



BUSINESS RETENTION AND EXPANSION

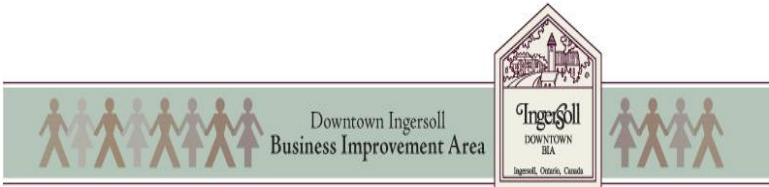


The Corporation of the Town of Ingersoll

Business Retention and Expansion Report 2009



THANKS TO THE FOLLOWING SPONSORS OF THE INGERSOLL BR+E PROJECT 2008:



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Project Sponsors:

The Corporation of the Town of Ingersoll
Ingersoll District Chamber of Commerce
Ingersoll Business Improvement Area
Oxford Small Business Support Centre
Ontario Ministry of Agriculture, Food and Rural Affairs

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A MESSAGE FROM THE MAYOR

Since 2003, the Town of Ingersoll has been in a proactive mode with a variety of Reports and Studies to take the pulse of the community and look at actions and implementations to create economic and community development.

This includes the following:

- Ingersoll Community Strategic Plan 2003 / 2004
- Recreation Needs Study 2004
- Ingersoll Downtown Revitalization Plan 2005
- First Impressions 2005 with the towns of Alliston and Leamington
- Ingersoll Cultural Strategic Plan 2006 – which is now ‘Arts Ingersoll’
- Ingersoll Youth Advisory / Action Committee 2007
- Industrial Readiness Project 2008 with the Economic Development Council of Ontario

An opportunity arose to participate in the Ontario Ministry of Agricultural, Food and Rural Affairs BR+E Project through the Rural Economic Development (RED) Fund. BR+E is a cooperative effort between the Town of Ingersoll, local businesses and organizations, and the community with the purpose of identifying opportunities and actions to assist local businesses in their expansion, retention and creation of jobs. The Economic Development Department of the Town of Ingersoll is sponsoring the BR+E program in cooperation with: the Ingersoll Business Improvement Area, the Ingersoll District Chamber of Commerce, the Oxford Small Business Support Centre, and the Ontario Ministry of Food, Agriculture, and Rural Affairs.

The economic well-being of our local economy is dependant on a strong and fiscally healthy business community. The Ingersoll Business Retention and Expansion (BR+E) project is a community-wide effort that emphasizes personal business visits as a way to identify the needs of our business community.

The objectives of the project are laid out later in this report. As you will read in the Executive Summary, the BR+E survey results indicate the future plans / needs of local business and how business views the community as a place to do business. This information from the survey will be used to plan future economic and community development activities. The Economic Development Department will continue to review the recommendations in this report and provide an update on a yearly basis to Council.

On behalf of the Town of Ingersoll Council, I would like to thank our partners, staff and community volunteers who dedicated time and energy in the interview stages in gathering all the information.

Sincerely,

Mayor Paul Holbrough
Town of Ingersoll

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A. Introduction to BR+E

I. The Business Retention and Expansion Program (BR+E)

Business development and job creation are key factors in developing healthy and vibrant communities. Depending on the characteristics of a specific economic situation, anywhere from 40 to 90 per cent of new jobs in a community is generated from existing businesses.

Traditionally in order to maintain and expand existing businesses, municipal officials, economic development officers, representatives of Chambers of Commerce or Boards of Trade, and others did one of two core functions. First, these groups created a program to visit business people to hear their concerns; and then took action addressing the issues facing the business community. The other common approach used by some communities was to hire consultants to systematically survey businesses and then to prepare reports based on the findings. The Business Retention and Expansion Program (BR+E) approach is different and a more results - based approach.

II. What is BR+E?

BR+E take the best from both approaches to create and use a more strategic method. This approach combines the initiative of community business visits but follows a systematic interview process. By using community leaders and other citizens in leading the interviews, the process has more credibility with locals. This combination is an important ingredient to an effective and well-managed economic development strategy that leads to increased economic opportunities and to an improved community quality of life. The future outcome is expected to increase community wealth and human capacity.

BR+E is an action-oriented and a community-based approach to business and economic development. The program promotes internal job growth by helping a community learn first - hand about its own unique issues, obstacles, and opportunities related to business development; and then set priorities for projects to address both these challenges and opportunities. Ultimately, communities will have greater success in attracting new business if existing businesses can articulate positive attitudes as to local economic conditions and as to community support.

III. Community-based, Volunteer-driven

BR+E is community-based because it involves a variety of local people who bring experience and credibility from all sectors. It is a multi-stakeholder process that is able to build the commitment needed from a variety of community organizations to implement action plans. Broad citizen participation is a key first step for successful community-based initiatives.

BR+E is volunteer-driven because the key roles are played primarily by local volunteers. In some instances employers allow BR+E volunteers time during work hours to be involved in this project. Business visits are completed by teams of community members who are trained before interviewing business people.

IV. Benefits of the BR+E Approach

The overall goal of visiting community businesses is to enable businesses to retain or create jobs through the steps of local assessment and then of intentional action. BR+E provides a number of additional benefits, including:

- lower direct costs for systematic business visitations due to the donation of goods and services from community supporters and due to time from volunteers;
- citizen support for the recommendations and actions they helped create;
- increased citizen awareness of business concerns and of broader economic development issues;
- increased community capacity and enthusiasm to take on future economic development projects.

V. Short-term BR+E Objectives

- Provide community support for local business
- Identify and address immediate concerns of individual business
- Encourage local businesses by letting them know how much they are valued in Ingersoll

VI. Long-term BR+E Objectives

- Increased competitiveness of local businesses
- Implemented economic development strategic action plan
- Strengthened business development
- Expanded job creation

B. BR+E Ingersoll 2008

Ingersoll Town Council felt the time was right as the Community Strategic Plan 2004 was coming up on 4 years to revisit the pulse of business and industry in Ingersoll. The OMAFRA model was in place to be able to survey business and industry and get a measurable result of actions and implementations.

C. Project Objectives

The objectives of the project are to:

- Identify the needs, concerns and opportunities of existing local business in order that, where appropriate, local action can be taken to respond to the businesses' needs or development opportunities.
- Learn of future plans of area businesses with respect to expansion, relocation and or retention that will allow us to assess where assistance can be provided.
- Demonstrate the community's pro-business attitude and develop an effective means of communication between the Town and local businesses.
- Have the community actively involved in economic development.

D. Project Methodology

I. Ingersoll Economic Development Department

The Ingersoll Economic Development Department was tasked by Ingersoll Town Council to complete a Business Retention and Expansion Survey for the Town of Ingersoll using the Ontario Ministry of Agriculture, Food and Rural Affairs model and financial assistance. This process began in May 2008.

II. Leadership Team and Task Force

The Leadership Team and Task Force met May 20, May 26, June 10, June 23, 2008. A workplan was developed and put into action from May 2008 to the completion of the project in September 2008. The surveys were completed and tabulated and the group held their retreat Thursday September 11, 2008 to review all the data for the final report.

III. Public Launch

The BR+E project was launched throughout the month of May 2008 through the local newspapers and local radio. Two detailed articles were written for the Ingersoll Times by writer Geoff Dale outlining the details and importance of the BR+E project.

IV. Volunteer Training

In June 2008 the project's leadership team held two volunteer training sessions in conducting surveys. There were 21 volunteers attended these sessions; and received proper training in the method of conducting the BR+E survey using the BR+E training materials. (Dates were Wednesday July 09 and Thursday July 10, 2008)

V. Business Surveys

At the resumption of the project, the project leadership team randomly selected fifty six (56) businesses and organizations to conduct interviews within the town. The leadership team used a process to ensure that these fifty six represented diverse cross-sectoral interests, by involving the entire spectrum of businesses and organizations (non-profit, educational, service clubs, religious organizations, etc.) that composed Ingersoll's socio-economic structure. The Industry Classification System, shown below, served as a factor in the interview selection.

Breakdown by Statistics Canada North American Industry Classification System (2007):

Business Demographics – what primary activity is conducted by your business – NAICS:	
Primary Activity	%
Retail Trade	43%
Manufacturing	11%
Other services (except public administration)	7%
Real estate and Rental and Leasing	5%
Professional, Scientific and Technical Services	5%
Accommodation and Food Services	5%
Agriculture, Forestry, Fishing and Hunting	4%
Construction	4%
Transportation and Warehousing	4%
Educational Services	4%
Health Care and Social Assistance	4%
Finance and Insurance	2%
Arts, Entertainment and Recreation	2%

VI. Data Input & Analysis

Alice Longfield and Jeet Athukorale inputted the data from all these surveys during a three week period. The two inputers used Executivepulse, a computerized system provided by BR+E Ontario. After the data was initially entered, they then meticulously scrutinized each of the fifty six entries to ensure accuracy of all the entered data into the system.

After the data entry, Lauran Timlin and Jeet Athukorale analyzed and commented on this data by extracting information provided by the survey respondents. This analysis then was presented at the public meeting to allow for community feedback. The leadership team presented this analysis, which was reviewed by the community, at the Ingersoll Council meeting on December 2008.

VII. Public Meeting

On Tuesday September 23, 2008, a public meeting was held in Ingersoll Council Chambers with a PowerPoint presentation outlining the results of the survey and recommendations. This information was summarised and is included in this report.

VIII. Council Meeting

Plans are under way to submit this report to Ingersoll Town Council for December 2009.

E. Executive Summary

In our world of constant change and dramatic shifts, a municipality must be pro-active in order to ensure that a positive environment exists to create jobs and to generate wealth. Over the years, The Town of Ingersoll has demonstrated solid commitment in being strategic and intentional in economic development so that both businesses and residents are attracted and stay in Ingersoll.

The Town of Ingersoll has accessed several OMFRA tools to assist local community development. One of these key tools is BR+E. BR+E is an action- orientated and community--based approach to maintain and stimulate appropriate business development. This tool supports both community internal job growth and retention while strengthening local assets to attract external business development. In 2008 the Town completed the required research so that the municipality and community had access to this report in 2009.

The short term objectives or expected results include:

- Providing community support for local businesses;
- Addressing immediate concerns of individual businesses
- Encouraging local businesses

The longer term expected results include:

- Increased competitiveness
- Strengthened business development climate
- Expanded job creation

As part of the process, this study identified what was referred to as “Red Flag” issues. These are immediate and more individualized concerns or stress points noted by businesses. In 2009 the Economic Development Department responded to and dealt with all of these eleven “Red Flag” issues.

This executive summary condenses the findings of this report into three areas:

1. The Current Situation
2. Future Directions
3. Recommended Action Steps.

1. The Current Situation

Overall Business Climate

The current businesses rate Ingersoll as a positive place to do business. Generally businesses are satisfied with the level of municipal services and the level of support from business organizations.

The noted barriers include: the level of business taxes, availability of skilled labour, access to properly serviced and zoned land, and public transit.

Business Composition

As to business type, the majority are those engaged in retail at 43 %, followed by those in manufacturing at 11%. Most businesses are stable and have been in the community for several years.

Business Markets

The vast majority of business sales occurred within Canada; and the majority of that 95% of sales, occurred within the local area.

Employment

In the past three years, half of the businesses kept the same level of employees while 35% did increase their number of employees.

Municipal Role

Generally businesses felt positive as to the municipal role in business development. However a relatively high percentage (27 %) were not aware of what the municipality does for business. It appears that a good percentage of businesses are not aware of local marketing and business development initiatives.

The current level of water and sewer capacity, availability of utilities, and quality of life were all rated a key positive factors for Ingersoll as a place to do business.

2. Future Directions

Overall Business Climate

Existing businesses have a relatively positive view as to future potential of business development and of job creation. This positive perspective is due in part to the high level satisfied with the community and its provision of services. The vast majority of businesses noted a plan to re-invest into their operations. A third plan to expand their business.

The main obstacles for re-investment include:

- Access to financing
- Availability of labour
- Securing strategic alliances

As identified by the existing businesses, the most important factors in order to achieve future competitiveness include:

- Energy costs and access to affordable alternate energy
- Access to state of the art telecommunications systems
- Access to skilled labour
- Ability to improve customer service

Business Markets

In the near future is expected that business sales will increase due to expanding market share despite increased competition.

Employment

Close to half (46%) of businesses think their labour force will increase while a high percentage (44%) think it will remain the same. Key factors for this projected stable and growing labour include:

- New products and services introduced into the market
- Quality labour force

More than half of businesses stated that access to skilled trades as their most important future need.

3. Recommended Action Steps

The following are recommendations for the Municipality and its partners to consider implementing:

- a. Need to better communicate its marketing and economic development activities to current businesses.
- b. Need to continue to promote itself aggressively within its target markets.
- c. Continue to create a positive investment climate- for the entire community but with a special focus in the downtown.
- d. Continue its focus on social aspects and on the natural environment to improve the quality of life.
- e. Explore ways to create a business cluster.
- f. Investigate need for serviced industrial/ commercial lands.
- g. Continue to collaborate with post- secondary institutions to provide skilled labour with high technology competencies.
- h. Investigate improved public transit.
- i. Explore ways to help businesses with marketing, financial planning and succession plans.
- j. Determine ways to ensure availability of serviceable buildings and upgraded commercial storefronts.
- k. Pursue future study to re-position Ingersoll as a "Green Community".
- l. Pursue further study to assist businesses to compete in the global economy.
- m. Conduct a cost comparison study with other similar communities relative to taxes, land costs, development charges, and construction costs.
- n. Continue with ongoing downtown revitalization with a focus on business development.

The Survey Findings

Local Community

This “Local Community” section of the BR+E survey focused on the various factors related to living and working in the Town of Ingersoll. Questions in this section were developed to explore different ways of improving the Town of Ingersoll as a place to live, work and play.

A 1. Businesses were asked how they responded to the recent economic conditions. The most common responses were: reduced spending, reduced income / lower profits, improved efficiency by lowering operating costs (less employee and store hours, improved inventory management systems, less driving / more coordinated deliveries using shorter routes, etc.), diversified product / offered cheaper product (off-brands), and increased prices of products. Businesses that provided knowledge intensive services (doctors, lawyers, accountants, physiotherapists, etc) were less affected by the recent economic downturn. A few businesses had no idea of how to cope with the economic downturn or whom to contact for assistance.

A 2. When businesses were asked what can the Municipality of Ingersoll and/or the County of Oxford do to help businesses cope in the current economic downturn, the most common responses were: reduce taxes, change tax structure, attract more businesses / industries / residents, spend / buy local, reduce local government expenses in order to collect less taxes, improve contact with local businesses, reduce cost of infrastructure services, and increase tourism in Ingersoll.

B 1.

How would you rate Ingersoll’s marketing and promotion for Tourism, Attraction of New Businesses and to Promote Local Businesses – Provincially, Nationally and Globally? [1 = lowest 10 = highest]			
Rank	Provincial	National	Global
1	20%	27%	55%
2	9%	27%	15%
3	6%	9%	0%
4	6%	5%	0%
5	11%	9%	10%
6	9%	0%	5%
7	9%	9%	5%
8	23%	14%	10%
9	6%	0%	0%
10	3%	0%	0%
	Total Count = 35	Total Count = 22	Total Count = 20

Conclusion: Overall more businesses responded negatively than positively to Ingersoll’s marketing and business development efforts (52% below 5 on the 10 scale versus 48% over 5 on the 10 scale). It appears that local businesses are not well versed as to local initiatives. Firstly only 35 out of 56 businesses and organizations responded to this question indicating a lack of their knowledge. Second, the greater negative responses mean that the Town of

Ingersoll has to significantly improve its promotion and communications so that businesses within the community and outside will be fully aware of Ingersoll as a place to live, work and play.

Significant work needs to be done to enhance Ingersoll’s market position on a national scale to increase awareness as to Ingersoll amongst the national business community. If businesses and organizations within Ingersoll are not highly aware of local marketing, it can be assured that businesses outside our region- in the province and in Canada- even have a much smaller understanding or interest of Ingersoll. Based on this significant negative response, the Town of Ingersoll must, in the future, promote and market itself more aggressively on a national scale.

The rating of effective global marketing by Ingersoll was the lowest of the three categories. Thus significant work as well needs to be done to enhance Ingersoll’s position on a global scale in order to increase awareness amongst a strategic global business community.

B 2.

Do you live in Ingersoll?	
Yes	No
65%	35%
Total Count = 55	

Conclusion: 36 of the 55 respondents or 65% said they live in Ingersoll – majority of the respondents are residents of the community. Generally speaking, resident business people are more committed to the overall health of the community.

B 3.

As a commercial enterprise in Ingersoll, is your commercial banking done in or out of Ingersoll?	
In	Out
73%	27%
Total Count = 55	

Conclusion: The majority of the respondents – 40 out of 55 or 73% - did their commercial banking in Ingersoll.

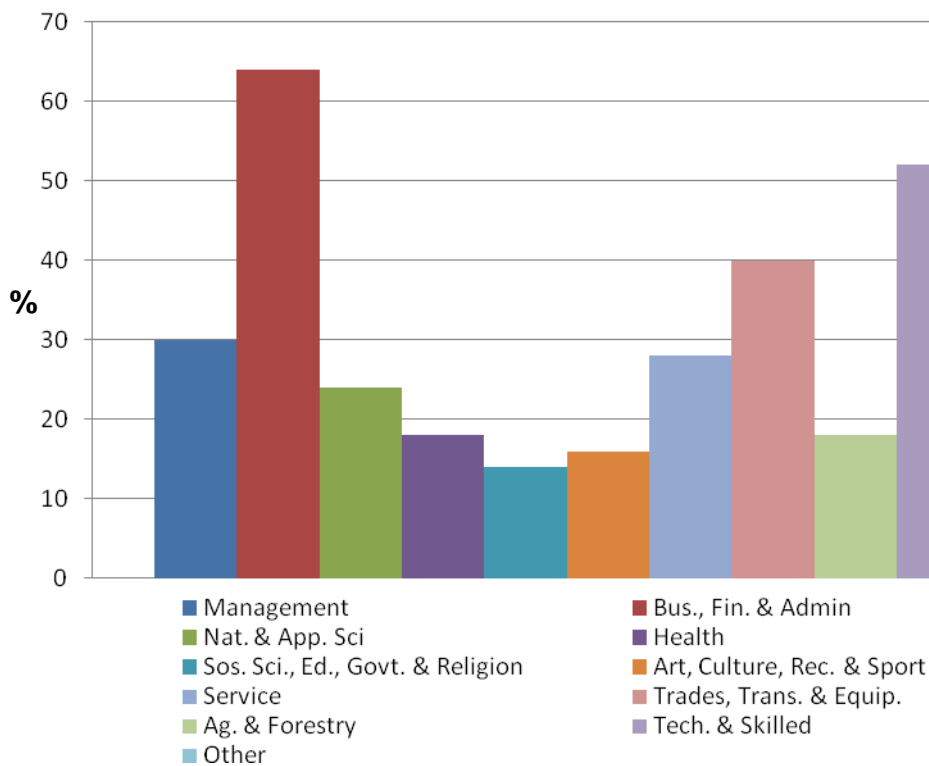
B 4.

Have you had a need to use the services of the Oxford County Planning Department?	
Yes	No
37%	63%
Total Count = 54	

Conclusion: Most respondents – 34 out of 54 or 63% - did not use the services of the Oxford County Planning Department.

C 1.

Of the following <i>creative</i> occupations which ones does your business use?	
Management Occupations (senior management)	30%
Business, finance and administrative occupations (analysts, accountants, secretaries, etc.)	64%
Natural and applied sciences related occupations (engineers, architects, chemists, etc.)	24%
Health occupations (doctors, nurses, pharmacists, etc.)	18%
Occupations in social science, education, government service and religion	14%
Occupations in art, culture, recreation and sport	16%
Service occupations (sales, chefs, child care & home support, estheticians, etc.)	28%
Trades, transport and equipment operators and related occupations	40%
Occupations in agriculture and/or forestry	18%
Technical and skilled occupations (those that require knowledge and skills and are not routine)	52%
Other	18%
Total Count = 50 (more than one response selected)	



Conclusion: Of the 50 businesses and organizations that responded to this question, the top three types of creative occupations (out of 10) used are: a) Business, finance and administrative occupations = 64%; b) Technical and skilled occupations = 52%; and c) Trades, transport and equipment operators and related occupations = 40%. Thus, Ingersoll's business community supports other businesses working in technical and skilled occupations in addition to those in finance and administrative occupations.

C 2.

Is <i>skilled</i> labour for your business sourced primarily from out of Oxford County?	
Yes	No
37%	63%
Total count = 46	

Conclusion: The majority of the skilled labour is sourced primarily from within Oxford County. This indicates that most of the local businesses and organizations have sufficient resources of skilled labour to tap into from within the County. This indicates that there is not a requirement for programs to attract skilled labour from other parts of Ontario or elsewhere.

D 1.

How would you rank the business support and services provided in Ingersoll for a new start-up business operation? [1 = lowest 10 = highest]	
Rank	%
1	19%
2	11%
3	4%
4	0%
5	4%
6	0%
7	11%
8	37%
9	15%
10	0%
Total Count = 27	

Conclusion: About half the businesses/organizations surveyed did not answer the question. Of the 27 respondents the majority gave a ranking of “8” or more. Of those businesses that are aware of this service, the level of positive ranking is relatively high. However the relatively low number of respondents means that the Town must focus on more awareness building about services available in Ingersoll for new start-up businesses.

D 2

When businesses were asked what message they had for the Municipality of Ingersoll to help improve Ingersoll’s business climate, the most common responses were: reduce taxes/change tax structure (especially that of property and business taxes); communicate and network with local businesses; improve marketing of Ingersoll; ensure a more stable economic development department; attract more businesses of different types; promote consumption from local businesses, speed up approval processes for construction/land development, create uniform and attractive commercial storefronts, and improve and upgrade the downtown core; include non-downtown businesses in plans; create a welcome package for new businesses; provide a location of small units for small businesses to operate and for start-ups; and provide data on available sites for businesses.

E 1.

As a business owner in Ingersoll how important is the quality of life in Ingersoll to attract and/or retain other businesses and employees? [1 = lowest 10 = highest]	
Rank	%
1	0%
2	0%
3	0%
4	0%
5	2%
6	2%
7	5%
8	20%
9	29%
10	42%
Total Count = 55	

Conclusion: Out of 55 respondents, an overwhelming 91% noted that “quality of life” is extremely important for their employees, and in order to attract and retain other businesses. All respondents found the quality of life to be of more than an average ranking (5 or more on the 10 scale) importance. This clear statistic indicates the significance of the quality of life in Ingersoll for our economic future. The social aspect needs to be maintained and improved if the Town of Ingersoll is to have a bright and prosperous economic future.

E2.

When businesses were asked if they were involved in supporting Ingersoll’s arts and culture, two-thirds of the respondents stated a positive response. As to the respondents that were not involved, the majority stated that they were either unaware or had no idea of how to get involved in culture. A small percentage did not support arts and culture in Ingersoll. Or those that are currently involved, their activities included sponsorships, advertising, donations, and volunteering for events and activities.

E 3.

How important is the health of Ingersoll’s natural environment to your business? [1 = lowest 10 = highest]	
Rank	%
1	8%
2	2%
3	4%
4	2%
5	8%
6	4%
7	4%
8	19%
9	13%
10	38%
Total Count = 53	

Conclusion: Of the 53 respondents, 70% rated the health of the natural environment as extremely important, and 86% rated as being above average (5 or more on the 10 scale). Thus local businesses and organizations rate the health of Ingersoll's natural environment as being highly important to their operations. This indicates that a healthy natural environment is as important as the quality of life and it needs to be maintained and improved if the Town of Ingersoll is to have a bright and prosperous economic future.

F1.

As to the importance of partnerships with other businesses/industries, most of the businesses responded that partnerships were very important to their operations. It was noted the importance of involving partners from industries different to their own in delivering their products to the consumer. Some businesses said that partnerships were somewhat important to them; and a few said that they were not relevant to their business.

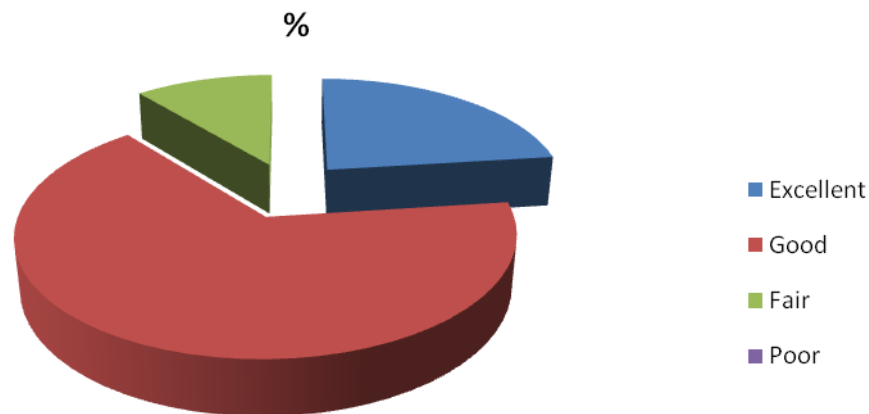
F 2.

Would a business cluster in Ingersoll consisting of different industries neighbouring each other enhance the creativity and productivity of Ingersoll's businesses?	
Yes	No
81%	19%
Total Count = 47	

Conclusion: Clearly the surveyed businesses agreed that a business cluster would benefit their business and that of Ingersoll's overall business climate.

Business Climate

1. What is your general Impression of this community as a place in which to do business?	
Rank	%
Excellent	23%
Good	66%
Fair	11%
Poor	0%
Total Count = 56	



Conclusion: 89% of local businesses in Ingersoll were more than satisfied with the community as a place in which to do business – out of which 23% found Ingersoll to be an excellent location for their business. Although this statistic strongly supports Ingersoll as a place in which to do business, our community can be further enhanced as a business location to ensure that we have more respondents chose the “excellent” category for Ingersoll as a business location.

2. In the past 3 years has your attitude about doing business in this community changed?	
Yes	No
25%	75%
<i>If yes is your attitude now more positive?</i>	
Yes	No
31%	69%
Total Count = 52	

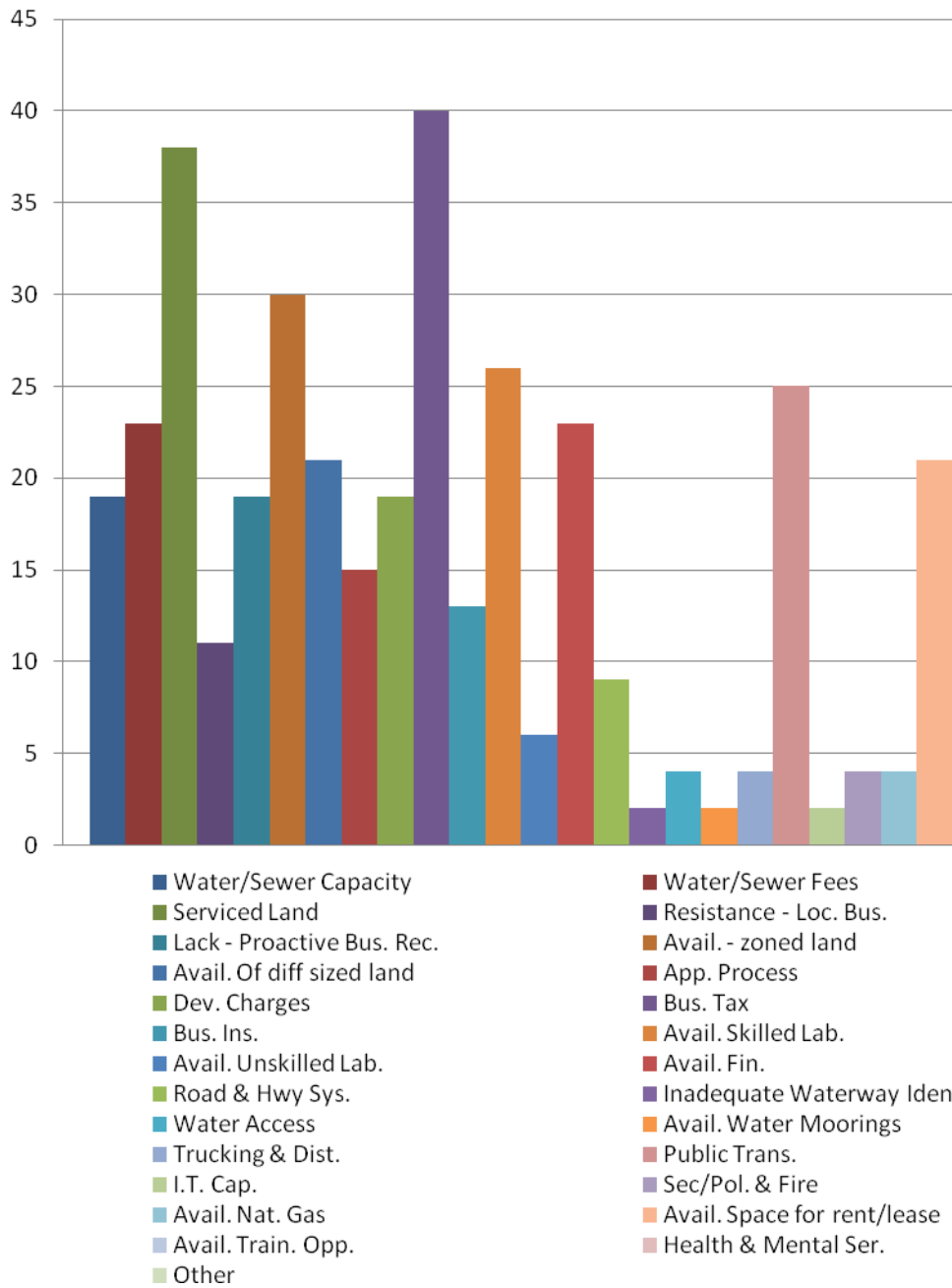
Conclusion: A quarter of the businesses surveyed had changed their attitude about doing business in the community – out of which 69% had negative change in their attitude. Although the majority of local businesses did not have a change in their attitude towards doing business in Ingersoll, out of those that did have a change the majority was negative. This is an area that needs more attention as Ingersoll is a community that needs a positive business climate for its success.

3. What is your general impression of the Province of Ontario as a place in which to do business?	
Rank	%
Excellent: 20%	20%
Good: 57%	57%
Fair: 19%	19%
Poor: 4%	4%
Total Count = 54	

Conclusion: By and large most respondents found the Province of Ontario a conducive place for business with 57% noting a good response and another 20% noting an excellent response. The trend is similar to that of Ingersoll.

4. Which, if any, of the following factors are barriers to the expansion of existing businesses and the development of new businesses in the community?	
Barrier	%
Water/sewage capacity	19%
Water/sewer fees	23%
Serviced land	38%
Resistance from local business	11%
Lack of proactive new business recruitment	19%
Availability of properly zoned and designated land	30%
Availability of variety of different sized parcels of land	21%
Approval processes	15%
Development charges	19%
Business taxes	40%
Business insurance	13%
Availability of skilled labour	26%
Availability of unskilled labour	6%
Availability of financing	23%
Road & highway system	9%
Inadequate waterway identification	2%
Water access	4%
Availability of water moorings	2%
Trucking & distribution	4%
Public transit	25%
Information technology capacity	2%
Security/policing & fire service	4%
Availability of natural gas	4%
Availability of space for rent or lease	21%
Availability of training opportunities	8%
Health & medical services	15%
Other	13%
Total Count = 53 (more than one response selected)	

Graph indicating reported barriers 5% and over only:



Top 5 barriers out of 27:

a. The #1 reported barrier was business taxes at 40%

Conclusion: Ingersoll’s business tax rates are comparable with other similar communities in the region. This is not an unexpected response as no one enjoys paying taxes

b. The #2 reported barrier was serviced land at 38%

Conclusion: This major issue needs to be addressed in consultation with other levels of government, in an expedient manner.

c. The #3 reported barrier was the availability of appropriately zoned land.

Conclusion: This major issue needs to be addressed in consultation with other levels of government, in an expedient manner

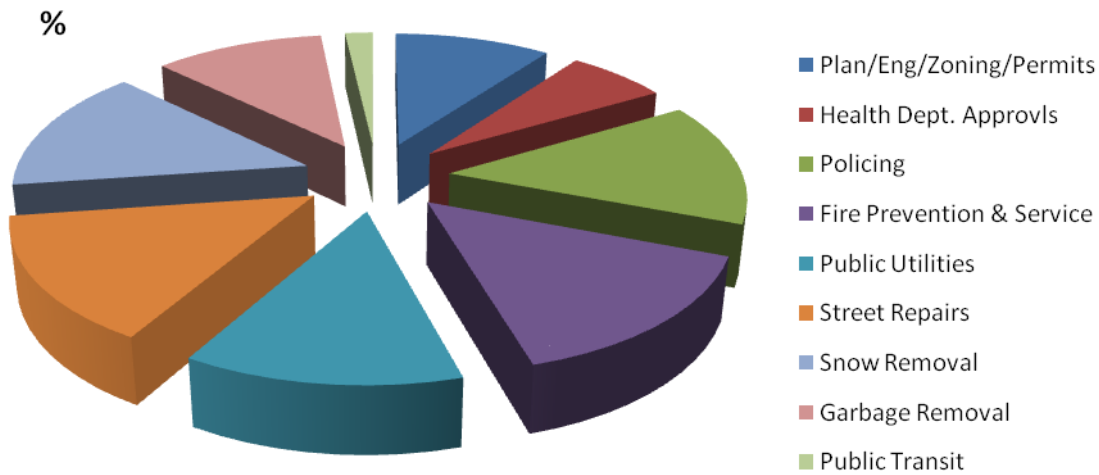
The #4 reported barrier was the availability of skilled labour.

Conclusion: This is a serious and an increasingly common problem faced by both knowledge-based and skill intensive businesses throughout Ontario. In order to address this issue, the Town of Ingersoll needs to collaborate with agents from local employment boards, colleges and universities, other levels of government and local businesses to better understand these challenges and to find effective solutions.

d. The #5 reported barrier is that of public transit.

Conclusion: Improved public transit in terms of more frequent VIA train and Greyhound bus service was a common response. Need to future investigate this issue?

5. What is your level of satisfaction with each of the following services provided by local government and community organizations?	
Very/Somewhat satisfied with Local Government services	%
Planning/engineering/zoning/permits (35% no contact)	56%
Health department/approvals (58% no contact)	36%
Policing (9% no contact)	79%
Fire Prevention and service (15% no contact)	82%
Public Utilities (13% no contact)	71%
Street repairs (15% no contact)	80%
Snow removal (13% no contact)	80%
Garbage removal (29% no contact)	61%
Public Transit (73% no contact)	10%



Key Results: The three departments that businesses had least contact with and least positive responses are:

- a. As to Public Transit, 73% of respondents had no contact and only 10% were either very/somewhat satisfied.

Conclusion: Public transit is not considered a viable means of transportation due to Ingersoll's present population density.

- b. As to Health department/health unit approvals, 58% of respondents had no contact and 36% were either very/somewhat satisfied.

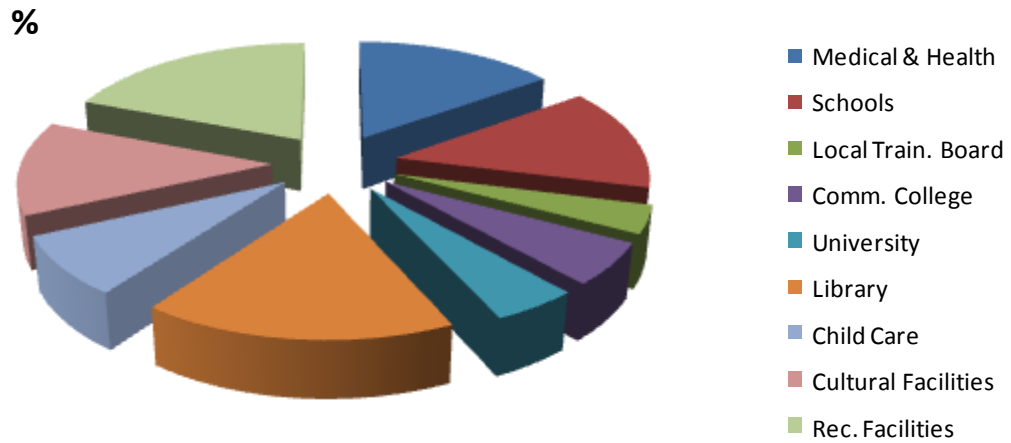
Conclusion:

- c. As to Planning, engineering, zoning and building permits, 35% of respondents had no contact and 56% were either very/somewhat satisfied. As these are the regulatory arms, and can create stress points, these levels are overall viewed as positive.

Conclusion:

- d. All other departments – Policing; Fire Prevention and Service; Public Utilities; Street Repairs; Snow Removal; and Garbage Removal performed well in the businesses' opinion by indicating a good level of satisfaction.

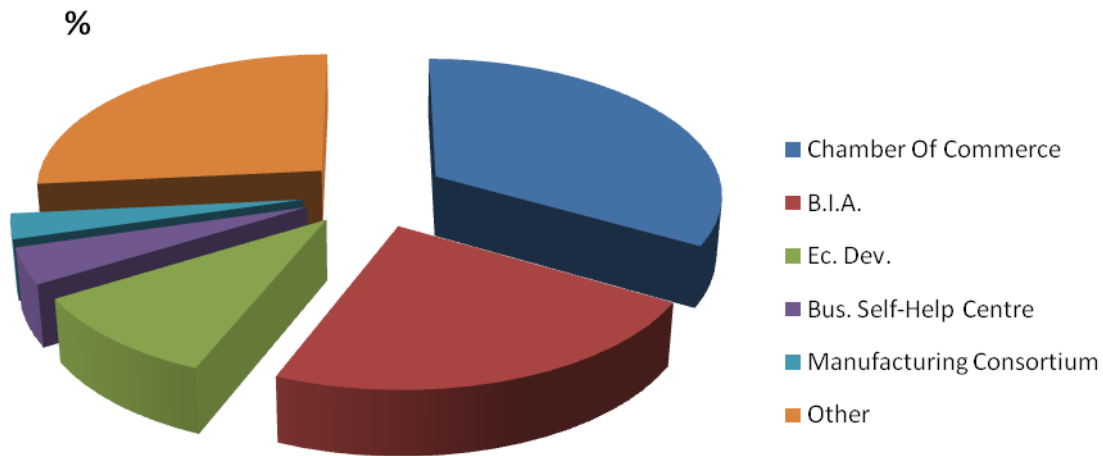
What is your level of satisfaction with each of the following services provided by local government and community organizations?	
Very/Somewhat satisfied with Community Orgs	%
Medical and health (13% no contact)	64%
Schools (31% no contact)	59%
Local Training Board (79% no contact)	16%
Community college (74% no contact)	24%
University (79% no contact)	20%
Library (26% no contact)	72%
Child Care (62% no contact)	34%
Cultural facilities (36% no contact)	54%
Recreational facilities (11% no contact)	81%



Conclusion: There is a high level of satisfaction with the recreational and cultural services. The medical and health services received a moderate level of satisfaction. Higher education satisfaction levels are relatively low. The gap between local businesses / organizations, educational institutions, and the training board needs to be bridged as soon as possible in order to ensure that skilled labour is available in Ingersoll to suit the needs of local businesses.

6. What is your level of satisfaction with the services provided by the Provincial Government and the Federal Government?

7. What is your level of satisfaction with the services provided by business organizations?	
Very/Somewhat Satisfied with Business Organizations	%
Chamber of Commerce (11% no contact)	79%
BIA (29% no contact)	54%
Economic Development Corp (62% no contact)	24%
Business Self-Help Centre (87% no contact)	10%
Manufacturing Consortium (89% no contact)	7%
Other (38% no contact)	63%



- i. All local businesses and organizations had no contact with either the provincial or federal ministries or agencies named in the survey.
- ii. The Chamber of Commerce performed notably well with 79% of the local businesses and organizations reported being either very or somewhat satisfied, and only 11% had no contact with the Chamber.
- iii. Out of the 56 businesses and organizations surveyed 16 or 29% of them had no contact with the BIA. Of the remaining 40 businesses and organizations 18% were either very or somewhat dissatisfied with the BIA.
- iv. 62% of the 53 business and organizations that reported, said they had no contact with the Economic Development office.

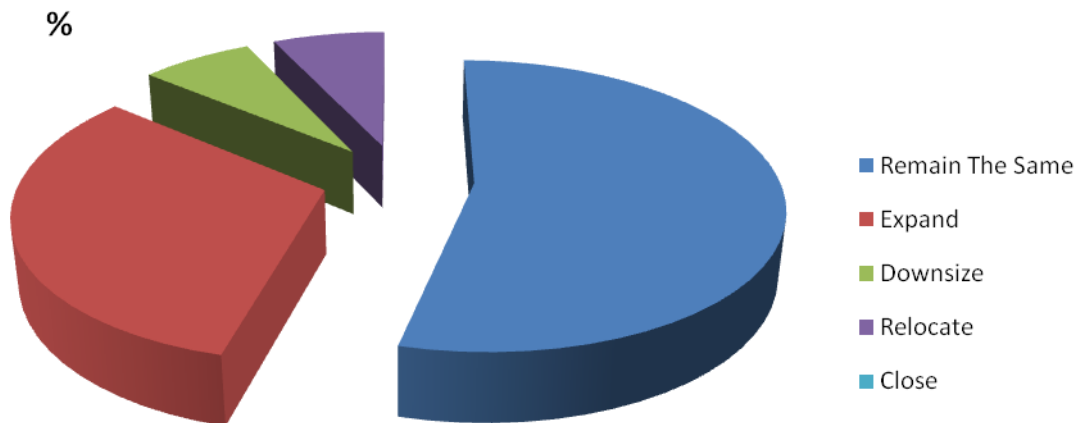
Conclusion: This disconnect between the Economic Development Department and local businesses and organizations needs to be addressed quickly if the economy and business and social climate of Ingersoll is to sustain healthy progress.

- v. 87% of the 54 businesses and organizations surveyed reported having no contact with the business self help/enterprise centre/COBSC – the Oxford Small Business Support Centre.

Conclusion: More needs to be done to connect local businesses and organizations with the Oxford Small Business Support Centre and to increase awareness of the centre's programs and services offered to the community.

Future Plans

8. Within the next 3 years, which of the following do you plan to undertake at this site?	
Plan	%
Remain the same	54%
Expand	32%
Downsize	7%
Relocate	7%
Close	0%
Total count = 56	



Conclusion: Overall it is expected that Ingersoll will realize a small increase in businesses within the next three years. Four out of the 56 businesses plan to downsize. Two out of these 4 businesses indicated that the downsizing would result in a reduction of the workforce. Of these two businesses, one has decided to downsize operations due to retirement and to the absence of succession partners. The other indicated that the downsizing would arise from the demolition of a current building site. The business owner indicated a request for assistance from the municipality in securing grants and funding for the cleanup of the site in order to rebuild and expand on the site.

Four out of the 56 businesses plan to relocate, out of which 2 businesses have planned to relocate within the next 3 years and 2 businesses are exploring the possibility of relocating in the same time period. Of the two businesses that plan to relocate, one plans to relocate out of Ingersoll while the other plans to relocate within the community.

The main reason for one of the businesses planning to relocate out of Ingersoll is due to the current inadequate size of its facilities to meet its needs. Although town assistance not mentioned by these businesses, the municipality needs to explore ways in which it can be more of assistance to prevent businesses from leaving the community.

The other business that is planning to relocate within the community has indicated that a change in markets and lower property taxes have led them to their decision. This business has mentioned that the municipality can assist it by making changes to the tax structure.

Of the two businesses that are exploring the possibility of relocating, one plans to relocate out of Ingersoll and the other is exploring its options. The business planning to relocate out of Ingersoll mentioned that changes in markets, restrictive local regulations and the availability of business tax incentives in other locations as reasons for their relocation. This business also mentioned that the municipality should investigate providing business assistance by financing and making changes to the tax structure.

The business that is still exploring its relocation options did not mention any specific reasons for doing so, other than that it needs more visibility at the 401 highway.

9. Will the downsizing result in a reduced workforce?	
Yes	No
50%	50%
Total Count = 4	

Conclusion: Half the respondents (only four) report a reduction in the workforce.

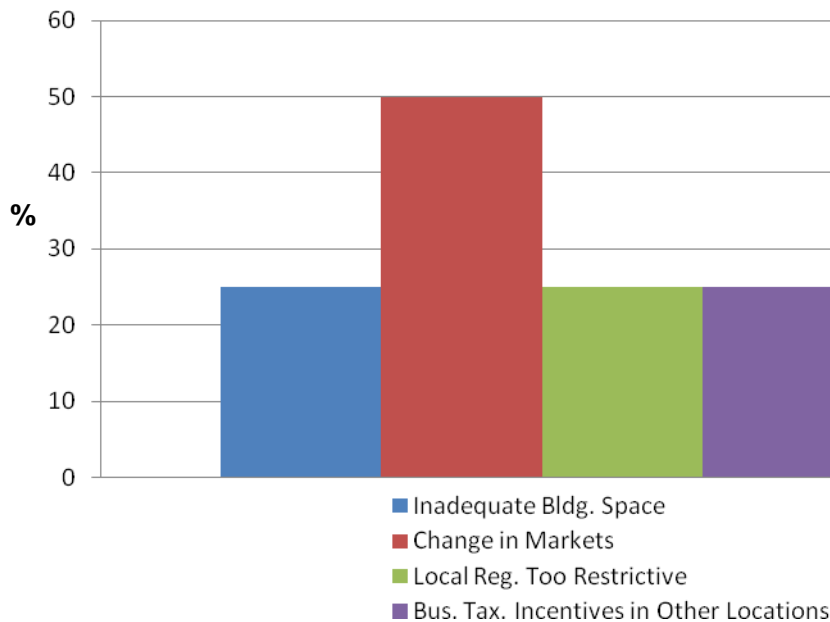
10. Do you plan to relocate this business within the next 3 years?		
Yes	No	Exploring
50%	0%	50%
Total Count = 4		

Conclusion: Half the four respondents are planning to relocate and the other half are still exploring their possibilities.

11. Where do you plan to relocate this community?	
Relocation	%
Within the Community	33%
Outside the municipality but within the County/District/Regional Municipality	0%
Elsewhere in Ontario	67%
Another Province	0%
Outside Canada	0%
Total Count = 3	

Conclusion: Two out of the three respondents plan to relocate elsewhere in Ontario.

12. Why are you planning to relocate the business?	
Why	%
Inadequate facilities in terms of building space	25%
Change in markets	50%
Local regulations too restrictive	25%
Business tax incentives in other locations	25%
Other (401 Visibility & Lower Property Taxes)	50%

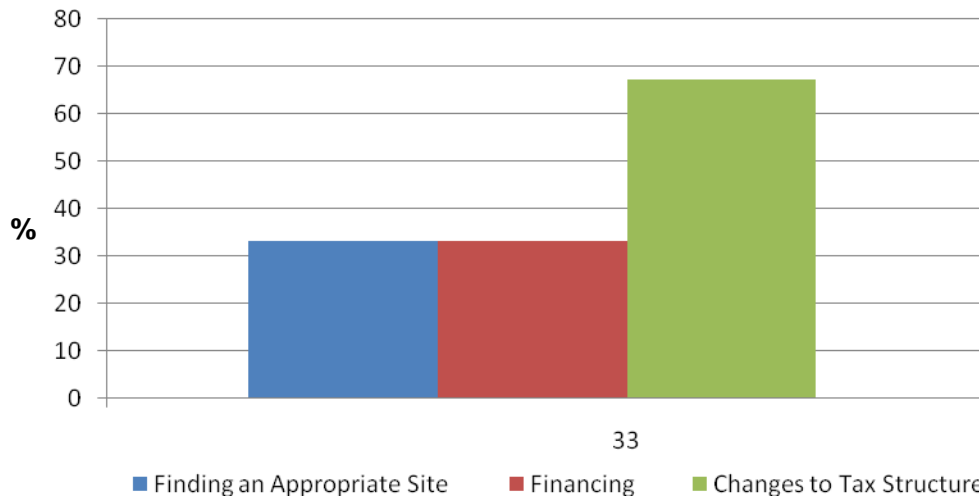


Conclusion: Recent changes in market (economic) conditions had a direct impact on those businesses that plan to relocate. In addition, “other” factors have played a significant role in the relocation decisions of the businesses that plan to relocate.

13. Has a business case been made to head office to justify your company remaining at this site?	
Yes	No
0%	100%
Total Count = 1	

Conclusion: As the businesses planning to relocate are owner operated, the decisions to relocate are made by the local business owners.

14. What assistance, if any, could help to prevent the relocation of this business?	
Assistance	%
Nothing, decision is made	33%
Finding an appropriate site location	33%
Financing	33%
Changes to tax structure	67%
Total Count = 3 respondents (more than one response selected)	



Conclusion: Changes to the tax structure has been the most common and profound response by most businesses interviewed.

15. Within the next 3 years, do you plan to undertake a building expansion at this site?	
Yes	No
39%	61%

Conclusion: Future business expansion will mostly involve retaining existing dimensions of the current sites.

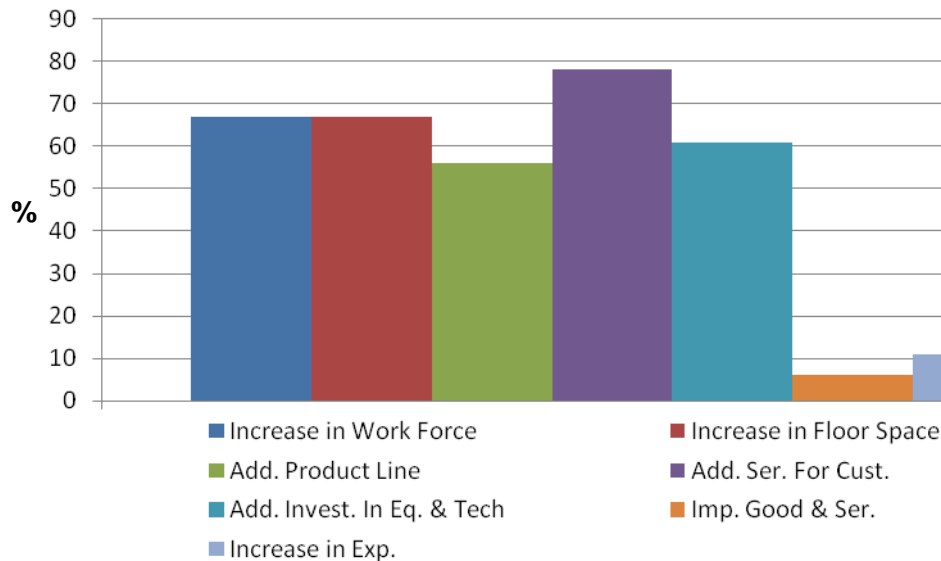
16. Within the next 3 years, are you planning to invest in new equipment in your operation?	
Yes	No
89%	11%

Conclusion: Future business expansion will be based on capital – technology – intensive development. Therefore skilled labour with competencies to operate this technology will be needed in the future.

17. Is your expansion plan based on innovation?	
Yes	No
61%	39%

Conclusion: Innovation is an important factor in expansion plans. Need to explore ways and means to facilitate innovation.

18. Will your expansion lead to...:	
An increase in work force	67%
An increase in floor space	67%
Additional product line(s)	56%
Additional services for customers	78%
Additional investment in equipment and technology	61%
Importing goods or services to Canada	6%
An increase in export of goods or services	11%
Process improvements	50%
An increase in demand for skills training	50%
Other: [Energy (innovation), possible increase in skills training demand & increase in membership]	17%
Total Count = 18 respondents (more than one response selected)	

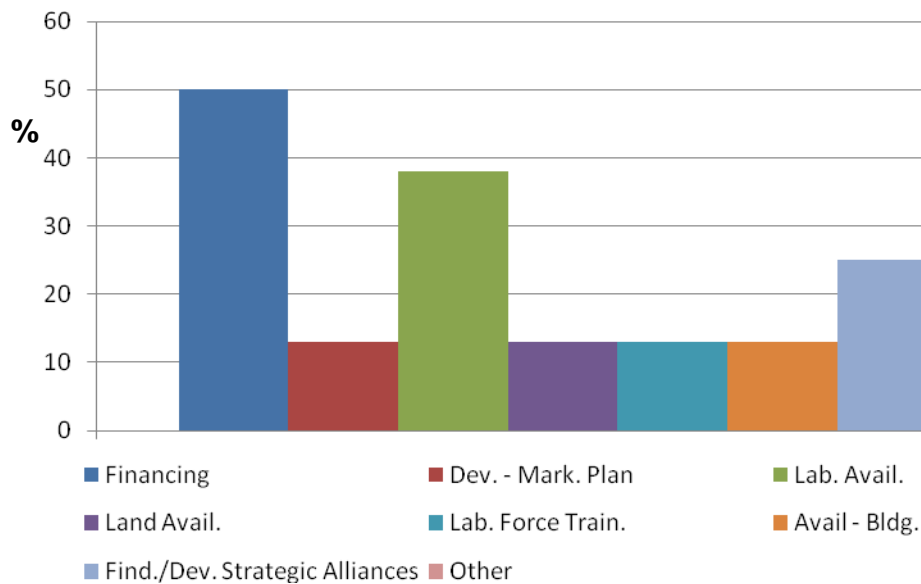


Conclusion: Future expansion will result in an increase in the workforce, equipment, services for customers and floor space. Secondly these expansions will also result in an increased demand for skilled labour – a significant issue that needs to be addressed immediately in order to ensure that Ingersoll’s economy continues to grow and remains competitive in the new economy.

19. Is your business experiencing difficulties with its expansion plan?	
Yes	No
50%	50%
Total Count = 18	

Conclusion: Half of those businesses that are expanding are facing difficulties in their expansions. This indicates that a business support system is needed to ensure expansion.

20. Please identify difficulties you are experiencing with the expansion plans	
Difficulty	%
Financing	50%
Developing a marketing plan	13%
Labour availability	38%
Land availability	13%
Labour force training	13%
Availability of buildings	13%
Finding/developing strategic alliances	25%
Other (Commodities)	13%
Total Count = 8 (more than one response selected)	



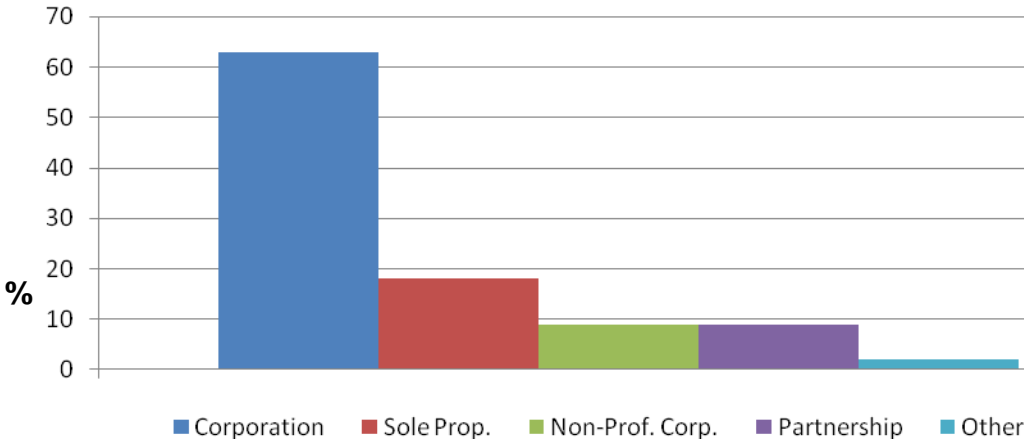
Conclusion: Financing, labour availability and developing effective strategic alliances are significant reasons for the difficulties in the expansion plans of businesses.

21. How will this expansion be financed? Will it be...	
Type of Finance	%
Cash	29%
Line of credit	24%
Venture Capital	6%
Private Investment	12%
Short Term Bank Loan (<1yr)	12%
Long Term Bank Loan (>1yr)	41%
Other (Not sure yet & Government program to expand business)	12%

Conclusion: Cash, line of credit and long-term bank loans are the most significant financial sources of the businesses expansion plans.

Company Information

22. What is the legal form of this business?	
Type	%
Corporation	63%
Sole Proprietorship	18%
Non-Profit Corporation	9%
Partnership	9%
Other	2%



Conclusion: Most businesses are corporations, which is a common trend in today’s global business environment. The limited liability of a corporation prevents debts from being owed by its employees and shareholders / investors. Of an interesting note, none of the businesses that were interviewed was a branch plant – something that will have to be explored in another survey of the local business community.

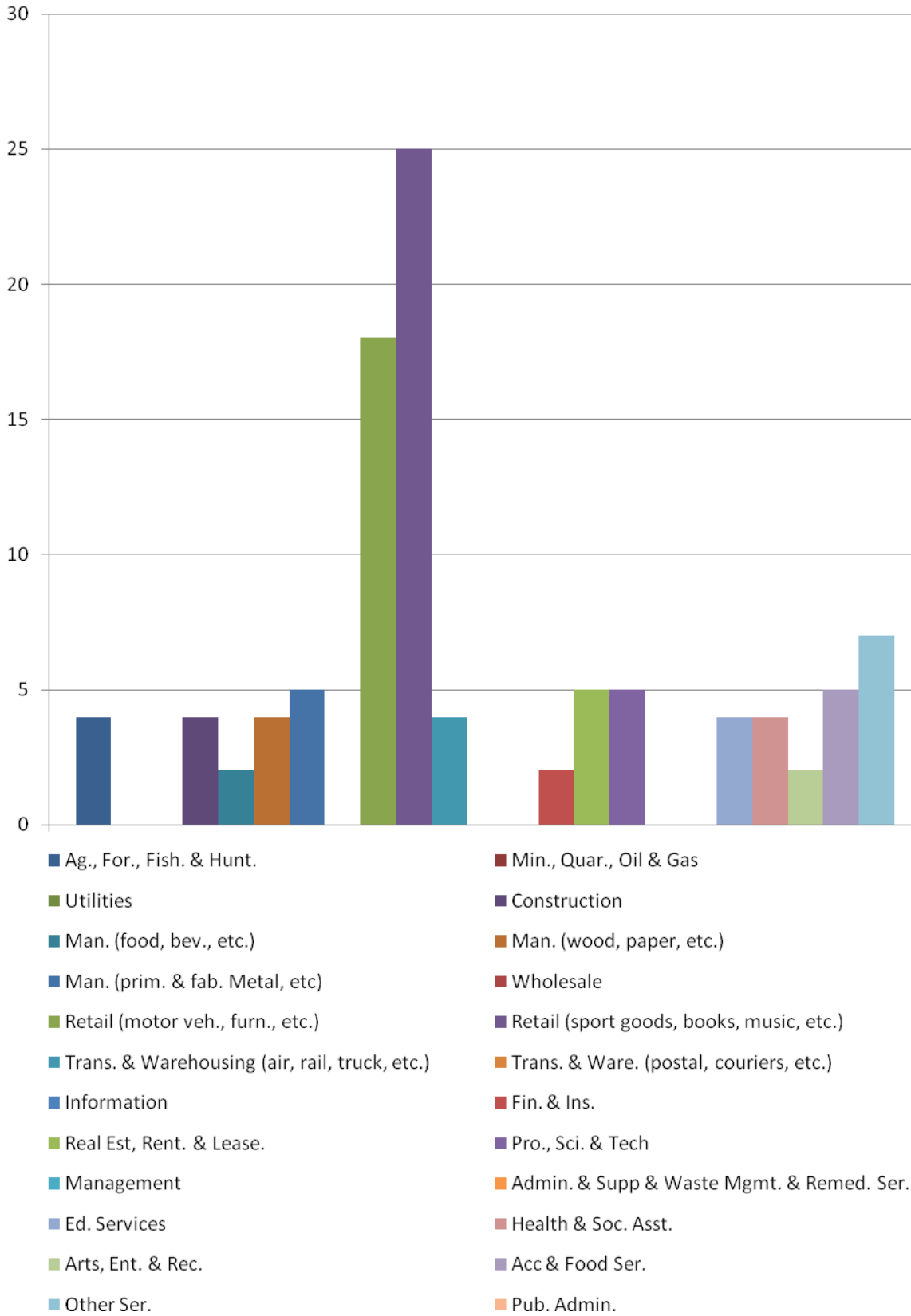
23. Business Demographics – is this business a franchise?	
Yes	No
14%	86%

Conclusion: Most of the businesses surveyed were in the retail sector; hence a large proportion of franchises in the community were captured in the survey. However the results indicate that most businesses are not franchises, but are independent business that are unique to Ingersoll. Therefore, every effort must be made by the municipality to support our local business environment in order to ensure that our unique businesses can become a success and to create more businesses that are unique to Ingersoll.

24. Business Demographics – what primary activity is conducted by your business?	
Primary Activity	%
Agriculture, Forestry, Fishing and Hunting	4%
Mining, Quarrying, and Oil and Gas Extraction	0%
Utilities	0%
Construction	4%
Manufacturing, (food, beverage, etc.)	2%
Manufacturing, (wood, paper, etc.)	4%
Manufacturing, (primary and fabricated metal, etc.)	5%
Wholesale Trade	0%
Retail Trade, (motor vehicle, furniture, etc.)	18%
Retail Trade, (sporting goods, book, music, etc.)	25%
Transportation and Warehousing, (air, rail, truck, etc.)	4%
Transportation and Warehousing, (postal service, couriers, etc.)	0%
Information	0%
Finance and Insurance	2%
Real Estate and Rental and Leasing	5%
Professional, Scientific, and Technical Services	5%
Management of Companies and Enterprises	0%
Administrative and Support and Waste Management and Remediation Services	0%
Educational Services	4%
Health Care and Social Assistance	4%
Arts, Entertainment, and Recreation	2%
Accommodation and Food Services	5%
Other Services (except Public Administration)	7%
Public Administration	0%
Total Count = 55	

Conclusion: This survey took a general approach in terms of the different business categories that were interviewed. In the process a general snapshot was captured that took into account as many types of businesses as we could possibly conduct within the time, budget, and resource constraints. The overall picture paints similar image of Ingersoll’s business and social services community with the majority of it being composed of retail trades, followed by manufacturing and closely followed by other types of services. This picture gives an industry composition and not an employment in industry composite, which is similar to Ingersoll’s overall economic composition.

%	36. Is the owner (or at least one of the owners) involved in the day-to-day operation of the business?	
	Yes	No
	93%	7%
Total Count = 55		



Conclusion: The high level of owner-operators indicates the potential for strong personal commitment to the business.

37. Is the owner (or at least one of the owners) of this business a resident of the community?	
Yes	No
Yes = 65%	35%
Total Count = 55	

Conclusion: The high level of owner-residents indicates the potential for strong personal commitment to the community.

38. Where is the headquarters for this business?	
Ingersoll	84%
Elsewhere in Ontario	16%
Total Count = 56	

Conclusion: The high level of local headquarters indicates the potential for strong personal commitment to the community.

39. As a commercial enterprise in Ingersoll, is your commercial banking done in our out of Ingersoll?	
In	73%
Out	27%
Total Count = 55	

40. Is this a family owned business?	
Yes	No
73%	27%
Total Count = 56	

Conclusion: Businesses/organizations in Ingersoll are operated mostly by people living in the community and the majority of the owners are entrepreneurs having the sole interest in their businesses/organizations. This indicates that most businesses/organizations in Ingersoll are small/medium-sized operations, and are the core of our economy. Moreover, the majority of the businesses are Ingersoll-based, again indicating that Ingersoll’s economy is run by local citizens. In addition commercial banking is mostly done within Ingersoll meaning that access to finance is determined from within the community. Therefore, protecting the interests of our business community is necessary to benefit the future of Ingersoll economically and socially.

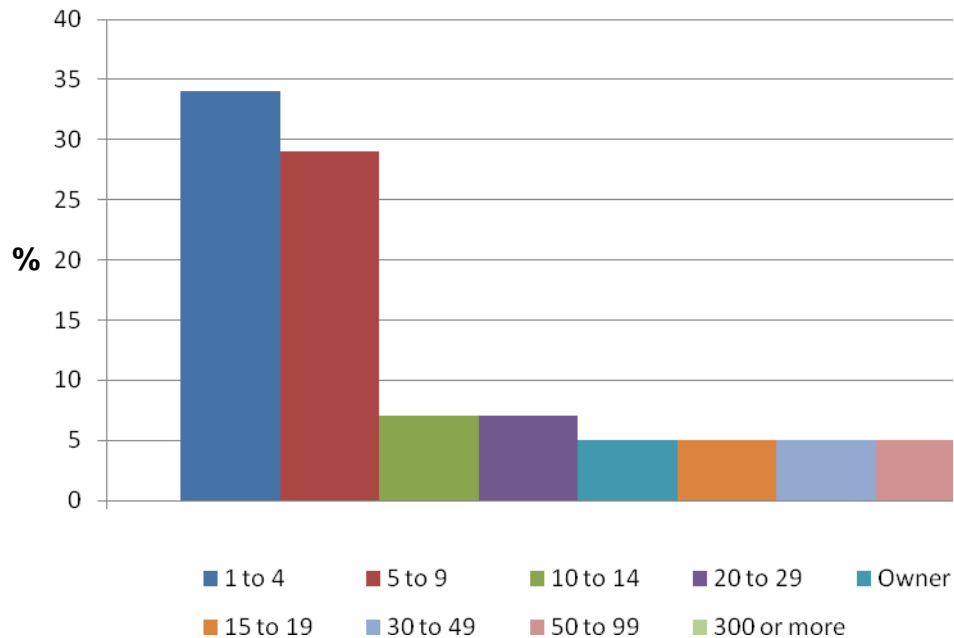
30. Business Demographics - How many years has this business been in operation in this community?	
# of Years	%
11 to 25 years	32%
Over 35 years	20%
4 to 10 years	18%
1 to 3 years	13%
26 to 35 years	13%
Less than 1 year	4%
Total Count = 56	

Conclusion: Most businesses in Ingersoll are mature and stable businesses as 65% of the businesses have been in existence for eleven or more years. Therefore, as seen by their longevity, Ingersoll's businesses have found our community to be a good place to do business over the long term.

31. Business Demographics:		
	Yes	No
Does the business have a succession plan?	52%	48%
Does your business have a business plan?	64%	36%
Does your business have a marketing plan?	55%	45%

Conclusion: A striking number of businesses do not have succession or marketing plans. This issue needs to be addressed by the municipality by contacting and potentially partnering with the relevant service providers and the businesses that need these services. These plans will enable these businesses to become more competitive and to capture more market share thus help improve Ingersoll's economy. There is also a significant number of businesses that reported to not having a business plant, with small businesses frequently falling into this category. Again the Town of Ingersoll needs to explore partnering with the relevant service providers to assist these businesses develop business plans and help them improve and compete in the rapidly globalizing economy. The health of all our businesses is crucial to the future of Ingersoll's economy.

32. Business Demographics – how many employees work at this location?	
# of Employees	%
1 to 4	34%
5 to 9	29%
10 to 14	7%
20 to 29	7%
Owners	5%
15 to 19	5%
30 to 49	5%
50 to 99	5%
300 or more	3%
Total Count = 56	



Conclusion: The majority of the businesses in Ingersoll are small, with 63% having a workforce of nine or less. This is followed by medium-sized businesses (10 to 49 employees) at 24%. These two categories combined with owner-operators compose 93% of Ingersoll's workforce. Therefore, taking care of our small/medium businesses is fundamental to the prosperity of Ingersoll.

33. Business Demographics:	
How many of these employees are permanent full-time = 2,567	93%
How many of these employees are permanent part-time = 145	5%
How many of these employees are seasonal/temporary = 32	1%
How many of these employees are – contract employees = 25	1%
Total = 2,761	

Conclusion: The vast majority of jobs are permanent full time, thus Ingersoll businesses provide a livelihood for their employees.

34. What percentage of your employees at this location live:	
Within the municipality	73%
Outside the municipality but within the county	23%
Outside the county	4%

Conclusion: The majority Ingersoll's businesses/organizations draw their workforce from within Ingersoll; and as noted above the majority of the workforce is employed in full-time permanent jobs. Overall this is a positive indication of Ingersoll being a solid base for employment. However, the recent economic downturn did result in many people losing their well-paid permanent full-time jobs at least on a temporary basis. The main reason for this large number of permanent full-time jobs has been CAMI Automotive. Even this giant of Ingersoll did not escape

the recent economic hardships that hit the automotive manufacturing industry. Therefore, although these results indicate at the time of the survey a positive and stable workforce in Ingersoll, future trends can lead to a very different picture. The municipality has to explore ways to assist businesses during the current and in future turbulent economic times. The municipality also has to look at ways of assisting current laid-off workers and workers that will be laid-off in the future, regain employment by upgrading their skills to match the requirements of emerging economic sectors.

35.	
Unionized	4%
Non-unionized	96%
Total Count = 56	

Conclusion: From a business numbers perspective, the vast majority of workplaces are non-unionized.

Business Development

36. Is this business location the only location?	
Yes	No
73%	27%
Total Count = 56	

Conclusion: Most businesses in Ingersoll are located only within the community. Hence, the majority are unique to Ingersoll.

37. Is this location the headquarters?	
Yes	No
53%	47%
Total Count = 19	

Conclusion: A relatively even number of businesses have headquarters in Ingersoll as compared to another location. This would mean that when a business has another location beyond Ingersoll, its headquarters would be located outside of Ingersoll.

38. Where are the other locations for this business?	
Other Locations	%
This Municipality	33%
Outside this Municipality but in the County/District/Regional Municipality	73%
Elsewhere in Ontario	47%
Another Province	13%
Outside Canada	20%
Total Count = 15 (more than one response selected)	

Conclusion: Of those businesses who also are located outside Ingersoll, most have their other operations within Oxford County.

39. How satisfied are you with the current site of this business in this community?	
Completely satisfied	63%
Somewhat satisfied	30%
Somewhat dissatisfied	7%
Very dissatisfied	0%
Total Count = 56	

Conclusion: Most businesses are completely satisfied with their current site. However, 30% of the businesses aren't completely satisfied; and 7% are somewhat dissatisfied. This 37 % is an

issue that must be addressed to ensure economic sustainability. The next section will explore why they are not completely satisfied and what the Town can do to rectify this issue in the future.

40. Why are you not completely satisfied with this site?	
Site is too small	62%
No opportunity for expansion	38%
Condition of building	10%
General appearance of site	14%
Utilities/energy	5%
Location is inconvenient for customers	29%
Access to research and development in the area	5%
Availability of skilled labour	10%
Availability of unskilled labour	10%
Location is inconvenient for employees	5%
Roads & highway system	5%
Trucking & distribution	5%
Public transit	10%
Policing/security/fire protection	5%
Business taxes	10%
Community business support	14%
General appearance of site	5%
Other (Bridge, more visibility, wheelchair accessibility and parking, & too many vacant buildings nearby)	19%
Total Count = 21 (more than one response selected)	

Conclusion: Addressing the issue of ensuring that buildings exist with adequate capacity to meet business' needs, is a key function where the municipality can assist business. The municipality can facilitate businesses in their search of existing locations that meet their needs or in encouraging the construction of new buildings. The municipality can also assist in the appearance of existing properties by expanding facade improvement programs beyond the downtown core; and by increasing awareness of such programs. A common complaint about the location is inconvenient accessibility. Thus the municipality can explore ways to help improve accessibility, especially for the disabled and seniors. The Town of Ingersoll also needs to improve community business support or increase awareness of programs provided by the municipality and its partners in assisting entrepreneurial activity.

41. Is this a home-based business operated from the owner's residence?	
Yes	No
5%	95%
Total Count = 56	

Conclusion: Only 5% of all respondents operate a home-based business.

42. Is this a home-based business operated from the owner's residence – does the owner of this business, own or lease the facility?	
Own	67%
Lease	33%
Total Count = 51	

Conclusion: The answer to this question is unclear as question 42 indicated only 5% of the respondents had a home-based business but this question had 51 responses. Therefore it can be assumed that the interviewees responded to this question as a business operator instead of a home-based business operator. For the results of this question, most businesses in Ingersoll are owned by their operators.

43. When does the lease expire?	
Month to month	24%
Next year	29%
In 2 to 3 years	18%
Over 3 years from now	29%
Total Count = 17	

Conclusion: There is a relatively even distribution in the responses indicating that the lease durations vary by each individual business. However one quarter of leases are on a monthly basis which is very temporary.

44. Do you anticipate any problems in renewing the lease?	
Yes	No
18%	82%
Total Count = 17	

Conclusion: Need to determine if the municipality can play a role in helping to mitigate against these leasing problems.

45. Which of the following energy sources does this business A) use and B) prefer?		
	Use	Prefer
Electricity/Hydro	100%	15%
Natural gas	92%	35%
Fuel oil	75%	25%
Propane	50%	50%
Wind	0%	100%
Bio-diesel	33%	67%
Other	20%	80%

Conclusion: Currently businesses are relying on traditional energy forms, most of which are non-renewable. In the future there is a strong preference for alternative energy – wind, bio-diesel and solar. This area has to be explored to re-position Ingersoll as a “green” community and to be more attractive to new businesses that seek to be environmentally friendly, which is

the future of all commercial, corporate and industrial operations. Therefore placing Ingersoll at the beginning of this “green” wave will enable it to grow well in to the future.

46. Why don't you use the type of energy you prefer?	
Not available in this community	24%
Not available to my site	32%
Price	40%
Cost of installation	48%
Other (4 counts)	16%

Conclusion: The prime reason is the cost- particularly costly installation. Secondly it is the lack of availability of these energy types to the site or to the community. These areas have to be addressed if Ingersoll is to prosper in the future.

47. Do you have any concerns with respect to energy supply, management or efficiency?	
Yes	No
32%	68%
Total Count = 56	

48. Do you have any concerns with respect to energy supply, management or efficiency – what are your concerns with respect to your current energy supply, management or efficiency?	
Inconsistent supply/periodic brownouts	18%
Cost of energy	88%
Other	24%
Total Count = 17 (more than one response selected)	

Conclusion: A reasonably high level of businesses do have concerns related to energy. Cost is the critical factor.

49. Would your business benefit from engineering or technical support with respect to energy conservation and efficiency?	
Yes	No
29%	71%

Conclusion: Since Green Technology will be critical to Ingersoll's economic prosperity, future investigation is required as to some sort of energy technical support beyond what is currently provided by other levels of government.

1. Please provide us with some insight in to the use and importance of IT in your business by indicating which you: A) use; B) prefer of these technologies to your business.		
	use	prefer
Internet access		
Dial-up	10%	0%
High Speed: Cable	23%	22%
High Speed: DSL	52%	35%
High Speed: Wireless	33%	43%
High Speed: Satellite	2%	4%
High Speed: T1	4%	0%
Internet ready devices (blackberry)	21%	22%
On Line Applications		
Own website	59%	52%
On others websites	67%	24%
Email	100%	28%
E-commerce (online sales transactions)	35%	36%
E-commerce (online business/marketing)	35%	32%
Government reporting/payments	41%	16%
Finance & accounting	46%	28%
Customer service	33%	28%
Broadening market potential	30%	20%
Human resource management/training	33%	16%
Distribution/supplier network	43%	16%
Marketing	31%	20%
Video conferencing	11%	8%
Voice Communications		
Personal Data Application (PDA)	18%	27%
Pager(s)	5%	7%
Cellular telephones	82%	53%
Digital telephones (touch phone)	91%	53%
Voice over internet protocol	7%	13%
Other	9%	7%

Conclusion: High speed internet, email, online applications and business, cellular telephones, and digital telephones are vital to Ingersoll's businesses.

2. What, if anything, is keeping you from implementing any of these telecommunication technologies?	
Telecommunications infrastructure in community	4%
Start-up cost of service	25%
Ongoing cost of service	23%
Privacy and/or security concerns (e-commerce)	13%
Experience with telecommunication applications within the business	4%
Local training opportunities for staff	8%
Effectiveness or usefulness of the technology & potential business application unknown	11%
Have what is needed	51%
Other	11%
Total Count = 53 (more than one response selected)	

Conclusion: Generally most businesses feel they currently have the required technology. Additional costs of setting up and operating additional technology are key barriers.

3. Looking forward to the next 3 years, indicate how important each of these factors will be in ensuring that this business remains competitive.	
Top 5 factors (out of 24) are – rated very/somewhat important:	
Energy costs	87%
Availability of telecommunication services	83%
Improved customer service	83%
Market development (locally)	82%
Availability of labour	79%

Conclusion: The two key factors are distilled down to energy costs and to the availability of technology and trained labour. These identified factors must not be allowed to become barriers for competitive businesses. This is where the municipality can step in to facilitate business/organizations in having the ability to compete with minimal barriers.

4. Does the business import products or services from...:		
	Yes	No
Outside the municipality:	80%	20%
Total Count = 55		
Outside Ontario but within Canada:	64%	36%
Total Count = 55		
Outside Canada:	48%	52%
Total Count = 54		

Conclusion: Ingersoll's businesses are involved in a network of businesses that span Canada and the rest of the world. In this globalized economy, the Town of Ingersoll has to look into ways

in providing assistance so that local businesses enter or continue into a smooth transition to the global economy in order to remain competitive.

5. Do you participate in a product and/or service buyer-supplier network?	
Yes	No
27%	73%
Total Count = 56	

6. Would a product and/or service buyer-supplier network be of benefit to your business?	
Yes	No
50%	50%
Total Count = 50	

Conclusion: Most businesses are not involved in network. At this point the lack of information as to the positive benefits of such networks may be a limiting factor.

7. Is there a concentration of firms in your area that could provide complementary products or services?	
Yes	No
32%	68%
Total Count = 53	

Conclusion: Ingersoll's businesses do not participate in a buyer-supplier network despite the fact that they acknowledge the lack of availability of a local network, and the lack of understanding of the benefit of such a network. Therefore, the Town of Ingersoll can explore the possibility of playing a role in establishing a buyer-supplier network for local businesses to increase their competitiveness and longevity.

Business Development – Markets

8. Are you interested in pursuing any of the following with other businesses in your community?	
Joint product purchasing	9%
Joint marketing	35%
Collaboration/networking/information sharing	44%
Other	6%
None	44%

Conclusion: Businesses could work together more in collaboration

9. What is the approximate percentage of the business' total dollar sales in each of the following markets?		
	3 years ago	Current
Within Canada	95 %	95%
Within the U.S.	5%	5%
Europe	<1%	<1%
Asia	0%	<1%
Other	<1%	<1%

Conclusion: The Canadian market is extremely important to Ingersoll. A few businesses o market into the US. The markets have not changed during the past three years.

10. What is the approximate percentage of the business' total dollar sales in each of the following markets within Canada?		
	3 years ago	Current
Within the area	72%	74%
Outside area, but within rest of Ontario	26%	24%
Outside Ontario but within Canada	2%	2%

Conclusion: Most local businesses/organizations' target market is the surrounding region. Given the small size of Ingersoll and the resulting limit on business capacity in terms of market share, this may come as no major surprise. However, most businesses in Ingersoll do have the potential to increase their market share beyond this region. Thus the municipality should play a role in providing businesses with the support and services needed for reaching into larger markets.

11. During the past 3 years, what has been your total dollar sales trend at this location?	
Increased	53%
Decreased	21%
Uneven sales pattern	13%
Same/no significant change	13%
Total Count = 53	

Conclusion: During the past 3 years, the majority of Ingersoll's businesses have seen growth and expansion. This bodes well for Ingersoll's economic future.

12. What are your expectations for next year's total dollar sales compared to last year?	
Higher	59%
Lower	19%
Same	17%
Not sure	6%
Total Count = 54	

Conclusion: Most businesses are optimistic about their revenue for next year. This survey was conducted during the current economic downturn. Therefore the positive response of Ingersoll's businesses is extremely encouraging for the ongoing stability of the community; and proves that businesses in Ingersoll are based on sound business principles and operations.

13. Is the competition in your market?	
Increasing	53%
Decreasing	9%
Staying the same	38%
Total Count = 55	

14. Is your market share?	
Increasing	38%
Decreasing	16%
Staying the same	45%
Total Count = 55	

Conclusion: Overall, the businesses market share has remained the same while their competition has increased. Businesses will need to be more competitive in order to increase their market share – the municipality can find ways to assist businesses in this process.

Business Development - Finance

15. Within the past 3 years, please identify financial/lending sources you have A) investigated; B) secured; C) currently use for operations; and D) use for expansion?				
	Investigated	Secured	Use for Operations	Use for expansions
Bank	49%	57%	89%	38%
Trust Company	71%	29%	57%	14%
Credit Union	100%	33%	17%	17%
Community Futures Development Corporation	100%	0%	0%	0%
Business Development Bank of Canada	90%	50%	40%	30%
Private	44%	33%	78%	22%
Venture Capitalists	100%	0%	0%	0%
Other	33%	67%	67%	0%

Conclusion: Banks are the primary source of financing for Ingersoll's businesses. Therefore the credit provided by banks must be maintained for the continued operations of Ingersoll's businesses. As with communities across Canada, the current credit crisis could have a lasting impact on Ingersoll.

16. How far in advance do you plan your financial performance?	
Not At All	9%
Daily	6%
Weekly	8%
Monthly	17%
Quarterly	8%
Yearly	40%
2 Years	9%
3 Years	4%
4 Years	0%
5 Years	0%
Total Count = 53	

17. How often do you review your financial plan against your actual performance?	
Not At All	11%
Daily	13%
Weekly	15%
Monthly	28%
Quarterly	15%
Yearly	17%
2 Years	0%
3 Years	0%
4 Years	0%
5 Years	0%
Total Count = 53	

Conclusion: The municipality should encourage a higher level of financial planning and monitoring among local businesses

Workforce Development

18. During the past 3 years, has the number of employees in this business increased, decreased or stayed the same?	
# of Employees	%
Increased	35%
Decreased	13%
Remain the same	50%
Don't know	2%
Total Count = 54	

Conclusion: Overall the business environment of Ingersoll has been strong during the past three years. More than a third of the businesses reported growth in their operations; while half remained the same. This is a significant positive note for Ingersoll's economy.

19. During the past 3 years, has the number of employees in this business increased, decreased or stayed the same – what factors are responsible for this change?	
Factors	%
Business did not exist before	8%
Technological changes in your business	4%
Increase or decrease in market competition	12%
Management effectiveness	12%
Corporate decision or policies	4%
More or less subcontracting	12%
Renovation or expansion	19%
Increase or decrease in sales	69%
New products or services introduced	42%
Entered new market	4%
Increase or decrease in market share	58%
Contracts/outourcing	8%
Other	15%
Total count = 26	

Conclusion: Employee growth of Ingersoll's businesses has been driven by more sales and by bigger market share, due to new products and services being introduced into the market. This means that Ingersoll consists of a positive and intentional business sector for which support must be continued to be provided.

20. During the next 3 years, do you think the number of employees in this business will increase, decrease or stay the same?	
# of Employees	%
Increase	46%
Decrease	4%
Remain the same	44%
Don't know	6%
Total Count = 54	

Conclusion: Ingersoll's businesses expressed a positive outlook for employment generation over the next three years. Therefore it is important that the municipality and other business development organizations maintain and enhance support and service so that job creation can be sustained in the future.

21. During the next 3 years, do you think the number of employees in this business will increase, decrease or stay the same - what factors are responsible for this change?	
Factors	%
Technological changes in your business	22%
Increase or decrease in market competition	48%
Management effectiveness	26%
Corporate decision or policies	11%
More or less subcontracting	7%
Renovation or expansion	26%
Increase or decrease in sales	78%
New products or services introduced	59%
Entered new market	11%
Increase or decrease in market share	56%
Contracts/outsourcing	11%
Other	4%
Total Count = 27	

Conclusion: Ingersoll's businesses look to continue to build on their strengths related to increased market share, increased sales and to the introduction of new products and services.

22. How do you rate the availability of workers in this area for your business needs?	
Excellent	8%
Good	53%
Fair	25%
Poor	15%
Total Count = 53	

23. How do you rate the quality of the workforce in this area for your business needs?	
Excellent	6%
Good	59%
Fair	27%
Poor	8%
Total Count = 51	

24. How do you rate the stability of the workforce in this area for your business needs?	
Excellent	8%
Good	59%
Fair	25%
Poor	8%
Total Count = 51	

Key Conclusions:

- i. 61% of the 53 businesses and organizations that responded rated the availability of workers in Ingersoll as either excellent (8%) or good (53%). 39% expressed the need for improvement in this area- 24% rated it as fair and 15% rated it as poor.
- ii. Of the 51 businesses and organizations that responded to the quality of the workforce in the area, 65 % appeared satisfied- with a 6% rating as excellent, and a 59% rating as good. 35% expressed the need for improvement in this area- 27% rating as fair and 8% rating as poor.
- iii. Of the 51 businesses and organizations that responded on the stability of the workforce, 67 % appeared satisfied- with an 8% rating as excellent, and a 59% rating as good. 35% expressed the need for improvement in this area- 5% rating as fair and 8% rating as poor.

The overall conclusion is a favourable attitude towards labour with a similar positive attitude amongst the three categories. Although the bigger picture indicates that Ingersoll’s workforce is an asset, more can be done to convert the “good” responses to “excellent” and the “fair” responses to “good” or “excellent.” This will ensure that businesses have access to a stable and well trained, reliable workforce in Ingersoll, which will enhance our community as a place in which to do business.

25. What are the A) current and B) 3-year projected employee needs of your business?	
Employment Needs	%
Skilled trades	53%
Unskilled labour	38%
Industry specialists	4%
Manufacturing technology	2%
Computer technology/programming	9%
Environmental technology/management	2%
Electronic engineering	0%
Clerical	19%
Sales	34%
Business Administration	13%
Product development	4%
Market development	1%
Other	15%
Apprenticeship	19%
None	2%
Total Count = 47	

Conclusion: There is a significant demand for skilled trades. Other labour demands include sales, clerical, and business administration. The municipality together with the community, post-secondary institutions, employment resource agencies and the local businesses need to collaborate to address the primary demand for skilled labour so that local business requirements can be met from within Ingersoll instead of sourcing labour from out of the town/county.

26. Are you able to recruit sufficient qualified employees for this location?	
Yes	No
68%	32%
Total count = 50	

27. Are the recruitment problems limited to:	
Community	80%
Industry sector	80%
Total Count = 15	

Conclusion: Although most businesses and organizations were able to recruit qualified employees there are a notable number of respondents unable to do so. These respondents had recruitment problems in the community, in addition to their industry sector. The Town of Ingersoll can work in partnership to alleviate these employee recruitment problems and to ensure that Ingersoll can provide the needed qualified employees for these businesses and organizations.

28. Does this business have difficulty retaining employees?	
Yes	No
16%	84%
29. What are the reasons for these difficulties?	
Reasons	%
Wages	50%
Competition	38%
Seasonal	13%
Other	50%

Conclusion: A majority of the businesses did not have problems in retaining their employees. For those businesses that did have retention problems, it appears due to the market externalities beyond the control of the municipality. Therefore businesses and organization in Ingersoll experience a stable workforce; and at the same time Ingersoll as a community offers a stable and reliable workforce in general.

30. Workforce – does your workforce need to improve skills in any of the following areas?	
<i>The top 4 (out of 20) skills identified are:</i>	
Customer service	YES = 42%
Computer software	YES = 33%
Sales & Marketing	YES = 33%
Oral communications	YES = 32%

Conclusion: Customer service, communications, sales, and computer literacy are noted as the key skills that employees need to improve. The municipality can assist these businesses and organizations to improve workforce skills by partnering with local training/educational institutions and/or post-secondary institutions in the area. Also this training can be offered through distance education in order to reduce lost time during training of the workforce.

31. Where do your employees receive training, and does this training meet your needs?			
	Location of Training	Training meets Needs	
		Yes	No
Local Community College	41%	86%	14%
Distance Education	16%	100%	0%
In-house	82%	95%	5%
Customized training	41%	86%	14%
University	22%	90%	10%
Outside of the area	14%	100%	0%
Other	10%	100%	0%

Conclusion: The majority of the businesses and organizations train their employees in-house and to their level of requirements. Therefore any training to be offered with the assistance of the municipality should be preferably offered within the businesses. Hence distance education may be a suitable method of delivery. Local community colleges also are seen as a positive and effective option.

32. What are the most significant barriers to your employees receiving the necessary training?	
Significant Barriers	%
Cost	46%
Awareness of existing training programs	23%
Awareness of training support programs	15%
Relevant training is not offered at community college	21%
Distance to training facility	26%
Availability of training locally	33%
Unable to release employees	23%
Losing trained employees to other businesses	23%
Awareness of legislated training	3%
Loss of productivity during training period	36%
Other	8%
Total Count = 39 (more than one response selected)	

Conclusion: Employers noted the key barriers included cost, lost productivity during training, and access to training. All three barriers can be addressed by providing local training, by in-house training or by distance education. This will reduce cost, travel time, and lost time. Hence the key barriers can be mitigated through this method.

33. Would a mentoring program benefit the businesses in this community? This would involve meeting and working with other businesses as a way of sharing and learning new skills.		
Yes	No	Not sure
44%	40%	15%
Total Count = 52		

Conclusion: The overall response is mixed; and therefore the need for such a program will have to be explored further. Potential needs for mentoring include marketing, human resources and technical.

34. Would your business benefit from a mentoring program in any one of the following areas?	
Business planning	38%
Marketing	62%
Financial	38%
Technical	43%
Human Resources	48%
Production	38%
Logistics (distribution)	10%
Other	10%
Total Count = 26 (more than one response selected)	

Local Community

35. As far as you know, does the local community have an economic development plan?		
Yes	No	Don't know
63%	5%	32%
Total Count = 56		

36. As far as you know, does the local community have an economic development plan - As far as you are concerned, is this plan being effectively implemented?		
Yes	No	Don't know
41%	26%	32%
Total Count = 34		

Conclusion: Almost two thirds of the respondents were aware of the local economic plan. Overall this is a positive level of awareness. Of those aware of the plan, 41 % felt it was being effectively implemented while 32 % did not know. It appears that the Town needs to communicate the results of the plan in a more effective manner.

37. In your opinion, does the local municipality take an adequate role in business and economic development in this community?		
Yes	No	Unaware of what is being done
48%	25%	27%
Total Count = 56		

Conclusion: Almost half of the respondents viewed the economic development office in a positive light. On the other hand, 27% were not aware of what is being done. Overall the municipal efforts are being recognized. More attention to communication is needed by the municipality.

38. Using a scale of excellent, good, fair and poor how would you rate the following factors in doing business in this community?				
	Excellent	Good	Fair	Poor
Availability of skilled labour	6%	55%	33%	6%
Labour costs	0%	56%	28%	16%
Transportation costs	2%	53%	29%	16%
Availability of transportation	20%	45%	14%	20%
Availability of appropriately zoned land	5%	27%	38%	30%
Land costs	8%	23%	58%	13%
Cost of construction	0%	39%	55%	6%

Cost of leasing space	3%	44%	31%	22%
Local permit process	10%	55%	25%	10%
Availability of utilities	27%	60%	10%	2%
Access to markets/customers/clients	24%	65%	10%	0%
Access to suppliers	17%	52%	22%	9%
Municipal taxes	0%	23%	42%	35%
Quality of life	33%	60%	4%	4%
Water and sewer capacity	18%	66%	14%	2%
Development charges	4%	39%	25%	32%
Support from municipality	14%	43%	27%	16%
Support from local business	19%	57%	19%	6%
Support from local residents	33%	52%	11%	4%
Municipal by-laws	15%	55%	25%	5%
Telecommunications infrastructure capacity	20%	51%	22%	6%
Size of local market	9%	49%	28%	15%
Access to research and development	3%	65%	26%	6%
Access to training facilities	8%	43%	33%	18%

Conclusion:

The top five factors in Ingersoll are:

1. Quality of life = 93% reported either excellent or good
2. Access to markets/customers/clients = 89% reported either excellent or good
3. Availability of utilities = 87% reported either excellent or good
4. Water and sewer capacity = 84% reported either excellent or good
5. Support from local businesses = 76% reported either excellent or good

Overall Conclusion: Ingersoll is a community that is strong on social capital, has good infrastructural services and is in a great location.

ii. The bottom five factors in Ingersoll are:

1. Municipal taxes = 77% reported either fair or poor
2. Land costs = 69% reported either fair or poor
3. Availability of appropriately zoned land = 68% reported either fair or poor
4. Cost of construction = 61% reported either fair or poor
5. Development charges = 57% reported either fair or poor

Conclusion: These negative factors are related to costs and taxes. This may be a perception and an adversity to costs generally and not be specific to Ingersoll. It is believed that a comparison study will prove that Ingersoll is competitive with other similar communities.

39. Please describe how local business associations and/or economic development offices could assist your business sector.	
Marketing seminars	50%
Access to capital seminars	23%
Trade shows	38%
Business networking sessions	54%
Export development programs and services	10%
Joint advertising and marketing	58%
Attraction of related supply & services businesses	33%
Workforce planning, employee training and attraction	25%
Identification of opportunities for shared use of buildings, infrastructure etc.	35%
Productivity improvement workshops	35%
Website development	54%
E-marketing	42%
Other	10%
Total Count = 48	

Conclusion: The suggested key areas of needed support include: joint marketing, website development, business networking and marketing seminars.

Farm/Agriculture

40. Which of the following best describes your farm/agriculture business?	
Response	Percent
Livestock and/or crop production only	50%
On-farm production and processing	50%
On-farm production, processing and retailing	0%
Total Count = 2	

41. Are you interested in expanding and diversifying your business to include value-added processing?	
Response	Percent
Yes	0%
No	100%
Total Count = 1	

42. How do you currently market your product (primary and/or processed)?	
Response	Percent
Direct to processor	50%
Ontario Food Terminal/brokers	0%
Direct to regulated marketing board or agency	0%
Farmer's market	0%
At the farm-gate	0%
To local retailers (including restaurant)	0%
Other: Specific sales associations	50%
Total Count = 2	

43. How do you currently market your product (primary and/or processed)?	
Response	Percent
Direct to processor	50%
Ontario Food Terminal/brokers	0%
Direct to regulated marketing board or agency	0%
Farmer's market	0%
At the farm-gate	0%
To local retailers (including restaurant)	0%
Other (Specify):	50%
Total Count = 2	

44. How could the market potential of your agricultural product(s) be enhanced?	
Response	Percent
Increased co-operative marketing	0%
Improved transportation	0%
Develop export opportunities	0%
Direct marketing to consumer	0%
Product quality/safety assurance programs	50%
Additional local processing or value-added opportunities	0%
Access to distribution channels/networks	0%
Access to a local abattoir	0%
New or different role for marketing boards or agencies (Specify):	0%
Other (Specify):	50%
Total Count = 2	

45. What are your plans for your farm operation within the next 3 years?	
Response	Percent
Maintain the current size and type of production	50%
Expand the scale of the existing business (increase acreage and/or livestock numbers)	0%
Diversify (new crops/livestock) on existing acreage	50%
Diversify (new crops/livestock) on increased acreage	0%
Downsize	0%
Exit the industry by transferring the business to a new owner	0%
Total Count = 2	

46. What barriers to the expansion of your farm operation are you experiencing?	
Response	Percent
Access to land (leased or purchase)	0%
Land rental rates	0%
Land costs	0%
Access to capital	50%
Uncertain markets	50%
Low commodity prices	50%
Deadstock disposal facilities	0%
Custom operators	0%
Access to information	0%
Access to processing services	0%
Securing necessary farm services (Specify):	0%
Other (Specify):	0%
Total Count = 2	

47. During the past 3 years has your farm operation's financial situation changed?	
Response	Percent
Improved	50%
Stayed the same	0%
Deteriorated	50%
Total Count = 2	

48. During the next 3 years do you expect your farm operation's financial situation to...	
Response	Percent
Improve	100%
Stay the same	0%
Deteriorate	0%
Total Count = 2	

49. Do you expect to sell or transfer some or all of your farm assets within...	
Response	Percent
1 to 5 years	0%
6 to 10 years	50%
11 to 15 years	0%
15+ years	0%
Don't know	0%
Don't expect to sell/transfer	50%
Total Count = 2	

50. Using the scale provided, rank the following factors according to their priority for agriculture businesses in your community.					
	Very Important	Somewhat Important	Not Very Important	Not At All Important	Not Applicable
Restrictive residential lot severance policy	0	0	0	50%	50%
Minimum Distance Separation for new or expanding farms and homes	50%	0	0	0	50%
Road maintenance	50%	0	0	0	50%
Snow removal	50%	0	0	0	50%
Fencing	100%	0	0	0	0
Drainage	50%	0	0	0	50%
Nutrient Management Regulations	50%	0	0	50%	0
Tree cutting by-law	0	0	0	50%	50%
Conflicts with non-farm residents	0	0	0	0	100%
Services to rural property owners (i.e. piped water, gas, garbage collection)	50%	0	0	50%	0
Agricultural Economic Impact Studies	0	50%	0	0	50%
Livestock Medicine Certification	0	0	0	0	100%
Pesticide Safety Certification	0	50%	0	0	50%
Veterinary services	50%	0	0	0	50%
Processing/marketing facilities	50%	0	0	0	50%
Irrigation	0	0	0	50%	50%
Water Taking Permits	0	0	0	50%	50%
Access to local abattoir	0	0	0	0	100%
Other	0	0	0	0	0
Total Count = 2					

51. Using the scale provided, indicate how important the following factors are to your operation					
	Very Important	Somewhat Important	Not Very Important	Not At All Important	Not Applicable
Availability of production/management information	50%	0	0	50%	0
Assistance with financial management	50%	50%	0	0	0
Sourcing of capital	50%	0	0	50%	0
Labour availability	50%	50%	0	0	0
Adopting latest technology	50%	0	50%	0	0
Environment responsibility	50%	0	50%	0	0
Nutrient Management Plans	0	0	50%	0	50%
Environment Farm Plans	0	0	50%	0	50%
Total Count = 2					
52. In what ways could local government assist agricultural businesses in your area?					
Response					Percent
Streamlining of local regulatory and permitting processes (e.g. building permits, zoning changes, etc.)					50%
Review of taxes and fees					50%
Infrastructure maintenance and improvement (roads, telecommunications, energy supply, services, etc.)					50%
Database of available local farm labour					50%
Other (Specify):					0%

53. During the next 12 months, how critical will each of the following factors be to your farm business?					
	Very Critical	Somewhat Critical	Not Very Critical	Not At All Critical	Not Applicable
Commodity prices	50%	50%	0	0	0
Land use issues	50%	0	0	0	50%
Overall cost of doing business	100%	0	0	0	0
Securing financing for operations	50%	0	50%	0	0
Securing financing for expansion	50%	0	0	50%	0
Public concern/awareness of industry	50%	50%	0	0	0
International competition	50%	50%	0	0	0
Technological changes	50%	0	50%	0	0
Availability of labour	50%	0	50%	0	0
Total Count = 2					

54. Do you have adequate access to the following agri-business advisory services?			
	Yes	No	Not Applicable
Crop production advisory services	0	0	100%
Livestock production advisory services	0	0	100%
Financial management consultants	50%	50%	0
Nutrient management consultants	50%	0	50%
Human resource consultants	50%	0	50%
Tax management consultant	100%	0	0
Market development/export consultants	0	0	100%
Food industry consultants	50%	0	50%
Other	0	0	0
Total Count = 2			

Conclusion: Very few respondents addressed the agricultural sector. It is difficult to determine accurate trends based on only two responses. It appears that this sector has really declined in importance related to Ingersoll.

Manufacturing

55. What are your A) current and B) projected plans regarding the plan operation?		
	Current	Projected in 3 Years
Maintain the current size and type of production	100%	0
Expand the size of plant and diversify products	75%	75%
Maintain current size, but diversify products	75%	100%
Downsize	0	0
Exit the industry by transferring the business to another owner	0	0

Conclusion: In the future, manufacturing plants are expected to diversify products.

56. Do you compete for business against “sister” plants within your corporate organization?	
Yes	No
29%	71%
Total Count = 7	

57. Are these “sister” plant(s)...?	
Newer	50%
Larger	100%
More efficient	50%
About the same/little difference	50%
In Ontario	50%
In Canada	50%
Outside of Canada	50%
Total Count = 2	

58. Where is your A) primary and B) secondary product in its life cycle?		
	Primary	Secondary
Emerging	50%	50%
Growing	100%	75%
Maturing	100%	0
Declining	0	0

59. What percentage of your products' components are outsourced from another manufacturer?	
Response	Percent
0 - 10%	43%
11 - 25%	29%
26 - 50%	0%
50% +	29%
Total Count = 7	

60. What percentage of your products' components are outsourced from another manufacturer - From what areas do you primarily outsource products?	
Response	Percent
Within Canada	83%
USA	50%
Japan	0%
Europe	0%
China	17%
Australia	0%
India	0%
Other (Specify):	0%

Conclusion: Generally Ingersoll manufactures make a good percentage of their own components.

61. Is there a new technology emerging that will change your primary product or how it is produced?	
Response	Percent
Yes	57%
No	43%
Total Count = 7	

62. In which of the following will new technology play a key role?	
Response	Percent
Production/Manufacturing Innovation	75%
Product/Service Innovation	25%
Telecommunications/Internet	0%
Computer Software/Information Technology	0%
Distribution/Inventory Innovation	0%
Confidential	25%
Other (Specify):	0%

Conclusion: Emerging technology will be most important in production manufacturing.

63. As a percent of sales, how much does the company spend on research and development (R&D)?	
Response	Percent
0%	14%
Under 3%	29%
3% - 6%	14%
Over 6%	43%
Total Count = 7	

Conclusion: The municipality will need to encourage R+D spending within all manufacturers.

64. As a percent of sales, how much does the company spend on research and development (R&D) - Do you conduct R&D at:	
Response	Percent
This location	100%
Head office	0%
Other branch location	0%
Other (Specify):	0%

65. As a percentage, how was the R&D budget divided among the following categories A) 3 years ago; B) today and C) what are your projections for 3 years in the future:			
	3 Years Ago	Today	3 Years in The Future
New product development	64%	54%	58%
Product improvement	21%	26%	25%
Production improvement	15%	20%	17%

66. Do you require R&D assistance in any one of the following areas?		
	Yes	No
New product development	33%	67%
Product improvement	33%	67%
Production improvement	33%	67%
Other	50%	50%

67. Are any of the following factors barriers to your business undertaking R&D?		
	Yes	No
Financing	43%	57%
Proto type development	14%	86%
Expertise	14%	86%
Human Resources	29%	71%
Other	0	100%

Conclusion: The two key barriers restricting R+D include financing and human resources. The municipality should conduct an investigation to reduce these barriers.

68. Is your business focused on implementing any of the following process improvements?		
	Yes	No
Productivity improvement (lean mfg.)	71%	29%
Six sigma & quality	33%	67%
Energy efficiency	40%	60%
Waste product recovery	43%	57%
Health & safety activities	57%	43%
Administrative support toward ISO Certification	57%	43%
Vendor/supplier network for continuous product improvement	86%	14%
Other	0	0

Conclusions: Need to determine if the municipality can help encourage business networks, productivity improvement, health and safety, and ISO Certification.

69. Is your manufacturing process currently certified?		
	Yes	No
Quality certifications	60%	40%
HACCP	0	100%
ISO	57%	43%
Other	50%	50%

70. Is your plant equipment:		
	Yes	No
At capacity	50%	50%
Underutilized	60%	40%
Out-dated	0	100%

71. If your plant or equipment is underutilized, are you interested in cooperating with another business to bring the plant or equipment to full capacity?	
Yes	No
100%	0
Total Count = 3	

Conclusion: The municipality should look into a facilitation role of helping businesses cooperate in sharing underutilized equipment.

72. Is your manufacturing firm a...	
Response	Percent
Potential exporter	43%
First time exporter	0%
Single market exporter	14%
Multi-market exporter	43%
Total Count = 7	

73. Looking forward to the next 3 years, how important will the development of export markets be in ensuring that your business remains competitive?	
Response	Percent
Very Important	43%
Somewhat Important	43%
Not very Important	14%
Not at all Important	0%
Total Count = 7	

Conclusions: The municipality needs to work with other levels of government to help / encourage manufacturers to investigate expansion of their export markets.

74. A number of government programs and services are available to help your business succeed in the global market place. Would you like information on any of the following services?		
	Yes	No
General export information	0	100%
Export training and skills development	0	100%
Export counselling	0	100%
Market entry support	33%	67%
Export financing	33%	67%
In-market assistance	33%	67%
Accessing information on provincial and/or federal export support programs	33%	67%
Exporting marketing plans	17%	83%
Export pricing	17%	83%
Export documentation	33%	67%
Customs clearance	50%	50%
Legal requirements	33%	67%
Banking considerations	33%	67%
Regulatory compliance	33%	67%
Warehouse distribution	0	100%
Product promotion	33%	67%
Other	0	100%

Conclusion: Manufactures are interested in a wide range of global exporting supports and services. The town will need to determine and implement its role in helping to disseminate market intelligence.

Retail/Service Business

75. Are you located in an identifiable commercial district?	
Yes	No
79%	21%
Total Count = 43	

76. Are you located in...	
Response	Percent
Downtown	79%
Highway/commercial strip plaza	6%
Regional shopping mall	0%
Other principle shopping street	6%
Power centre/big box new format retail	0%
Tourist area/destination	0%
Neighbourhood commercial	6%
Industrial Park	3%

Conclusion: Most retail businesses are located in the downtown.

77. Is there a strategy or plan in place for promoting and managing your commercial district?		
Yes	No	Don't know
41%	20%	39%
Total Count = 41		

78. If yes, please respond yes or no to the following statements about the Retail strategy or Plan:			
	Yes	No	Don't Know
It identifies the issues important to the future of my business	56%	13%	31%
It proposes actions to address those issues	56%	13%	31%
It is being effectively implemented	56%	13%	31%
It is a comprehensive and integrated plan i.e. addressing heritage, cultural aspects, social and economic etc.	69%	6%	25%
The plan is primarily focused on retail marketing and promotion	81%	0%	19%
Total Count = 16			

Conclusion: The majority of commercial businesses are aware of the commercial strategy (which is for the downtown). Overall there seems to be good support that this strategy is

effective. The Municipality needs to continue to monitor and evaluate this strategy and communicate the results to the commercial businesses.

79. Is there an organization or group that represents the interests of your commercial district?	
Response	Percent
Business Improvement Area Association	69%
Development Corporation or Board of Management	0%
Chamber of Commerce	79%
Committee of Council	0%
Ratepayers Association	0%
Other (Specify):	10%

80. Using the scale provided, please rate the condition of your commercial district for each factor.				
	Excellent	Good	Fair	Needs Improving
Physical Setting				
Street furniture (lights, benches, waste containers)	32%	50%	8%	11%
Public amenities (parks, fountains, washrooms)	28%	53%	11%	8%
Plantings, trees, flower boxes	34%	54%	6%	6%
Graffiti and litter	24%	35%	22%	19%
Transportation				
Sidewalks, pedestrian environment	29%	55%	8%	8%
Traffic flow on streets in the area	14%	57%	19%	11%
Adequacy of public transit	0%	21%	8%	71%
Accessibility for people with disabilities	5%	58%	16%	21%
Parking				
# of parking spots/facilities	21%	39%	16%	24%
Parking signage	14%	51%	11%	24%
Fees, enforcement	20%	43%	14%	23%
Gateways/Entrances				
Highway signage/tourism directional signs	11%	56%	17%	17%
Roadside advertising	6%	49%	29%	17%
Visual identity of the area – unifying banners	9%	46%	17%	29%
Storefronts				
Exterior appearance of facades	3%	27%	32%	38%
Window displays	0%	51%	23%	26%
Signage	5%	46%	19%	30%
Other Issues/Social Conditions				
Vagrancy/homelessness/panhandling	18%	54%	18%	11%
Vandalism	5%	26%	42%	26%
Public safety services – e.g. lightning, security, police presence, etc.	18%	47%	18%	16%
Conditions of the housing stock	3%	68%	24%	6%

Competitive Position				
Appropriate mix of businesses	14%	44%	28%	14%
Appropriate range of quality/price for target markets	6%	69%	19%	6%
Number of vacancies/turnover	6%	21%	41%	32%
Joint Marketing/Promotion				
Organization of special events	29%	63%	6%	3%
Uniform hours of operation	3%	51%	20%	26%
Customer service programs	0%	38%	33%	29%
Advertising campaigns	3%	50%	17%	30%

Conclusion: The commercial core's top strengths include: the physical environment, public amenities, plantings, sidewalks, commercial mix and well organized special events. The top weaknesses include: public transit, commercial storefronts, lack of customer service programs, vandalism, vacancies, and window displays.

81. Would your business benefit from any of the following programs or services?		
	Yes	No
Store design and layout assistance	38%	63%
Networking events	74%	26%
Cooperative advertising/joint marketing	61%	39%
Building improvement loan/grant programs	66%	34%
Sign improvement loan/grant programs	54%	46%
Physical improvements in public areas (benches, lighting etc.)	44%	56%
Business directories, brochures, maps	66%	34%
Mentorship programs – business to business counselling	52%	48%
Analysis and reporting on the downtown market/economy	75%	25%
Retail and special event coordination	64%	36%
Customer service training	65%	35%
Marketing on the web	74%	26%
Training in financial management & product pricing	40%	60%
Succession planning	52%	48%
Improved telecommunications infrastructure (internet access, debit machines etc.)	45%	55%
Other: garbage dumping monitoring	67%	33%

Conclusion: The municipalities should investigate provision of the following activities for the commercial sector: downtown market analysis, networking events, web-based marketing, business brochures & directories, customer service training, and retail & special event coordination.

82. What are your top 3 suggestions for improving the retail business environment?	
Response	Percent
Repair or remove "eyesore" buildings	85%
More and better festivals and events	10%
More niche market specialty shops	21%
More restaurants and entertainment facilities	41%
More hotels/accommodations	5%
More and better signage	15%
Improved streetscape	8%
Uniform store hours	15%
Extended store hours	10%
Improved parking	15%
Focused downtown revitalization strategy	33%
Financial support to improve store front facades	21%
Retail gap analysis and recruitment program	13%
Other (Specify):	0%

Conclusion: The top three suggestions include: repair eyesore buildings, attract more restaurants and entertainment facilities, and implement focussed downtown strategy.

83. In order for your business to be more competitive, A) what retail skills would you like to see improved and B) would you participate in workshops to address any of the following issues?		
	Area to Improve	Would Attend Workshop
Retaining existing or attracting new customers	86%	86%
Assessing new technologies	89%	78%
Staff training and development	80%	100%
Visual merchandising	92%	77%
Product pricing	100%	50%
Financial management	82%	82%
Marketing	94%	81%
Evaluating market opportunities	94%	81%
Dealing with the competition	91%	73%
Customer service training	94%	100%
Other	0	0
More than one response selected		

Conclusion: The commercial organizations should investigate holding workshops on staff development, customer service, customer development, and financial management.

84. Are any of the following costs of operation a serious concern to the success of your business?		
	Yes	No
Business & property tax structure	66%	34%
Rents and lease costs of buildings	28%	72%
Cost and availability of full-time employees	53%	47%
Cost and availability of part-time employees	33%	67%
Insurance	47%	53%
Cost of utilities	54%	46%
Other	50%	50%

Conclusion: Costs related to taxes and utilities are a serious concern to the viability of commercial businesses.

85. What four community assets would you most like to see developed in your community?	
Response	Percent
Walking & bike trails	65%
Public parking	38%
Parks and/or green space	38%
Public cultural facilities - libraries, museums, entertainment centres	50%
Sports or recreation facilities	35%
Farmer's market	30%
Waterfront access marinas, boat landings	8%
Public washrooms conveniently located in the downtown	30%
Directional signs	20%
Other (Specify):	18%

Conclusion: Support exists for improving the following community assets: walking and bike trails, public cultural facilities, public parking, and more green space.