transportation (33%), Municipal taxes (29%), Availability of skilled labour (22%), and Telecommunications infrastructure (20%).
  - The highest rated factors for the community were: Quality of life (55%), Support from local residents (35%), Support from municipality & local business (28%), Development charges (26%), and Availability of utilities (23%).
  - In the 1999 BR&E survey, lowest factors for the community were: availability of skilled labour and size of local market. The highest factors were: quality of life, labour costs, support from local residents, water/sewer capacity, and support from local business.

- **Business Location**
  - 64% of the businesses interviewed are completely satisfied with the location of their business.
    - In the 1999 BR&E survey, 79% indicated a general satisfaction with the site of their business.
  - The reasons for those that are not completely satisfied:

Site is too small	59%
No opportunity for expansion	41%
Condition of building	32%
Business taxes	32%
Other reasons	27%
Location is inconvient to customers	18%
Utility level or quantity available	14%
Availability of skilled labour	14%
Availability of unskilled labour	14%
Roads & highway system	14%
Public transit	14%
General appearance of community	14%
General appearance of site	9%
Inconvient for employees	9%
Community support	5%
Policing/fire protection/security	0%
Access to R&D	0%
Trucking & distribution	0%
Site is too large	0%

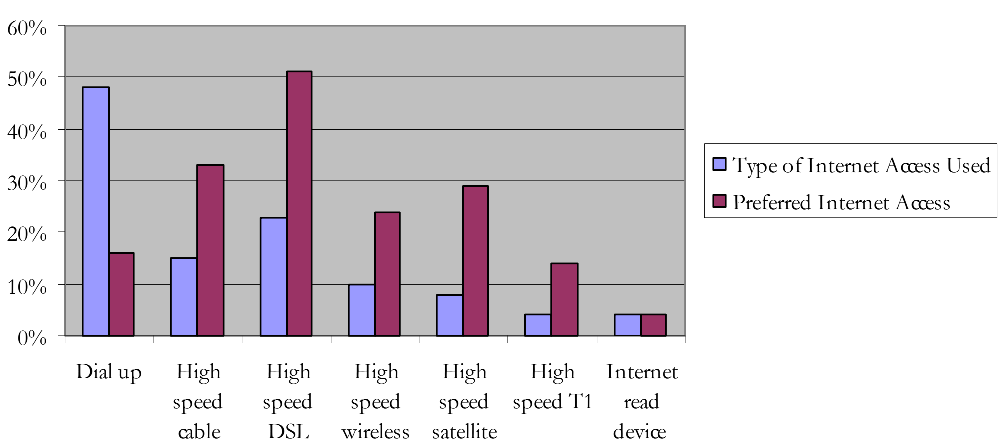
  - Other reasons included: parking is too limited, appearance of downtown storefronts, soil quality is a concern, and prefer a storefront from customers and employees.
  - 68% of the businesses interviewed indicated the current site is the only business location.
  - Of the other 32% -
    - About half of the other business sites were within Northumberland County and within Ontario.
    - 67% noted the headquarters were elsewhere.
  - 30% of the businesses interviewed are home-based.
  - 58% own the business building.
  - Of those that lease, 94% do not anticipate any problems in renewing the lease.

- **Energy Sources & Preferences**



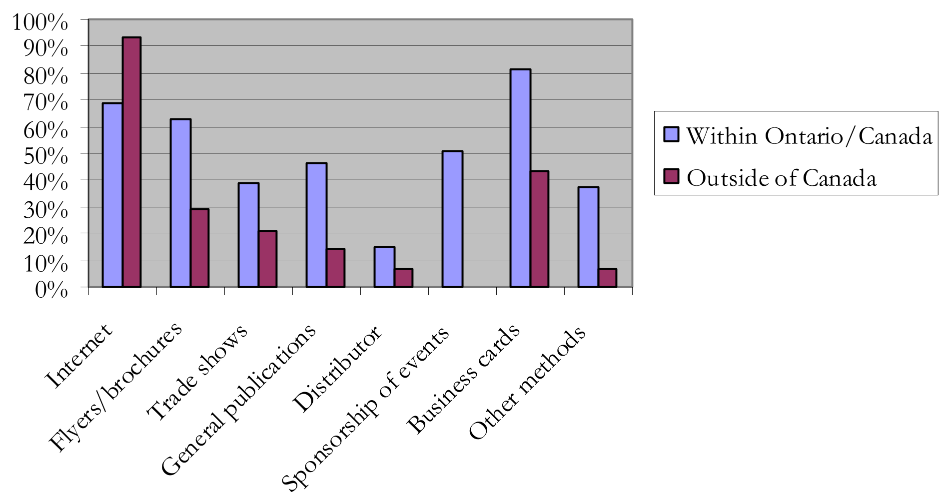
  - The most common "Other" sources of energy are: wood, solar, and bio-diesel.
  - The reasons why the preferred source of energy is not being used by the business:
    - Cost of installation (62%)
    - Not available at my site (38%)
    - Other (31%); Other referred to: Do not have the site for the alternative energy (wind), Do not own the building/property, inadequate support from levels of government, Need time to investigate and become knowledgeable, and Reliability of source is uncertain.
    - Price (28%)
    - Not available in this community (24%)
    - Insufficient/inadequate available supply (3%)

- **Information Technology Use, Preferences & Importance to Business**
  - Internet Use, Preference & Importance



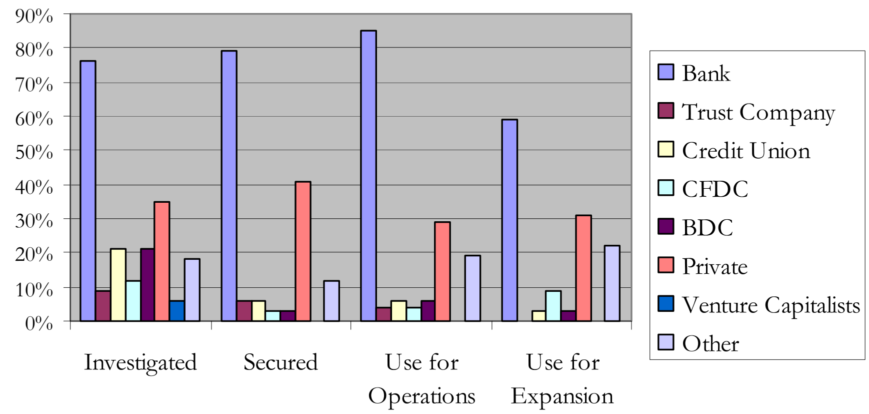
- In rating the importance of internet access (very important, somewhat important or not at all important):
    - Dial up: 96% indicated it is either very or somewhat important
    - High speed cable: 64% indicated very or somewhat important
    - High speed DSL: 72% indicated very or somewhat important
    - High speed wireless: 50% indicated not at all important
    - High speed satellite: 57% indicated very or somewhat important
    - High speed T1: 64% indicated not at all important
- 93% of the businesses interviewed have use email, 69% have their own website, 40% use the internet for marketing, 33% use the internet for contact with suppliers, and 24% conduct e-commerce.
- The most important technology applications included: email 73%, financial/accounting 59%, broadening market potential 59%, distribution/supplier network 56%, website 55%, and marketing 51%.
- 77% of the businesses interviewed use cellular telephones for business activities and 87% indicated it is very important technology to their business.

- **Marketing**
    - 64% of business interviewed indicated an interest in pursuing joint marketing with other businesses & 77% indicated an interest in collaboration/networking/information sharing with other businesses.
    - Marketing of products/services are done in the following manner:



- **Buyer/Supplier Opportunities**
    - 84% import products/services from outside the Municipality.
        - In the 1999 BR&E survey 88% indicated purchasing from outside the local area.
    - 72% import products/services from outside Ontario, but within Canada
    - 65% import products/services from outside Canada
    - 29% participate in a buyer/supplier network, while 58% indicated a buyer/supplier network would be of benefit to their business.

- **Financial**
  - The most commonly used financial sources are: Banks, Private and Other. Other includes:



  - 37% of businesses interviewed review their financial plan on a monthly basis.

- **Workforce Development**
  - 95% of businesses interviewed indicated the number of employees has either grown or remained the same in the last 3 years.
  - Factors responsible for this: Increase or decrease in sales (64%), new products or services introduced (60%), increase or decrease in market share (48%), renovation or expansion (32%), entered new market (32%).
  - 88% of businesses interviewed indicated the numbers of employees will either grow or remain the same over the next 3 years.
  - Factors responsible for this: increase or decrease in sales (78%), new product or service introduced (63%), increase or decrease in market share (63%), entering new market (41%).
  - Rate the local workforce:

Characteristic	**Excellent**	**Good**	**Fair**	**Poor**
Stability of the workforce	15%	56%	21%	8%
Quality of the workforce	13%	52%	25%	10%
Availability of workers	8%	43%	30%	19%

  - Current employee needs are: unskilled trades (45%), sales (34%), skilled trade (34%), and business administration (30%).
  - 68% of businesses interviewed indicated they are able to recruit sufficient qualified employees.
  - 75% indicated they do not have difficulty retaining employees. For those that do, the reasons are: wages (75%), seasonal work (58%), and competition (50%).

- Skill development needs for the workforce:

Skill	Yes	No
Customer service	43%	57%
Computer software	40%	60%
Oral communication	36%	64%
Supervisory	33%	68%
Health and safety	32%	68%
Working with others	31%	69%
Written communication	30%	70%
Sales and marketing	30%	70%
Computer hardware	29%	71%
Quality assurance	23%	77%
Numeracy	15%	85%
Financial management	15%	85%
Reading	8%	92%

- 86% of employees receive training in-house.
- Significant barriers to employees receiving necessary training: availability of training locally (40%), distance to training facility (37%), cost (37%), and loss of productivity during training period (31%).
- 50% indicated a business mentoring program would benefit the community.
  - Key areas of mentoring: marketing (80%), business planning (55%), human resources (50%).

COMMUNITY CLIMATE

*** Need No Contact/ N/A added to answers**

- **Level of Satisfaction with Local Government**

Service	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Planning/zoning permit	39%	50%	9%	2%
Health unit approvals	57%	36%	2%	4%
Policing	29%	60%	2%	9%
Fire prevention & services	53%	43%	3%	0%
Public utilities	37%	50%	7%	6%
Street repair	22%	58%	20%	0%
Snow removal	41%	49%	6%	3%
Garbage removal	39%	56%	2%	3%
Public transit	18%	0%	18%	64%

- In the 1999 BR&E survey dissatisfaction was highest with the planning department (31%), street repair (30%), and police (27%). The highest levels of satisfaction were with fire prevention (25%), public utilities, snow removal and health services.

- **Level of Satisfaction with Local Services**

Service	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Medical/health services	35%	29%	29%	8%
Schools	63%	33%	4%	0%
Local training board	40%	40%	7%	13%
Community college	30%	58%	3%	9%
University	32%	59%	0%	9%
Library	57%	43%	0%	0%
Child care services	39%	50%	11%	0%
Cultural facilities	39%	51%	8%	2%
Recreational facilities	20%	56%	18%	7%

- **Level of Satisfaction with Provincial Government**

Service	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Ministry of Ec Dev & Trade	33%	47%	20%	0%
Ontario Exports Inc	14%	86%	0%	0%
Ministry of Tourism	25%	67%	8%	0%
Ministry of Training, Colleges…	28%	28%	39%	6%
Ministry of Municipal Affairs & Housing	22%	56%	22%	0%
Ministry of Natural Resources	9%	50%	36%	5%
Ministry of Culture	33%	67%	0%	0%
Ministry of Ag & Food	17%	50%	25%	8%
Ministry of Environment	8%	63%	15%	15%
Ministry of Public Infrastructure Renewal	0%	50%	50%	0%
Ministry of Transportation	12%	53%	24%	12%

- **Level of Satisfaction with Federal Government**

Service	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Industry Canada	22%	56%	22%	0%
CFDC	36%	43%	7%	14%
HRDC	25%	50%	21%	4%
National Research Council	50%	25%	0%	25%

- **Level of Satisfaction with Business Organizations**

Organization	Very Satisfied	Somewhat Satisfied	Somewhat Dissatisfied	Very Dissatisfied
Chamber of Commerce	38%	55%	7%	0%
BIA/WBA/HBA	25%	60%	10%	4%
Economic Development Committee	42%	54%	4%	0%
Business Self-Help Centre	22%	56%	11%	11%
Sector Associations	50%	50%	0%	0%
Other business organizations	64%	29%	7%	0%

- **Issues that have the greatest impact on the growth of the business:**
    - Increase in area population
    - Buyer attitudes towards shopping locally
    - Federal & provincial government fix agricultural trade
    - Completion of new zoning bylaws
    - Local help for starting and maintaining a business
    - On-site student employment centre to assist with summer staff
    - BSE problem and border closing for agriculture is major problem
    - More retailers
    - High level of taxation
    - Residential development delays – Osprey Point, Hastings
    - Decrease in water and sewer fees
    - Nutrient Management Act – clarification for the farming community
    - Licensing internet service providers to create stability
    - Subdivision approval
    - Agricultural Adaptation Council. Government food pricing policies
    - Bill C124 – clarify implementation at the municipal level
    - MPAC assessment
    - Lower provincial sales tax by 2%
    - Small business growth in the cultural and recreation sector
    - More doctors
    - More space
    - Allow for businesses to choose their year end
    - New tax rate structure
    - Improve wages and educational assistance in the social service sector. HRDC must be fixed.
    - Need commercial zoning expansion on the Main Street in Warkworth
    - Warkworth Business Association – too much time is spent on issue and lack of solid decision making, too concerned with political issues between businesses.
    - Federally inspected abattoir
    - Available and well maintained retail space

- **Factors in doing business within Trent Hills**

Factor	Excellent	Good	Fair	Poor
Availability of skilled labour	4%	41%	33%	22%
Labour costs	6%	75%	17%	2%
Transportation costs	5%	34%	43%	18%
Availability of transporation	7%	31%	29%	33%
Avail. of appropriately zoned land	5%	41%	39%	15%
Land costs	13%	50%	33%	4%
Cost of construction	6%	62%	28%	4%
Cost of leasing space	10%	50%	30%	10%
Local permit process	16%	51%	28%	5%
Availability of utilities	23%	42%	25%	11%
Access to markets/customers/clients	15%	46%	35%	4%
Access to suppliers	12%	49%	37%	2%
Municipal taxes	4%	25%	42%	29%
Quality of life	55%	42%	4%	0%
Water and sewer capacity	15%	61%	17%	7%
Development charges	26%	43%	22%	9%
Support from municipality	28%	50%	19%	4%
Support from local business	28%	57%	13%	2%
Support from local residents	35%	48%	15%	2%
Municipal bylaws	14%	49%	30%	7%
Telecommunication infrastructure	17%	33%	30%	20%
Size of local market	4%	34%	53%	9%
Access to research and development	11%	42%	37%	11%
Access to training facilities	5%	38%	43%	15%

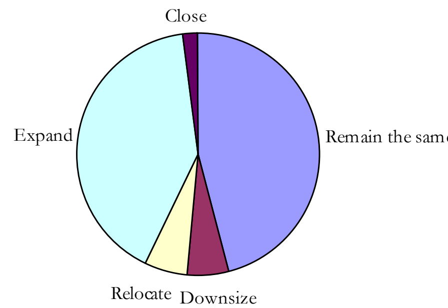
- 74% of businesses interview are interested in participating in a Business Ambassador program.

- 75% indicated they are aware the community has an economic development plan. 52% believe it is being effectively implemented.
- How Business Associations & Economic Development offices assist the business community: Joint advertising and marketing (69%), trade shows (55%), marketing seminars (49%), business networking sessions (47%), attraction of related supply/service businesses (45%), workforce planning, employee training/attraction.

FUTURE PLANS

- Within the next 3 years, the businesses interviewed plan to undertake the following:

- In the 1999 BR&E survey the results compare quite similar with 12% indicating plans to relocate their business and 43% with plans to expand.



- **Business Expansion – 45% indicated plans to expand**
  - 59% plan to undertake major renovations in the next 3 years.
  - 81% plan to invest in new equipment
  - The expansion plans will lead to the following:
    - Increase in the workforce – 83%
    - Investment in equipment – 76%
    - Addition of production lines – 72%
    - Additional services – 72%
    - Process improvements – 66%
    - An increase in floor space – 59%
    - An increase demand for skills training – 55%
  - 55% indicated experiencing difficulties with expansion plans:

Difficulty	**Percentage**
Financing	50%
Labour availability	38%
Other difficulties	38%
Local by-laws	31%
Land availability	25%
Labour force training	25%
Highway and roadside signs	25%
Availability of buildings	19%
Developing a marketing plan	13%
Developing a business plan	13%
Road and highway system	13%
Water infrastructure	13%
Exporting of goods and services	6%
Warehousing	6%
Electrical supply	6%
Waste water infrastructure	6%
Sewer capacity	6%
Finding/developing strategic alliances	6%
Importing of goods and services	0%
Trucking and distribution	0%

- The expansion will be financed by:

Financing	Percentage
Private investment	38%
Long term bank loan	38%
Cash	31%
Line of credit	25%
New owner equity	25%
Other type of financing	19%
Short term bank loan	13%
Venture capital	13%
Credit card	0%

- **Businesses Downsizing/Closing/Relocating – 14% indicated plans of either/all**
  - 75% indicated the downsize will result in a reduction in the workforce.
  - 75% are planning to relocate, all within the Trent Hills. Due to: inadequate building space, change in markets, available of appropriate labour, expansion limitations, or head office decision
- **50% of Businesses Interviewed Indicated they would Remain the Same**
  - 65% of all businesses interviewed indicated they did not have a succession plan.
  - 62% indicated they have a business plan.
  - 63% indicated they have a marketing plan.
- Factors that will be important to ensuring the business remains competitive:

Factor	**Very Important**	**Somewhat Important**	**Not at all Important**
Local market development	77%	17%	6%
Availability of labour	70%	20%	10%
Energy cost	70%	27%	3%
Improved customer service	68%	29%	4%
Outside local area market development	67%	25%	8%
Workplace skill development	67%	20%	12%
Business planning	66%	28%	7%
Product research & development	65%	26%	9%
Industry/professional standards	65%	14%	21%
Workplace health & safety	65%	24%	10%
Availability of telecommunication services	60%	34%	5%
Strategic marketing	58%	36%	7%
Resolution of cross border issues	55%	19%	26%
Add or change in products or services	54%	28%	18%
Improving worker productivity	50%	30%	20%
Water/sewer availability	50%	30%	20%
Water/sewer costs	47%	34%	19%
Exchange rate for Canadian dollar	45%	29%	25%
Strategic alliances	41%	33%	26%
Accessing capital	40%	44%	16%
Access to international markets	34%	11%	54%
Access to importing of products and services	30%	27%	43%
ISO9000/HACCP standards	21%	42%	36%

  - In the 1999 BR&E survey the top factors were: Improved customer service, good business management, energy costs, workforce skill development and new market development.

- 94% of the businesses total dollar sales are within Canada.
- 55% of the sales are in the area and 40% are within Ontario.
- 74% of the businesses indicated the total dollar sales trend has increased with 62% expecting high sales in the next year.
    - In the 1999 BR&E survey 62% reported an increase in recent sales trends and 68% expect higher sales in the next year.
- 51% indicated the competition in their market is increasing.
- 47% indicated their business' market share is increasing.
- **The businesses interviewed identify their customers needs in through the following methods:**

Method	Percentage
Informal customer contact	93%
Customer complaints	59%
Sales calls	38%
Trade or industry publications	38%
Electronic communications	36%
Marketing publications	29%
Customer survey	26%
Customer database management	21%
Other ways	10%
Customer comments cards	7%

- **Retailed businesses interviewed in an identifiable commercial district – 64%**
  - Downtown (86%), Highway commercial (14%), Tourist area (14%), Neighbourhood commercial (14%), Industrial Park (14%).
- **45% indicated there is a strategy or plan to promote/manage the district.**
  - 80% believe the issues and actions to be well addressed have been identified.
  - 20% believe the plan is being effectively implemented.
  - 100% believe the plan is primarily focused on retail marketing & promotion.
- **Conditions of the Commercial District:**

Condition	Excellent	Good	Fair	Needs improvement
Adequacy of public transit	0%	0%	25%	75%
Exterior appearance of facades	0%	18%	18%	64%
Signage	0%	9%	27%	64%
Number of vacanies/turnover	0%	0%	38%	63%
Customer service programs	0%	0%	43%	57%
Roadside advertising	11%	11%	22%	56%
Parking signage	0%	18%	27%	55%
Fees and enforcement	13%	25%	13%	50%
Tourism directional signage	10%	20%	20%	50%
Unifying visual identity of the area	0%	13%	38%	50%
Number of parking spaces	9%	27%	18%	45%
Window displays	0%	22%	33%	44%
Accessbility for people with disabilities	9%	18%	36%	36%
Vandalism	9%	27%	27%	36%
Graffiti and litter	22%	0%	40%	33%
Organization of special events	11%	33%	22%	33%
Sidewalks	20%	10%	40%	30%
Traffic flow	20%	10%	40%	30%
Appropriate mix of businesses	0%	10%	60%	30%
Appropriate range of quality/price for target market	20%	20%	40%	30%
Advertising campaigns	14%	14%	43%	29%
Uniform hours of operation	13%	0%	63%	25%
Street furniture	30%	20%	20%	20%
Public amenitites	20%	20%	20%	20%
Plantings, trees, flower baskets	30%	20%	20%	20%
Public safety services	0%	40%	30%	20%
Condition of housing stock	0%	30%	50%	20%

- In the 1999 BR&E survey quality of merchandise had the highest rating, followed by customer service and special events and promotions.
- **Top 3 suggestions to improve retail business:**
  - Repair or remove eyesore buildings (73%), more hotel/accommodations (45%), more niche market specialty shops (36%), more restaurants and entertainment facilities (36%), more and better signs (36%).
- **Improve retail skills in the following areas:**
  - Retaining existing or attracting new customers (100%), marketing (73%), customer services training (64%)

- **Workshop suggestions for retail skill development:**
  - Retaining existing or attracting new customers (100%), marketing (90%), customer service training (80%), dealing with competition (50%).
- **The 4 community assets the retail businesses would most like to see developed:**
  - Public washrooms in located downtown (73%), Waterfront development (50%), Directional signage (45%), sports or recreation facilities (45%)

FARM/AGRICULTURE

- **Types of farm operations interviewed:**
  - Livestock and/or crop production only (44%), on-farm production, processing and retailing (44%), and on-farm production and processing (11%)
- 75% indicated they were not interested in expanding and diversifying their operation to include value-added processing.
- **Marketing of products:**

Method	Percentage
To local retailers	56%
Other	44%
Ontario Food Terminal/brokers	11%
Farmers market	56%
Direct to regulated marketing board	33%
Direct to processor	44%
At the farm gate	78%

- **How the market potential of the businesses' agricultural product could be enhanced:**

Method	Percentage
Increased cooperative marketing	33%
Improved transportation	22%
Develop export opportunities	44%
Direct marketing to consumer	67%
Product quality/safety assurance programs	33%
Additional local processing or value added opportunities	56%
Access to distribution channels/networks	22%

- **During the past 3 years has the farm operations financial situation changed:**
  - Stayed the same (44%), improved (33%), and deteriorated (22%)
- **Financial expectations for the farm operations financial situation for the next 3 years:**
  - Improve (67%), stay the same (33%), and deteriorated (0%)
- **Expectations to sell or transfer farm assets:**
  - 11 to 15 years (33%), 1 to 5 years (22%), Don't know (22%), 6 to 10 years (11%), Don't expect to sell/transfer (11%).
- **Sale/transfer will be to:**
  - Family member (67%) or unrelated third party (33%)

- **Important factors for agricultural businesses:**

Factor	Very important	Somewhat important	Not very important	Not at all important	Not applicable
Minimum distance for new or expanding farms	75%	13%	0%	0%	13%
Drainage	56%	22%	0%	22%	0%
Processing/marketing facilities	56%	44%	0%	0%	0%
Access to local abattoir	56%	11%	11%	11%	11%
Road maintenance	44%	56%	0%	0%	0%
Snow removal	44%	33%	0%	22%	0%
Nutrient Management Regulations	44%	44%	0%	0%	11%
Services to rural property owners	44%	33%	22%	0%	0%
Restrictive residential lot severance policy	33%	44%	22%	0%	0%
Conflicts with non-farm residents	33%	56%	11%	0%	0%
Pesticide safety cerfication	33%	33%	0%	11%	22%
Veterinary services	33%	22%	22%	11%	11%
Agricultural Economic Impact Studies	22%	33%	33%	0%	11%
Water taking permits	22%	33%	11%	11%	22%
Tree cutting by-law	13%	13%	38%	38%	0%
Fencing	11%	11%	56%	22%	0%
Irrigation	11%	33%	33%	22%	0%

- **Important factors in your farm operation:**

Factor	Very important	Somewhat important	Not very important	Not at all important	Not applicable
Commodity Prices	78%	11%	11%	0%	0%
Environmental responsibility	67%	33%	0%	0%	0%
Overall cost of doing business	67%	22%	11%	0%	0%
Public concern/awareness of industry	67%	33%	0%	0%	0%
Environmental Farm Plans	44%	44%	11%	0%	0%
Land use issues	44%	22%	33%	0%	0%
Availability of production/management information	33%	56%	0%	11%	0%
Soucing of capital	33%	33%	22%	11%	0%
Labour availability	33%	33%	22%	11%	0%
Adopting latest technology	33%	67%	0%	0%	0%
Securing financing for operations	33%	22%	33%	11%	0%
International competition	33%	22%	44%	0%	0%
Technology changes	33%	44%	22%	0%	0%
Assistance with financial management	22%	33%	22%	22%	0%
Nutrient Management Plans	22%	67%	11%	0%	0%
Availability of labour	22%	33%	33%	11%	0%
Securing financing for expansion	11%	56%	22%	11%	0%

- **Ways local government can assist agricultural businesses:**
    - Streamlining of local regulatory and permitting process (89%), review of taxes and fees (78%), infrastructure maintenance and improvement (56%), database of local farm labour (33%).

MANUFACTURING

- **What are your current plans regarding the plant operations:**
    - Maintain current operations (80%) and maintain current size, but diversify (20%)
- **What are your future plans regarding the plant operations:**
    - Maintain current operations (40%), maintain current size, but diversify (40%), and expand size of plant and diversify products (20%)

- **Product life cycle:**
    - Primary product: maturing (67%) and growing (33%)
    - Secondary product: maturing (50%) and growing (50%)
- 83% do not compete for business against sister plants.
- 60% indicated that emerging new technology will change their primary product.
- 67% indicated 10% or less of product components are outsourced.
- 100% on the businesses indicated 3% or less of sales are spent on research and development.
- 60% indicated their plant is under capacity.
    - 75% indicated they would be interested in cooperating with another business to bring the plant to full capacity.
- **Exporting**
    - 50% are single market exporters and 50% are potential exporters
- **Process Improvements**

Process	**Yes**	**No**
Productivity improvement (Lean mfg)	100%	0%
Energy efficiency	80%	20%
Health and safety activities	80%	20%
Waste product recovery	75%	25%
ISO certification	50%	50%
Six sigma & quality	33%	67%
Vendor/supplier network for product improvement	33%	67%

ACTION PLAN

ISSUE	ACTION	RESPONSIBILITY	RESOURCES	TIME
Human Resources	Develop a Trent Hills Workforce Skill Development Strategy	Community Living – Resource Centre Other Partner: Workforce Development Board Municipality of Trent Hills Service Canada (HRDC) Loyalist College Sir Sanford Fleming	Funding Sources: Community Futures Development Corporation, Service Canada, etc Committee with expertise to oversee development of the Plan	Plan approved and implemented in 2008
	Customer Service Training Program (Superhost)	Trent Hills & District Chamber of Commerce Other Partners: Loyalist College	Funding Sources: Municipality of Trent Hills & Trent Hills & District Chamber of Commerce Staff Training Staff Time to offer training to workplaces/employees	Training complete in Winter of 2006/7 Spring 2007
Improved technology infrastructure	Identify service gaps and lobby service providers for improvement	Municipality of Trent Hills	Committee, staff and Council time to identify issues and communicate to service providers	Ongoing
Transportation	Lobby for government services only offered outside of Trent Hills to be offered locally	Municipality of Trent Hills Other Partners: Northumberland United Way	Committee, staff and Council time to identify service gaps and communicate to government	Ongoing
Medical services	Physician Recruitment	Physician Recruitment Committee Partners: Campbellford Memorial	Funding Sources: Municipality of Trent Hills & Campbellford Memorial Hospital Staff and Committee with	Ongoing

		Hospital Municipality of Trent Hills	expertise to oversee activities and strategy	
Business Development	Financial Planning Seminars Creation of financial services on website and available in hard copy for distribution	Municipality of Trent Hills Other Partners: WBA, HBA, CBIA, Community Living Resource Centre, and Chamber	Funding Sources: Municipality, Community Futures Time & expertise of local financial service providers Development & distribution of marketing materials	2007 - 2009
	Implement Trent Hills Community Improvement Plan in downtown areas of Campbellford, Warkworth, & Hastings	Municipality of Trent Hills	Funding source: Municipality of Trent Hills, OSTAR RED Time & expertise of staff and Committee members to address program applications	Spring 2007
	Business Planning Seminars Creation of business planning template and resources on website and available in hard copy for distribution	Municipality of Trent Hills Other Partners: WBA, HBA, CBIA, Community Living Resource Centre and Chamber	Funding Sources: Municipality, Community Futures, Ontario Ministry of Ag, Food & Rural Affairs Time & expertise of local financial service provider Development & distribution of marketing materials	2007 - 2009
Business Taxes	Implement Trent Hills Community Improvement Plan in downtown areas of Campbellford, Warkworth, & Hastings	Municipality of Trent Hills	Funding source: Municipality of Trent Hills, OSTAR RED Time & expertise of staff and Committee members to address program applications	Spring 2007
	Continue to support	Municipality of Trent Hills	Committee, staff and Council	Ongoing

	taxpayers to receive fair and equitable treatment from MPAC		time to identify issues and communicate to MPAC	
Serviced Land	Completion of Campbellford Business Park Servicing	Municipality of Trent Hills	Service Design Plan Tender for Service Installation Construction Funding Sources: Municipality of Trent Hills Time & expertise of staff and Council	2007-2009
Cooperative Marketing	Trent Hills Tourism Committee host an annual information session regarding marketing strategy for tourism and event planning	Trent Hills & District Chamber of Commerce Other partners: Campbellford BIA, Warkworth Business Association, and Hastings Business Association	Funding sources: Municipality of Trent Hills Time & expertise of Chamber staff and Committee members Participation of local tourism partners	Fall 2006
Signage	Develop and implement signage improvement program – community/municipal signage	Municipality of Trent Hills Other Partners: Hastings Business Association, Warkworth Business Association, and Campbellford BIA	Funding sources: Municipality of Trent Hills Time & expertise of staff and Committee members to address signage improvements	2007-2009
	Develop and implement signage improvement program – commercial signage • Sign Bylaw • Community	Municipality of Trent Hills Other Partners: Hastings Business Association, Warkworth Business Association, and Campbellford	Time & expertise of staff and Committee members to address signage improvements Marketing of program to local businesses	2007-2009

	Improvement Plan	BIA		
Parking	Develop and implement parking improvement strategy	Municipality of Trent Hills Other Partners: Hastings Business Association, Warkworth Business Association, and Campbellford BIA	Partners, staff and Council time to identify opportunities to improve parking Cost of implementing improvements to be determined	2007-2009
Façade/Building Improvement	Implement Trent Hills Community Improvement Plan in downtown areas of Campbellford, Warkworth, & Hastings	Municipality of Trent Hills	Funding source: Municipality of Trent Hills, OSTAR RED Time & expertise of staff and Committee members to address program applications	Spring 2007
Retail Recruitment	Develop & maintain an inventory of available property	Municipality of Trent Hills Other Partners: Hastings Business Association, Warkworth Business Association, and Campbellford BIA	Time of staff to update list weekly and communicate with partners	Fall 2006
	Identify and promote retail gaps in each community – Market Feasibility Study 2005	Hastings Business Association, Warkworth Business Association, Campbellford BIA Other Partners: Municipality of Trent Hills	Time & expertise of members to identify gaps Development & distribution of marketing materials	Spring 2007
Improved Recreation and Cultural Infrastructure	Continue the needs assessment	Established community groups	To be determined with the development of a strategy	2006-2009