

City of Cambridge

Business Retention Report

*Executive Summary and
Survey Highlights*

Manufacturing Sector

Prepared by the Economic Development Division

July 2011



Business Retention Report for Cambridge's Manufacturing Sector

Executive Summary and Survey Highlights

Introduction

The City of Cambridge Economic Development staff has conducted a detailed business survey with business representatives in the manufacturing sector in order to better understand the issues and business climate for this industry in Cambridge.

Individual meetings with business owners/plant managers were conducted where an extensive survey was used to elicit information about the business. The questionnaire used to guide the interview is attached as Appendix A.

The goals of the program were as follows:

- to obtain a snapshot of the business climate for manufacturers in Cambridge
- to better understand the obstacles for manufacturers
- to improve the relationship between businesses and the municipality and provide a point of contact for the business owner
- to better understand the business operation in order to facilitate business opportunities
- to characterize the supply chain in order to identify possible gaps and opportunities
- to understand the businesses growth plans and ensure the City accommodates growth and expansion needs of local businesses
- help direct business owners to other organizations or agencies that may help them to improve business performance (e.g. Export assistance, research and development, local business opportunities)

Methodology

The target companies for the business visits were randomly selected from the list of manufacturers in the Cambridge Business Directory. Of the 105 businesses that were asked to participate in the survey, 42 agreed to be interviewed. Business visits were carried out from November 2009 to April 2011.

The interview generally took one hour to one and a half hours, and was conducted on-site. In many cases a tour of the facility was included.

The results of the questionnaire have been summarized and the aggregate results are reported in this document. Also many of the interviewees' comments are included where relevant.

Of the 7,392 businesses in Cambridge, 512 are manufacturers, and 45% of these manufacturing companies have fewer than 10 employees. Another 35% have 10 to 50 employees, and 20% have 50 or more employees.

With the random selection of companies, staff was able to visit a wide range of these manufacturers with diverse products such as machinery, textiles, plastics, metal products, and equipment manufacturing.

Selected Survey Results

This executive summary will present selected survey results from the full report which can be obtained from the Economic Development Office or found on the City's website www.cambridge.ca under the Economic Development section.

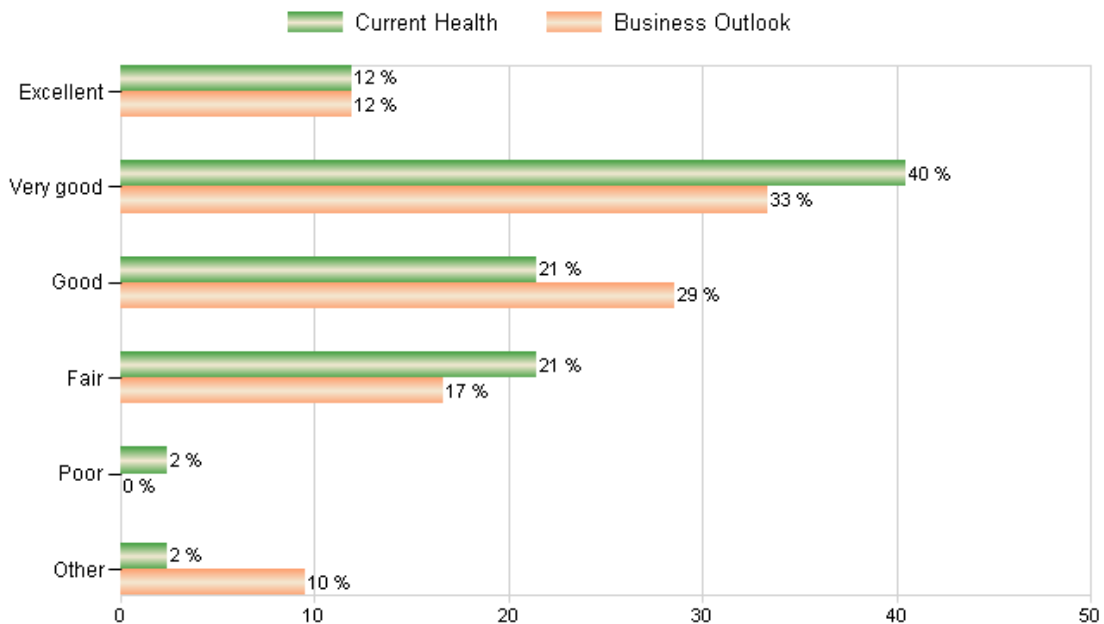
Current Business Health and Business Outlook (% of respondents)

(n=42)

Overall, how would you describe your company's current business health?

And

How would you describe your company's business outlook over the next two years?



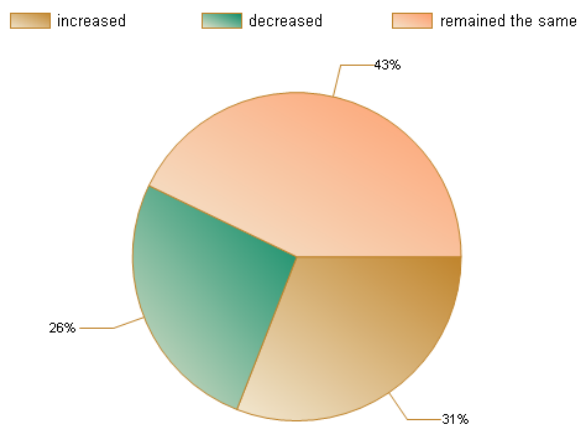
One of the general questions asked of business leaders was how they perceived both their current business health, and what they anticipated for the future. Generally, businesses indicated that current health was excellent to fair, with their outlook overall to be a little weaker.

As this survey was carried out over 2010 and early 2011, some of the responses date back to when the outlook for a recovery in the economy was still questionable, and the responses reflect that uncertainty in the economy.

Employee Growth or Decline (% of respondents)

Over the past year, how have your employee numbers in Cambridge changed?

(n = 42)

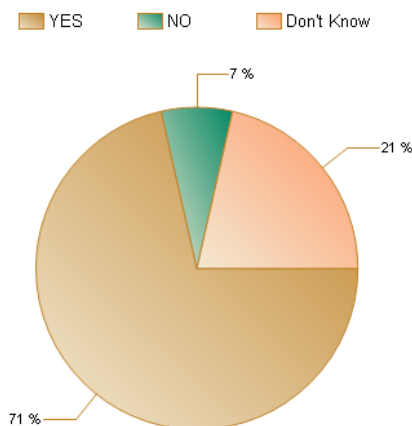


Companies were asked how their employee numbers have changed over the past year, and 31% indicated they increased, 26% said it decreased, and 43% responded that employee numbers stayed the same.

Plans for Employee Growth (% of respondents)

Are you planning to hire more staff within the next three years?

(n = 42)

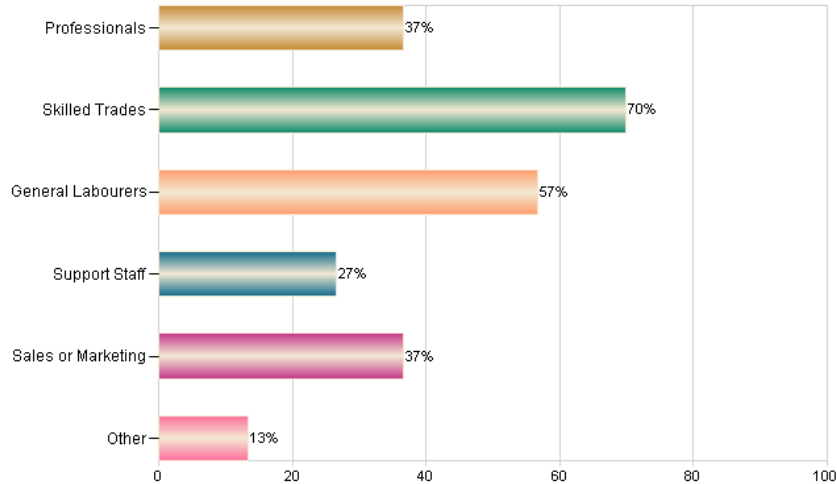


Businesses were asked if they plan to hire more staff in the next three years. 71% said yes, 7% said no, while 21% could not provide a forecast.

Type of Employees Needed (% of respondents)

If yes, what type of workers would you be hiring?

(n = 30)

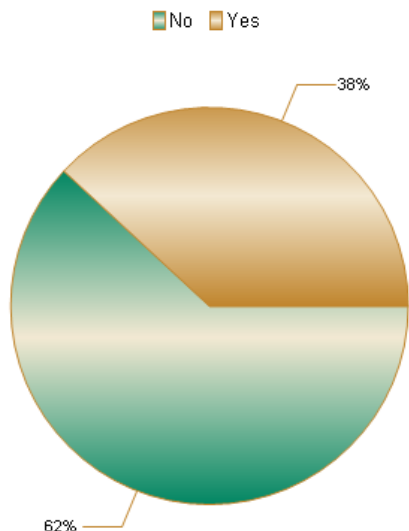


Companies indicated that the types of employees they plan to hire would primarily be skilled trades at 70%, followed by general labourers (57%), while professionals and sales and marketing followed at 37%.

Difficulty in Acquiring Workforce (% of respondents)

Is it difficult for you to acquire the workforce you need for your business?

(n = 42)



When asked if it was difficult for companies to obtain the workforce they needed, 38% agreed and indicated the challenges are primarily in attracting skilled people, as illustrated in the next figure.

Challenges in Attracting/Hiring Workforce (% of respondents)

What are the primary challenges you face in attracting or hiring the workforce you need?
(n = 16)

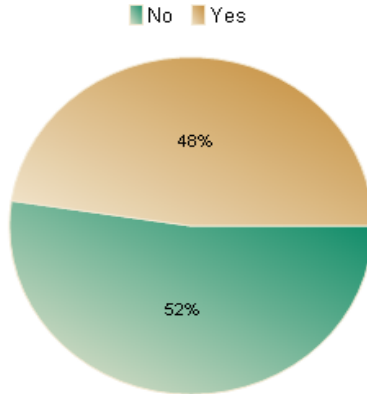


The most important challenge noted was attracting skilled people. One company noted that when manufacturing declined, skilled tradespeople were either laid off or found other work opportunities, therefore these people did not return. Another commented that there are not enough qualified people and when those aged 50+ (with experience) retire, they cannot be replaced. This just reinforces the concept that skilled trades are very important to keep the manufacturing sector strong and growing.

Plans To Expand Markets (% of respondents)

Do you have plans to expand to other geographic areas ?

(n=42)

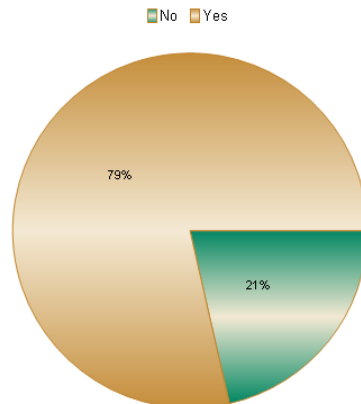


Close to half (48%) of the companies surveyed indicated that they have plans to expand sales to other markets, and these locations include penetrating the U.S. markets, overseas markets as well as expanding beyond current provincial jurisdictions.

Exporting Status (% of respondents)

Do you export?

(n = 42)

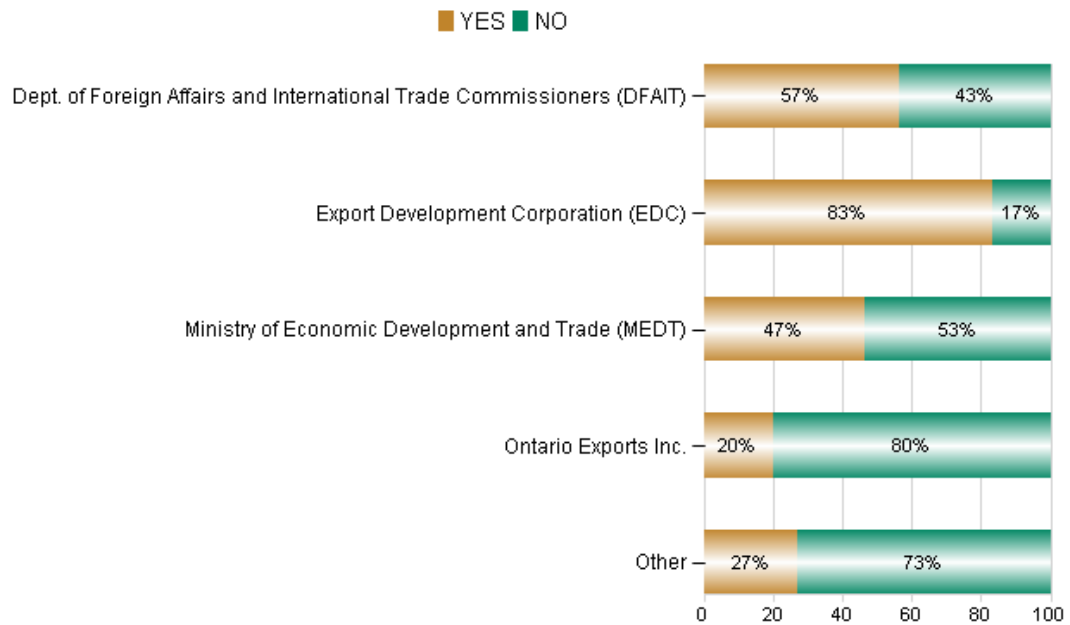


Of those surveyed, 79% indicated they export, and we asked what, if any, challenges they faced. Responses included, the U.S.- Canadian currency exchange, the cumbersome paperwork for customs brokers, high shipper's fees, and the difficulty in obtaining contracts in the U.S. as many government contracts specify U.S. content requirements.

Companies by familiarity with export organizations/programmes (% of respondents)

For those that export or are interested in exporting - are you familiar with the following services or organizations involved in export assistance?

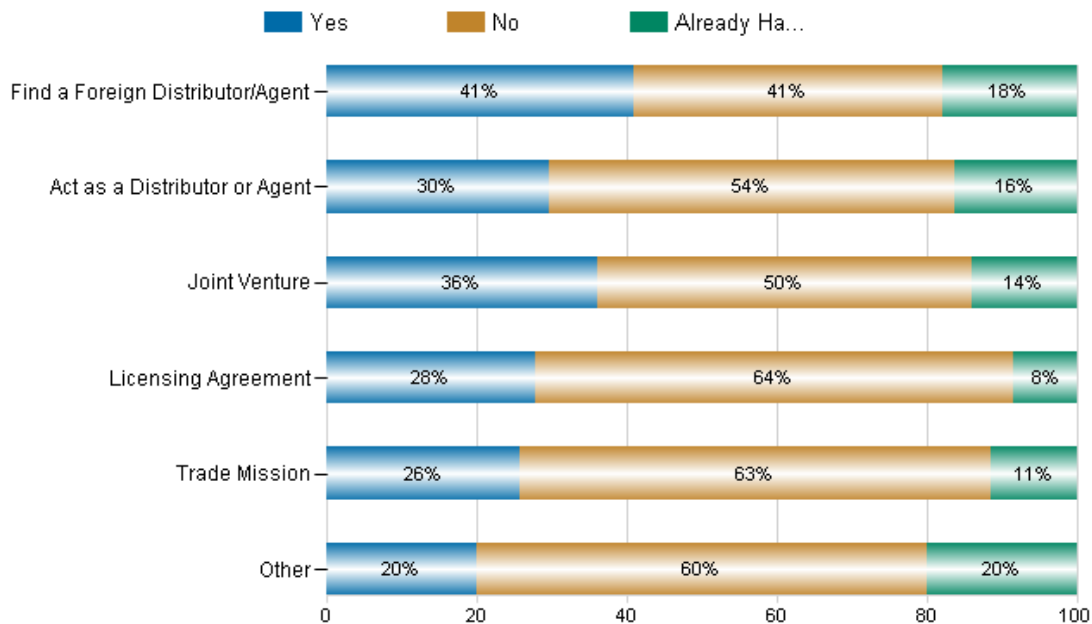
(n = 42)



Companies were asked to identify if they had used, or were familiar with some of the more common organizations involved in export assistance and foreign trade. If companies indicated they had not already used any of these services, then this was an opportunity to inform them on how these organizations can help businesses expand into new markets.

Companies by interest in exploring business opportunities with foreign companies (% of respondents)

Do you have an interest in exploring business opportunities with foreign companies?
(n = 42)



Companies were asked if they have an interest in exploring business opportunities with foreign companies or if they have already been involved in any of these activities.

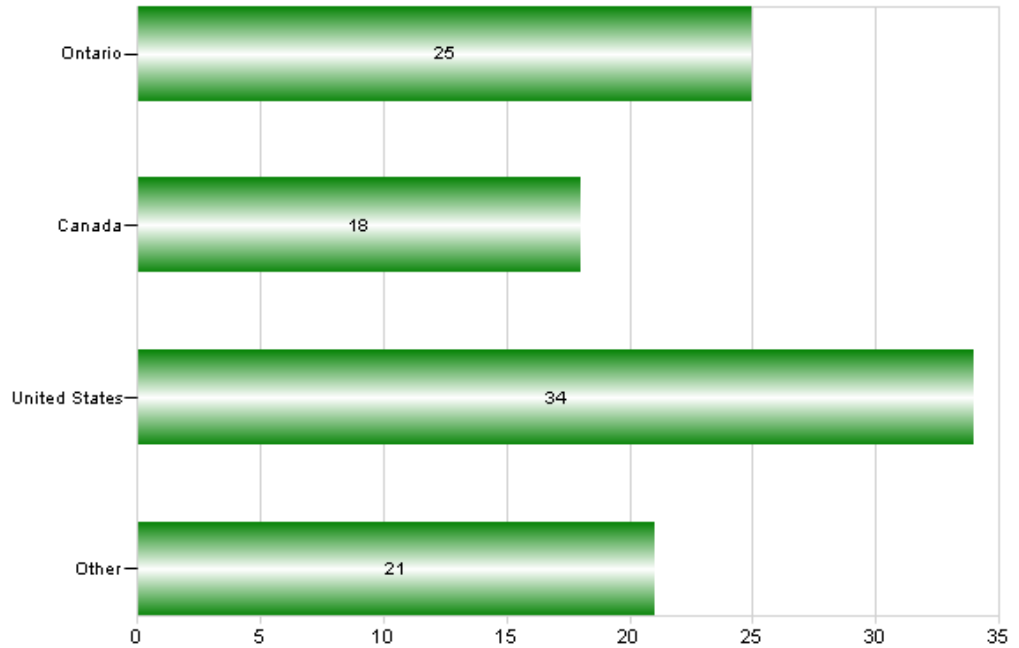
Between 40 and 60% responded they have no interest in any type of foreign business opportunities, while 8 to 20 % already have some type of foreign business experience. The rest indicated an interest in some type of foreign business opportunity such as: finding a foreign distributor, or acting as an agent for a foreign company, or would be interested in a joint venture or licensing, or participating in a trade mission.

The Department of Foreign Affairs and International Trade, the Ministry of Economic Development and Trade, and Canada’s Technology Triangle run foreign missions, as well as other programmes to help businesses expand abroad. Once these interests are identified, Economic Development staff can then help by passing along business information as it becomes available.

Location of Suppliers (% of respondents)

Where do most of your supplies originate?

(n = 40)

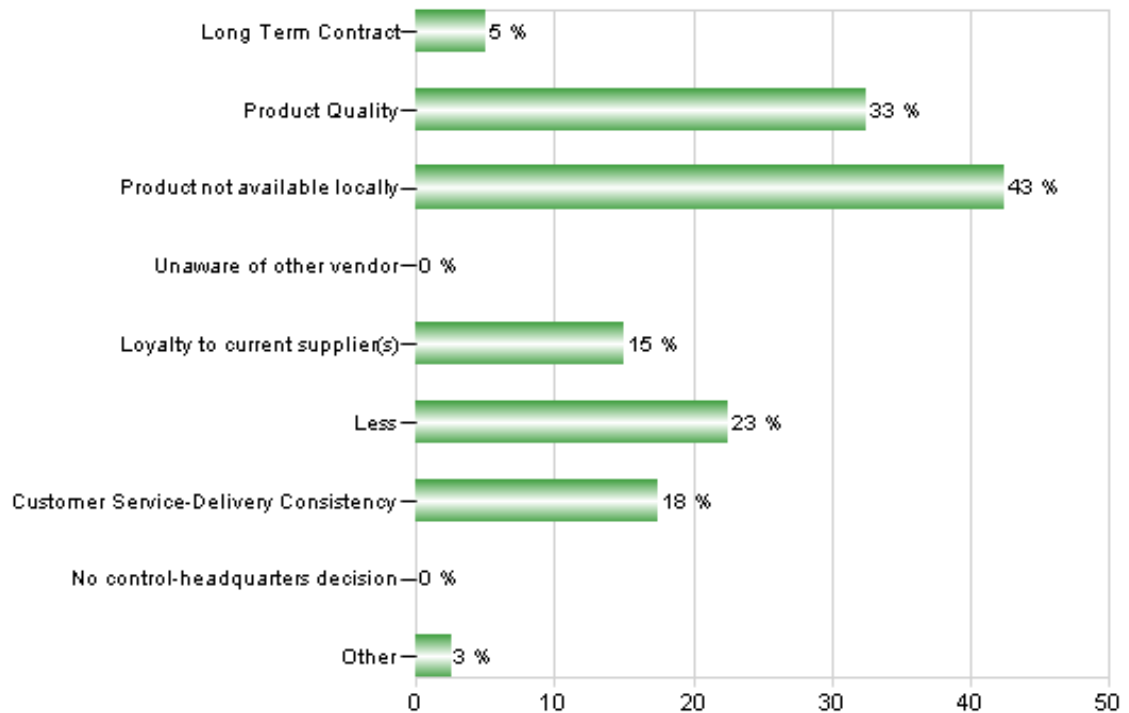


The U.S. was identified as the area from which most of the manufacturers sourced supplies. Ontario ranked second most popular, followed by other Canadian locations and foreign sources. Several companies indicated they would prefer to source locally but have not been able to find components from nearby companies.

Reason for Choice of Suppliers (% of respondents)

Why do you choose these suppliers?

(n = 40)



When companies were asked why they had chosen their suppliers, the most common three reasons identified included: that the product is not available from a closer supplier, secondly, the company purchases the product because of the quality, and thirdly that the company purchases the lowest cost supplies they can find.

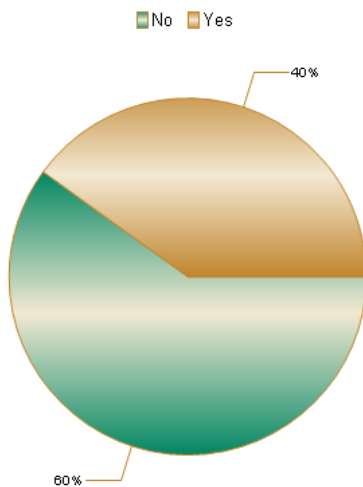
One of the companies commented that years ago there were thirty suppliers in the Toronto area. Now there are none, and therefore the company now sources products from the United States.

Interest in Local Industrial Trade Show (% of respondents)

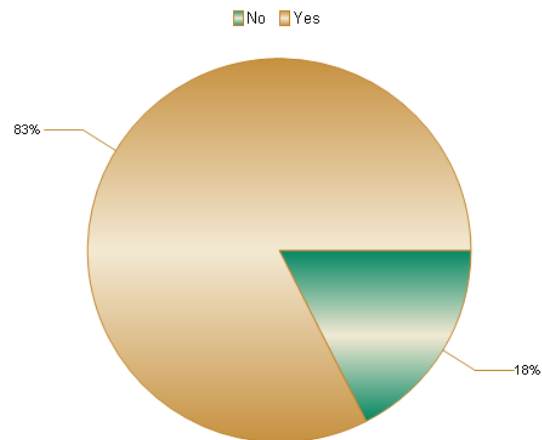
If a manufacturing/industrial trade show featuring local businesses and their products and services was held in Cambridge would you attend?

(n = 40)

As an exhibitor



As an attendee?



In order to determine if a local trade show would help local businesses market their products to each other, companies were asked if they would attend a local manufacturing trade show. While 40% said they would attend as an exhibitor, 83 % said they would attend as a visitor to the show.

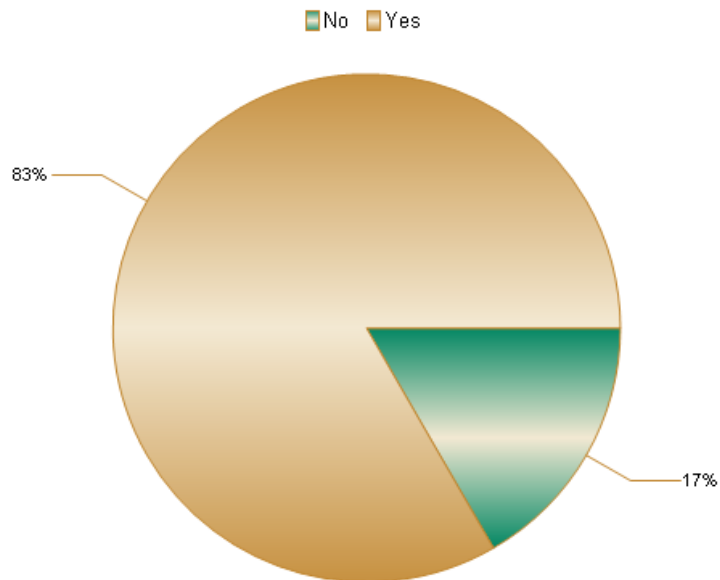
Some of the comments received from the 60% that said they would not attend as an exhibitor included:

- Not a good return on investment, too expensive
- Internet has changed how customers do business
- They currently deal with a network of representatives, so a trade show is not of interest
- Local manufacturing is not relevant to this business
- Most people know about them already
- Do not find trade shows to be beneficial
- Would not exhibit because the decision-makers who purchase their products would not be in attendance
- Their product is not a brand, it is private label retail presence therefore this type of trade show would not have any value to them

Activity in Research and Development (% of respondents)

Does your company do research and development?

(n = 42)

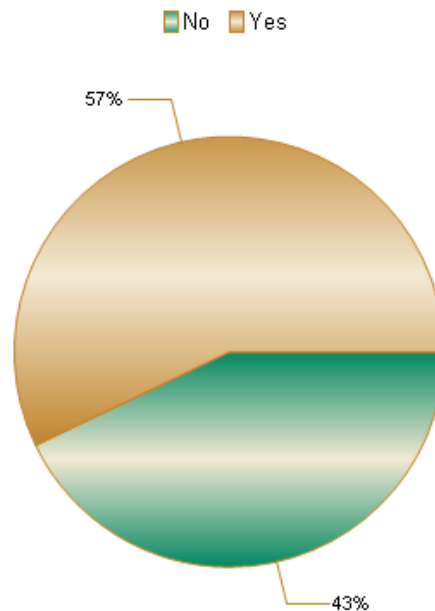


Of the companies surveyed, 83% responded that they do research and development in their operations. Some of the companies commented that they focus on development of new manufacturing processes and product development, or they do testing on new materials. Some indicated that they are always doing research into improving production methods, and one company indicated they are working with the university on a prototype. In many cases, companies have taken advantage of the Scientific Research and Experimental Development Tax Credit. Clearly it is important to companies to continually improve their products and processes to remain competitive.

Training Program (% of respondents)

Do you provide or have a formal training program?

(n = 42)



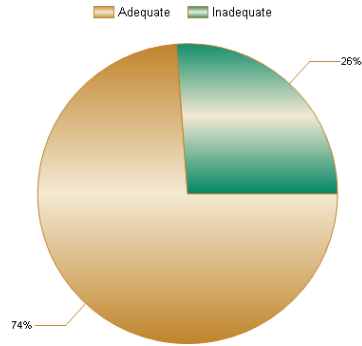
The training provided by companies is prevalent as 57% of respondents indicated they had a formal training program in place. The type of training varied; some had apprenticeship programs, while others indicated the training was done offsite. In some cases training is specifically geared to the specialized equipment in the businesses' operation, while many have ongoing on-the job training and in-house training.

Keeping the workforce well-trained is important for businesses to keep competitive. The City recognizes excellence in workforce training through the annual presentation of the Mayor's Award for Workforce Training & Development, which has been in place since 1994.

Plant and Equipment

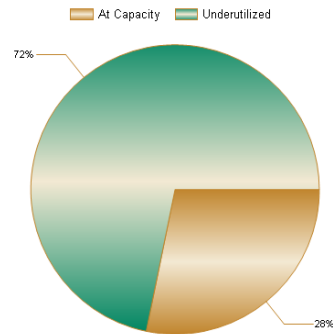
Is your facility/plant adequate or inadequate?

(n = 42)



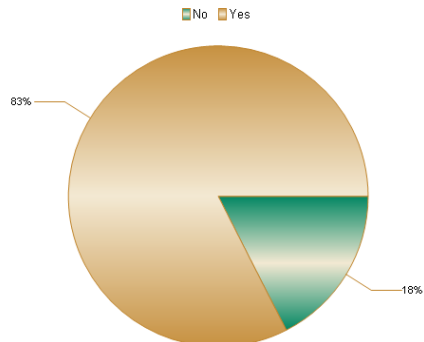
When asked if their facility/plant was adequate for their needs, 74% responded that there facility was adequate.

Is your equipment at capacity or underutilized?



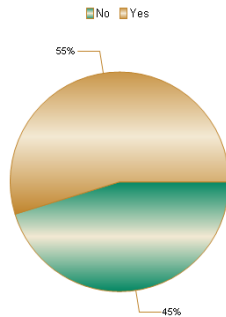
When asked if their equipment was being utilized fully or not, 72% indicated that their equipment was underutilized.

Do you have plans to upgrade your equipment?



Companies were asked if they had plans to upgrade their equipment and 83% said yes.

Do you have plans to upgrade your plant/facility?



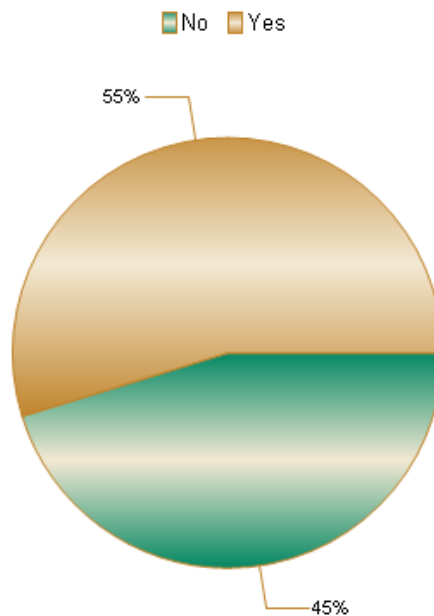
Companies were asked if they had plans to upgrade their plant/facility and 55% said they would be upgrading their facility.

These questions regarding plant and equipment upgrades help to characterize the building and equipment growth limitations that Cambridge companies are experiencing. If companies are nearing capacity and need space to grow their operations they typically look to expand. The next two questions deal with expansion plans.

Future Plans to Expand (% of respondents)

In the next two years, do you plan to expand your facility(s)?

(n = 42)

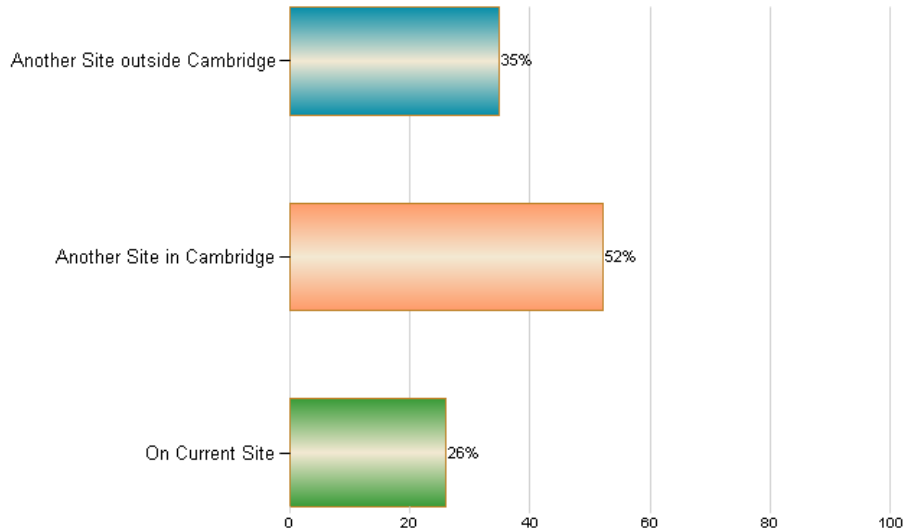


When asked if they plan to expand in the next two years, 55% said yes.

Type of Expansion Plans (% of respondents)

If yes, where will expansion occur?

(n = 23)



Companies that indicated they would be expanding were then asked to identify the type of expansion they would consider, and

- 26% said they plan to expand on-site,
- 52% said they plan to look for another building or site in Cambridge, and
- 35% said they would be looking outside Cambridge

Various reasons were given to explain why some companies intended to set up outside of Cambridge. One indicated they want to set up an additional office in Western Canada to service existing customers. Another is giving consideration to Mexico and China as they are lower cost manufacturing areas. One company indicated they plan to move their operation to a neighbouring community as it is closer to its existing employees, and where the taxes are lower on a similar building. Once the growth needs are identified, staff can work closely with each company to identify options for them in Cambridge.

Factors Influencing Business Success

What are the top three factors that have the most impact on your business profits or success?

When asked to identify the three most important factors affecting business profits or success, the most common responses included:

- Currency exchange rate – as the high Canadian dollar makes selling to the U.S. more difficult and purchasing supplies outside Canada more expensive
- Offshore competition – because competitive products from countries where labour costs are much lower is causing declining sales
- Economic downturn has substantially reduced sales volumes
- Overall operating costs- costs of utilities, labour, taxes etc., have a significant impact on margins
- The lack of financing products, and that banks have been reluctant to finance equipment purchases and business growth

Reasons for Locating in Cambridge

Why did your Company originally locate in Cambridge?

Comments from businesses explaining why their business is located in Cambridge included:

- Close to customers
- Close to Toronto and centrally located in Southern Ontario for access to the corridor
- Great industrial park; priced reasonably; close to highway 401
- Cambridge is my hometown
- Best location in North America for business
- Access to supplier chain and excellent employee resources
- Purchased business that was already established here
- Cost of living is less here than Toronto
- Beautiful downtown next to the river and old stone buildings

Valuable Cambridge Characteristics

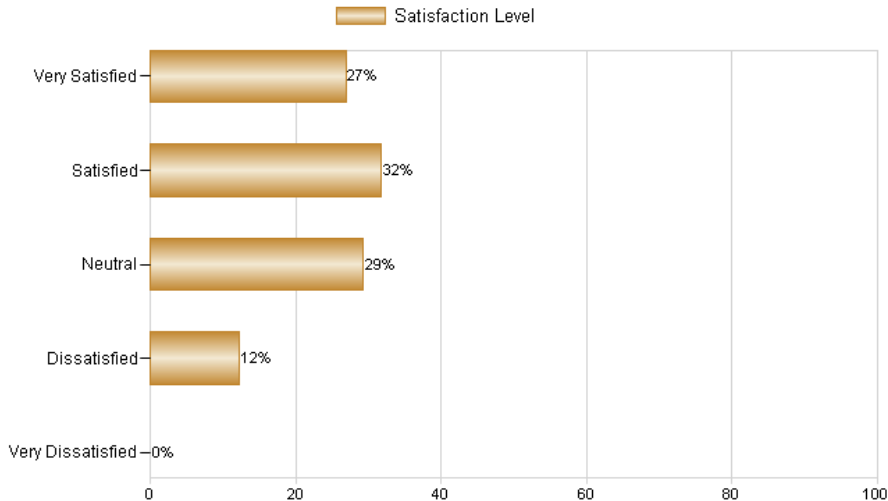
What do you value most about having your company located in Cambridge?

Some of the responses to this question included:

- Within commuting distance of Toronto
- Staying close to the customers is very important
- Community and the good business "feeling" in Cambridge
- Services are close and convenient; diverse community
- Availability of the manufacturing base
- You can get everything you need from the suppliers here
- Like the convenience of living and working nearby, with only a 5 to 10 minute commute
- Quality of life is great; the cost of employees is fair, (not inflated like Toronto), and the area is safe
- Strategic location; centrally located; people - most valuable asset
- Proximity to post-secondary institutions

Satisfaction with Municipal Services (% of respondents)

Overall, how satisfied are you with Cambridge's municipal services for your business/company?
(n = 41)



Companies were asked to indicate their level of satisfaction with Cambridge's municipal services, and about a third of the companies indicated they were satisfied, while a little less than a third were either very satisfied or neutral, and 12% were dissatisfied. The primary concerns identified are listed in the next section.

Primary Concerns about Cambridge Location

What are your primary concerns and/or challenges with your business location in Cambridge?

Some of the concerns companies identified with their location in Cambridge included: taxes, traffic congestion, the decline in the manufacturing climate, loss of clients due to closures of businesses, operating costs, pollution concerns, and smallness of Cambridge. Some issues identified are those that the Municipality has no direct control, such as the general decline in the economy. However, most companies responded that they had no concerns with Cambridge as a business location.

Suggestions for Municipality to improve Business Climate

What do you think the municipality could do to reduce any impediments to your future business success?

Some of the companies' responses included:

- Reduce taxes
- Keep Cambridge competitive & maintain "Open For Business" attitude
- Improve traffic flow
- Create incentives for investing in 'green' technology
- Reduction or waiving of building permit fees and development charges to stimulate building additions and expansions
- Promote "shop local"
- Attract more manufacturing to the area
- Help connect companies to create synergies and partnerships

Recommendations for Improvements (% of respondents)

Do you have any recommendations for improvements to the community?

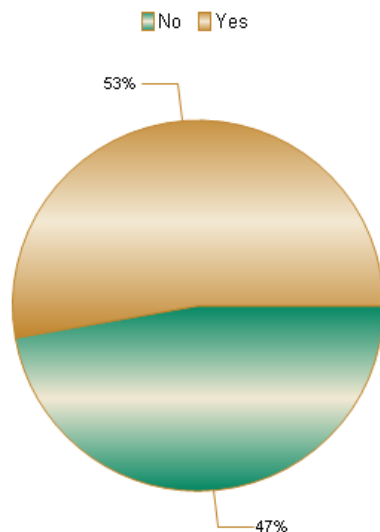
Additional comments from businesses included:

- More road improvements
- Improve approvals process at City Hall for new business
- Would like more cultural events to promote community spirit
- Would like a recycling program for small industries
- Improve public transit in business parks
- City needs to keep control of expenses, taxes down
- Land is expensive, so keep price down
- Bring GO train service to Cambridge

Tour of Facility (% of respondents)

Was a tour of the Facility conducted?

(n = 36)



A tour of the plant was provided in 53 % of the visits, which enabled staff to obtain a better understanding of the business operation and the capabilities so that when business opportunities arise, staff can ensure these are directed to those companies that have the capabilities for that particular product.

Summary and Next Steps

In summary, the Business Retention Program is a very effective method to develop closer ties with the business community and collect business intelligence. It also enables staff to identify issues or obstacles affecting local businesses, and in many cases help them resolve their concerns by bringing these matters to the attention of appropriate City Departments, other levels of government and various agencies to coordinate a resolution. Staff can also assist by providing help with business opportunities and information to help grow business, and connect companies to agencies such as the Department of Foreign Affairs and International Trade, the Ministry of Economic Development and Trade, and Canada's Technology Triangle who also provide services for business growth. In addition, the identification of gaps in the supply chain for manufacturers provides an opportunity to target these types of businesses for future potential investment.

The next step in the Business Retention Program will be to focus on companies in the environment/energy/clean tech sector. Economic Development staff plan to begin visits to these companies this fall. The visits will begin with service firms such as consultants and engineers, and then will connect with suppliers in this sector.



Appendix A- Questionnaire

CITY OF CAMBRIDGE
BUSINESS RETENTION PROGRAM QUESTIONNAIRE

COMPANY INFORMATION

NAME OF COMPANY/BUSINESS:

DATE OF INTERVIEW:

TIME OF INTERVIEW:

INTERVIEWER(S): NAME: 1)

NAME: 2)

COMPANY REPRESENTATIVE(S) INTERVIEWED: (MAY BE COMPLETED FROM BUSINESS CARD)

NAME (1):

POSITION/TITLE

NAME (2):

POSITION/TITLE

COMPANY CONTACT INFORMATION

Note: a) COMPANY/BUSINESS INFORMATION CAN BE TAKEN FROM THE BUSINESS DIRECTORY, OR
b) COMPANY/BUSINESS MAY NOT BE LISTED IN BUSINESS DIRECTORY

YEAR ESTABLISHED _____

YEAR ESTABLISHED IN CAMBRIDGE _____

CONTACT INFORMATION:

CONTACT NAMES:

ADDRESS:

PARENT COMPANY:

[IF APPLICABLE]

PHONE:

FAX:

EMAIL:

WEB SITE:

BUSINESS PROFILE:

PRIMARY NAICS: _____

SECONDARY NAICS: _____

BLDG SIZE: _____ SQ.FT.

ISO REGISTRATION: _____

OWNERSHIP:

PRIVATELY-OWNED OR

PUBLICLY-TRADED

CANADIAN OWNED OR

FOREIGN-OWNED

FRANCHISE

OTHER (SPECIFY) _____

ANNUAL SALES: UNDER \$100,000.

\$100,000. - \$249,999.

\$250,000. - \$499,999.

\$500,000. - \$999,999.

\$ 1 – 5 MILLION

\$ 5 – 10 MILLION

\$10 – 50 MILLION

OVER \$50 MILLION

NO RESPONSE

COMPANY PRODUCT OR SERVICE:

WHAT IS YOUR COMPANY'S PRIMARY PRODUCT OR SERVICE?

BUSINESS ACTIVITY

1. OVERALL, HOW WOULD YOU DESCRIBE YOUR COMPANY'S CURRENT BUSINESS HEALTH?

- | | |
|------------------------------------|--|
| <input type="checkbox"/> EXCELLENT | <input type="checkbox"/> FAIR |
| <input type="checkbox"/> VERY GOOD | <input type="checkbox"/> POOR |
| <input type="checkbox"/> GOOD | <input type="checkbox"/> OTHER (SPECIFY) _____ |

2. HOW WOULD YOU DESCRIBE YOUR COMPANY'S BUSINESS OUTLOOK OVER THE NEXT TWO YEARS.

- | | |
|------------------------------------|--|
| <input type="checkbox"/> EXCELLENT | <input type="checkbox"/> FAIR |
| <input type="checkbox"/> VERY GOOD | <input type="checkbox"/> POOR |
| <input type="checkbox"/> GOOD | <input type="checkbox"/> OTHER (SPECIFY) _____ |

3. WHAT ARE SOME OF THE KEY CHALLENGES CURRENTLY FACING YOUR BUSINESS?

COMMENTS: _____

MARKETS – (PRODUCTS & SERVICES)

4. WHO ARE YOUR MAJOR CUSTOMERS?

COMMENTS: _____

**5. WHAT SECTORS DO THEY (CUSTOMERS) REPRESENT?
(i.e. automotive; high tech; aerospace; textiles; agriculture & food).**

COMMENTS: _____

6. WHICH GEOGRAPHIC AREAS DO YOU SELL YOUR PRODUCT OR SERVICE?

- | | |
|----------------------------------|--|
| <input type="checkbox"/> ONTARIO | <input type="checkbox"/> US |
| <input type="checkbox"/> CANADA | <input type="checkbox"/> OTHER: (SPECIFY LOCATION) _____ |

7. DO YOU HAVE PLANS TO EXPAND SALES TO GEOGRAPHIC AREAS? YES NO

WHERE? COMMENTS: _____



8. WHERE DO MOST OF YOUR SUPPLIES ORIGINATE?

- ONTARIO
- CANADA
- UNITED STATES
- OTHER (SPECIFY) _____

COMMENTS: _____

EXPORT SECTION

- 9. DO YOU EXPORT?** YES WHERE _____
 NO EXPLAIN _____

NO, BUT INTERESTED IN EXPORTING IN THE FUTURE. _____

IF ANSWER "YES" TO EXPORTING TO U.S., ARE YOU EXPERIENCING ANY CHALLENGES?

COMMENTS: _____

10. QUESTION ELIMINATED – LEAVE BLANK

11. DO YOU HAVE AN INTEREST IN EXPLORING BUSINESS OPPORTUNITIES WITH FOREIGN COMPANIES?

	<u>YES</u>	<u>NO</u>	<u>ALREADY HAVE</u>		
FIND A FOREIGN DISTRIBUTOR/AGENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACT AS A DISTRIBUTOR OR AGENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
JOINT VENTURE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LICENSING AGREEMENT	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TRADE MISSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
OTHER (EXPLAIN): _____					

COMMENTS: _____

RESEARCH AND DEVELOPMENT

12. DOES YOUR COMPANY DO RESEARCH AND DEVELOPMENT?

- YES EXPLAIN: _____
- NO IF NO, GO TO "LABOUR MARKET" SECTION.(SKIP TO Q15)

13. IS RESEARCH AND DEVELOPMENT DONE LOCALLY?

- YES NO

IF NO, IN WHAT CITY/COUNTRY IS R&D ACTIVITY CARRIED OUT? _____

14. QUESTION ELIMINATED – LEAVE BLANK

LABOUR MARKET

15. WHAT IS YOUR CURRENT NUMBER OF EMPLOYEES? FULL TIME: _____ PART TIME: _____

16. IS YOUR WORKFORCE UNIONIZED? YES NO
IF YES, NAME UNION LOCAL(S) _____

17. OVER THE PAST YEAR, HAVE YOUR EMPLOYEE NUMBERS IN CAMBRIDGE ?
 INCREASED DECREASED REMAINED THE SAME

18. HOW MANY PEOPLE ARE EMPLOYED BY YOUR COMPANY WORLDWIDE (IF APPLICABLE)?
 NUMBER _____ N/A

19. ARE YOU PLANNING TO HIRE MORE STAFF WITHIN THE NEXT 3 YEARS?

- YES HOW MANY? _____
- NO (SKIP TO Q21)
- DON'T KNOW (SKIP TO Q21)
- COMMENT _____

20. IF YES, WHAT TYPE OF WORKERS WOULD YOU BE HIRING?

- PROFESSIONALS (SUCH AS ACCOUNTANTS, ENGINEERS, ETC.)
- SKILLED TRADES (SUCH AS WELDERS AND TECHNICIANS)
- GENERAL LABOURERS
- SALES OR MARKETING
- SUPPORT STAFF
- OTHER (PLEASE SPECIFY) _____

21. IS IT DIFFICULT FOR YOU TO ACQUIRE THE WORKFORCE YOU NEED FOR YOUR BUSINESS?

- YES
- NO (SKIP TO Q23)

22. WHAT ARE THE PRIMARY CHALLENGES YOU FACE IN ATTRACTING/HIRING THE WORKFORCE YOU NEED?

(May select more than one challenge)

- ATTRACTING SKILLED PEOPLE
- MEETING SALARY EXPECTATIONS
- BENEFITS/PENSIONS EXPECTATIONS
- PROVIDING TRAINING OPPORTUNITIES
- SHIFT WORK
- AVAILABILITY OF CAREER DEVELOPMENT WITHIN THE ORGANIZATION
- ACCESSIBILITY TO PUBLIC TRANSPORTATION
- QUALITY COMMUNITY OR LIFESTYLE
- OTHER (SPECIFY) _____
- NONE

COMMENTS: _____

23. DO YOU PROVIDE OR HAVE A FORMAL TRAINING PROGRAM? YES NO

COMMENTS: _____

24. **QUESTION ELIMINATED – LEAVE BLANK**

25. I AM GOING TO READ YOU A LIST OF AGENCIES AND/OR PROGRAMMES RELATED TO EMPLOYMENT, AND ASK IF YOU CURRENTLY USE ANY OF THESE SERVICES.

	YES Use services	NO Doesn't use services
CONESTOGA COLLEGE – CO-OP PROGRAM		
HUMAN RESOURCES & SKILLS DEVELOPMENT CANADA (HRSDC)		
JOB CONNECT ONTARIO		
LUTHERWOOD		
SCHOOL BOARDS - CO-OP PROGRAM(S)		
UNIVERSITY OF WATERLOO – CO-OP PROGRAM		
WILFRID LAURIER UNIVERSITY - CO-OP PROGRAM		
WORKFORCE PLANNING BOARD OF WATERLOO WELLINGTON DUFFERIN (WPB) (FORMERLY WWTAB)		
WRIEN (WATERLOO REGION IMMIGRATION EMPLOYMENT NETWORK)		
OTHER - (PLEASE SPECIFY)		

COMMENTS: _____

LOCATION NEEDS – RELOCATION/EXPANSION PLANS

26. THE FOLLOWING IS A LIST OF CRITERIA RELATED TO YOUR BUSINESS LOCATION AND I'D ASK YOU TO PLEASE RANK THEM FROM 1 TO 5, WITH 1 BEING VERY IMPORTANT AND 5 NOT IMPORTANT TO YOUR BUSINESS SUCCESS.

	VERY IMPORTANT		NOT IMPORTANT			NA
	1	2	3	4	5	
PROXIMITY TO MAJOR HIGHWAYS						
ACCESS TO RAIL						
ACCESS TO TORONTO (PEARSON) AIRPORT						
ACCESS TO WATERLOO AIRPORT						
PROXIMITY TO CUSTOMERS						
PROXIMITY TO SUPPLIERS						
PROXIMITY TO COLLEGES & UNIVERSITIES						
LABOUR AVAILABILITY						
HIGHLY SKILLED LABOUR FORCE						
LABOUR COSTS						
UTILITY COSTS						
AVAILABILITY OF LAND & BUILDINGS						
CONCENTRATION OF SIMILAR COMPANIES						
PRESENCE OF BUSINESS SUPPORT ORGANIZATIONS (SUCH AS THE CHAMBER OF COMMERCE, COMMUNITech, MEDT)						
LIFESTYLE – COMMUNITY AMENITIES						
OTHER CRITERIA – PLEASE SPECIFY						

COMMENTS: _____



PHYSICAL PLANT AND/OR EQUIPMENT

27. IS YOUR FACILITY/PLANT ADEQUATE INADEQUATE NA

COMMENTS: _____

28. IS YOUR EQUIPMENT AT CAPACITY UNDERUTILIZED NA

COMMENTS: _____

29. DO YOU HAVE PLANS TO UPGRADE YOUR EQUIPMENT? YES NO NA

COMMENTS: _____

30. DO YOU HAVE PLANS TO UPGRADE YOUR PLANT/FACILITY? YES NO NA

COMMENTS: _____

31. IF YES ABOVE, DO YOU HAVE PLANS TO UPGRADE BY IMPLEMENTING LEED (LEADERSHIP IN ENERGY AND ENVIRONMENTAL DESIGN) OR OTHER ENERGY EFFICIENCIES?

YES NO NA

COMMENTS: _____

32. IN THE NEXT 2 YEARS, DO YOU PLAN TO EXPAND YOUR FACILITY(S)? YES NO
 IF NO (SKIP TO Q37)

- ON YOUR CURRENT SITE) (SKIP TO Q35)
- ANOTHER BUILDING/SITE IN CAMBRIDGE) (SKIP TO Q35)
- ANOTHER BUILDING/SITE OUTSIDE CAMBRIDGE) (SKIP TO Q33)

PLEASE SPECIFY: _____

33. (IF YES TO LOCATING/EXPANDING OUTSIDE CAMBRIDGE), WHICH GEOGRAPHIC AREA ARE YOU CONSIDERING? (SELECT CHOICE(S) AND IDENTIFY LOCATION IF KNOWN)

- WITHIN WATERLOO REGION _____
- TORONTO (GTA) _____
- OTHER AREA IN ONTARIO _____
- OTHER AREA IN CANADA _____
- U.S. _____
- OTHER (PLEASE SPECIFY) _____

34. WHAT ARE THE MAIN REASONS FOR YOUR DECISION TO RELOCATE OUTSIDE OF CAMBRIDGE?

COMMENTS: _____



**35. WHICH OF THE FOLLOWING DEVELOPMENT OPTIONS WOULD YOU CONSIDER FOR YOUR RELOCATION/
EXPANSION PLANS? (PLEASE CHECK ALL THAT APPLY)**

- EXPAND ON CURRENT SITE
- PURCHASE LAND AND BUILD A NEW FACILITY
- PURCHASE AN EXISTING BUILDING
- LEASE A BUILDING OR SPACE
- OTHER (PLEASE SPECIFY) _____

36. HOW MUCH SPACE WILL YOU NEED FOR YOUR EXPANSION OR RELOCATION?

- | | |
|---|---|
| <p>A) ON SITE EXPANSION</p> <p>0 – 2,500 SQ. FT. _____</p> <p>2,500 – 5,000 SQ.FT. _____</p> <p>5,000 – 10,000 SQ.FT. _____</p> <p>10,000 – 20,000 SQ.FT. _____</p> <p>20,000 – 30,000 SQ.FT. _____</p> <p>30,000 – 40,000 SQ.FT. _____</p> <p>40,000 – 50,000 SQ.FT. _____</p> <p>50,000 SQ. FT. + _____</p> <p>UNKNOWN _____</p> | <p>B) RELOCATION FACILITY</p> <p>0 – 2,500 SQ. FT. _____</p> <p>2,500 – 5,000 SQ. FT. _____</p> <p>5,000 – 10,000 SQ.FT. _____</p> <p>10,000 – 20,000 SQ.FT. _____</p> <p>20,000 – 30,000 SQ. FT. _____</p> <p>30,000 – 40,000 SQ. FT. _____</p> <p>40,000 – 50,000 SQ. FT. _____</p> <p>50,000 SQ. FT. + _____</p> <p>UNKNOWN _____</p> |
|---|---|

**37. ARE YOU SOLELY RESPONSIBLE FOR DECISIONS REGARDING YOUR COMPANY’S EXPANSION AND RELOCATION
PLANS? YES NO**

COMMENTS: _____

**38. DOES YOUR COMPANY HAVE PLANS WITHIN THE NEXT 5 YEARS TO GROW BY ACQUIRING
OTHER COMPANY(S)? YES NO**

COMMENTS: _____

39. IN THE NEXT 5 YEARS, ARE YOU CONSIDERING SELLING/DIVESTING THE COMPANY? YES NO

COMMENTS: _____

MUNICIPAL SERVICES

**40. OVERALL, HOW SATISFIED ARE YOU WITH CAMBRIDGE’S MUNICIPAL SERVICES FOR YOUR
BUSINESS/COMPANY?**

- VERY SATISFIED DISSATISFIED
- SATISFIED VERY DISSATISFIED NEUTRAL

COMMENTS: _____

41. QUESTION ELIMINATED – LEAVE BLANK



ATTRACTION TO CAMBRIDGE

42. WHY DID YOUR COMPANY ORIGINALLY LOCATE IN CAMBRIDGE?

COMMENTS: _____

43. WHAT DO YOU VALUE MOST ABOUT HAVING YOUR COMPANY LOCATED IN CAMBRIDGE?

COMMENTS: _____

44. WHAT ARE YOUR PRIMARY CONCERNS AND/OR CHALLENGES WITH YOUR BUSINESS LOCATION IN CAMBRIDGE?

COMMENTS: _____

45. WHAT ARE THE TOP THREE (3) FACTORS THAT HAVE THE MOST IMPACT ON YOUR BUSINESS PROFITS OR SUCCESS?

COMMENTS: _____

46. WHAT DO YOU THINK THE MUNICIPALITY COULD DO TO REDUCE ANY IMPEDIMENTS TO YOUR FUTURE BUSINESS SUCCESS?

COMMENTS: _____

NETWORKING

47. IS YOUR COMPANY CURRENTLY INVOLVED IN (OR MEMBERS OF) ANY OF THE FOLLOWING BUSINESS GROUPS, GOVERNMENT AGENCIES OR TRADE ORGANIZATIONS?

	YES	NO
AUTOMOTIVE PARTS MANUFACTURERS' ASSOCIATION (APMA)		
CAMBRIDGE CHAMBER OF COMMERCE		
CANADA'S TECHNOLOGY TRIANGLE (CTT)		
CANADIAN FEDERATION OF INDEPENDENT BUSINESS (CFIB)		
CANADIAN MANUFACTURERS & EXPORTERS (CM&E)		
CANADIAN TOOLING & MACHINING ASSOCIATION (CTMA)		
COMMUNITECH		
DEPARTMENT OF FOREIGN AFFAIRS & INTERNATIONAL TRADE (DFAIT)		
EXCELLENCE IN MANUFACTURING CONSORTIUM (EMC)		
EXPORT DEVELOPMENT (EDC)		
GREATER KW CHAMBER OF COMMERCE		
HIGH PERFORMANCE MANUFACTURING CONSORTIUM (HPM)		
MANUFACTURERS INNOVATION NETWORK (MIN)		
MINISTRY OF ECONOMIC DEVELOPMENT & TRADE (MEDT)		
NATIONAL RESEARCH COUNCIL – INDUSTRIAL RESEARCH ASSISTANCE PROGRAM (NRC-IRAP)		
ONTARIO ENVIRONMENT INDUSTRY ASSOCIATION (ONEIA)		
WATERLOO CENTRE FOR AUTOMOTIVE RESEARCH (WATCAR)		
OTHER (PLEASE SPECIFY)		

