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survey of manufacturing concerns (1976)



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CITY HALL 100 WELLINGTON SQUARE BRANTFORD, ONTARIO N3T 2M3



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BRANTFORD
DEVELOPMENT
COMMISSION

CITY HALL 100 WELLINGTON SQUARE BRANTFORD, ONTARIO N3T 2M3
D. W. LATTA, DEVELOPMENT COMMISSIONER TELEPHONE (519) 759-4150

November 5, 1976

Dear Sir/Madam:

Having been formally approved for release by the Brantford Development Commission on October 28, 1976, you will find attached the total response profile of a Study conducted by the Commission and entitled, "Survey of Manufacturing Concerns (1976)".

Whether you are the Chief Executive of one of the manufacturing facilities in Brantford and area who actually completed a Survey on behalf of your firm, an individual looking at Brantford as a possible site for a new facility, or an interested and concerned citizen of our Community, the following parameters of the Survey, indicating the extremely high statistical significance of the results, will be of interest:

- * The total number of Surveys mailed to the manufacturing companies in Brantford and area was 156 and all Surveys were mailed on March 12, 1976.
- * The first completed Survey was received on March 16, 1976 and the last Survey in the sample was received on July 13, 1976 with 93.6 percent of all returned questionnaires received prior to April 30, 1976.
- * The total number of completed Surveys returned was 109.
- * Thus, the percentage return of questionnaires in this direct mail survey was 69.9 percent.
- * The total number of employees represented by the 109 companies responding to the Survey was 15,143.
- * The total number of employees represented by the 156 manufacturing companies in Brantford and area was 16,621. This figure was compiled through personal contact with those firms who chose not to respond to the Survey.

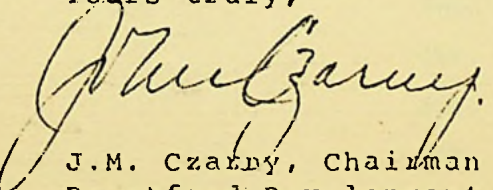
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- * Thus, the manufacturing companies who responded to the Survey represented 91.1 percent of the employment opportunities in the Manufacturing Sector of Brantford and area.
- * Based on the complete Survey of forty-four questions, there were 29,321 "units" or "cells" of information incorporated into the analysis.

As most of you will know, the members of the Development Commission are appointed by the Council of the Corporation of the City of Brantford and, as a Commission, have as a prime concern the health and vitality of the Manufacturing Sector of the Community. As a result, complete and unedited copies of the Survey are being sent to many Boards, Commissions and Civic Agencies in Brantford whose recommendations and decisions have a direct or indirect bearing on this vital Sector of our Community. The Commission feels that not only the aggregate totals, but also the detailed individual comments to many questions will serve as an accurate data base reflecting the attitudes of employers representing over 15,000 employment opportunities.

In closing, and on behalf of all members of the Brantford Development Commission, a special note of thanks to the Chief Executives of the manufacturing companies in Brantford and area who took the time to complete the questionnaire - we are confident that the Survey analysis will be studied in great detail by many people and will play an important part in ensuring the continued prosperity of our Community.

Yours truly,



J.M. Czarny, Chairman
Brantford Development Commission

JMC:ec
Att.

MEMBERS OF THE 1976
BRANTFORD DEVELOPMENT COMMISSION

* * *

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SURVEY OF MANUFACTURING
CONCERNS (1976)

BRANTFORD DEVELOPMENT COMMISSION
OCTOBER, 1976

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raw counts	%	<u>Question One:</u> What is the scope of your business?
41	37.6	National
38	34.9	International
19	17.4	Provincial
10	9.2	Local
1	0.9	N/A

* * * * *

Question Two: What year did you commence operations in the City of Brantford?

1876		Oldest business reporting in the survey (year)
1975		Newest business reporting in the survey (year)
25.7		Average age of all those reporting in the survey (years)

* * * * *

Question Three: Did you relocate from another centre?

21	19.3	Yes
88	80.7	No

* * * * *

Question Four: Are you a branch operation?

52	47.7	Yes
57	52.3	No

* * * * *

raw counts %

Question Four: (cont'd)

Nationality of parent company?

22	42.3	Canadian
30	57.7	American
0	0.0	Other

* * * * *

Question Five: What is the total number of employees in the Brantford operation?

15,143	Total number of employees of those companies reporting in the survey.
138.9	Average number of employees per business.
2 to 3,490	Size range in terms of number of employees.

* * * * *

Question Six: What percentage of your labour force is:

Skilled
Semiskilled
Unskilled

The average percentage reply for each of the three labour types for all responses with some answer other than zero percent:

34.5	Skilled Labour
31.8	Semiskilled Labour
33.7	Unskilled Labour

* * * * *

raw counts %

Question Seven: Could you give a breakdown of the employees in terms of:

- Office (including management and sales)
- Production and Processing
- Other

The average percentage reply for each of the three areas for all responses with some answer other than zero percent:

23.7	Office (including management and sales)
74.5	Production and Processing
1.8	Other

* * * * *

Question Eight: What is the floor area breakdown of your operation in terms of:

7,406,215 Total floor area represented by 97 respondents* (sq. ft.)

Breakdown of Total Floor Area:

563,645	Office Space (sq. ft.)
4,569,752	Manufacturing/Processing (sq. ft.)
2,120,925	Warehouse (sq. ft.)
151,893	Other (sq. ft.)

76,352 Average number of square feet per company including all 97 respondents

61,255 Average number of square feet per company excluding the largest and smallest square footage response (total of 95 companies used in calculation)

*12 of the companies did not provide this information

* * * * *

raw counts	%	
		<u>Question Nine:</u> What are your peak seasons or months of the year?
		There were four possible types of answers received. These are listed below with the appropriate number of responses pertaining to each.
49	45.0	Answer received that business is 'steady' all year with no real peaks.
41	37.6	Answer provided in terms of months and not seasons.
16	14.7	Answer provided in terms of seasons and not months.
3	2.7	N/A
		For those people who provided an answer in terms of seasons and not months, the following is the breakdown:
10	37.1	Fall
9	33.3	Spring
5	18.5	Winter
3	11.1	Summer
		For those people who provided an answer in terms of months and not seasons, the following is the breakdown:
31	14.2	September
26	11.9	June
25	11.4	October
22	10.0	May
21	9.6	August
21	9.6	November
18	8.2	April
18	8.2	July

survey of manufacturing concerns (1976)

raw counts	%	
		<u>Question Nine:</u> (cont'd)
13	5.9	March
10	4.6	December
7	3.2	January
7	3.2	February

* * * * *

Question Ten: Could you give the one main reason why you chose Brantford in which to locate your operations?

The following is a breakdown by raw counts and percentages of the 83 companies who provided a response:

24	28.9	Hometown
10	12.1	Brantford's Central Location
9	10.8	Labour Supply
9	10.8	Purchased Existing Business
6	7.3	Government Incentives
25	30.1	Other - Includes:

Truck transportation facilities
Growth of industry

Availability of foundries and machine shops

No other similar business was here

Location of already established associated company

Ontario survey indicated Brantford desirable

Favourable priced real estate

* * * * *

raw counts %

67 61.5
40 36.7
2 1.8

Question Eleven: Have you expanded previously on this site?

Yes
No
N/A

2,535,088

Total Square Footage Expansion Reported (sq. ft.)

49,708

Average Expansion (sq. ft.)

1,000 to
834,000

Size Range in Terms of Square Footage

* * * * *

Question Twelve: Would you say your decision to locate in Brantford was made after formal market studies, informal market studies, or on an ad hoc basis?

18 16.5
28 25.7
30 27.5
33 30.3

Formal
Informal
Ad Hoc
N/A

* * * * *

Question Thirteen: Was there information that you would have liked about Brantford that you found hard to obtain or nonexistent?

4 3.7
69 63.3
36 33.0

Yes
No
N/A

raw counts %

Question Thirteen: (cont'd)

If yes, could you describe the nature of this data?

- 1 When road would be completed, sewers in. Stalled at our new residence. (Still not in).
- 1 More accurate data on labour market and availability of services.
- 1 Dept. of Labour 1st encouraged then after locating here let us have a bundle of do's and dont's. M.P.P. very helpful.
- 1 Year 1957. As an immigrant you know very little of the official acts or laws and nobody informs you about anything.

* * * * *

Question Fourteen: Do you lease or own the land that you are presently on in this location or do you rent building space only?

78	71.6	Own Land
4	3.7	Lease Land
19	17.4	Rent Space
2	1.8	Own Land and Lease Land
5	4.6	Own Land and Rent Space
1	0.9	Lease Land and Rent Space

If you own or lease land, how much land is involved?

- 2,016 Total number of acres involved for the 63 companies who answered this part of the question.
- 32.0 Average number of acres per company.

* * * * *

raw
counts

%

Question Fifteen: What is the single most important problem facing you as a businessman operating in the City of Brantford?

Of the 63 replies received to this question, the following is a complete listing of the responses:

8	Limited availability of skilled labour
4	Trying to get conscientious help
2	Labour force
2	Mac Makarchuk and Derek Blackburn
1	Competition in international markets - no locally created problems
1	Distance from Toronto and access speed to that City
1	High labour cost and militant labour atmosphere
1	High taxes
1	Traffic on Park Rd. North. Something has to be done immediately
1	Located right next to a residential area that was supposed to have been a commercial zone. Now a fourplex is the neighbour
1	Transportation - loading dock - rail facilities
1	North-South Expressway
1	Dirty canal in front of our premises
1	Financing
1	Remaining competitive - keeping plant operating
1	Attraction of professional engineers or designers
1	Labour cost
1	Government assistance in a depressed industry
1	Extension of 403 from Q.E. to 401 at Woodstock
1	Distance from Toronto. Supply/customers/visitors/entertainment - bearing in mind that most of our business is export

raw counts	%	
		<u>Question Fifteen: (cont'd)</u>
1		High cost and scarcity of skilled labour
1		Labour turnover and absenteeism - i.e. - attitude of the unskilled labour we have
1		Skilled machinists shortage
1		Supply of raw material
1		Skilled and semiskilled employees
1		Finding skilled labour and competition from farming equipment industries with reference to wages demanded
1		Attraction of highly skilled professional staff - who tend to prefer the major metropolitan areas
1		Inadequate labour pool from which to draw. Situation dominated by the larger companies such as M/F and White
1		U.A.W.
1		The high hourly rate at Massey's and White Farm
1		Some of the City By-laws
1		Distance from most rapidly expanding market areas - such as Mississauga
1		Distribution
1		Lack of land space at this location
1		Suitable employment for continuous shift operation
1		Airport facilities to other centres in Ontario - specifically to Toronto airport
1		Skills in plastics
1		As a new businessman, becoming familiar with plants and plant personnel that would use tool and die services
1		Lack of skilled labour and absenteeism
1		Obtaining reasonably priced semiskilled labour in busy economy
1		High cost of housing for our employees

raw counts	%	
		<u>Question Fifteen:</u> (cont'd)
1		Utility costs (energy)
1		High wages paid by other employers in area
1		Concern about zoning of future reserves
1		Cost of labour wages (U.A.W.) for our industry - textiles
1		Inflation
1		Expansion and money lending
1		Enticing people to shop downtown
1		Distance from market
1		Keeping costs in line with worldwide competition
1		Labour supply (seasonal)

* * * * *

Question Sixteen: Is the current system of roadway networks adequate to serve your company's needs?

84	77.1	Yes
21	19.2	No
4	3.7	N/A

If no, what would be your first street priority and what would you recommend be done?

4		North-South Expressway - Bypass completion
3		403 Highway - Extension of 403 from Q.E.W. to 401 at Woodstock
1		Colborne Street East - Only access to east Brantford - action re route
1		Alice Street - Either change name of other side of street or put tunnel under train tracks to join both

raw counts

%

Question Sixteen: (cont'd)

- 1 Park Road North - Updated to four lanes and railway bridge
- 1 Lorne Bridge (Colborne Street) - Needs widening or better alternate to north
- 1 Grand River Avenue - Connect Grand River Ave. to Parkside Dr. as originally planned
- 1 Morton/West - Morton/Park Rd. need traffic light
- 1 Webster Street - Re-surfacing
- 1 Lorne Bridge Area (Colborne Street) - Lorne Bridge Area
- 1 Park Road North and Henry Street - Park Rd. N. railway overpass - Henry St. interchange
- 1 Newport Street - Repair Newport St.
- 1 Catharine Avenue (between Colborne and Spalding) - Trucks still use - parking one side
- 1 Morton Avenue - Traffic lights req'd at both ends of survey
- 1 Alice Street (west section) - Needs curbs and paving and restricted parking to allow transports in and out of our docks
- 1 N/A

* * * * *

Question Seventeen: What three urban centres constitute your largest market area either provincially, or nationally?

Of the 81 companies who answered part or all of this question, the following is a complete listing of the responses:

- 60 Toronto
- 41 Montreal
- 17 Brantford

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raw counts	%	<u>Question Seventeen:</u> (cont'd)
16		Vancouver
14		Hamilton
12		Kitchener
10		London
6		Simcoe
5		Edmonton
4		Calgary
4		Windsor
3		Guelph
3		Paris
3		Winnipeg
2		Burlington
1		Cambridge
1		Mississauga
1		Belleville
1		Peterborough
1		St. Catharines
1		Quebec City
1		Brockville
1		Sarnia
1		Thunder Bay
1		Chatham
1		Lloydminster, Alberta
1		Stratford
1		Jarvis

Survey of manufacturing concerns (1976)

raw counts %

Question Seventeen: (cont'd)

1 North Bay

* * * * *

Question Eighteen: What is Brantford's single most important problem as far as you are concerned as one of the 160 manufacturing concerns in our City?

The 59 replies received to this question can be grouped into seven major headings as follows:

17	28.8	Downtown
16	27.1	Labour
4	6.8	Housing
3	5.1	Taxation
3	5.1	Industrial Growth
2	3.4	Transportation
14	23.7	Miscellaneous (Issues referenced only once)

- Holding expenditures to realistic budgets
- Unemployment and welfare figures are unnecessarily too high
- Custom Clearance
- N.D.P. Government
- Education
- Toronto costs without Toronto convenience
- Most industrial parcels of land too large for small manufacturers
- Small town attitude
- Thought of as a "hick" town

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raw
counts

%

Question Eighteen: (cont'd)

Miscellaneous (cont'd)

- Public Transportation
- Low water pressure on Mohawk Street
- Lack of serviced industrial land
- Mine is very particular
- Developing into a commuting city

* * * * *

Question Nineteen: What action would you like to see taken?

Outlined below is a complete listing of all responses under the headings provided in question eighteen.

Downtown

- Extensive study to develop southwest so downtown is put back in centre of City
- Rebuild
- Start by improving City-owned property - e.g. Market Square
- Revitalize downtown core
- A development plan for the City's core followed by a real effort to encourage developers and large organizations and companies to invest and develop
- No out-of-town malls, redevelopment of downtown area
- Put a restaurant, cum garden with outdoor facilities on Market Square
- Clean up the "eye sores", rebuild the City centre and endeavour to attract business beneficial to that area

raw
counts

%

Question Nineteen: (cont'd)

Downtown (cont'd)

- Establishment of downtown planning to rebuild area with modern hotel complex
- An attractive endeavour to update the downtown core
- Downtown renewal. Arts Centre. Racquets facilities.
- Complete renovation and upgrading of downtown section of town

Labour

- Lack of skilled labour
- Future availability of labour - co-ordinate industrial growth with size of available labour force
- Less relief payments for those who won't work
- Assistance in training programs - particularly for welders
- Some kind of dilution of the power of International Unions. Perhaps limit unions to Canadian control.
- Local, Provincial or Federal Government program to solve
- Establishment of formal post-secondary educational facilities
- Promote aggressively the availability and image of training facilities already in existence
- Training of recruitment programs developed
- More efficient training facilities - training and apprenticeship schemes
- Too involved - entire country now out of line with world competition
- Some positive action by welfare department

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raw
counts

%

Question Nineteen: (cont'd)

Housing

- Study on future services for housing development to provide suitable land
- Stronger City Official leadership

Taxation

- Economizing in the cost of municipal operation

Industrial Growth

- I would like to see Brantford appeal to more small and medium size businesses to settle here as in Kitchener, Galt, etc. This may even help the labour situation.
- New and diversified industrial growth in the City and area. While much improvement has been made in this area, it takes a large number of new and smaller industries to offset the tremendous influence of Massey-Ferguson and White.

Transportation

- Press Ontario Government to build Highway 403 from the Q.E.W. to Woodstock
- Park Road North railway overpass and Henry St. interchange

Miscellaneous

- Reduce unemployed and welfare recipients by 90% and I feel there is work around for that 90% if they don't have a choice.
- That the major national custom brokers allow the local Custom Agents to clear on site, on demand
- Reduce the size of industrial acreage and allow more plant area per acre
- Small Town attitude - Expressway, Arts Centre. More professional leadership in City Government, less hesitation and a little more daring.

brantford development commission

survey of manufacturing concerns (1976)

raw counts %

Question Nineteen: (cont'd)

Miscellaneous (cont'd)

- Better public relations about life and living in Brantford to counter "hick" town image
- Improved public transportation
- Water pressure must be increased on Mohawk St. to meet insurance industry standards
- Tax rebate for resident workers to counter Brantford developing into a commuting city

* * * * *

Question Twenty: Is there a particular type of industry you would like to see located in Brantford, which currently, in your estimation, there is a deficiency?

20	18.4	Yes
63	57.8	No
26	23.8	N/A

If yes, what is the nature of the industry?

3	Steel warehouse
1	No specific suggestion
1	Aluminum extrusion mill and suspension manufacturers
1	Bakers' equipment
1	Chemical, textile, furniture and appliances
1	Light clothing manufacturer
1	Automotive manufacturer
1	Tank fabrication
1	Good machine shop

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raw counts	%	
		<u>Question Twenty:</u> (cont'd)
1		Corrugated paper box, steel warehousing
1		Heat treating
1		Small to medium sized labour intensive industry
1		Hot dip galvanizing plant
1		Alloy steel foundry
1		Electronic manufacturing or an outfit that carries a decent inventory
1		Plastic mold makers
1		Small jobbing machine shops
1		Public cold storage
		<u>If yes, would this industry provide support to your company/institution in terms of service?</u>
15	75.0	Yes
4	20.0	No
1	5.0	N/A

* * * * *

Question Twenty-one: What additional types of industry would you like to see in the City that would provide an increased market for your products or services?

Of the 38 companies responding to this question, 25 listed one type of industry, 5 listed two types and 8 listed three types.

5		Auto manufacturer
4		All types

survey of manufacturing concerns (1976)

raw counts	%	<u>Question Twenty-one:</u> (cont'd)
3		Food processing
2		Appliance Manufacturers
2		Large metal fabricators
1		Manufacturers of automatic equipment
1		Engineering firms
1		Heavy industry like pulp and paper, mining and steel
1		Industry - prime mfg.
1		Hospital
1		Retail businesses of any nature
1		Candy company
1		Shoe company
1		Cosmetics
1		Door manufacturer
1		Gummed tape
1		Mobile home
1		Furniture
1		Knitting mill
1		Yarn mill
1		Comm. dyeing plant
1		We service Canada's egg producers and national chain stores so industries cannot help
1		N/A to pharmaceutical manufacturers
1		Automotive muffler and pipe
1		Heavy equipment
1		Any industrial user of rubber products

survey of manufacturing concerns (1976)

raw counts	%	<u>Question Twenty-one:</u> (cont'd)
1		Electrical
1		Manufacturing
1		Automotive parts
1		Electrical motors
1		Oil refinery
1		Brewery
1		Distillery
1		Machinery
1		Road Equipment
1		Large bakery
1		Electronics
1		Farm implements
1		Paper products
1		Prime manufacturing (e.g. M.F., White)
1		Textile
1		Poultry processing
1		Heavy appliances
1		Contractors
1		Snow plow blade and grade blade manufacturer
1		Rock bits
1		No additional industry - any increase would tend to increase our costs due to competition in labour force
1		More independent large grocceterias

* * * * *

raw
counts

%

Question Twenty-two: What approximate percentage of the following modes of transport do you utilize to receive incoming materials and supplies?

Air

Road

Rail

The average percentage reply for each of the three modes of transportation is as follows:

1.2	Air
86.7	Road
12.1	Rail

* * * * *

Question Twenty-three: What approximate percentage of the following modes of transport do you utilize to ship your finished goods?

Air

Road

Rail

The average percentage reply for each of the three modes of transportation is as follows:

1.7	Air
86.7	Road
11.6	Rail

* * * * *

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Question Twenty-four: Is our City's form of landbanks for industrial use a good approach to ensuring industrial growth? In other words, do you like the idea of City-owned Industrial Parks?

95	87.2	Yes
3	2.8	No
11	10.0	N/A

* * * * *

Question Twenty-five: Which of the following non-industrial uses are compatible with industrial zoned areas?

- Automotive Parts and Service
- Service Station
- Hotel and Motel
- Warehouse and Storage
- Sports/Meeting Complex
- Barber Shop
- Banking Facilities
- Other _____

The following is a breakdown summary of the reply frequency to each alternative expressed as a percentage of the total number of responses:

23.9	Warehouse and Storage
18.4	Service Station
16.3	Banking Facilities
14.4	Automotive Parts and Services
12.0	Hotel and Motel

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counts

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Question Twenty-five: (cont'd)

8.6	Sports/Meeting Complex
4.0	Barber Shop
2.4	Other

* * * * *

Question Twenty-six: Which three of the following are the most attractive features to industrial concerns considering Brantford as a possible location?

Diversified industrial base

Proximity to a large market

Industrial training facilities

Available labour:

(Skilled

(

Type: (Semi-skilled

(

(Unskilled

Transportation facilities

Local service and support industries

Local living conditions

Housing costs and availability

Education facilities

Recreational facilities

Other _____

The following is a breakdown summary of the reply frequency to each alternative expressed as a percentage of the total number of responses:

Question Twenty-six: (cont'd)

raw counts	%	
28.8		Proximity to a large market
12.4		Transportation facilities
11.3		Diversified industrial base
9.9		Local living conditions
9.1		Available semi-skilled labour
6.9		Available skilled labour
5.1		Industrial training facilities
4.4		Local service and support industries
3.7		Available unskilled labour
3.3		Housing costs and availability
3.3		Recreational facilities
1.8		Educational facilities

* * * * *

Question Twenty-seven: Do you, as a businessman, feel that Brantford is providing adequate housing of the right type in the right location?

72	66.0	Yes
22	20.2	No
15	13.8	N/A

If no, of what type of housing do you feel Brantford needs?

Single Family

Town Houses

Semi Detached

raw
counts

%

Question Twenty-seven: (cont'd)

Small Apartments

Large Apartments

Other _____

The following is a breakdown summary of the reply frequency to each alternative expressed as a percentage of the total number of responses:

46.2	Single Family
15.4	Small Apartments
12.8	Town Houses
12.8	Semi Detached
10.2	Large Apartments
2.6	Condominiums

* * * * *

Question Twenty-eight: Do you envisage that you may expand your operation in the next five years?

74	67.9	Yes
32	29.4	No
3	2.7	N/A

If yes, what would be the nature of the expansion?

Relocate total operation (in Brantford)

Establish satellite operation (in Brantford)

Survey of manufacturing concerns (1976)

raw
counts

%

Question Twenty-eight: (cont'd)

Relocate total operation (outside
Brantford)Establish satellite operation
(outside Brantford)

Other _____

The following is a breakdown by raw counts and percentages of the 74 companies who responded and envisage that they may expand their operation in the next five years:

29	39.2	Expand existing plant
18	24.3	Relocate total operation (in Brantford)
6	8.2	Establish satellite operation (in Brantford)
6	8.2	Establish satellite operation (outside Brantford)
2	2.7	Establish a satellite operation in Brantford AND a satellite operation outside Brantford
2	2.7	Consolidate the two locations in Brantford
1	1.3	Continuous programme of expansion and acquisition in Ontario
1	1.3	Internal changes (to building and equipment)
1	1.3	Relocate total operation (outside Brantford)
1	1.3	Relocate total operation in Brantford AND establish a satellite operation outside Brantford
1	1.3	Not certain
6	8.2	N/A

If yes, what would be your requirements in terms of land?

AND/OR _____ acres/other

If yes, what would be your building requirements?

_____ sq. ft.

Survey of manufacturing concerns (1976)

raw
counts

%

Question Twenty-eight: (cont'd)

From the first part of this question, 27 companies surveyed indicated that they envisage relocating their total operation in Brantford or establishing a satellite operation in Brantford and of the 19 companies who could/did specify a requirement for land within five years, the total acreage needed is 55 acres, or an average of 2.9 acres per company.

The balance of eight companies, making up the total of 27 who indicated they would envisage relocating their total operation in Brantford or establishing a satellite operation in Brantford to accomodate their plans for expansion within the next five years did not/could not provide an acreage requirement.

* * *

A total of 56 plants envisage that they may expand their operation in Brantford in the next five years (51.4 per cent). This total of 56 is made up of those companies who anticipate relocating their total operation in Brantford, establishing a satellite operation in Brantford, as well as those companies looking to an expansion of their existing facilities.

Of the 56 companies considering expansion in the next five years, 32 indicated their square footage requirements representing a total building area of 923,440 square feet. This is an average per company of 28,857 square feet with a range of 1,440 to 100,000 square feet.

Based on the average of 28,857 square feet for each of the 32 companies, and extrapolating this average per company to the total of 56 companies who are willing/can state their five year expansion plans, the total number of square feet of building expansion, represented by the 56 companies, is 1,615,992 square feet over the next five years.

* * * * *

Question Twenty-nine: Do you feel that the existing zoning on your land gives the protection you feel acceptable to your particular operation or function?

86

78.9

Yes

raw counts % Question Twenty-nine: (cont'd)

9 8.3 No

14 12.8 N/A

* * * * *

Question Thirty: Does the existing zoning restrict any plans for the future or inhibit your operational efficiency?

11 10.1 Yes

80 73.4 No

18 16.5 N/A

* * * * *

Question Thirty-one: Are the hourly-rated employees of your Brantford operation, involved in production/processing, members of a National or International union?

47 43.1 Yes

61 56.0 No

1 0.9 N/A

If yes, which union(s)?

The following is a summary of the unions listed by the companies surveyed including the raw count frequency summary:

15 United Auto Workers

6 International Woodworkers of America

3 International Chemical Workers Union

3 International Association of Machinists

raw counts	%	
		<u>Question Thirty-one:</u> (cont'd)
2		Canadian Food and Allied Workers
2		United Cement, Lime and Gypsum Workers
2		United Steelworkers of America
2		United Glass and Ceramic Workers
2		Canadian Chemical and Textile Workers
1		International Union of Electrical, Radio & Machine Workers
1		Teamsters
1		International Electrical Workers
1		Textile Workers
1		Amalgamated Clothing Workers of America
1		International Molders and Allied Workers
1		United Rubber Workers
1		Boilermakers
1		Canadian Union of Operating Engineers
1		United Brotherhood of Joiners of America
1		American Federation of Grain Millers
1		Graphic Arts I.T.V. Guild

* * * * *

Question Thirty-two: Would you consider labour-management relations in Brantford, excellent, fair or poor?

2	1.8	Excellent
48	44.1	Good
39	35.8	Fair

raw counts	%
8	7.3
12	11.0

Question Thirty-two: (cont'd)

Poor

N/A

* * * * *

Question Thirty-three: What are the two most important needs for the area around your present location to which you would assign a high priority?

A total of 24 companies (22.0%) had one comment, 31 companies (28.5%) had two comments and 54 companies (49.5%) had no comments.

The following is a summary of the comments made by the companies in the survey including the raw count frequency summary:

- | | |
|---|---|
| 3 | Increased water pressure |
| 3 | Street improvement |
| 3 | Parking facilities |
| 2 | Better police protection |
| 2 | None known |
| 2 | Provide better snow removal |
| 2 | All is fine |
| 1 | Curbs and gutters in Brancida |
| 1 | Restrict the growth of residential areas, especially the new townhouse project proposed on the south side of Morton |
| 1 | Finish second stage of Expressway |
| 1 | Sanitary sewers |
| 1 | Bus service |
| 1 | Better water supply for purpose of fire protection |

survey of manufacturing concerns (1976)

raw counts	%	<u>Question Thirty-three:</u> (cont'd)
1		Bottleneck on Lorne Bridge
1		Additional industries (basic and secondary)
1		Curb and sidewalk reconstruction
1		Parking for existing industries and plants
1		No problems now
1		Clean up of property immediately opposite on West Street and removal of Silverwood operation
1		Hydro
1		Improve surface Ryan Place
1		We could do with the re-surfacing of Wadsworth Street - it is in very poor condition
1		Get this neighbour of ours to clean up his messy operation
1		Fire Station (presently under construction)
1		Appearance - other plants/operations
1		Eliminate R.R. crossing on Park Road North
1		Adequate exit onto No. 53 Hwy. from Spalding Drive
1		Transportation
1		Check on vandalism
1		Traffic control
1		Widening and re-paving of Erie Avenue
1		No parking facilities on Wadsworth Street
1		Southern access road
1		Street lights
1		More industrial development land be made available
1		Proper arterial exits to main highways
1		Lack of concern by one area business regarding state of property

raw
counts

%

Question Thirty-three: (cont'd)

- | | |
|---|---|
| 1 | Public transportation from various sections of the City |
| 1 | Removal of railway lines in West Brant |
| 1 | Completion of Highway 403 |
| 1 | Mail delivery of sub-station |
| 1 | Traffic lights at Morton and Park Road and South |
| 1 | Easy access to money with low interest |
| 1 | Apartments close by to give a larger flow of customers |
| 1 | Redevelopment to more industrial |
| 1 | New water main to supply area. Fire protection is currently inadequate because of water supply |
| 1 | Sewers (Township) |
| 1 | A buffer zone between industrial and residential areas |
| 1 | Security - protection against vandalism |
| 1 | Better upkeep of City-owned land |
| 1 | Guarantee protection to present industries against possible residential complaints that may injure the industries that are already established in industrial parks. |
| 1 | Better public transportation to our immediate area |
| 1 | University and/or College |
| 1 | Traffic control of a very busy artery |
| 1 | Unloading area |
| 1 | Water |
| 1 | Install 27,000 volt electrical loop system to Henry Street plants |
| 1 | Have the City clean up the drainage problem (storm sewers and East Ward Creek) |
| 1 | Traffic lights at Morton/Park Rd. North and Morton (West Street) |

raw counts	%	
		<u>Question Thirty-three: (cont'd)</u>
1		Hotel/Motel in West Brant
1		Factory locked in - no room for expansion on Wadsworth if ever required
1		T.H.&B. track - removal and new marshalling yard
1		Clear empty lots and clean up canal hole
1		Better bus service after 6:00 p.m.
1		Better street lighting in industrial areas
1		Establishment of hotel/motel plus dining facilities
1		Fire protection
1		Improvement of Lorne Bridge and traffic intersection at east end of bridge
1		New or rebuilt roadway on Mohawk Street
1		Long range zoning
1		Traffic control system for rush hour periods
1		Give away or forgivable loans which the Government and big business used against me
1		Something done about small stores that are empty and let go run down
1		Better public transit system
1		Alice Street west section should be curbed and paved and parking restricted around our plant and truck dock area - too many cars blocking these areas
1		Mail delivery to industrial areas

* * * * *

Question Thirty-four: Would you say there is a labour shortage in Brantford?

41 37.6 Yes

raw counts	%	
64	58.7	No
4	3.7	N/A
		<u>If yes, in what area?</u>
		Skilled
		Semi-skilled
		Unskilled
		The following is a breakdown by raw counts and percentages of the 41 companies who say there is a labour shortage in Brantford:
20	48.8	Skilled
9	22.1	Skilled and Semi-skilled
3	7.3	Semi-Skilled
3	7.3	Semi-skilled and Unskilled
3	7.3	Skilled, Semi-skilled and Unskilled
1	2.4	Unskilled
1	2.4	Skilled and Unskilled
1	2.4	Willing Workers
		* * * * *
		<u>Question Thirty-five:</u> When was the last time you had any communciation with the City Hall?
15	13.8	Within the last month
23	21.1	Within 3 months
16	14.7	Within 6 months

survey of manufacturing concerns (1976)

Question Thirty-five: (cont'd)

raw counts	%	
14	12.8	Within 12 months
23	21.1	More than a year
11	10.1	Never
7	6.4	N/A

If yes, what is the functional area within the City Hall with whom you dealt on this occasion?

Engineering
 Planning
 Welfare
 Streets and Traffic
 City Clerk
 Industrial Development
 Zoning
 Sewers
 Building Inspection
 Other _____

The following is a breakdown by raw counts and percentages of the 128 "functional area" contacts made most recently by the companies surveyed, with City Hall:

44	34.3	Engineering
31	24.2	Industrial Development
15	11.7	Building Inspection
13	10.2	Planning
8	6.3	City Clerk
5	3.9	Streets and Traffic

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raw counts % Question Thirty-five: (cont'd)

3	2.3	Welfare
3	2.3	Zoning
2	1.6	Sewers
2	1.6	Mayor Bowen
1	0.8	Alderman
1	0.8	Mayor and Others

If yes, were you happy with the manner in which your inquiry was handled?

82	75.2	Yes
7	6.4	No
20	18.4	N/A

* * * * *

Question Thirty-six: With the projected growth rate, Brantford will have a population of some 100,000 people by 1991. What would you feel is the single most important consideration for the City to ensure orderly and beneficial growth for our community?

The following is a summary of the comments received from companies in the survey including the raw count frequency summary:

4	Housing
2	Regional Government
1	Adequate industrial and housing land
1	Housing planning to meet future employment levels
1	More planning put into road networks, bridges across river

survey of manufacturing concerns (1976)

raw counts	%	<u>Question Thirty-six:</u> (cont'd)
1		Urban development
1		Low cost housing
1		Planning and zoning
1		Good smooth movement of traffic
1		Teach younger generation there is pride and respect in working for a living, not having it handed to them on a platter
1		Attract smaller industries so that Brantford will not ever be governed by one or two large industries
1		Orderly and continual planning
1		Expand your boundaries or take in all Brant County as one governed body
1		Good zoning by-laws
1		Strict control of zoning
1		Restoration of downtown
1		Housing development not controlled by real estate companies
1		A good growth plan for industrial, commercial and residential development - balance tax base
1		Make sure that proper housing mix and access roads keep pace with growth to industrial sector
1		Attract more industry
1		Proper growth plan required
1		Re-development of downtown area, completion of Brantford Throughway and 403 to Hamilton. Additional serviced industrial land.
1		Cost of adequate housing
1		Sound, diversified industrial base and adequate housing for incoming residents. Brantford seems to be lacking an industrial assessment base.
1		More public say in local administration

Survey of manufacturing concerns (1976)

raw counts	%	<u>Question Thirty-six:</u> (cont'd)
1		Continue to bank industrial land and keep separate from housing units
1		Suitable housing - planned Downtown development
1		Once again, education
1		Land banks and long range plan
1		Complete redevelopment of downtown area
1		Land use planning and expansion of City boundaries
1		Planning Board
1		Such changes to the City that will attract first class competitive people to relocate in Brantford
1		Fiscal responsibility
1		Land bank to ensure adequate land at reasonable price for housing and industrial
1		Redevelopment of town centre
1		Proper long range planning of roads, housing areas and industrial areas
1		Planning
1		Continuation of present residential vs: industrial concentration and planning
1		Traffic planning
1		Planned City growth, housing and industry
1		Land acquisition to assure housing at reasonable cost
1		Parking areas downtown - sell all parking meters and provide free parking
1		Completion of an arterial road system
1		Improvement of Downtown area
1		Continued availability of serviced land for residential and industrial use

Survey of manufacturing concerns (1976)

raw counts	%	<u>Question Thirty-six:</u> (cont'd)
1		Planned industrial development co-ordinated with required housing to meet the demand of influx of labour
1		Completion of Highway 403 and Southern Access Road
1		Well planned road system. Airport facilities must be expanded. Create a community centre for the Arts so people will want to live in Brantford.
1		Strongest possible Civil Servants, meaning adequate staffing and expertise at appropriate wages
1		Continuous planning for industrial and residential land and road system to serve each
1		The answer is mainly political and not business-like
1		Proper and economic housing
1		Planning for utilities required for such an influx
1		Planned community development areas
1		Strong City officials
1		Alternate greenbelts retained in the planning of homes and industrial areas
1		There should be sewers southwest of the City to allow industrial growth in that direction
1		Planned housing on moderately priced land
1		Long range planning of expressways and main traffic arteries
1		To slow the growth rate down - I would like to see Brantford grow no bigger than 80,000
1		Better downtown area/more affordable housing
1		Business development to ensure people work not in massive killing factories but many small enterprises
1		Proper planning by Planning Board
1		Additional inner-City redevelopment
1		Planning ahead

Survey of manufacturing concerns (1976)

raw counts %

Question Thirty-six: (cont'd)

1 Do not expand unless money is available in a way that future generations are hurt

* * * * *

Question Thirty-seven: Is the passenger train scheduling of the C.N.R. adequate to meet the needs of your Executives?

75 68.8 Yes
 5 4.6 No
 29 26.6 N/A

If no, what would be the one train you would like added?

The following is a summary of the additional trains that the five companies suggested:

- 1 Brantford to Windsor at early a.m.
- 1 Brantford to Toronto at 12:00 p.m.
- 1 Toronto to Brantford at 5:30 p.m.
- 1 Toronto to Brantford at 2:00 p.m.
- 1 Windsor to Brantford at 6:00 p.m. - currently have to change in London

* * * * *

Question Thirty-eight: Do you, as an Executive of one of Brantford's manufacturing concerns, feel that the industrial tax levies are commensurate with municipal services?

72 66.0 Yes
 15 13.8 No
 22 20.2 N/A

* * * * *

survey of manufacturing concerns (1976)

raw counts	%	
43	39.5	Yes
64	58.7	No
2	1.8	N/A

Question Thirty-nine: Do you have a rail siding immediately adjacent to your site?

If yes, are these rail facilities adequate?

42	97.7	Yes
1	2.3	No

If yes, are rail facilities adjacent to your plant and/or warehouse essential to your operation?

28	65.1	Yes
13	30.2	No
2	4.7	N/A

* * * * *

Question Forty: From what areas does your firm receive its raw materials?

Brantford

S.W. Ontario

Northern Ontario

Eastern Canada

Western Canada

Overseas

United States

Other _____

survey of manufacturing concerns (1976)

Question Forty: (cont'd)

The following is a breakdown summary of the reply frequency to each alternative expressed as a percentage of the total number of responses:

raw counts	%	
33.9		S.W. Ontario
27.0		United States
12.1		Eastern Canada
9.7		Overseas
9.3		Brantford
4.0		Western Canada
2.8		Northern Ontario
0.8		Mexico
0.4		South America

* * * * *

Question Forty-one: What percent of goods and materials needed for your operation are obtained locally?

The average percentage of goods and materials obtained locally by those companies in the survey is 14.0 percent with a range of 0 percent to 100 percent.

* * * * *

Question Forty-two: Which five of the following possible considerations are the most important when a Company is assessing a particular city as a location? Please rank the five in order of importance (1-2-3-4-5).

Building regulations

Housing costs

survey of manufacturing concerns (1976)

raw
counts

%

Question Forty-two: (cont'd)

Cost of labour
 Truck transportation
 Land taxes
 Proximity to expressway
 Surrounding street/traffic conditions
 Available labour pool
 Airport facilities
 Vitality of the core of the City
 Water supply
 Proximity to service and supply
 General appeal of the City
 Business taxes
 Leaseback availability
 Cost of industrial land
 Reception by civic officials
 Proximity to arterial highways
 Public transportation
 Power and fuel supply
 Availability of serviced acreage
 Proximity to markets
 Railway facilities
 Other _____

For this question, 105 companies provided some answer and four companies did not provide any response. However, 25 companies did not rank their choices as requested and two companies listed more than five without ranking same.

survey of manufacturing concerns (1976)

raw
counts

%

Question Forty-two: (cont'd)

Therefore, 78 companies are represented in the following summary of this question.

* * *

The following is a summary breakdown by raw counts and percentages of those responses chosen more than once and ranked as FIRST CHOICE:

19	24.4	Cost of labour
19	24.4	Proximity to markets
17	21.8	Available labour pool
5	6.4	Availability of serviced acreage
4	5.1	Cost of industrial land
3	3.9	General appeal of the City
2	2.6	Housing costs

* * *

The following is a summary breakdown by raw counts and percentages of those responses chosen more than once and ranked as SECOND CHOICE:

18	23.1	Cost of labour
16	20.5	Available labour pool
14	18.0	Proximity to markets
6	7.7	Proximity to service and supply
5	6.4	Cost of industrial land
4	5.1	Proximity to arterial highways
3	3.9	Power and fuel supply

survey of manufacturing concerns (1976)

raw counts	%	
		<u>Question Forty-two:</u> (cont'd)
3	3.9	Proximity to expressway
2	2.6	Building regulations
2	2.6	Availability of serviced acreage
2	2.6	Housing costs

* * *

The following is a summary breakdown by raw counts and percentages of those responses chosen more than once and ranked as THIRD CHOICE:

13	16.7	Cost of labour
10	12.8	Available labour
8	10.3	Cost of industrial land
7	9.0	Availability of serviced acreage
6	7.7	Proximity to arterial highways
6	7.7	Proximity to markets
5	6.4	Truck transportation
4	5.1	Housing costs
3	3.9	Power and fuel supply
3	3.9	Proximity to service and supply
3	3.9	Railroad facilities
2	2.6	General appeal of the City
2	2.6	Water supply

* * *

Survey of manufacturing concerns (1976)

raw
counts

%

Question Forty-two: (cont'd)

The following is a summary breakdown by raw counts and percentages of those responses chosen more than once and ranked as FOURTH CHOICE:

11	14.1	Available labour pool
8	10.3	Cost of industrial land
8	10.3	Proximity to markets
7	9.0	Proximity to service and supply
6	7.7	Availability of serviced acreage
6	7.7	Truck transportation
5	6.4	Cost of labour
5	6.4	Power and fuel supply
5	6.4	Proximity to arterial highways
4	5.1	Land taxes
3	3.9	Business Taxes
2	2.6	Housing costs
2	2.6	Proximity to expressway
2	2.6	Water supply

* * *

The following is a summary breakdown by raw counts and percentages of those responses chosen more than once and ranked as FIFTH CHOICE:

7	9.0	Available labour pool
7	9.0	General appeal of the City
7	9.0	Proximity to arterial highways
7	9.0	Truck transportation

Survey of manufacturing concerns (1976)

raw counts	%	<u>Question Forty-two:</u> (cont'd)
5	6.4	Proximity to expressway
5	6.4	Proximity to markets
4	5.1	Housing costs
4	5.1	Business taxes
4	5.1	Availability of serviced acreage
4	5.1	Proximity to service and supply
3	3.9	Building regulations
3	3.9	Cost of labour
3	3.9	Cost of industrial land
3	3.9	Power and fuel supply
2	2.6	Land taxes
2	2.6	Public transportation
2	2.6	Railroad facilities
2	2.6	Surrounding street/traffic conditions

* * * * *

Question Forty-three: There are some 300 organizations or Industrial Commissions in Canada trying to assist local industry and promote their City as an industrial location. Do you feel that the Brantford Development Commission has been achieving these two basic objectives?

84	77.1	Yes
2	1.8	No
23	21.1	N/A

* * * * *

Survey of manufacturing concerns (1976)

raw
counts

%

Question Forty-four: What suggestions would you have for the Brantford Development Commission to either assist local industry or promote our City to potential industry?

The following is a complete listing of all comments received:

- * Continue to provide all necessary information for prospective Brantford industrialists. There has been great improvement in this over the years. In 1975 I visited Development Commission or equivalent in 6 other Ontario communities and it is my opinion that an excellent job is being done here.
- * None - they are presently doing a good job.
- * Geographic location to the population of Ontario.
- * Until very recently, perhaps two years ago, there was very little promotion - since that time the Development Commission has seemed to make great strides forward.
- * Revitalize downtown.
- * Greater effort - personal contact - in U.S.A.
- * Closer contacts with local industry.
- * Brantford suffers from its high cost of labour and labour's domination by the U.A.W.
- *
 - (a) Continue purchasing available acreage for industrial development.
 - (b) Promote the advantages of training unskilled labour.
 - (c) Keep those responsible informed of low and medium priced housing requirements as new industry locates in Brantford.
 - (d) Determine ways and means of attracting semi-skilled labour to Brantford.
- * This would take volumes.
- * Brantford is one of the best locations in Ontario and/or Canada. Keep doing what you are doing--have available industrial land serviced, ready to go, and at reasonable prices. I believe the Development Commission to be very strong, alert, and will show the way!

raw
counts

%

Question Forty-four: (cont'd)

- * Make periodic visits to plants (at least once a year) to discuss present and future. We have had very little contact with industrial commission or City Hall in the 18 years we have been in Brantford (this is not a complaint, only a suggestion.)
- * Obtain and use the active support of the service industries in Brantford, such as ours.
- * Better acquaintance with the Brantford Development Commission rather than once a year.
- * The escalating costs of doing business are becoming paramount to all industries. I am suggesting studies be made for those industrial prospects available of those costs pertinent to its operation - energy, labour, regulatory costs, etc., to assist the prospect in question.
- * I think we have an excellent Industrial Commission.
- * Location of Brantford--"The heart of industrialized Canada".
- * N/A - Member of Commission.
- * Several issues that I have no feel for--so not very helpful. Sorry.
- * Sorry I can't do better than this for you.
- * Large industry adversely affects small industry in the area of wages. Determine a maximum percentage of large industry desirable and stick to it.
- * Lower taxes.
- * Scheduled jet flights between Brantford and major cities.
- * Continued development and updating of Industrial Brochure. Circulation and promotion to other areas. Perhaps on a selected mailing basis.

Survey of manufacturing concerns (1976)

raw
counts

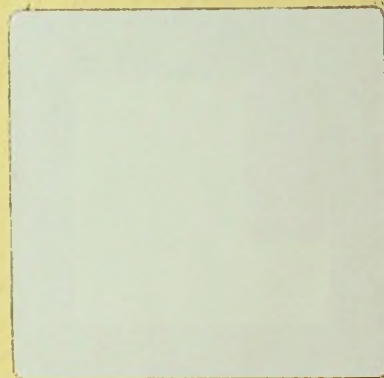
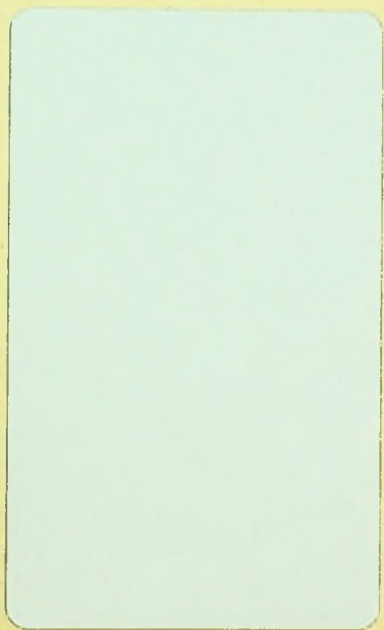
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Question Forty-four (cont'd)

- * I feel that your efforts over the past years have been honest and adequate. Keep up the communications.
 - (1) Provide companies, especially those that cover the National scene with envelope inserts that are imaginary and capture the recipients.
 - (2) Push Downtown redevelopment.
- * A better lobby in Ottawa or Queen's Park when bureaucratic tours are made.
- * No specific recommendations.
- * Effort should be made to diversify from and attract main industries other than agricultural.
- * Have produced more effective training programs for industrial force.
- * Convince present manufacturers that Brantford is a good place to work and live and enlist their support.
- * Continue to assure availability of adequately serviced land (at reasonable prices). Encourage the development or conservation of Brantford and Brant County as a satisfying place to live and work. Special emphasis on the Grand River and its valley as a recreation resource.
- * To promote industrial growth--determine what type of industries would be attracted by Brantford's particular assets and concentrate on them.
- * Sell the quality of life in the area for key personnel of companies.
- * Seem to be doing a good job now.
- * To stop listening and start doing!
- * Boost the City by sending circulars, etc., to different centres.
- * Periodic visitations to existing facilities to review them as well potential growth possibilities or availability of other existing facilities.
- * Have no applicable comments. Appears to be doing a very creditable job.

* * * * *

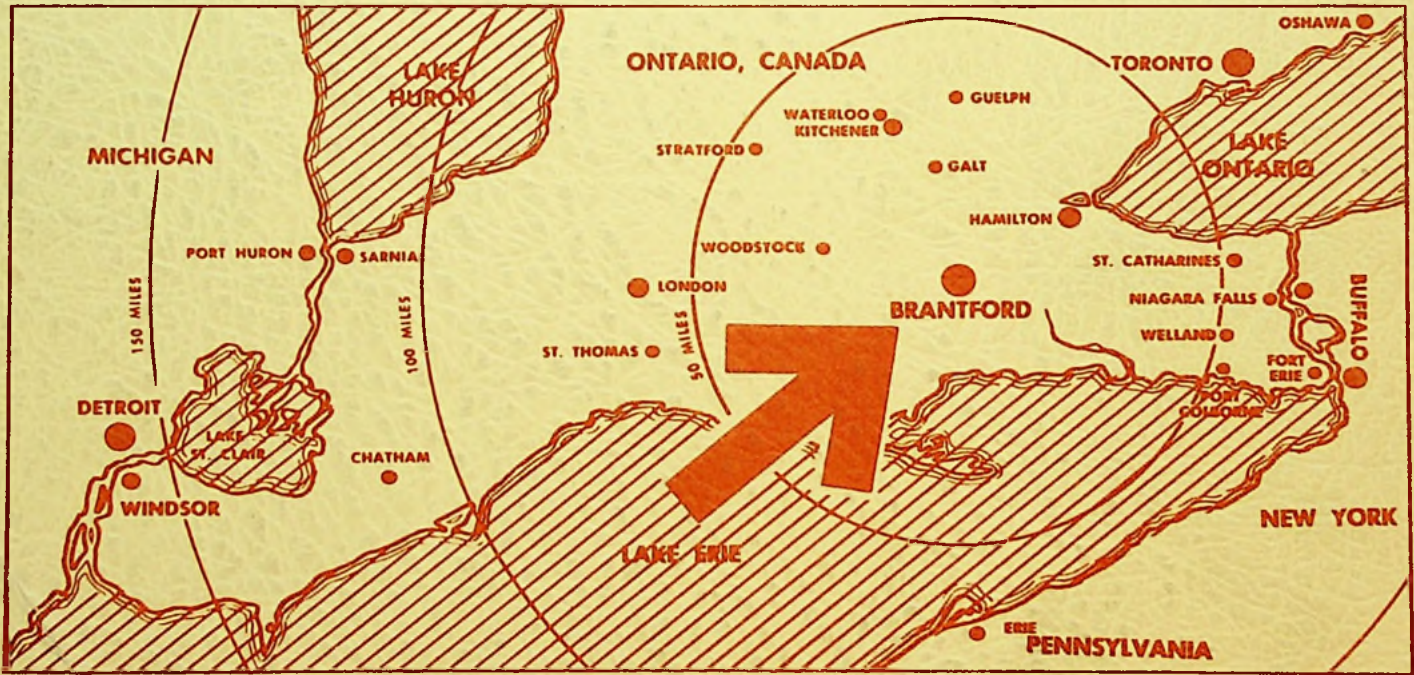
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