
Ongoing Survey Program: Retention Expansion & Youth

City of Kawartha
Lakes

Economic Development
Division

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1.0 Introduction

Business Retention and Expansion (BR+E) Surveys are a locally lead tool used in the field of economic development to better understand the business community. It provides a structured approach to ensure that all information is collected in a standardized process. This enables the data to be interpreted over time to see changes in the business community.

The City of Kawartha Lakes started the Ongoing Survey Program: Retention, Expansion & Youth (OSPREY) in October of 2017. This survey is an abridged version of the award winning Ontario BR+E program.

City staff engaged in the survey with the following short and long-term goals in mind:

Short-Term Goals

- Begin the process of building and improving relationships with existing businesses
- Identify the positive and challenging attributes of the community as a place to do business
- Identify and address immediate concerns and issues of individual businesses through an assessment and referral process
- Collect business and market data to support economic development planning
- Establish and implement a strategic action plan to support existing businesses

Long-Term Goals

- Increase the competitiveness of existing businesses
- Enable business development, investment and job creation
- Foster and enhance the environment for business development

2.0 The Survey

The project was led and coordinated by staff in the Economic Development Division. Businesses were identified for survey participation in a variety of ways including: regional selection (e.g. Pontypool and Lindsay Business Parks, smaller communities); referral (e.g. young entrepreneurs); and, targeted selection (e.g. large employers). Of the 40 businesses contact, 38 participated in the program. Many of the businesses declined due to lack of time on the part of the owners.

With the aim of increasing uptake in the OSPREY, the Economic Development Division condensed the Provincial template to make it more accommodating of local business owners' busy schedules.

Information was gathered under the following themes: General business information; Company Basics; Business Environment; Doing business in Kawartha Lakes; Youth; and, additional information. The list of questions is summarized in Appendix A.

Surveys were conducted by staff in the Economic Development Division across Kawartha Lakes. Surveys were conducted in person, with as many as three participants from the municipality attending the session. Survey results are confidential to help ensure the openness of discussion.

The population in Kawartha Lakes has an aging population. Its median and average ages are 8.4 years and 5.1 years above the provincial rates respectively. The Economic Development Division has an interest in understanding why young entrepreneurs started their businesses here in the hopes of creating a framework to attract more young and dynamic entrepreneurs to the municipality. Throughout this survey process, we spoke to 8 young entrepreneurs under the age of 35.

A draft of this this report has been sent to participants in the OSPREY program. Their comments have been incorporated where possible in the final document.

This survey is the first in a series of annual BRE programs. It is anticipated that the municipality will engage in sectorial surveys moving forward including tourism, agriculture and cultural industries. Staff from the Economic Development Division are in the planning phase for a Tourism survey in 2017/2018.

3.0 Executive Summary

The Economic Development Division is pleased to present the 2017 Ongoing Survey Program: Retention Expansion & Youth (OSPREY) report. Staff met with a total of 38 businesses across much of the City of Kawartha Lakes. This report identifies two types of information, results and trends. Results classify information in terms of hard facts and numbers whereas trends are an interpretation of conversations where common themes were identified. Some of the trends include:

Businesses are optimistic about the outlook of their businesses in Kawartha Lakes. The municipality ranked high as a place to run a business, and there is a belief that the municipality continues to improve or hold as a good/average place to do business.

Future business growth in the City of Kawartha Lakes will likely come from an expanded market. It is important that the municipality does a better job of supporting our business community as they expand. Further, it is important that the City of Kawartha Lakes continues to attract young and dynamic, employees and entrepreneurs. This will be done by upping the current investment marketing offering.

Businesses in Kawartha Lakes are looking for greater opportunities to partner with one another. There is an opportunity for the City to play a role in the facilitation of partnerships.

Potential actions are identified under each of trend sections. The potential actions from across the document have been consolidated at the end of the document. This list of potential actions will be contemplated in addition to background research, economic analysis, community surveys and consultations with key stake holders as part of the 2017 Economic Development Strategic Plan.

4.0 Results

4.1 Total results

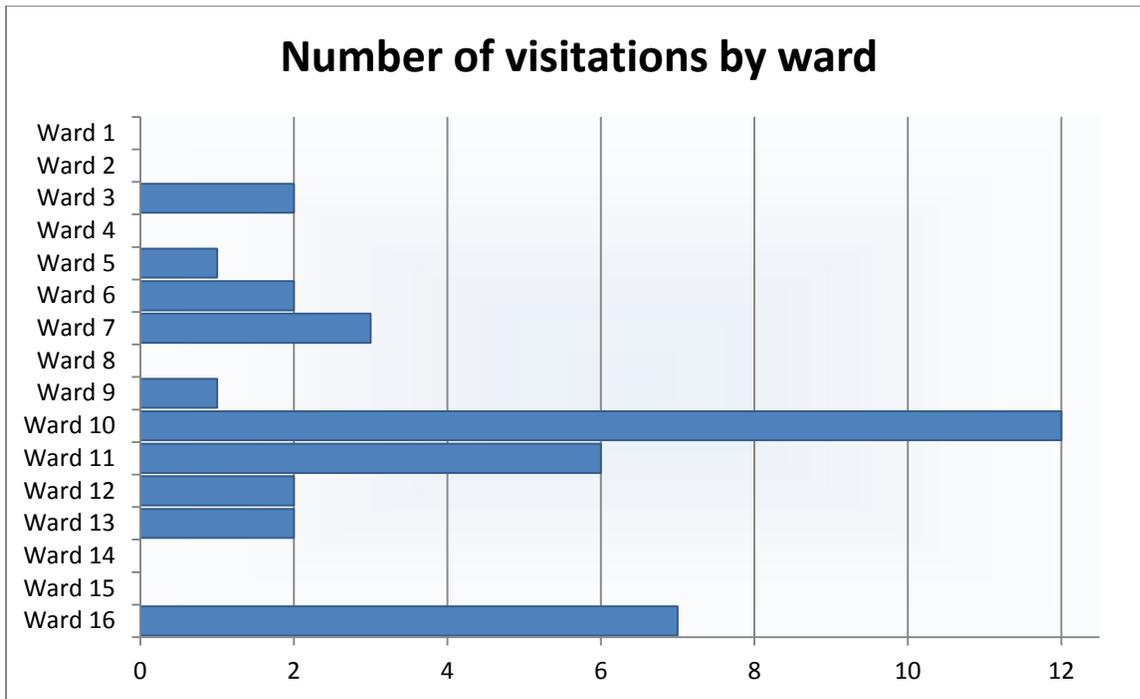
Staff met with a total of 38 businesses, of which 8 were identified as young entrepreneurs. Businesses in Canada are classified under the North American Industry Classification System (NAICS). NAICS classifies businesses based on a 6 digit system. In short, the more digits are used, the more specified the business classification. Breaking down our visitations in the most basic fashion, staff surveyed the following industries:

Table 1: Industries surveyed

Industry Sector	# of businesses
Manufacturing	16
Accommodation and food services	4
Retail trade	4
Construction	3
Wholesale trade	3
Other services (except public administration)	2
Professional, scientific and technical services	2
Administrative and support, waste management and remediation services	1
Arts, entertainment and recreation	1
Transportation and warehousing	1
TOTAL	38

Staff attempted to meet with businesses from all across the City of Kawartha Lakes. The table below outlines the number of businesses staff met with per ward:

Figure 1: Number of visitations by ward

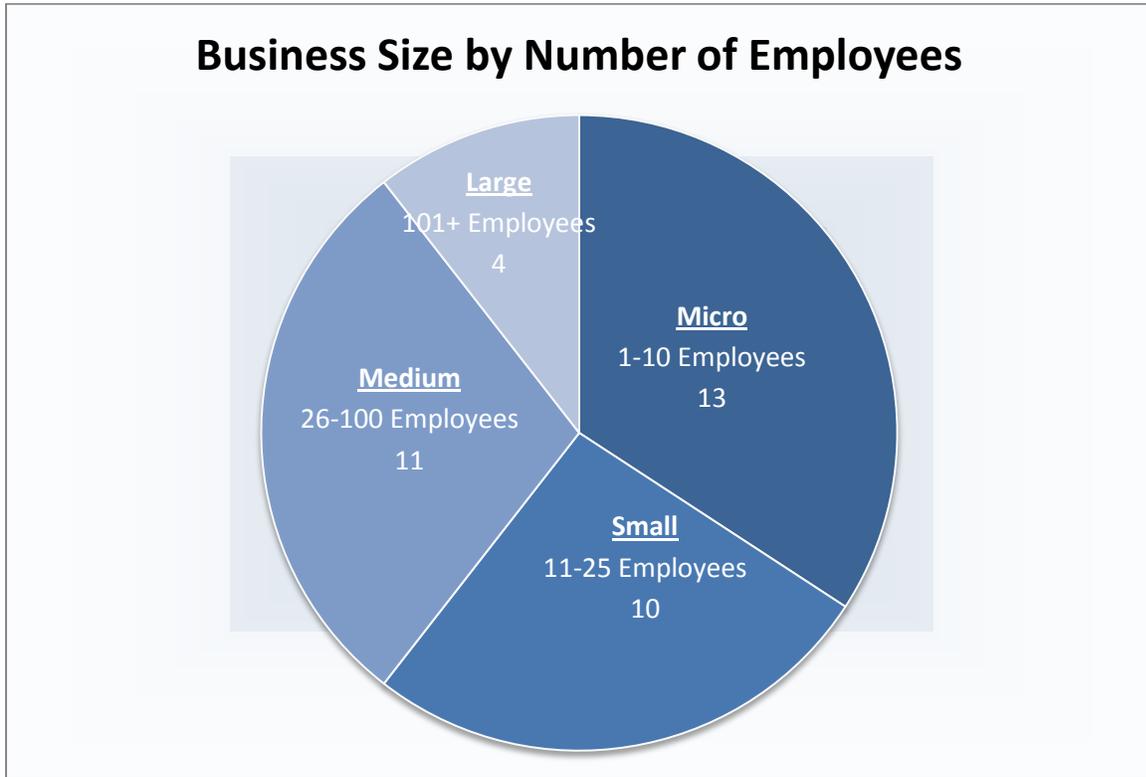


Survey participants were representative of a diverse business population. The gamut ran from one person operations to multi-generational businesses with multi-million dollar sales. In total, these 38 participants represent employers with approximately 1,260 full time employees, 600 part time and seasonal employees, over 1 million square feet of space 1,200 years of business experience and over \$350,000,000 in gross sales.

The tables below break down the survey participants by number of employees, annual sales, years of business as well as years in their current locations.

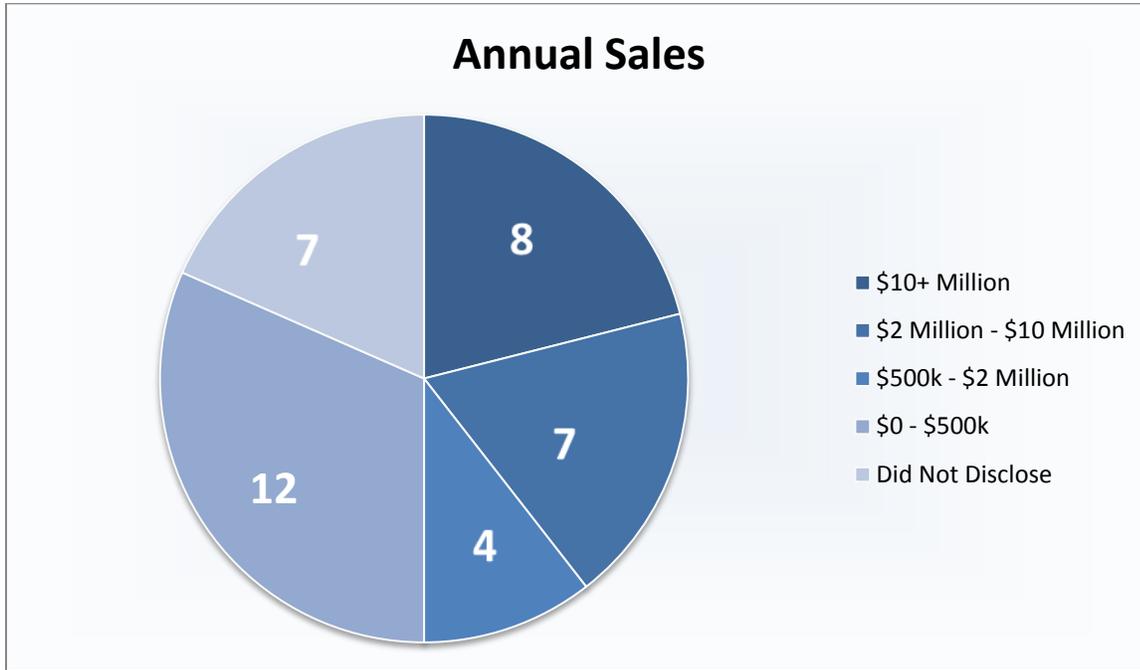
Number of Employees

Figure 2: Number of Visitations by Size of Business



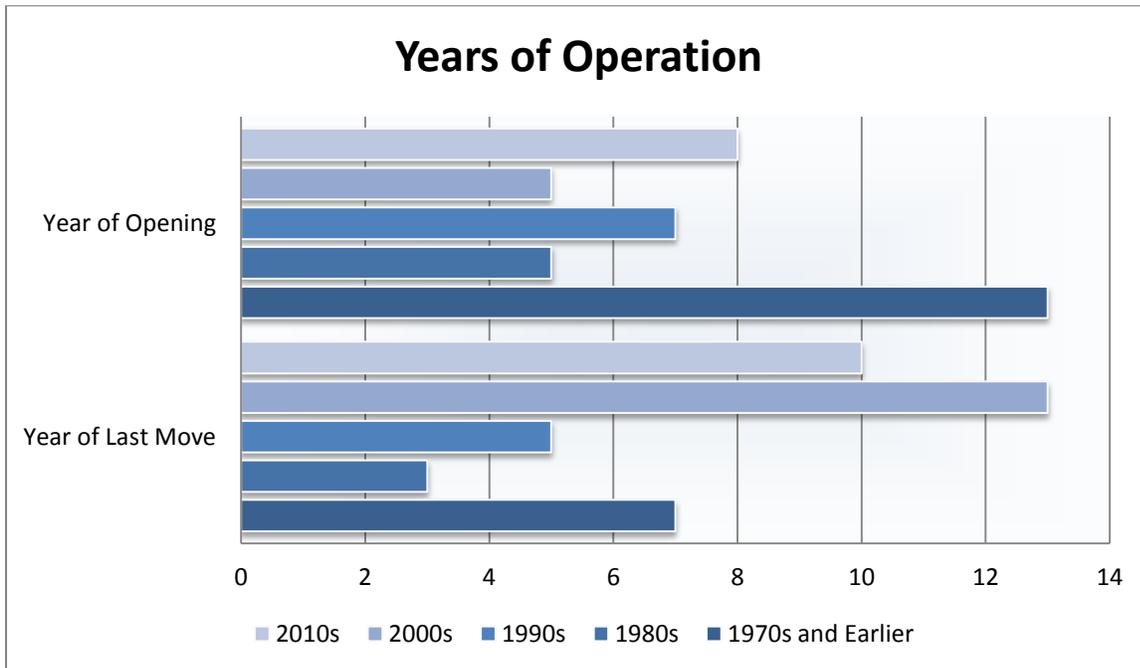
Annual Sales

Figure 3: Number of Visits by Annual Sales



Years of Operation

Figure 4: Number of Visits by Year of Opening and Year of Last Move



4.2 Bricks and Mortar

The businesses surveyed represented a variety of building foot prints. 35 of 38 businesses identified the size of their building foot print. The majority of businesses currently own the sites where their businesses are situated. Of the businesses who rent, one identified major concerns with the potential cost of lease renewal. Staff continues to explore options that could work for the business.

From a servicing perspective, nearly 60% of businesses surveyed have both Municipal Water & Waste Water while nearly 40% currently use Natural Gas. Only 5 of the 38 businesses surveyed are certain that they currently use fibre internet. There were concerns raised with regards to the availability and reliability of internet services.

Municipal staff received comment of general dissatisfaction with the level of service currently provided in the following areas:

Figure 5: Number of Visits by Building Footprint

- Lindsay's North-East industrial park where concerns were raised with regards to lack of street lighting, sidewalks and the reliability of internet; and,
- Pontypool's business park where concerns were raised with regards to the unavailability of water/waste water connections as well as winter road maintenance which has negatively affected business operations

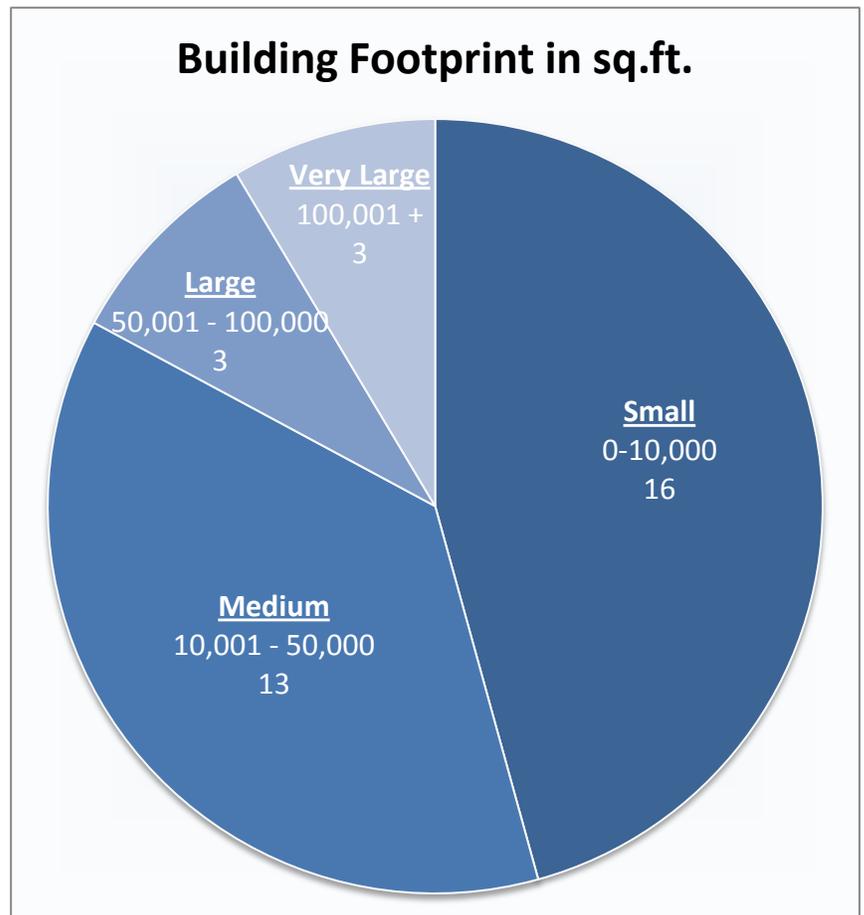
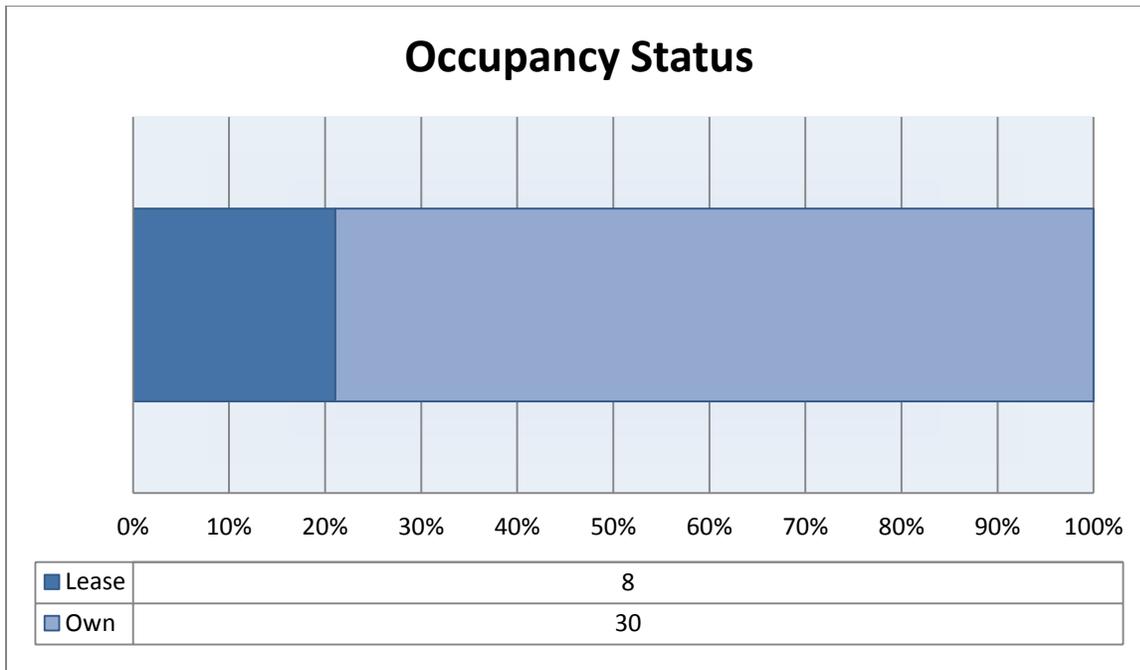
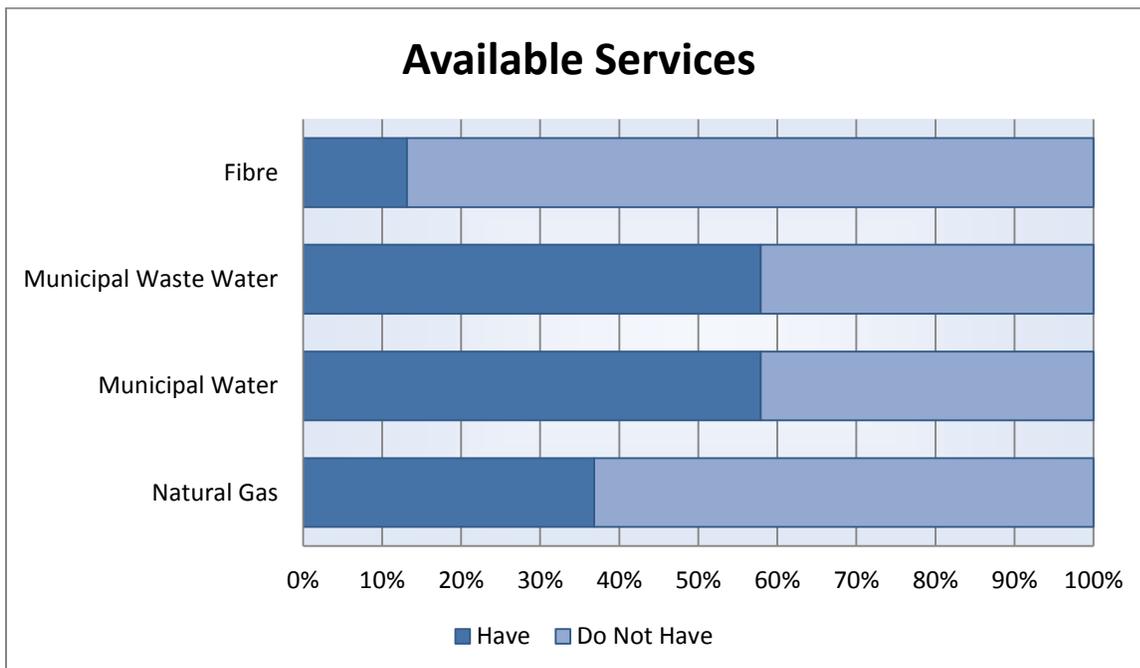


Figure 6: Occupancy Status



Servicing

Figure 7: Servicing



4.3 Proximity to Markets

With access to many major highways, the City of Kawartha Lakes continues to be an excellent location for business accessing local, regional, national and international customers and suppliers. The tables below outline where companies are shipping and receiving. Percentages will not add up to 100 as it was not uncommon for our businesses to ship to multiple locations across the world.

Figure 8: Location of Customers

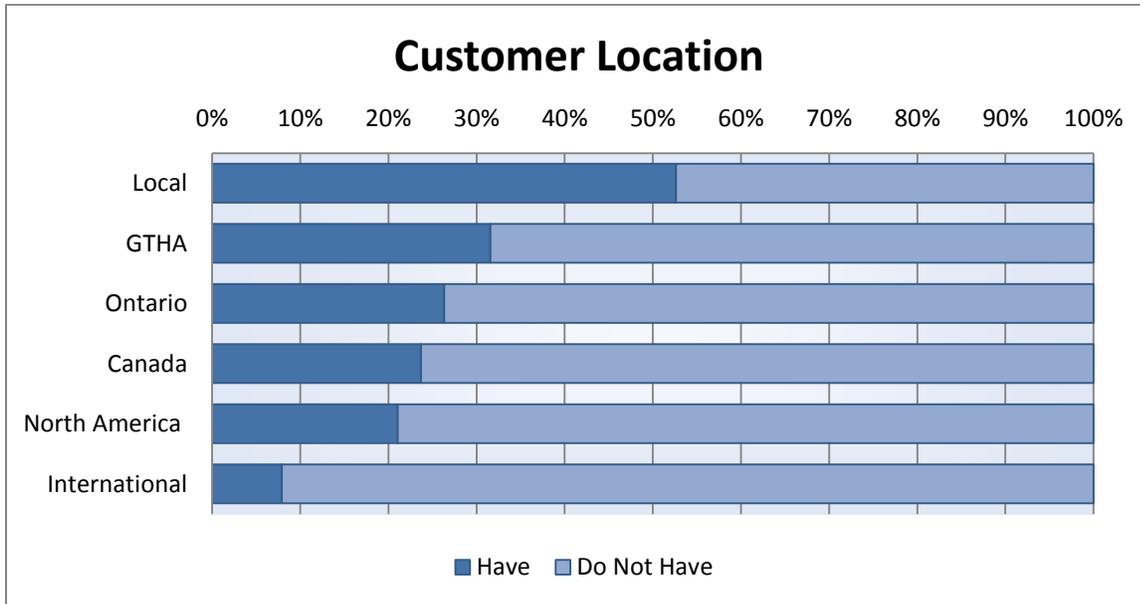
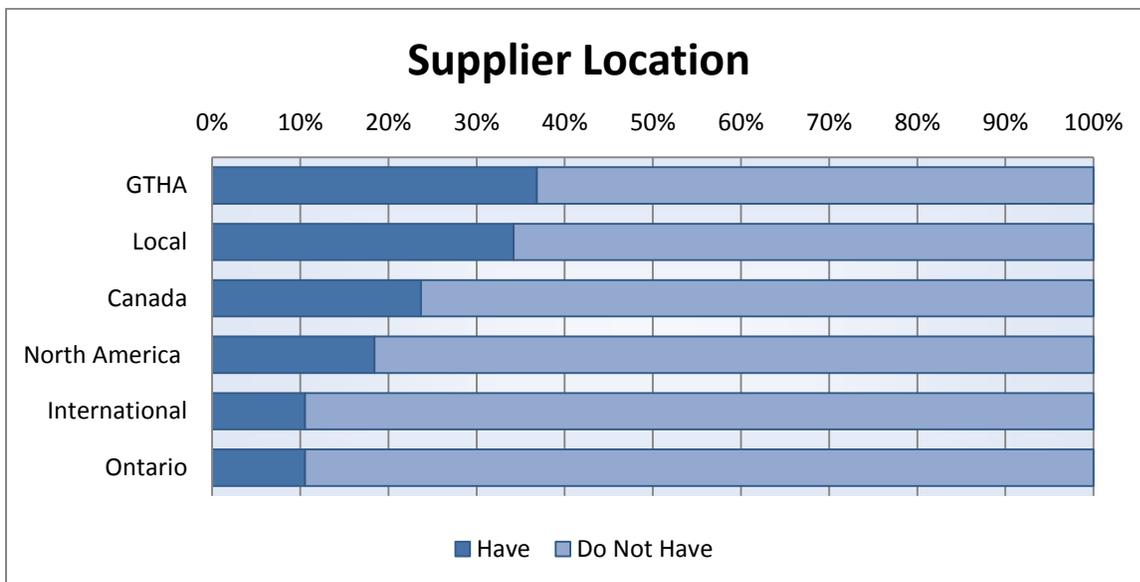


Figure 9: Location of Suppliers



4.4 Business Environment

The following section is useful in identifying the success and strength of the business community in Kawartha Lakes as well as the general outlook for business in Kawartha Lakes. Over 75% of respondents believe that Kawartha Lakes is a Good/Average place to do business, and 80% believe that the City of Kawartha Lakes has improved/stayed the same as a place to do business

The questions for the first graph are highlighted here:

- How is your business compared to 3 years ago?
- How do you see your business in 3 years?
- How has your business historically compared to others in the industry?
- How does your business currently compare to others in the industry?
- How will your business compare to others in the industry?

The first two questions are used to gauge how the business is currently doing and how it expects to be doing in the future. Of the businesses surveyed, 33 out of 38 are doing the same or better than they were 3 years ago, and all of the businesses surveyed anticipate doing better or the same in the future. This indicates a strong outlook from those surveyed.

Similarly, the last 3 questions are asking the respondents to compare themselves to the industry that they find themselves in. It should be noted that more businesses in Kawartha Lakes are anticipating performing better than their industry as time moves forward.

Figure 10: History and Outlook

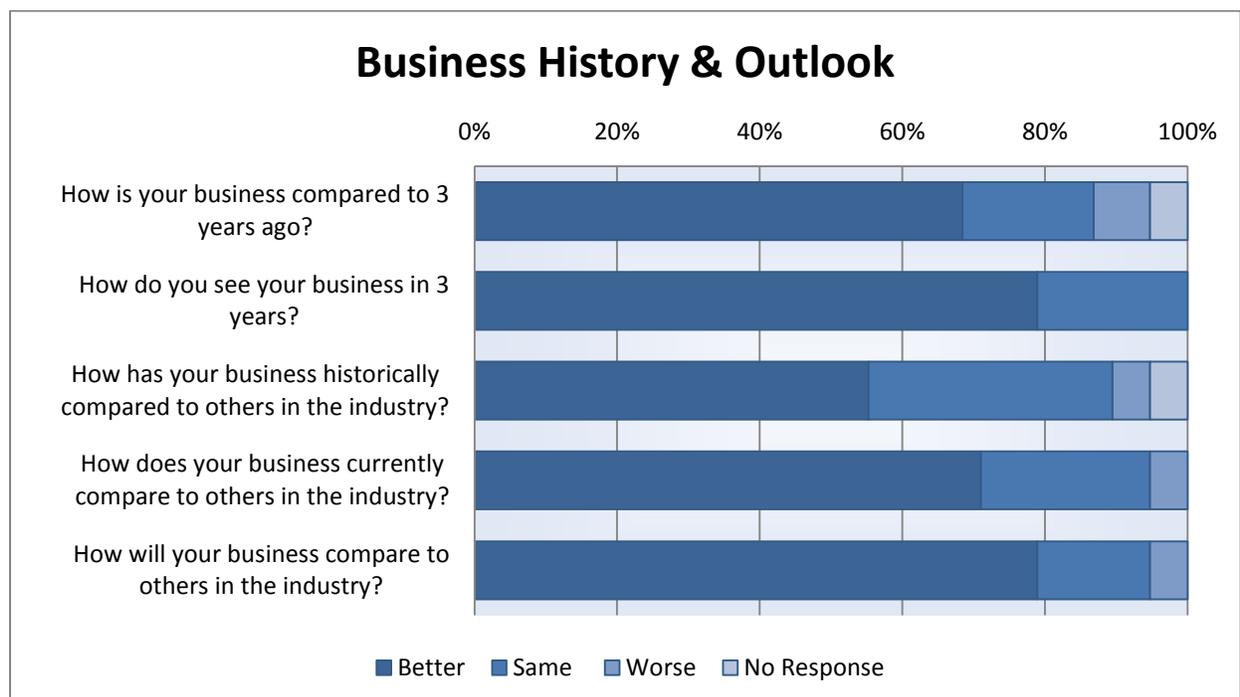


Figure 11: Impression of Kawartha Lakes as a place to do business

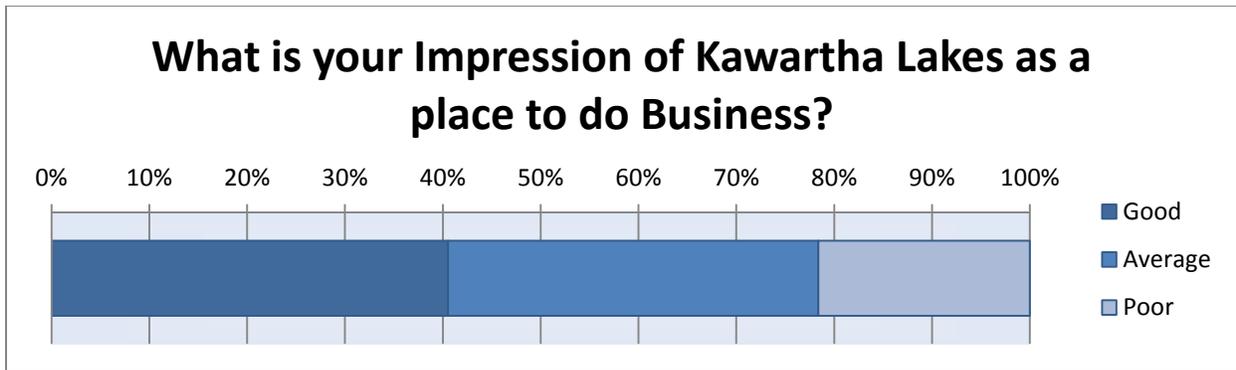


Figure 12: City of Kawartha Lakes Changes in past three years

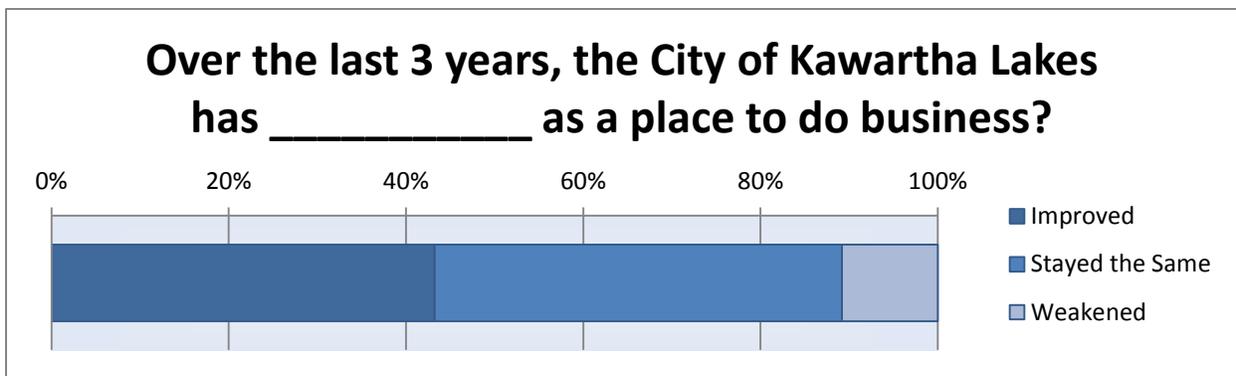


Figure 13: Percentage of Workforce below 35 Years

4.5 Youth

The City of Kawartha Lake’s population distribution is below the provincial average in every 5 year age cohort below the age of 55. The tables demonstrate that businesses continue to hire a large proportion of youth. 71% of businesses have engaged in co-op placements for youth to get them involved with local employers.

It has also noted that that over 70% of respondents believe that there are not enough activities for young people in the community and 74% believe that there are not enough jobs in available in the community for young people. Five of the respondents mentioned that there are enough recreation opportunities if the youth in questions enjoys outdoor activities.

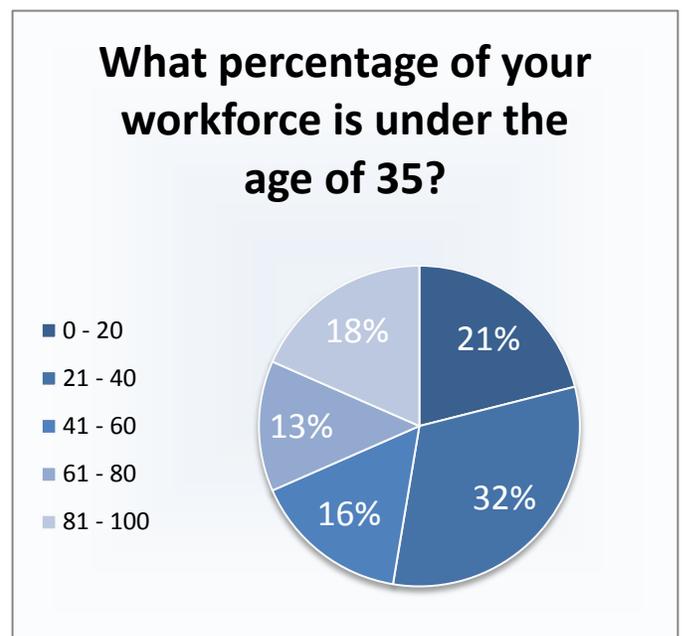


Figure 14: Opportunity for Socialization and Recreation

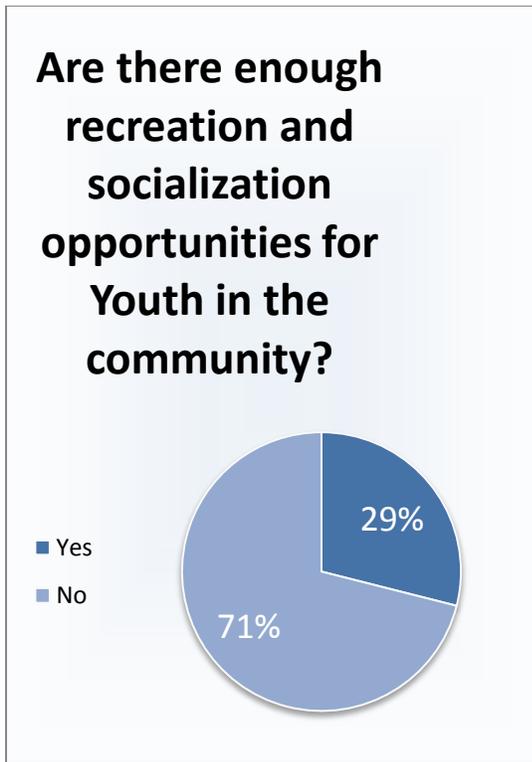


Figure 15: Opportunities for Employment

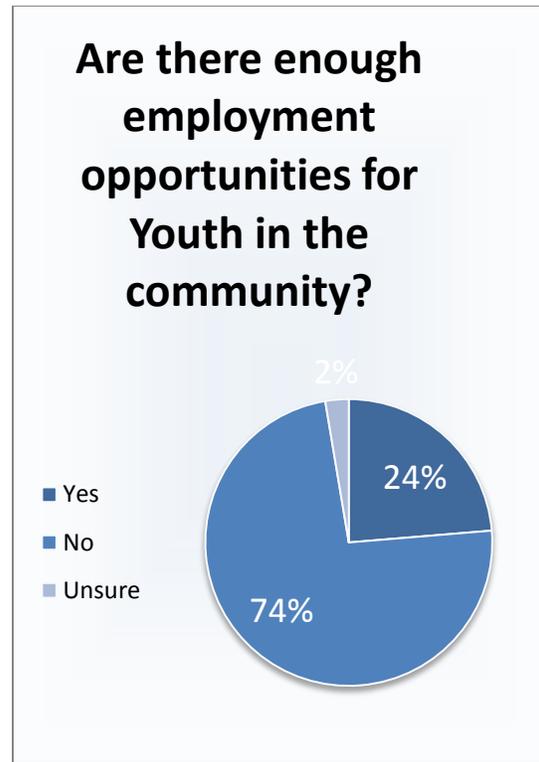
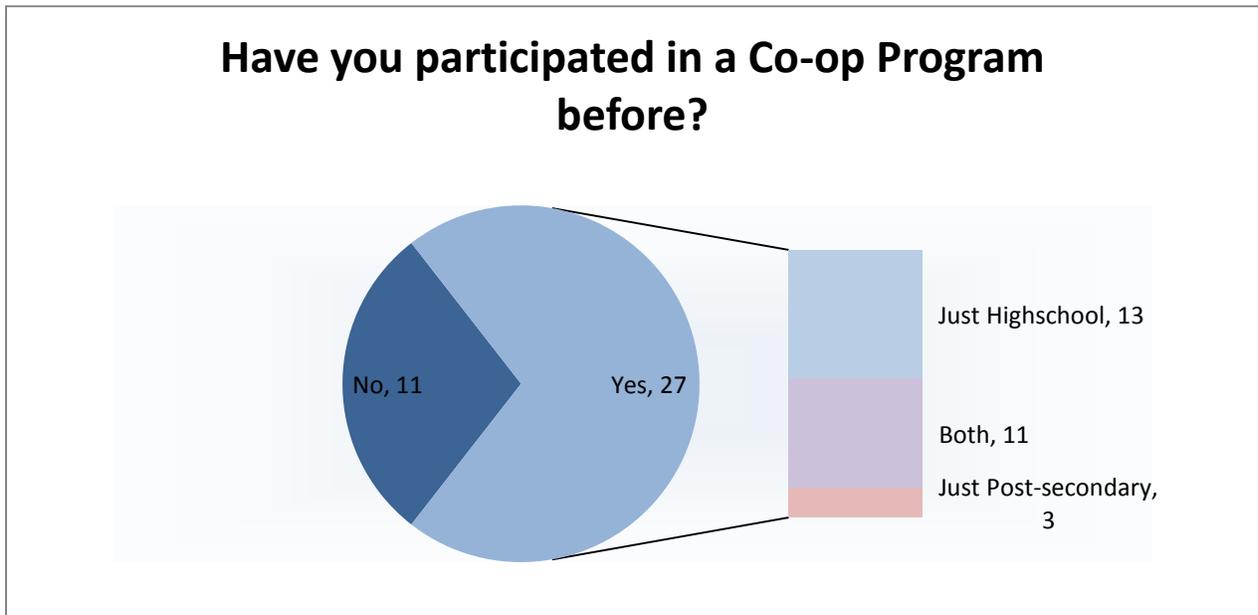
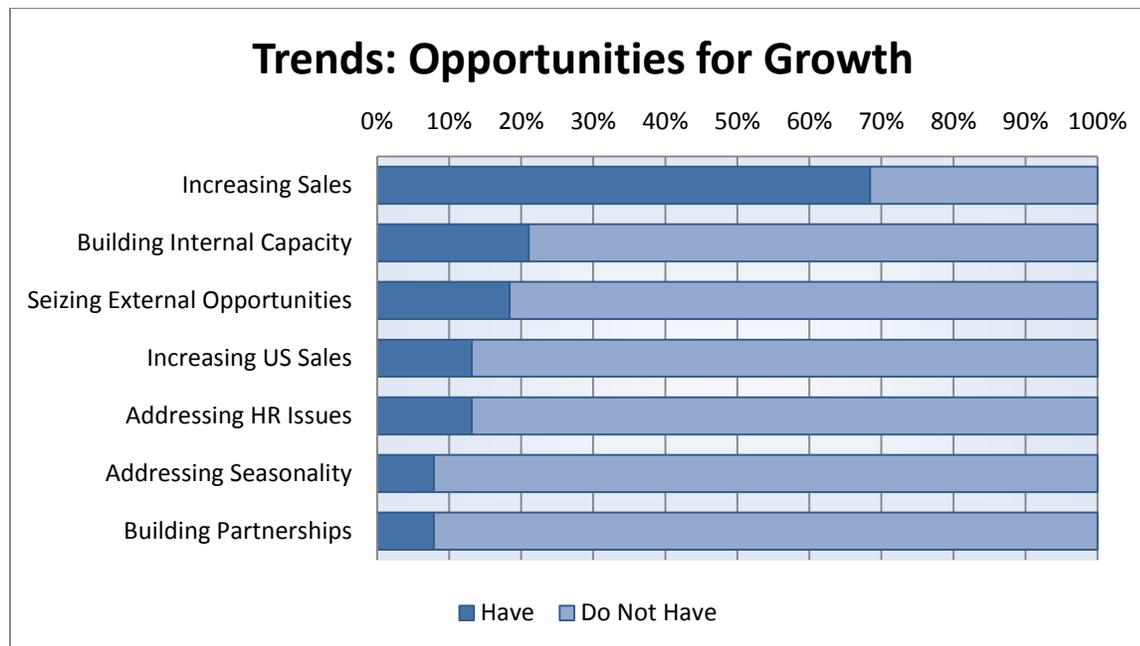


Figure 16: Past Participation in a Co-op Program



5.0 Trends

Figure 17: Trends – Opportunities for Growth



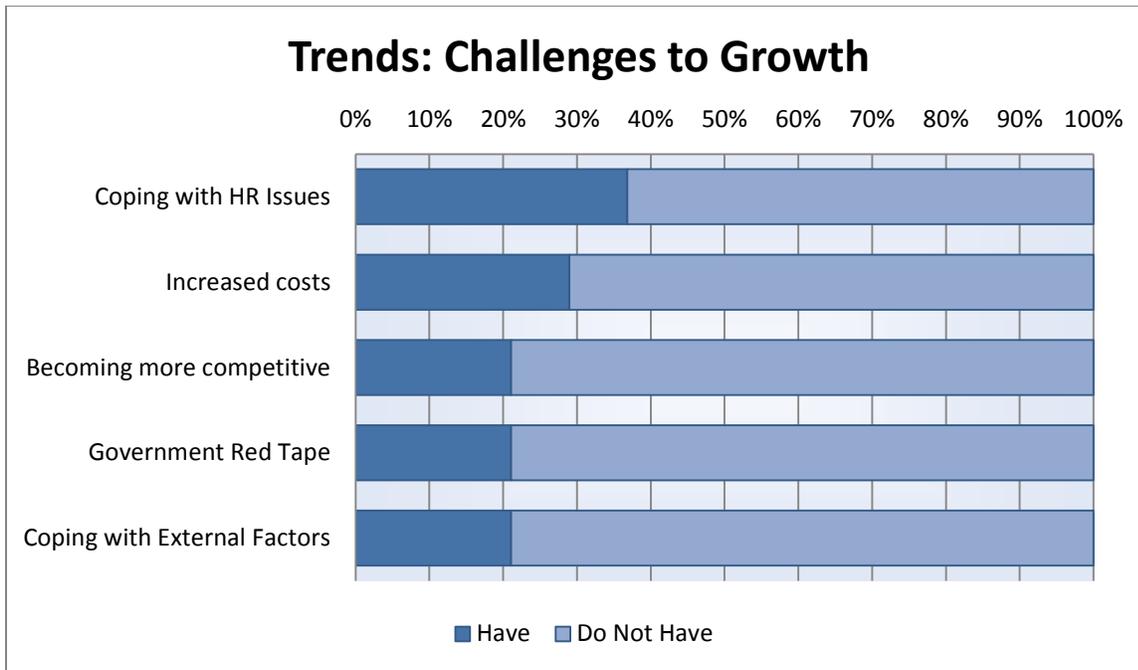
Businesses in the City of Kawartha Lakes are generally enthusiastic about their ability to expand or retain their current levels of success. They see the opportunity to grow their businesses in the following ways:

- Increasing sales – 26 of 38: e.g. the expansion of online sales; and the results of improved marketing
- Building internal Capacity – 8 of 38: e.g. investment in equipment and staff training
- Seizing external opportunities – 6 of 38: e.g. the natural growth of Kawartha Lakes and the increased customer pool that would result
- Addressing HR Issues – 5 of 38: e.g. family successions planning; better management practices; improved work load
- Increasing US sales – 5 of 38: 20% of those looking for increased sales saw their growth potential in the United States
- Addressing Seasonality – 3 of 38: e.g. looking at new ways to achieve consistency across seasons
- Building partnerships – 3 of 38: e.g. working with local business to find leads; co-packing opportunities

Potential Activities

- Workshops – virtual marketing; financing/grant writing; seasonality; import/export
- Increasing access to local organizations e.g. chambers
- Developing partnerships between businesses

Figure 18: Trends – Challenges to Growth



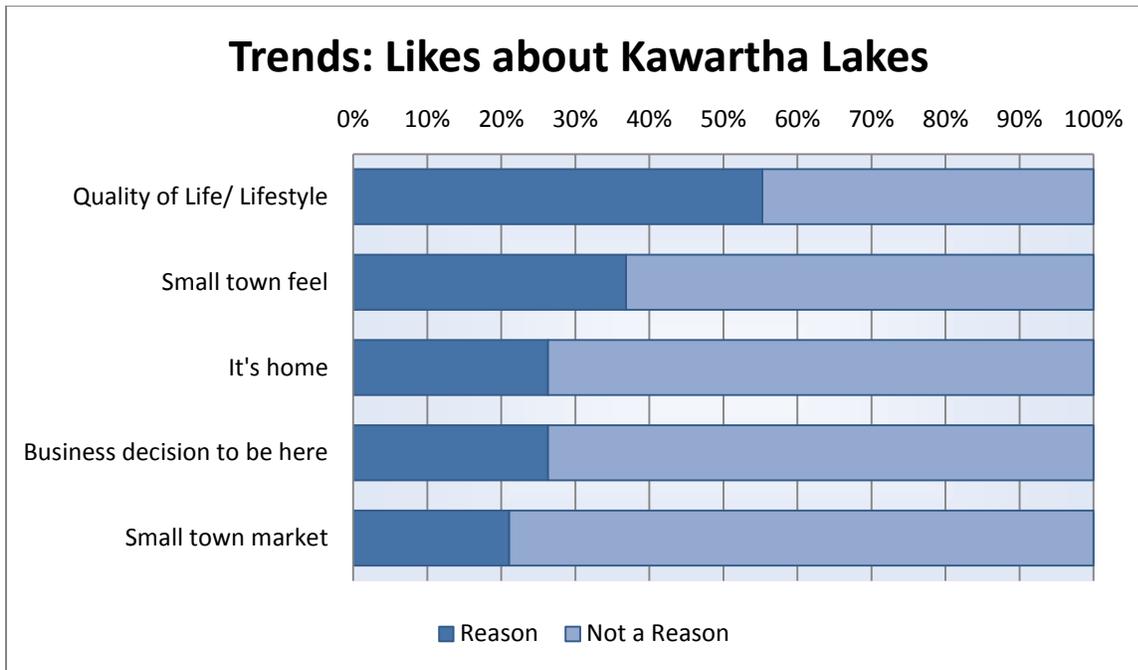
When comparing opportunities for growth and challenges to growth, the challenges are more evenly balanced across the municipality. There are 5 common trends:

- Coping with HR Issues – 14 of 38: e.g. supply & work ethic of employees; succession planning
- Increased costs – 11 of 38: e.g. increased rent; cost of utilities; cost of improvements; taxes and fees
- Government Red Tape – 8 of 38: e.g. difficulties in construction of facilities; planning fees; taxes; staff turnover; City response time
- Becoming more competitive – 8 of 38: e.g. copycat businesses; GTA businesses quoting projects in Kawartha Lakes; unregulated work interfering with those who follow rules; US politics and trade agreements
- Coping with external factors – 8 of 38: e.g. businesses shutting down; local organizations purchasing elsewhere; low median income

Potential Activities

- Provide increased municipal business support services
- Promote buy local campaigns
- Workshops – improved hiring techniques
- Improve partnerships with local work force planning boards.

Figure 19: Trends – Likes about Kawartha Lakes



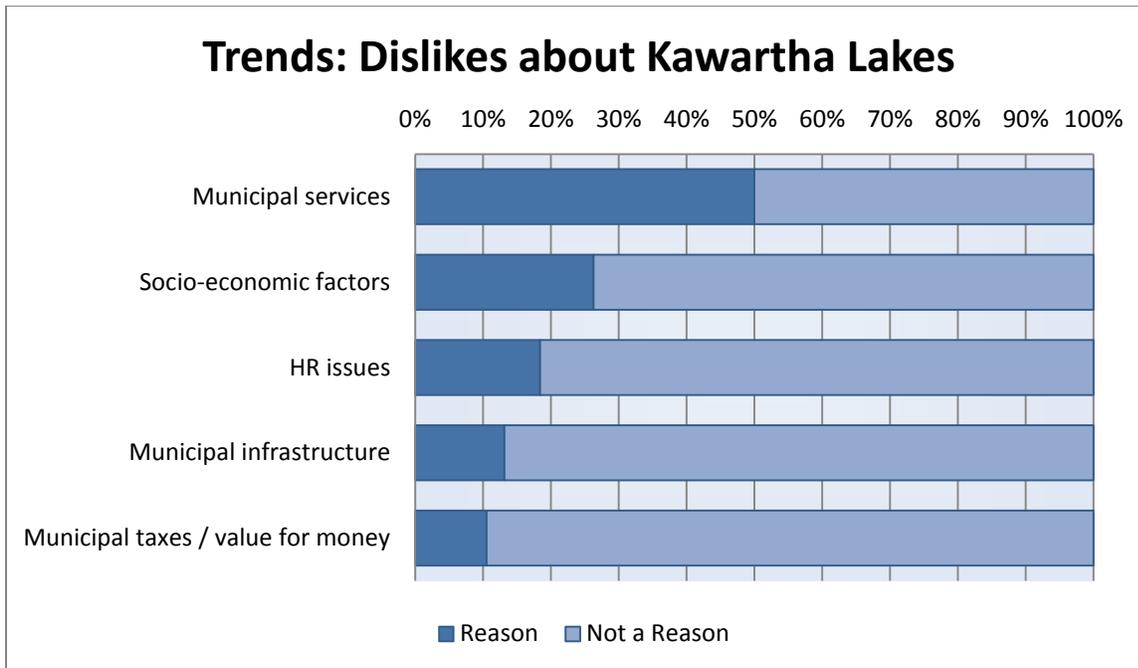
Unsurprisingly, quality of life & lifestyle are some of the most well liked aspects of running a business in Kawartha Lakes. The full list of trends include:

- Quality of life/ lifestyle – 21 of 38: e.g. change to live and work in cottage country; slower pace to life; work/life balance
- Small town feel – 14 of 38: e.g. nice people; everyone knows each other
- It's home – 10 of 38: e.g. born here or spouse was born here
- Business decision to be here – 10 of 38: e.g. provides a good proximity to market; business that focuses on cottage country lifestyle; accessibility to decision makes
- Small town market – 8 of 38: e.g. less competition; sense of community

Potential Activities

- Marketing materials – existing businesses; quality of life
- Opportunity for mentorship

Figure 20: Trends – Dislikes about Kawartha Lakes



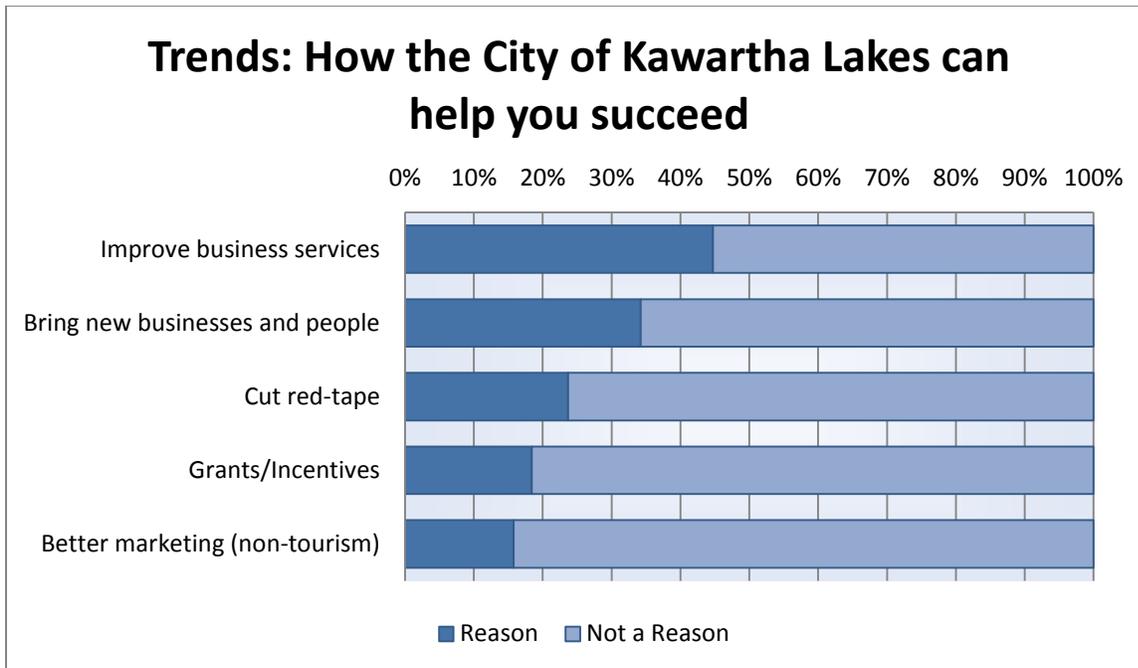
For many of the businesses consulted, this was the first time that a representative from the City of Kawartha Lakes was sitting in front of them asking to know where improvements can take place. Many of their issues were focused on municipal issues:

- Municipal services – 19 of 38: e.g. concerns building additions and new buildings; lack of services for businesses to subscribe; inequity in service levels (e.g. no sidewalks or lighting in Lindsay industrial parks); municipality doesn't seem interested in business; don't always receive consistent messaging; limited contact with Office Economic Development; municipal aesthetics are poor; winter maintenance
- Socio-economic issues – 10 of 38: e.g. no one has any money; businesses shut down during hunting season; people don't value shopping local; good businesses have shut down; scooter traffic; it's a retirement community
- HR issues – 7 of 38: e.g. hard to find good people; weak skillset; labour is seasonal
- Municipal infrastructure – 5 of 38: e.g. aesthetics of business parks could be improved; road infrastructure is weak; too many roads with load restrictions
- Municipal value for money – 4 of 38: e.g. expect better services for their tax dollars; snow plows not clearing streets; no garbage collection

Potential Activities

- Shop local campaigns
- Continue building relationships
- Investigate opportunities to address ongoing infrastructure development

Figure 21: Trends – How Kawartha Lakes Can Help Businesses Succeed



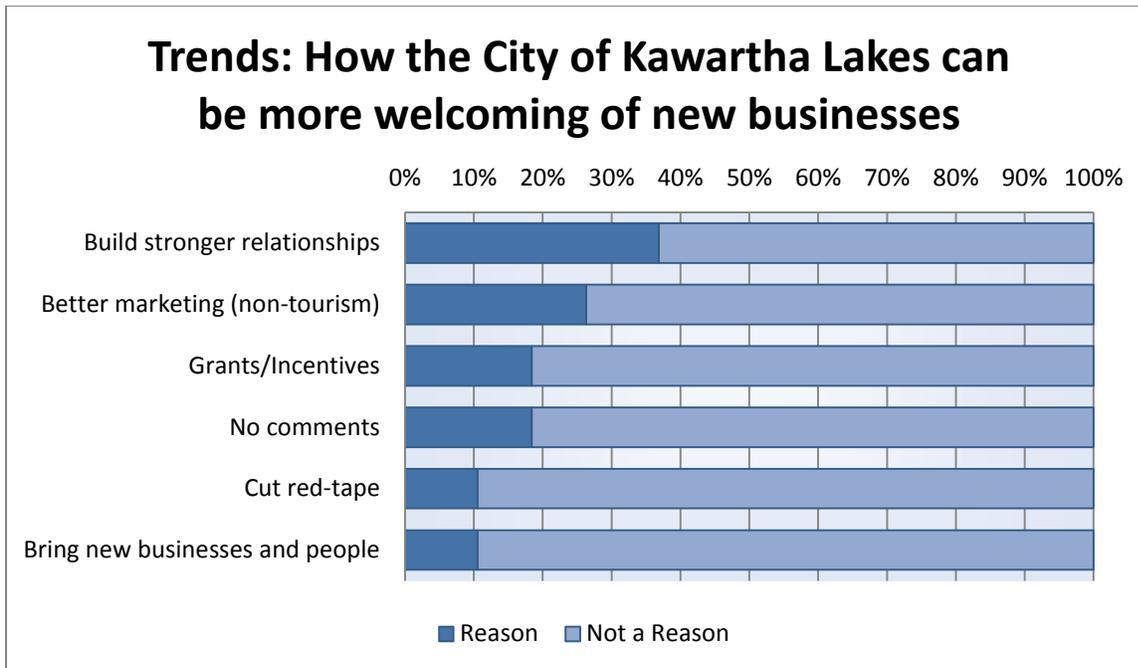
Businesses were eager to share ways that municipality can contribute to their success:

- Improved business services – 17 of 38: e.g. improved access to mental health services for staff; municipal staff to be more responsive; foster collaboration between businesses; provide more seminars using local people; have more community mentors; better description of how Economic Development Division can help businesses; provide water/waste water services in Pontypool; improve snow removal; give people a reason to come; request to expand BIA area
- Bring new businesses and people – 13 of 38: e.g. Help with promotion and exposure of businesses; perform a better job of marketing the area; attract the next wave of talent; gas stations needed in Coboconk, Kinmount; sell quality of life; introduce new businesses to the existing business community
- Cut red-tape – 9 of 38: e.g. Get out of the way of small business; reduce the cost to develop lands and site plans; make it easier to get permits
- Grants/incentives – 7 of 38: e.g. training incentives; more CFDC grants; incentives for doing business; incentives for equipment purchases
- Better marketing (non-tourism) – 6 of 38: e.g. Market the area; promote existing businesses; get more businesses involved in municipal events; do a better job of telling stories in Kawartha Lakes; use Instagram

Potential Activities

- Work to foster collaboration between businesses
- Promote by local campaign
- Improve mentorship network

Figure 22: Trends – How Kawartha Lakes Can be Welcoming to New Businesses



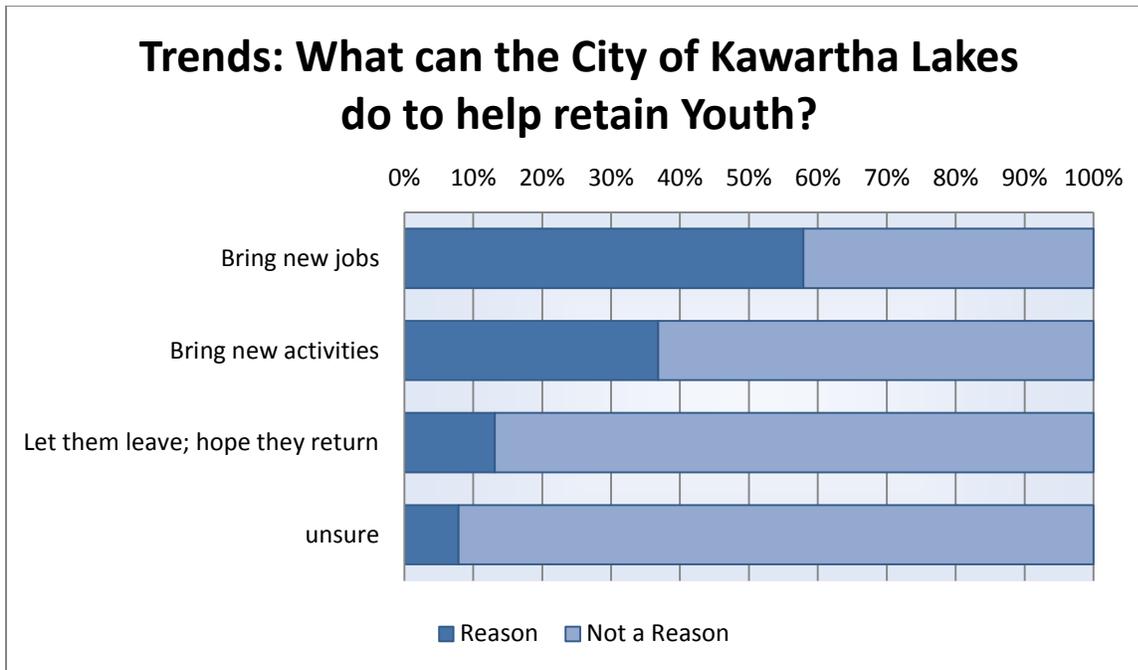
With so many businesses hoping to partner and sell to new businesses, here is the list of what current businesses think the City of Kawartha Lakes can do to become more welcoming of new business:

- Build stronger relationships – 14 of 38: e.g. Get to know more business; continue engaging with businesses; work with chambers to offer 1 year free memberships; make outsiders feel welcome; Starter package for new businesses; profile more businesses; created a formulated attraction strategy with industry specific documents; a what-to-know document for new entrepreneurs; do roadwork 24 hours a day, no need to close a main street all summer
- Better marketing – 10 of 38: e.g. Create an investment marketing package; improve aesthetics; introduce competitions with other municipalities; hold more grand openings; define the benefits of having a business in Kawartha Lakes
- Grants/incentives –6 of 38: e.g. Tax deferrals and incentives; subsidized rental space; cost of hydro
- Cut red-tape – 4 of 38: e.g. Limit development charges; reduce approval times
- Bring new businesses and people – 4 of 38
- No comments – 7 of 38

Potential Activities

- Partnerships to encourage new businesses to join local chambers
- Create starter packages for new businesses – what to know before investing; why invest; have them sector based

Figure 23: Trends – How Kawartha Lakes Can Retain Youth



Businesses were eager to share ways that municipality can contribute to their success:

- Bring new jobs – 22 of 38: e.g. attract quality employers with quality jobs
- Bring new activities – 14 of 38: e.g. Build a park in Pontypool; places for young families; more music events; better utilization of fair grounds; engage with the school
- Let them leave, hope they return –5 of 38:
- Unsure –3 of 38

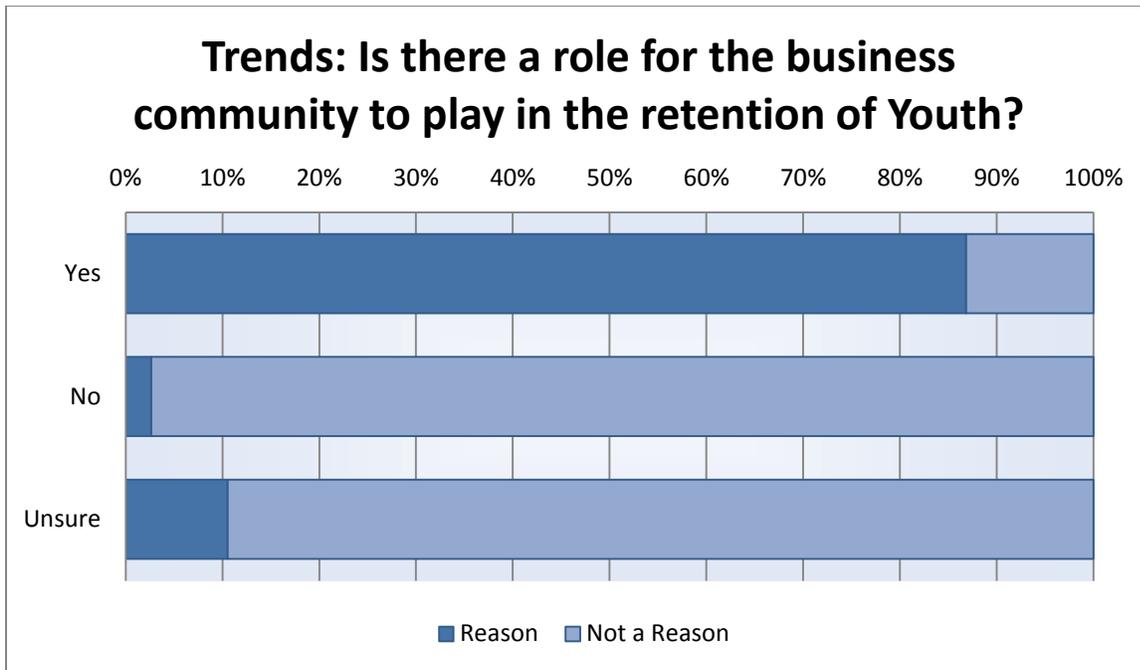
New business ideas to attract youth from survey respondents:

- Co-working space
- Business incubator/pressure cooker
- Micro-breweries
- Mexican restaurant
- Bbq or burger joint
- Lounge
- Clothing boutiques for men
- Axe throwing
- Clean bars to go to
- Martini lounge
- Creole/southern restaurant

Potential Activities

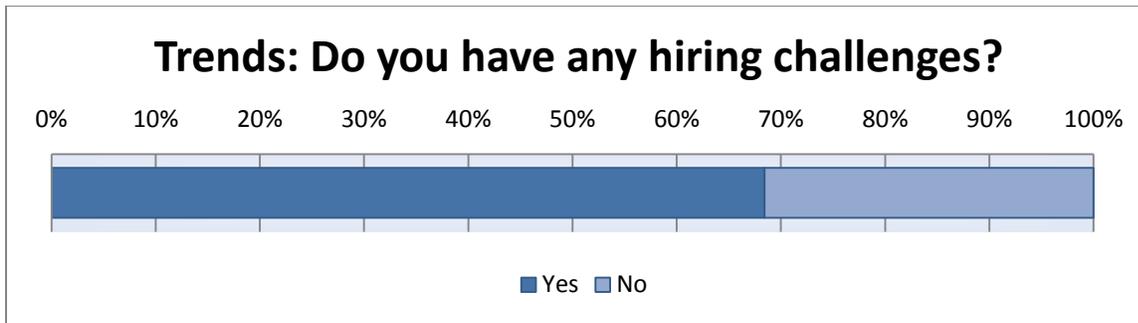
- Marketing materials for youth, especially youth that enjoy active lifestyles
- Target the right youth

Figure 24: Trends – Role for Business Community in Retaining Youth



33 out of 38 businesses believe there is a role for entrepreneurs to play in the retention of youth. Of that amount, 16 believe that roles is through the creation of jobs; 4 believe that it is through the fostering of entrepreneurship. 5 out of 38 businesses believe that there is value in letting youth leave so that they can appreciate where they grew up more.

Figure 25: Hiring Challenges



26 of 38 businesses currently have employment challenges. Of the 26 businesses, 16 have identified finding “quality people” as the difficulty. From our discussions, “quality people” can be defined in a variety of ways including:

- Show up to work
- Show up to work on time
- Stay off cellphones
- Ability to perform tasks
- Work ethic
- Strong customer service
- Enthusiastic attitude
- Entrepreneurial spirit

It has also been identified through the survey process that many businesses are paying lower wages compared neighbouring regions.

The businesses surveyed are experiencing difficulties recruiting in the following areas:

- Accounting
- Bilingual client support
- Cabinet makers
- Carpenters
- Computer programmers
- Customer service individuals
- Drivers
- Embroidery
- Engineers
- Estimators
- Finishers
- Fitters/Welders (Mig & Tig/stick)
- Kitchen Staff
- Front Desk
- Labourers
- Lab/tech
- Machinists
- Maintenance
- Management
- Nightshift
- Personal trainers
- Programmers
- Project Management
- Quality Assurance
- skilled labour
- mechanics &
- sales people
- trades
- warehouse

Potential Activities

- Attending job fairs on behalf of local employers selling the municipality
- Workshops – generational diversity;
- Partnerships with the Workforce Development Board

6.0 SWOT

Staff compiled the results of the survey into a Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis for the City of Kawartha Lakes. These terms are defined as follows:

- Strengths – Internal factors to Kawartha Lakes which are helpful to the municipality
- Weaknesses – Internal factors to Kawartha Lakes which are detrimental to the municipality
- Opportunities – External situations to Kawartha Lakes which are helpful to the municipality
- Threats – External situations to Kawartha Lakes which are detrimental to the municipality

	HELPFUL	HARMFUL
INTERNAL	<p>Strengths</p> <ul style="list-style-type: none"> • Natural Geography • Sense of community • Quality of life • Active lifestyle • Proximity to GTA 	<p>Weaknesses</p> <ul style="list-style-type: none"> • Infrastructure • Infrastructure maintenance • Quality of workforce • Aging population • Seasonality of residence • Perceived municipal red tape
EXTERNAL	<p>Opportunities</p> <ul style="list-style-type: none"> • Willingness of the business community to partner with other businesses • Willingness of the business community to improve • Ability to deliver improved business services • Attract new employers and entrepreneurs 	<p>Threats</p> <ul style="list-style-type: none"> • Shoppers not supporting local • Not drawing enough new residents • Seasonality • Outsiders knowledge of Kawartha Lakes • Limited availability of employment land to accommodate new businesses

7.0 Activities

Below is a summarized list of all of the potential actions identified in this document to address challenges or opportunities identified by the business community. These activities will be included as key consideration in the creation of the Economic Development Strategic Plan. These activities will be considered in addition to background research, economic analysis, community surveys and consultations with key stake holders.

Education and training

- Workshops – virtual marketing; financing/grant writing; seasonality; import/export; improved hiring techniques; generational diversity;

Building Business to Business Partnerships

- Increasing access to local organizations e.g. chambers
- Developing partnerships between businesses
- Promote buy local campaigns
- Improve partnerships with local work force planning boards.
- Improve mentorship network

Business Support

- Provide increased municipal business support services
- Continue building relationships
- Attending job fairs on behalf of local employers selling the municipality
- Create starter packages for new businesses – what to know before investing; why invest; have them sector based

Attraction & Retention

- Marketing materials – existing businesses; quality of life
- Marketing materials for youth

Appendix A – OSPREY Goals & Outcomes

Table 2: OSPREY Short Term Goals and Outcomes

<u>Goal</u>	<u>Outcome</u>
Begin the process of building and improving relationships with existing businesses	Many of the business consulted commented that they had never had contact with City staff for the purpose of getting to know their businesses. The project was an effective tool to start the conversation, staff are committed to fostering and building the relationships further over the coming months and years.
Identify the positive and challenging attributes of the community as a place to do business	Although known anecdotally, this survey allowed staff to hear directly from businesses about the positive and challenging attributes of running a business in Kawartha Lakes. These are identified in the SWOT analysis.
Identify and address immediate concerns and issues of individual businesses through an assessment and referral process	<p>Concerns that were raised include:</p> <ul style="list-style-type: none"> • Building Permit issues • Infrastructure concerns • Winter maintenance concerns • Expansion concerns <p>Staff were able to connect business owners and management with a variety of partners including Provincial and Federal staff, municipal staff, granting agencies. Staff continue to advocate for local businesses.</p> <p>Staff has reached out to vacant property owners to gauge interest in the sale of their lands to accommodate future business attraction or expansion .</p>
Collect business and market data to support economic development planning	Staff collected information relating to size of business, building square footage, number of employees, etc. this information will be used to help in the planning of economic development initiatives to support businesses
Establish and implement a strategic action plan to support existing businesses	Information gathered in this report will be contemplated in addition background research, economic analysis, community surveys and consultations with key stake holders as part of the 2017 Economic Development Strategic Plan.

Table 3: OSPREY Long Term Goals and Outcomes

<u>Goal</u>	<u>Outcome</u>
Increase the competitiveness of existing businesses	No tangible benefits to date, work on-going
Enable business development, investment and job creation	No tangible benefits to date, work on-going
Foster and enhance the environment for business development	No tangible benefits to date, work on-going

Appendix B – OSPREY Questions

Table 4: OSPREY Questions

Theme	Question
General business information	Date of Interview; Company Name; Contact Name; Contact Phone; Contact Position; Contact Email; Address; NAICS; Ward
Company Basics	Number of Employees; Number of Years in Operation; Number of Years in Location; Annual Sales; Lease or Own; Lease Renewal Date; Building Foot Print; Servicing; Where are your customers?; Where are your suppliers?
Business Environment	How does your Business Compare to itself three (3) years ago? (Better, Same or Worse); How do you see your business in three (3) years? (Better, Same or Worse); How has your business performed compared to others in your industry? (Better, Same or Worse); How does your business currently perform compare to others in your industry (Better, Same or Worse); How will your business perform compare to others in your industry (Better, Same or Worse); What are your Biggest Opportunities? ; What are your Biggest Challenges?
Doing business in Kawartha Lakes	What is your impression of City of Kawartha Lakes as a place to do business (Good, Average or Poor)?; Over the last 3 years, the CoKL has ____ (Improved, Stayed the Same or Weakened) as a place to do business?; What do you like about doing business in the CoKL?; What do you dislike about doing business in the CoKL?; What can we do to help you succeed?; What can we do to be more welcoming of new business:
Youth	What percentage of your workforce are youth? Are there sufficient opportunities for socialization & Recreation for Youth in the Community (Yes or No)? Is there enough employment opportunity for youth in the community (Yes or No)? Have you participated in Co-op opportunities in the past (High school or Post-secondary or No)? Why/Why not? What can the CoKL do to help retain Youth; Is there a role for entrepreneurs/businesses to play in the retention of Youth?
Additional information	Do you have any hiring challenges?; Do you have difficulty hiring for any specific skill?; Do you partner with _____?(Chamber, Association, Education, other); Additional Information