Target Sector Analysis Report for the Municipality of Powassan

The Municipality of Powassan

The Heart of Good Living

Prepared by:

McSweeney & Associates
ECONOMIC DEVELOPMENT

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for the Municipality of Powassan

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1 Executive Summary

Powassan's local economy, like many others is in a state of evolution. Highway transportation, close proximity to North Bay, small town atmosphere, current demand for industrial land, and affordability are amongst Powassan's strengths.

The target sector analysis revealed:

- Powassan has a population profile with a larger than average percentage of population aged 50+, and a smaller than average percentage of population aged 20-39, with lower than Ontario average incomes.
- Today's Powassan economy sees a high concentration of employees working in agriculture, wood product/related manufacturing, nursing/residential care, and amusement/recreation services. The health and social services sector (which includes nursing/residential care) is the sector with the largest number of employees. The education sector is a growing sector.
- Over 60% of Powassan's labour force commutes to work outside of the community, while 50% of Powassan's jobs are held by non-residents.

Powassan needs to continue to develop its local economy – in 2006 there were approximately 500 more residents working than there were jobs in Powassan, and as a result many people leave the area to go to work every day.

There are several keys to Powassan's growth and development:

- Continue to support residential development and attraction, and especially support residential intensification in the Powassan downtown;
- Continue to support the development of the health and social services sector, particularly in the Powassan downtown;
- The target sectors identified were:
    - Downtown revitalization, commercial development, and growth as a regional service centre;
    - Manufacturing, in particular, metal fabrication and value-added wood product manufacturing.
- Focus economic development efforts on the following:
    - Increasing the supply of serviced industrial land, currently underway with the development of the industrial park;
    - Support the planning and study that needs to be completed to maximise the opportunity provided by the "road ahead" project. This project has the potential to stimulate the overall economic health and viability of Powassan, particularly its downtown.
    - Continue to address gaps and investment readiness needs as identified in the gap analysis of this report and the Powassan Investment Readiness Action Plan.

2 Directions for Development

2.1 Potential for Investment

Powassan's early roots were in forestry and agriculture, with a water powered sawmill and gristmill generating employment starting in about 1880, followed in a few years by the construction of the railroad. Agriculture was the main economic driver for several decades, but has declined in importance as the economics of agriculture dictate larger and larger farm operations. Highway transportation, and close proximity to North Bay has also contributed to an evolution taking place in Powassan's local economy.

Today we find:

- Powassan has a population profile with a larger than average percentage of population aged 50+, and a smaller than average percentage of population aged 20-39, with lower than Ontario average incomes.
- Today's Powassan economy sees a high concentration of employees working in agriculture, wood product/related manufacturing, nursing/residential care, and amusement/recreation services. The health and social services sector (which includes nursing/residential care) is the sector with the largest number of employees. The education sector is a growing sector.
- Over 60% of Powassan's labour force commutes to work outside of the community, while 50% of Powassan's jobs are held by non-residents.

Powassan needs to continue to develop its local economy – in 2006 there were approximately 500 more residents working than there were jobs in Powassan, and as a result many people leave the area to go to work every day.

<u>Residential Development and Intensification:</u>

Residential attraction and intensification should continue to be viewed as a priority. Powassan is blessed with many assets and amenities deemed important to residents, including a high quality of life and good recreational assets. The "quality of place" could be further developed through revitalization of the downtown, and more housing development and choices need to be made available, especially for seniors. As people drive greater distances for retail purchases, larger populations are required to support a critical mass of retail in downtowns. With a further improvement in quality of place, more housing choices, and assets such as high speed internet, Powassan could begin to attract families and professionals and "knowledge workers".

It is important that Powassan continue its residential development work. A housing needs analysis demonstrated the housing demand, and there is a need for both transitional and assisted living, as well as for families. Work investigating how more serviced residential land can be brought to market, options for residential intensification in the downtown, and how a greater variety of housing tenure and types can be brought to market are all important initiatives to continue.

Industrial Development:

Current economic forecasts are optimistic for growth in the Ontario economy in 2011. While manufacturing has always been an important driver of the Ontario economy, it is not likely to return to its former "glory". Despite strong growth in 2010, a high Canadian dollar, a still sputtering U.S. economy, and excess production capacity[1] and idle plants that will take a long time to absorb, meaning a significant period of time will pass before any significant industrial plant growth across Ontario will occur.

That is not to say that opportunities will not occur, and Powassan has experienced a growing demand for industrial expansions from both local and non-local businesses. Demand for manufacturing space would appear to be driven by both value-added wood manufacturing, and manufacturing/fabrication services for the mining industry. The demand for industrial land is stronger in Powassan than might be expected, and is supported reasonable land costs and reasonable property tax levels.

We would also advise Powassan to be open to investment in a number of sectors, some of which are noted in the following "Directions for Development" section.

2.2 Directions for Development: Target Sectors

Given the data and information provided in this report, and the current and future directions of the Ontario economy, we recommend the following directions for the development of Powassan. As noted, these directions should be considered preliminary, as there has not been broad public input. It is recommended that Powassan prepare an economic development strategy involving the public and business community to validate each of these directions and to build detailed action and implementation plans, as well as monitoring and performance measures. In addition, to the targets described below, Powassan should also support any emerging sectors, such as the development of the equine industry. *The overall directional theme for Powassan is the further development and solidification of Powassan's position as a regional services centre, which is supported through the development of the two following target sectors.*

2.2.1 Downtown Revitalization, Commercial Development, Regional Service Centre

Powassan can build on its role as a regional services centre, as it currently serves as a service hub for rural and vacation properties in the area in addition to the local population. The "road ahead" project provides the opportunity to become a regional services centre for the traffic passing on Highway 11 as well. Work on this target sector should focus on the Powassan downtown, the "road ahead" project, and possibly on Trout Creek. Work should begin soon on the revitalization in the downtown(s) and the development of the "road ahead" area with the following efforts at minimum:

- The size of the local population required to support a reasonable critical mass of retail and services in the downtowns;

[1] Both Canadian and US capacity utilization rates are around 80%.

- Residential attraction, development, and intensification of housing in the downtown area – the development of the family health team site is a good example of services at grade with residential development above grade;
- The health and social services sector is a sector to be supported and encouraged to locate in downtown.
- In the development of land use plans and controls for the "road ahead" area, careful consideration needs to be given to the types of commercial uses which should be permitted and are suitable in this new area, versus the types of commercial uses which should be permitted[2] and are suitable for the downtown – setting up a complementary rather than competitive business environment;
- How the "Road Ahead" development could further support and build the local economy of Powassan by drawing more visitors and retail dollars into the area. The economic relationship between the Road Ahead area and its connectivity with downtown Powassan is critical. This will inevitably result in some evolution in the nature of downtown retail and services – and Powassan much like every other local economy, must either support change and evolution or face further decline;
- Street, sidewalk and public space landscaping and entrance treatments to draw people into the downtown;
- Design guidelines for building facades, and possibly considering a theme that relates to the history of Powassan;
- The nature and density of development to be encouraged through land use controls in the downtown (retail and services at grade, office and residential above grade, plus multi-unit residential development in close proximity to "main street")
- Implementation tools, such as considering the designation of the downtown as a Community Improvement Plan area in the Official Plan;
- Examining the current mix and adequacy of services and retail available, determining any missing elements in the mix, and recommend targets for attraction;
- Look for further opportunities to cement Powassan's role as an educational and health services centre for the area, building on the core asset of the family health team which intends to expand its patient base to 7,000 people;
- A focus on health services ties in closely with residential attraction, as both are mutually supportive. Health care could be further developed in Powassan, and prime targets to investigate to support the development of the health care sector include:
    - "Age in place" as a specialization
    - Further growth and development of the new health centre, seniors apartments, and assisted living all in one complex (or in close proximity to each other).

[2] This suggests that the commercial uses permitted and to be encouraged in the downtown should be studied at the same time as the study of uses to be permitted in the "road ahead" area.

The amount of work to be completed in the "road ahead" area and in the downtown suggests that all of the above points should be considered and addressed in a significant and simultaneous study of both areas. The focus of the study needs to be on how to maximise the opportunity provided by the "road ahead" project to stimulate and optimize the overall economic health and viability of Powassan, and particularly its downtown.

2.2.2 Industrial Development

As noted, Powassan is receiving a steady stream of inquiries for industrial land and space, both from local and non-local businesses. This is certainly the best indicator of demand. While demand has been diverse, there would appear to be some concentration of inquiries and latent local demand for expansions in wood product/related industries and manufacturing and fabrication services related to mining and resource extraction and processing. The following directions are provided:

- Proceed with haste to develop the municipal industrial/business park, as opportunities to work with existing businesses wanting to expand are currently being missed. There is no opportunity to accommodate either expanding and relocating businesses. The proposed industrial park is in an excellent location, with good visibility and superior access to a limited access highway. Combined with reasonable land costs (and reasonable servicing costs), the Fairview Road area provides the necessary platform for Powassan to attract manufacturing and/or distribution facilities. Appropriate land use controls, marketing and sales policies need to be put into place to ensure the achievement of municipal objectives.
- Pursue opportunities identified in two manufacturing sectors; value added wood industries; and manufacturing and fabrication services related to the mining and resource extraction/processing industries.

3 Needs/Gap Analysis

3.1 Framework for Gap Analysis

The rationale behind this section of the report is to examine Powassan's target sectors to determine investment barriers and identify disparities between where the Municipality envisions itself and its current economic position.

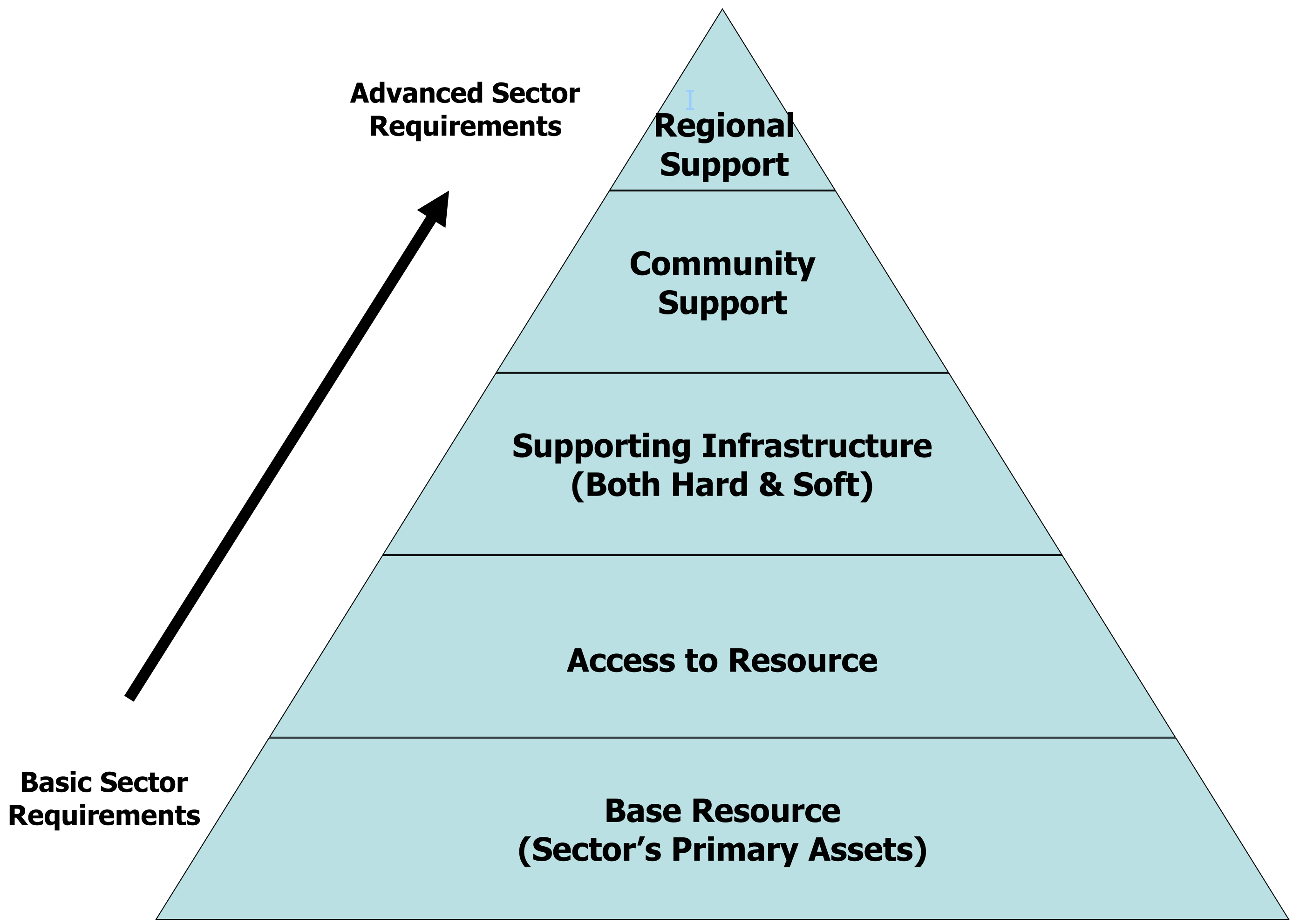
To undertake this analysis, the consultants used a Needs/Gap Analysis Model (see following page) to demonstrate the general order of priority of issues affecting Powassan's competitiveness in its three main industrial sectors:

1. Downtown and commercial development
2. Manufacturing: value-added wood processing and metal fabrication.

The model was developed by taking a ground-up approach to understanding the competitiveness and readiness of a specific community in relation to a particular industry. By first examining the specific target industry sector base requirements (i.e. raw materials or natural resources) and then incrementally moving upward to the top of the model, a community will get a more detailed perspective of the areas in which they excel and those in which they need to do some work to maximize their competitive advantages.

To enjoy success within their three priority industrial sectors, Powassan will need to ensure that the gaps identified through the model are addressed in sequential order, starting from the base and moving to the top of the paradigm. There will be some overlaps between steps in the model; however, attention needs to be paid to the hierarchy of the model and to ensuring that the requirements of each step are adequately fulfilled.

3.1.1 Needs/Gaps Analysis Model



3.1.2 Definitions and Explanation of Model

The following section briefly explains each step of the Needs/Gap Analysis Model and identifies the criteria within each stage.

Step 1 – Base Resource (primary assets need to be exploited/utilized in order to grow/develop a specific industry sector)

Essentially, this step identifies the main resources on which the sector is being developed. Typically these base resources will be unique to a specific area or region; however, in some cases, the base resource may not be native to the area and would need to be imported. Also note that these types of resources are not simply traditional natural resources but could also include other items such as material inputs, geographic location or local expertise, skills or a specific talent.

With respect to Powassan, the following base resources are needed to ensure the two target sectors can be established or further developed:

1. Downtown and commercial development – sufficient local demand for retail and services from: the local population; the population of the secondary trade area (vacation and agricultural communities); and any passing traffic that can be drawn off of Highway 11;
2. Manufacturing: value-added wood processing – access to raw materials such as wood, that has been sufficiently pre-processed for the value-added manufacturing.
3. Manufacturing: metal fabrication – access to raw materials such and metal stock.

Step 2 – Access to Resource

As with all industrial sectors, there needs to be an ability to gain access to the required base resources. This type of access can take several different forms depending on the resource. Items which have an effect on access to resources may include (not in any specific order of importance):

- Local, regional, world demand for resource
- Financial markets
- Ease of physical access – roads, waterways, rail
- Competitive shipping costs
- Approvals process (several levels and/or various government jurisdictions)
- Cost to extract, process, develop or exploit resource.

Step 3 – Required/Supporting Infrastructure (Hard and Soft)

As the needs of each industrial sector are different, so are the communities that support or develop each sector. In terms of supporting infrastructure, a community's ability to provide the necessary infrastructure will partially determine how successful they are in attracting or retaining specific industrial sectors.

Infrastructure can be separated into hard and soft services and include items such as:

- Hard
  - Industrial land (properly planned and designated land)
  - Visual/ vehicular/pedestrian access to properly planned and designated commercial properties
  - Available commercial and industrial space
  - Residential housing
  - Municipal water or access to a potable water source
  - Sewage disposal (on-site or municipal)
  - Electricity and electrical transmission capacity
  - Roads.
- Soft
  - Competitive tax rates

  - Skilled workforce (talent)
  - Training and skills development.

Step 4 – Direct Community Support

The decision for an investor to locate, expand an existing industry, or shut down an operation and completely leave a community will be influenced by a variety of factors. One such factor is the community's receptiveness, openness and willingness to embrace an industry. Although it is very difficult to allocate a specific monetary value to the importance that community support plays in the development of a specific industrial sector, the impact of positive community support can be the determining factor that places a community at the top of an investor's list.

Some characteristics that can be captured and assessed in this stage include:

- A community's willingness to accept the industrial sector;
- Local political support for the specific industrial sector, commercial sector and downtown revitalization;
- The focus/priorities of local municipal Economic Development program.

Step 5 – Regional Support

As most economies are now based on a regional scale, it is critical that communities look outside their municipal borders to develop partnerships with other communities, governments (at all levels), as well as business and industries in order to be successful. It is therefore extremely important that communities understand the need to work collectively for the well-being of their region.

When assessing this stage, there needs to be a demonstrated effort by the community that illustrates they understand the benefits of thinking locally while working regionally. In addition, they need to become engaged in regional economic development activities.

Items that demonstrate regional support include:

- Long-term planning and regional strategies;
- Sharing of resources (including financial, human and intellectual);
- Regional marketing plans and campaigns;
- Development of regional partnerships;
- Regional political support;
- Regional lobbying efforts;
- Provincial and Federal political support as required;
- Expeditious processing of Provincial and Federal approvals that may be required;
- Provincial and Federal lobbying efforts as required.

3.2 Summary of Powassan's Main Gaps

The three main areas that have emerged as existing gaps within Powassan are:

1. Lack of serviced and appropriately designated industrial land:
    a. No current supply of shovel ready industrial land;
    b. Very limited supply of available industrial buildings or space for lease;
    c. No list of available properties for business use.

2. Gaps with respect to downtown revitalization, commercial development, regional service centre:
    a. Significant study and planning needs to be completed to maximise the opportunity provided by the "road ahead" project. This project has the potential to stimulate the overall economic health and viability of Powassan, and particularly its downtown.

3. Gaps with respect to Investment Readiness and Investment Attraction:
    a. Creation of a quick facts brochure;
    b. A site selection request response template (customized response for each request) needs to be prepared to be able to respond quickly and efficiently to investor enquiries;
    c. Powassan requires an economic development website to provide an effective cornerstone of its marketing program;
    d. An economic development strategy needs to be prepared to analyze target sectors in depth, to engage the business community in its preparation, to develop detailed action plans, as well as an implementation plan and performance and monitoring measures;
    e. Powassan requires a marketing plan to build on current branding to be used in economic development, to confirm the marketing tools to be used to reach target audiences, and to prioritize the development of marketing collateral, and prepare mock-ups of collateral materials;
    f. Full suite of marketing collateral as determined by the marketing plan and strategic plan.

3.3 Sector-Specific Gap Analysis

3.3.1 Downtown Revitalization, Commercial Development, Regional Service Centre

Steps in Model	Strengths	Needs/Gaps
Base Resource	There is a currently readily identifiable downtown area.	There needs to be greater residential development within Powassan to support retail development in the downtown, and specifically, greater residential development within the downtown. A greater mix of retail and services, along with improved access and visibility will improve viability. There is a gap with respect to passing traffic on Highway 11: the retail/services sales potential is not being captured.
Access to Resource	There is a Highway 11 interchange that provides easy access to downtown Powassan.	Visibility of the downtown from Highway 11 is not evident. Access to downtown could be greatly improved through the road ahead project. Lack of access and visibility of the Trout Creek downtown has resulted in severe decline in the viability of this downtown.
Supporting Infrastructure	Overall, Powassan is in an excellent position to support revitalization of downtown Powassan: • Fully serviced; • Good highway access; • Good community facilities and amenities, reasonable housing costs means residential growth is possible. • Competitive tax and development charge rates.	With respect to the downtown, hard infrastructure is in place, although land use controls may need to be examined to ensure they are sufficient for encouragement of modern mixed use downtown development. The “road ahead” area needs to be planned and serviced, with appropriate connections to the downtown.

Steps in Model	Strengths	Needs/Gaps
Community Support	Municipality has a strong interest in economic development. The Township of Powassan is becoming more proactive in terms of understanding and addressing economic opportunities. Powassan still has some of the lowest tax rates and development charges. The Township is undertaking steps to make the community more attractive to investment: • Community Profile • Target Market Analysis • Needs/Gap Analysis • Investment Readiness Assessment Training. Some local businesses have indicated a need to expand to capitalize on the opportunities available to them.	Will benefit from other initiatives such as: • A study of retail/commercial uses to be permitted in the road ahead area and in the downtown, and how to develop a mutually supportive relationship between the two to maximise the economic viability of both areas. • Economic Development Website • Economic Strategy • Quick Facts Brochure • Site Selector Templated Response • A Marketing Strategy to showcase the area's competitive advantages.
Regional Support	Appears to be good political relationships and support from other levels of government.	Powassan must not appear to be "waffling" on the road ahead project if senior governments have indicated support.

3.3.2 Manufacturing

Steps in Model	Strengths	Needs/Gaps
Base Resource	Powassan is located in Northern Ontario, with easy access to wood supply that has received initial processing. Powassan has easy access to any required metal supplies.	No gaps
Access to Resource	Powassan is well connected via Highway 11 and has access to a rail siding. Powassan encompasses a large land mass within its municipal boundary Powassan is a fully serviced community providing municipal services such as water, sewer, garbage pick-up, etc. Powassan has easy access to a large labour force pool that is strong in the area of skilled labour.	No gaps, although there may be some cost disadvantages shipping from Powassan when ocean shipping is required.
Supporting Infrastructure	Overall, Powassan is in an excellent position to attract and support manufacturing due to: • Supply of municipal land that can be developed into serviced industrial land • Serviced by hydro and gas; • Fully self-sufficient community – housing, schools, hospital, recreation amenities, churches, retail, services, etc.; • An available labour force; • Competitive tax and Development Charge rates; • Excellent transportation networks (road and rail).	Currently there is no serviced and available industrial land or buildings, the planning and servicing of the industrial park needs to be completed. This is also critical to retention of local manufacturers – currently they must leave the Powassan to either expand or relocate.

Steps in Model	Strengths	Needs/Gaps
Community Support	The Township of Powassan is becoming more proactive in terms of understanding and addressing economic opportunities. Powassan has some of the lowest tax rates and development charges. The Township is undertaking steps to make the community more attractive to investment: • Community Profile • Target Market Analysis • Needs/Gap Analysis • Investment Readiness Assessment Training. • Some local businesses have indicated a need to expand to capitalize on the opportunities available to them.	Will benefit from other initiatives such as: • Economic Development Website • Economic Strategy • Quick Facts Brochure • Site Selector Templated Response • A Marketing Strategy to showcase the area's competitive advantages • Marketing materials for new industrial park.
Regional Support	Appears to be good political relationships and support between all levels of government.	No gaps

4 Situation Summary

Demographics

Population: 2001 to 2012	• Powassan's population has been increasing slower than Ontario's. • The overall population is older than that of Ontario.
Incomes: 2000 to 2011	• Generally, average and median incomes (total, family, household) have increased since 2000, however they are still lower than those of the province. • The largest segment of (total income) earners was in the $15,000 to $19,999 range. The percentage of the population making more than $60,000 was a smaller percentage than the provincial level.
Highest Level of Education: 2012	• The largest post-secondary field of study is architecture, engineering and related technologies - this percentage is larger than that of Ontario. • The percentage of Powassan residents who have a college, CEGEP or other non-university certificate or diploma is higher than the provincial percentage in 2011 (31.7% vs. 22.0%). • However, the percentage of Powassan residents who have a university certificate or diploma is significantly lower than that of Ontario in 2012 (10.5% vs. 30.9%).
Mobility: 2012	• In 2012, the percentage of Powassan residents that had moved within the previous year (13.2% movers) was more than the percentage of "movers" in Ontario (13.1%). • People moving to Powassan were more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province.
Language: 2012	• Over 89% of residents only speak English. • Just over 10% of residents are bilingual (English and French), which is lower than the provincial level (10.1% vs. 11.4%).
Dwellings: 2001 to 2012	• Powassan has competitive housing prices - the average value of dwellings increased from $116,316 to $184,943 between 2001 and 2012, yet was still significantly lower than the provincial average in 2012 ($426,787).

Labour Force

Key Indicators: 2012	• Participation and employment rates in Powassan are lower than in Ontario. • The unemployment rate in Powassan is slightly higher than that of Ontario in 2012 (8.1% vs. 8.0%).
Labour Force by Occupation: 2012	• Compared to Ontario, a higher percentage of the labour force in Powassan works in the following occupations: ○ Health ○ Social science, education, government service and religion ○ Trades, transport and equipment operators and related ○ Unique to primary industry ○ Unique to processing, manufacturing and utilities.
Labour Force by Industry: 2012	• Compared to Ontario, a higher percentage of the labour force in Powassan works in the following industries: ○ Agriculture, forestry, fishing and hunting ○ Construction ○ Retail trade ○ Education services ○ Health care and social assistance.
Commuting Patterns: 2006	• 60.7% of the workers living in Powassan had a usual place of work outside of Powassan. • 49.7% of workers declaring a usual place of work in Powassan lived outside of Powassan.
Net Import & Export Labour Force: 2006	• Powassan is a net 'exporter' of at least 490 employees to other communities. This represents 33.9% of the employed labour force. • From the economic development point of view, this represents a potential opportunity to attract these industries, as there is a resident labour force commuting elsewhere to work in those industries. Exceptionally, the following industry sectors have more jobs than resident labour force in Powassan: Wholesale trade; Finance and insurance and Arts, entertainment and recreation.

Economic Base Analysis

Employment Concentration Sector Level: 2006	• Most sectors in Powassan are below the average. Employment in the Agriculture, forestry, fishing and hunting sector is the most highly concentrated sector in Powassan. Other highly concentrated employment sectors in Powassan as compared to Ontario and Canada are: o Educational services o Health care and social assistance o Arts, entertainment and recreation.
Employment Concentration Subsector Level: 2006	• Compared to Ontario and Canada, the sub-sectors with high employment concentrations in Powassan were: o Heavy and civil engineering construction o Nursing and residential care facilities o Building material and supplies wholesaler-distributors o Building material and garden equipment and supplies dealers.
Employment Concentration Industry Level: 2006	• Compared to Ontario and Canada, the following industries have high employment concentrations in Powassan: o Highway, street and bridge construction o Lumber, mill work, hardware and other building supplies wholesaler-distributors o Other motor vehicle dealers o Used merchandise stores o Support activities for road transportation o Nursing and residential care facilities (6231 to 6239).
Competing Communities: 2006	• In 2006, employment in the agriculture, utilities and construction sectors was more highly concentrated compared to competing communities. • Compared with competing communities in 2006, Powassan had strength in the following concentrated employment sub-sectors: o Real estate o Educational services o Local, municipal and regional public administration.

Employer Structure Analysis

Business Sector: 2008	• In 2008, the construction sector had the largest number of employers (47 businesses).
	• The top two highest concentrations of businesses in Powassan were in the Construction and Agriculture, forestry, fishing and hunting sectors.
	• In 2008, the following businesses had a higher concentration per capita:
	  ○ Agriculture, Forestry, Fishing and Hunting
	  ○ Construction
	  ○ Public Administration.
	• The following businesses had a higher than average concentration in Powassan:
	  ○ Agriculture, Forestry, Fishing and Hunting
	  ○ Construction
	  ○ Public Administration.

Business Patterns: June 2008	• In 2008, the largest percentage of employers in Powassan was in the Construction sector while the largest percentage of employers in Ontario is in the Professional, Scientific and Technical Services sector. • At sub-sector level, the largest number of employers in Powassan was in the Specialty Trade Contractors sub-sector, while it was in the Professional, Scientific and Technical Services sub-sector in Ontario. • At industry level, the largest number of employers in Powassan was in the Cattle Ranching and Farming industry while it was in the Lessors of Real Estate industry in Ontario.

5 Statistical Overview of Powassan

The following table provides Powassan's 2012 statistical estimates based on 2011 census data.

Table 1: Statistical Overview of Powassan vs. Ontario, 2012[3]

Topic	Demographic Variable	Powassan	Ontario
Population	Total population	3,478	13,324,854
	Projected population 2017	3,560	14,242,936
	Projected population 2022	3,634	15,170,152
Labour Force[4]	Total population 15 years and over	2,950	11,106,547
	In the labour force	1,757	7,374,818
	Participation rate (%)	59.6	66.4
	Employment rate (%)	54.8	61.1
	Unemployment rate (%)	8.1	8.0
Income ($)	Average total per capita income (2011) ($)	33,720	45,692
	Median total per capita income (2011) ($)	22,919	31,800
	Average household income (2011) ($)	65,622	110,037
	Median household income (2011) ($)	52,681	70,135
Households	Total number of private households	1,333	5,082,414
	Average number of persons in private households	2.55	2.57
Dwelling	Total number of occupied private dwellings	1,333	5,082,414
	Average value of dwelling ($)	184,943	426,787

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

3 The content of the REPORT is derived from Manifold's proprietary postal code information. "no confidential information about an individual, household, organization or business has been obtained from Statistics Canada".

4 Labour force - Refers to persons who were either employed or unemployed. Participation rate - Refers to the labour force expressed as a percentage of the population 15 years and over excluding institutional residents. Employment rate - Refers to the number of persons employed expressed as a percentage of the total population 15 years and over, excluding institutional residents. Unemployment rate - Refers to the unemployed expressed as a percentage of the labour force.

The following table provides an overview of statistical changes in Powassan between 2001 and 2006.

Table 2: Statistical Overview of 2001-2006-2011 Changes for Powassan

Topic	Demographic Variable	Powassan		2006 – 2011[5]	
		2006	2011	Powassan[6]	ON
Population	Total Population	3,309	3,378	⇧	⇧
	Children & Youth (0-19)	Decreased		Powassan % < ON %	
	Youth Adult (20-44)	Decreased		Powassan % < ON %	
	Segments 45 and up	Decreased		Powassan % > ON %	
Topic	**Demographic Variable**	**Powassan**		**2001 – 2006**	
		2001	**2006**	**Powassan**	**ON**
Jobs[7]	Percentage Change 2001-2006	-9.9%		⇩	⇧
Labour Force	Total population 15 years and over	2,540	2,605	⇧	⇧
	In the labour force	1,600	1,565	⇩	⇧
	Participation rate (%)	63.0	60.1	⇩	⇩
	Employment rate (%)	59.8	55.7	⇩	⇩
	Unemployment rate (%)	5.0	7.7	⇧	⇧
Income ($)	Average total per capita income ($)	25,555	28,057	⇧	⇧
	Median total per capita income ($)	20,769	21,110	⇧	⇧
	Average household income ($)	50,814	56,010	⇧	⇧
	Median household income ($)	43,047	48,693	⇧	⇧
Households	Total number of private households	1,220	1,245	⇧	⇧
	Average number of persons in private households	2.5	2.5	No change	⇩
Dwelling Value	Average value of dwelling ($)	116,316	142,458	⇧	⇧

Source: McSweeney & Associates from Statistics Canada 2001, 2006 and 2011 Census data.[8]

[5] These two columns compare both the absolute value and percentage change for each category. The wider arrow indicates that there was a larger percentage change.

[6] A coloured arrow indicates Powassan has a larger absolute value than does Ontario. Arrows with no colour indicate that Powassan has smaller absolute value than does Ontario.

[7] Throughout this report, the word "job" is used as a commonly accepted term to refer to the employed labour force declaring a usual place of employment within Canada (or Ontario or Powassan as the case may be). It excludes those working in their home, working outside of Canada, or not having a usual place of employment that they report to at the beginning of a work shift.

6 SWOT Analysis

The following Strengths, Weaknesses, Opportunities, and Threats/Constraints analysis combines the input from most members of Council and the Economic Development Committee from a meeting held February 17, 2011, as well as from a number of interviews held with key stakeholders.

6.1 Key Strengths

- Transportation/infrastructure
- Economic Development Office team, progressive municipal government
- Cost of land, affordable land
- Low taxes, small differential in rates between residential and non-residential
- Affordable and diverse housing
- Agricultural economy
- Location: near north, corridor 11/17
- Access to big city amenities
- CN line
- Access to airport
- Hospital, health care
- Post-secondary education
- Skilled labour
- Recreation facilities, opportunities
- Clean air
- Safe
- Lots of land, forest
- Protective services
- Library, churches
- New high school
- Social service clubs, culture-related
- No development fees
- We own our utilities
- Northern Ontario incentives
- Community involvement
- People are starting to buy local
- AMISH community just outside town
- Small town atmosphere, everybody knows your name, easy pace of life

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[8] Census data 2001: **Statistics Canada, 2001 Electronic Profile, 95F0495XCB01001-Ont, Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2001 Census.**
Census data 2006: Statistics Canada, 2006 Electronic Profile, 94-581-XCB2006001, Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census.

- Can get everything you would expect in a small town
- Close to city for things you need, shopping

6.2 Key Weaknesses

- Official Plan too restrictive
- Insensitive government regulations
- Lack of shovel ready land
- Lack of broadband
- Small assessment base – reduced tax revenue
- No waterfront
- Big box stores, stores in North Bay draw $ out of community
- Loss of businesses
- Climate (northern)
- Northern energy fuel costs
- Transportation costs
- Lack of sales policies for industrial park
- Sewer system infiltration
- Debt fairly high
- Single source suppliers and contractors
- No hotels, diesel fuel
- Lack of quality restaurants
- Extensive area to maintain
- Distance to southern markets
- No large industry for employment
- Struggle with community identity due to amalgamation (divide between Powassan/Trout Creek).
- These two communities do not work together, do not shop in each other’s communities
- Some of the developmentally challenged people walk the streets begging and looking in garbage cans which does not leave a good impression
- Vacant store fronts
- Lack of rental properties
- Hard to find good workers, the workforce is ageing, lots of competition for specialist positions, difficult to fill
- Costly to meet increasing standards

6.3 Key Opportunities

- Value-added wood manufacturing
- Road ahead development

- Retirees – starting businesses
- Family health centre
- Showcase green industry and development
- Revitalize downtown, south end, and Trout Creek
- Industrial park
- Small farms/hobby farms
- Service station
- Equine hub of Northern Ontario
- Assisted living
- Transitional housing
- Investment readiness
- Vacant retail
- Service hub for vacation properties
- Good milieu for retirees
- Hwy 11 makes us more accessible – decreases "distance"
- We are on Hwy 11 vs. by-passed
- Capitalize on visibility – signage – draw people off Hwy
- How to get people off Hwy to spend money
- Accommodation
- Transitional living
- Need to increase population and density
- Bolton subdivision
- Light industry – manufacturing
- Grow and preserve heart of good living
- 'Road Ahead' project – to develop highway 11 just south of town all the way into downtown starting with a gas station, Tim Hortons, etc…idea is it will help with downtown revitalization.
- Development of the Amish community (Town is a little standoffish to them at the moment)
- Promote buy local mentality, use local professionals
- Town could buy EIDES home and move it, perhaps to a farm, creating employment for the residents
- Create subdivisions of new homes
- Attract more nurses, doctors, trades

6.4 Threats or Constraints

- Conflicts of interest
- Government regulations – increasing
- Opposition to change

- Environmental constraints
- Financial capacity
- Withdrawal of government funding
- Lack of interest in growth
- Fuel cost
- Apathy
- Threat to downtown
- Legislative changes driving up costs
- Accessibility
- Costs in general
- Source water protection
- Climate change
- Ageing workforce
- Not proceeding with road ahead
- Divided Council (currently stopping Road Ahead project)
- Politics – old boys club, closed-mindedness to new ideas.
- Rising housing costs
- Wages not rising as quickly as cost of living
- Shopping in North Bay
- EIDES residents wandering on the streets, begging
- Empty storefronts on main street
- Rising insurance premiums
- Uncertain about impact of future highway development – will people stop as often?

6.5 Competitive Advantages

- Close to highway 11
- On CN main line
- Close to North Bay and other urban centres.
- A self-sufficient town
- People will shop in town if there is good service
- Friendly people, community support, community spirit
- Safe community
- Low taxes
- Away from the rat race, but close enough to the city

7 Demographic Analysis

Highlights

- *In 2012, the Municipality of Powassan had an older population than Ontario.*
- *Between 2001 to 2012, all average and median incomes (total, family, household) in Powassan rose, however they were still lower than those of Ontario. The largest segment of (total income) earners was in the $15,000 to $19,999 range.*
- *In Powassan, the percentage of the population with a College, and other non-university certificate or diploma is higher than Ontario but the percentage of the residents that have attained a University Bachelor's degree is significantly lower than Ontario.*
- *Significantly more residents studied Architecture, engineering and related technologies as a post-secondary field of study compared to Ontario.*
- *Residents in Powassan were more likely to have moved than Ontario residents one year ago; a smaller percentage of movers are from outside of the country in comparison to Ontario.*
- *Almost 90% of Powassan's residents speak English only, and less than 10% of residents are bilingual (English and French).*
- *The average value of dwellings in Powassan increased from $116,316 in 2001 to $184,943 in 2012. These values are significantly lower than the provincial average.*

7.1 Population and Age Structure Profile

Table 3, derived from 2001, 2006 and 2011 Census data, illustrates the population change in Powassan from 2001 to 2011 in comparison to that of Ontario.

- According to the census data, the population in Powassan increased between 2001 and 2011.
- Population growth in Powassan was slower than the provincial rate.

Table 3: Population Change from 2001 to 2011, Powassan vs. Ontario

	2001	2006	2011
Powassan Population Count	3,252	3,309	3,378
% Change from Previous Census		1.8	2.1
Ontario Population Count	11,410,046	12,160,282	12,851,821
% Change from Previous Census		6.6	5.7

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and 2011.

Figure 1 and Table 10 to 11 in the Appendix represent the changing demographics of Powassan between 2001 and 2012 compared to Ontario in 2012.

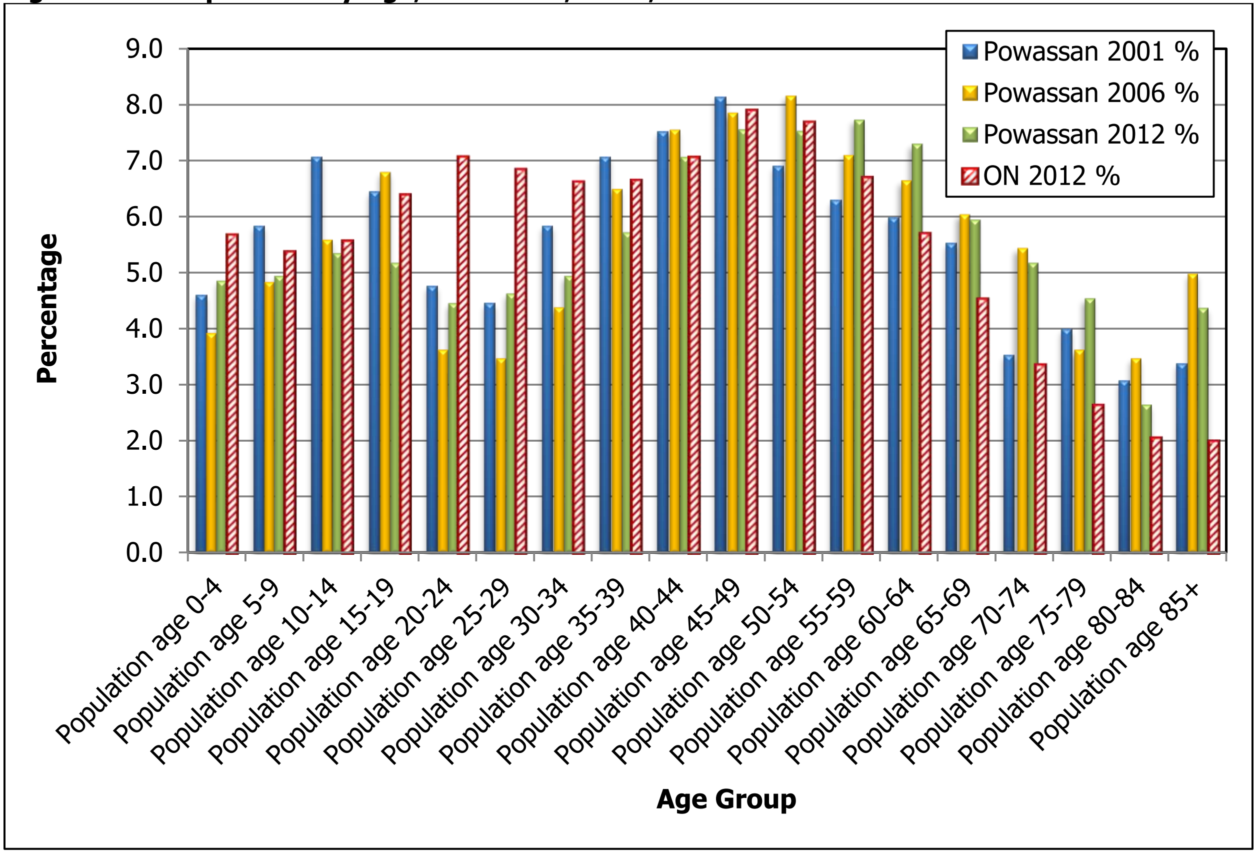
Powassan 2001 to 2006:

- The fastest growing age segments are from 50 to 74 and 85+ years of age.
- The 0-39 age segment declined sharply as a percentage of the total population.

Powassan compared to Ontario, 2012:

- The 55-59 age segment is the largest of all age segments in Powassan, while the 45-49 age segment is the largest in Ontario.
- Powassan’s population (as a percentage of the total population) aged 55+ years is significantly larger than that of Ontario.
- Powassan’s population (as a percentage of the total population) under the age of 50 is significantly smaller than that of Ontario.
- Overall, Powassan’s age profile indicates an older population than that of Ontario.

Figure 1: % Population by Age, Powassan, 2001, 2006 & 2012 vs. ON 2012



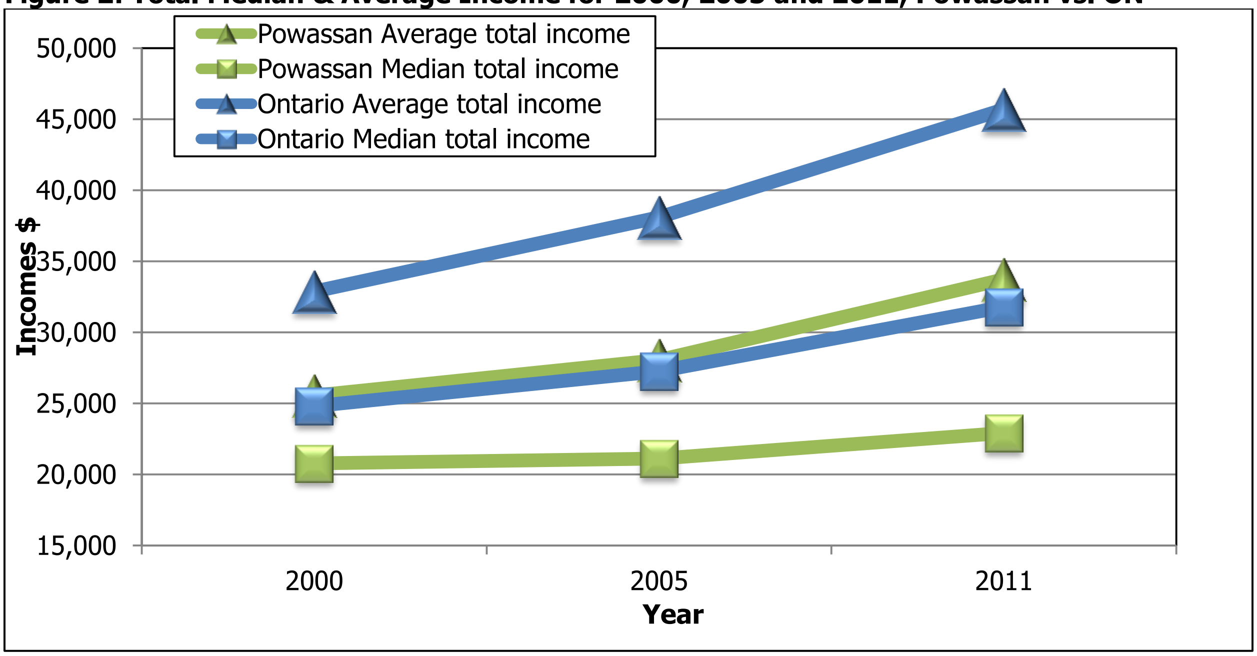
Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

7.2 Powassan Incomes

Based upon Figures 2 to 4, as well as Tables 12 to 16 in the Appendix, the following observations[9] can be made with respect to incomes:

- All average and median incomes (total, family, household) in Powassan increased between 2000 and 2011 and are lower than those in Ontario.
- With respect to total income changes from 2000 to 2011, the percentage of the population making $15,000 to $19,999 has the largest increase and becomes the largest income segment in Powassan.
- In 2011, compared to Ontario, the percentage of the population making $15,000 to $29,999 in Powassan was greater than the province but the percentage of the population making more than $60,000 was significantly smaller than Ontario.

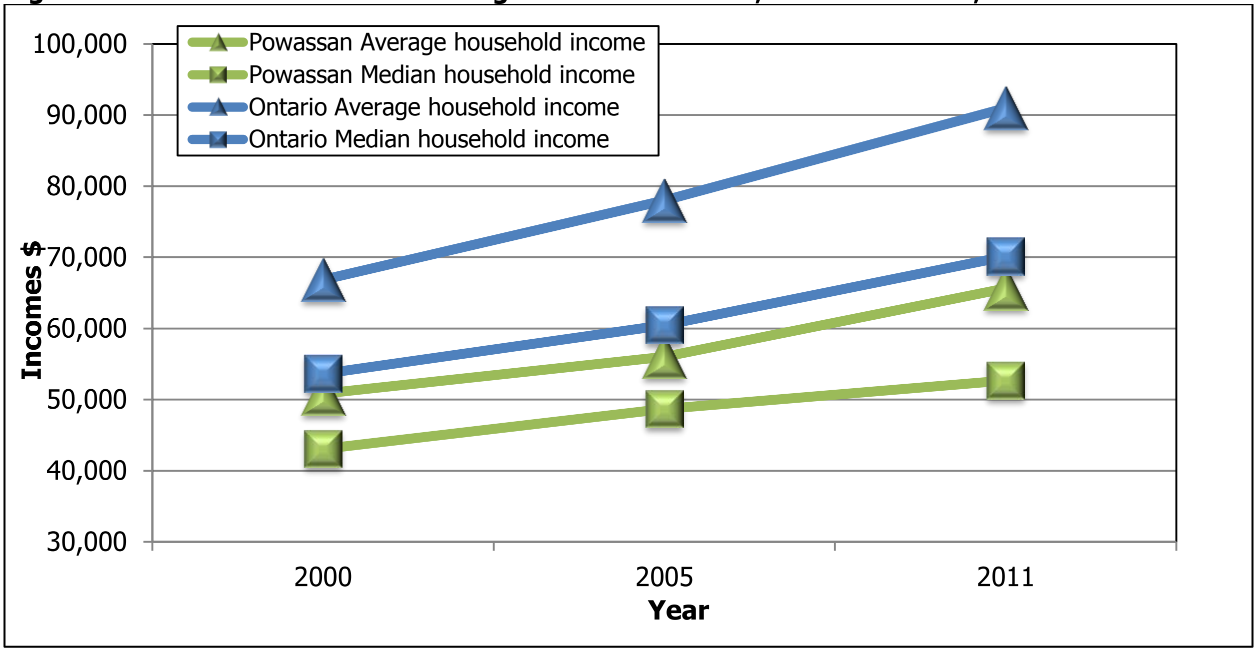
Figure 2: Total Median & Average Income for 2000, 2005 and 2011, Powassan vs. ON



Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

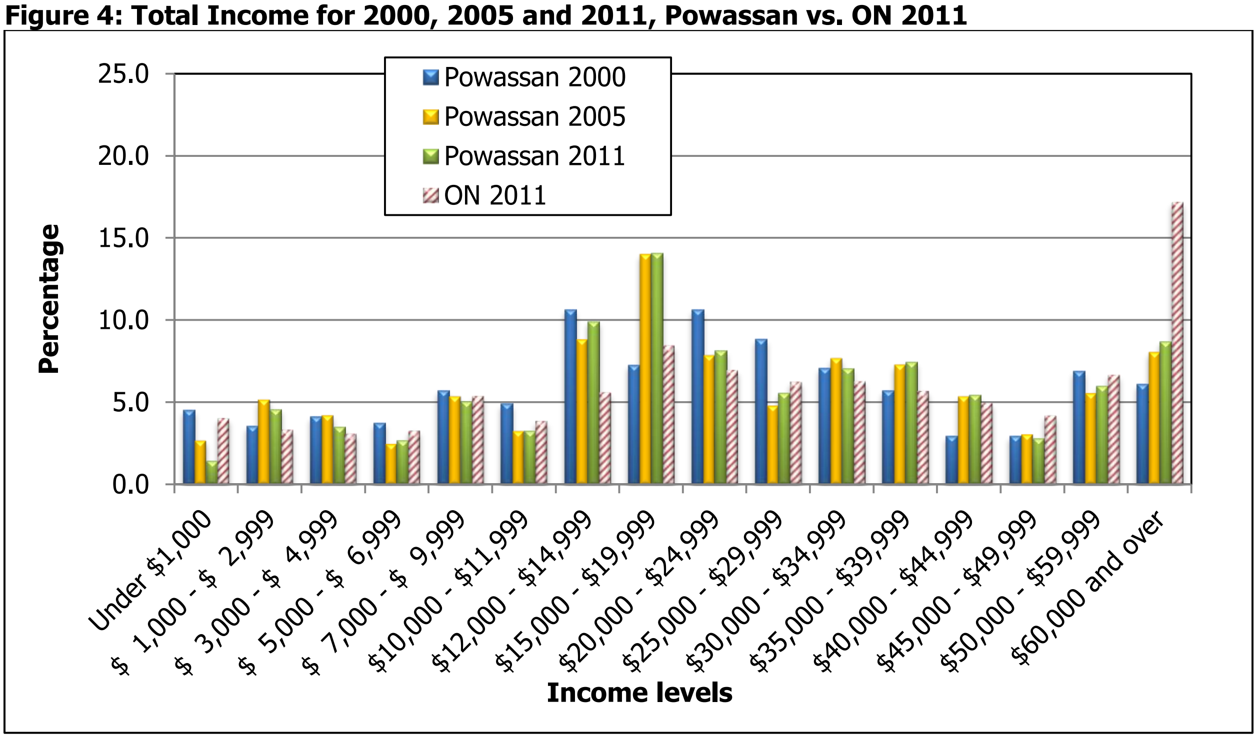
[9] Please note that Census data (2001 and 2006) is not exactly comparable to Superdemographics data (2009) estimates.

Figure 3: Household Median & Average Income for 2000, 2005 and 2011, Powassan vs. ON



Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Figure 4: Total Income for 2000, 2005 and 2011, Powassan vs. ON 2011



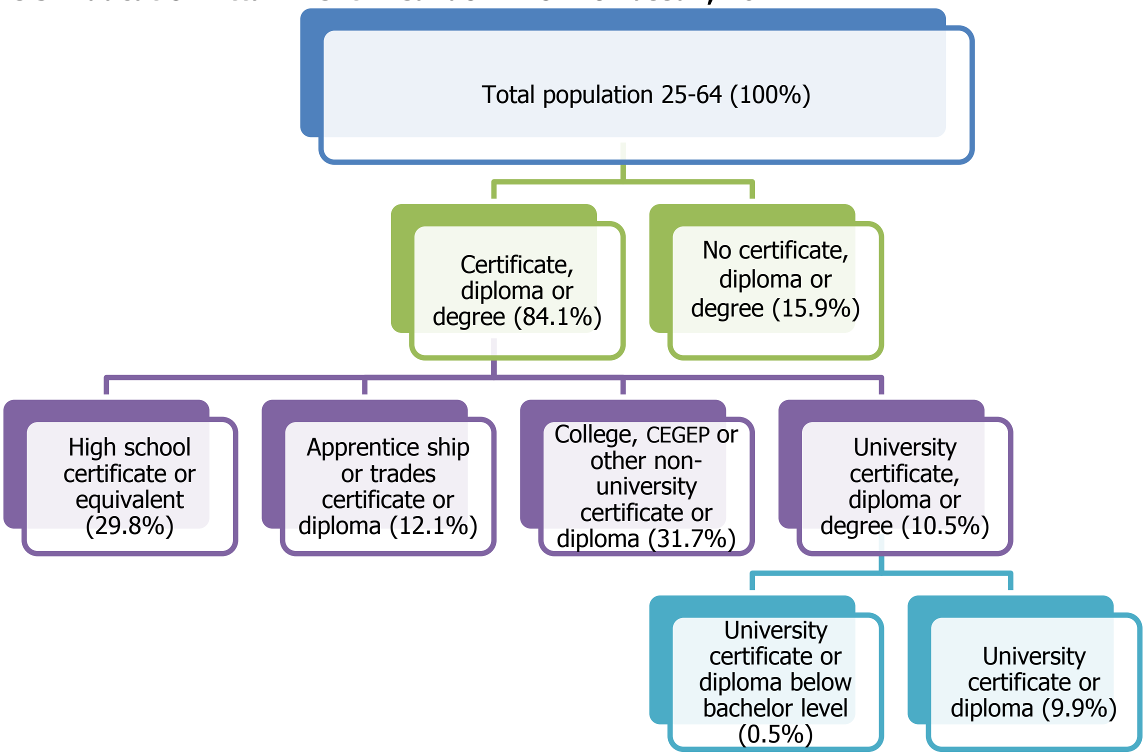
Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 20112 (2011 incomes).

7.3 Education

Figures 5 and 6, and Tables 17 to 18 in the Appendix, outline the education levels obtained by Powassan's residents (aged 25-64) for 2001, 2006 and 2012 as compared to Ontario averages.[10]

The following figure provides a visual breakdown of the educational attainment levels of the Powassan population aged 25-64 in 2012. Definitions may be found in the footnotes.

Figure 5: Education Attainment Breakdown for Powassan, 2012[11]



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

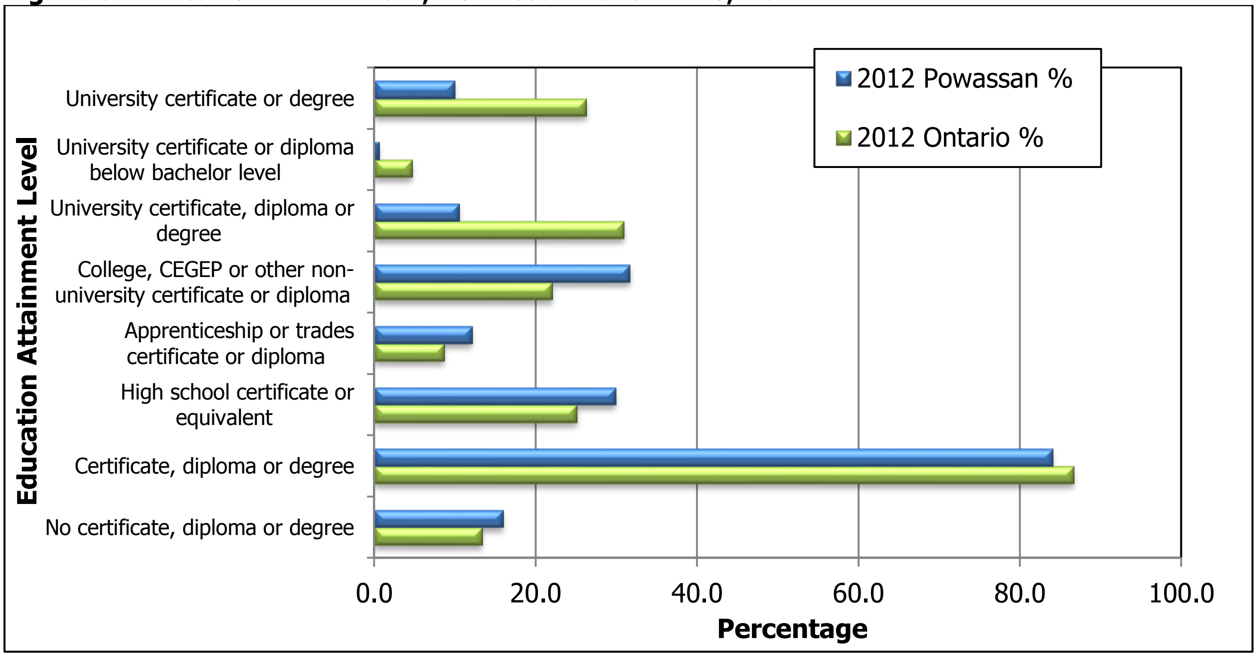
[10] 2001 Census data is not directly comparable to 2006 Census data.

- [11] 'Highest certificate, diploma or degree' refers to the highest certificate, diploma or degree completed based on a hierarchy which is generally related to the amount of time spent 'in-class.' For postsecondary completers, a university education is considered to be a higher level of schooling than a college education, while a college education is considered to be a higher level of education than in the trades. Although some trades requirements may take as long or longer to complete than a given college or university program, the majority of time is spent in on-the-job paid training and less time is spent in the classroom.
- 'High school certificate or equivalent' includes persons who have graduated from a secondary school or equivalent. Excludes persons with a postsecondary certificate, diploma or degree. Examples of postsecondary institutions include community colleges, institutes of technology, CEGEPs, private trade schools, private business colleges, schools of nursing and universities.
- 'College, CEGEP or other non-university certificate or diploma' replaces the category 'Other non-university certificate or diploma' used in previous censuses. This category includes accreditation by non-degree-granting institutions such as community colleges, CEGEPs, private business colleges and technical institutes.

Based on the following figure, it can be concluded that:

- The percentage of Powassan residents who have an College, CEGEP or other non-university certificate is higher than the Provincial percentage in 2012;
- The percentage of Powassan residents who have a university certificate or diploma is significantly lower than Ontario in 2012.

Figure 6: Education Attainment, Powassan vs. Ontario, 2012



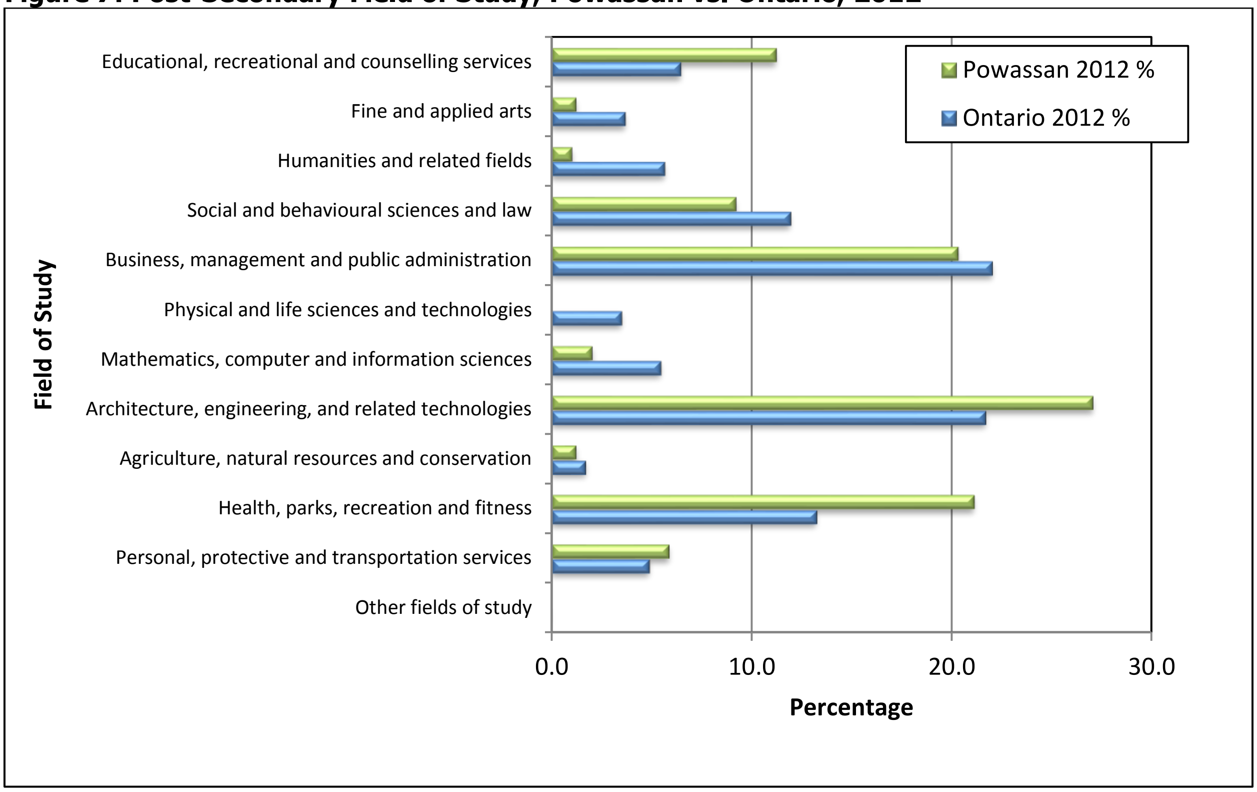
Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

7.4 Post-Secondary Field of Study

For 2012 post-secondary qualifications of persons aged 25-64, the following observation can be made from Figure 7 and Table 19 (in the Appendix)[12]:

- The percentage of the population who chose the Architecture, engineering and related technologies field was significantly greater than that of Ontario.
- The same was true for educational, recreational, and counselling services, as well as health, parks, recreation and fitness.
- The percentage of the population studying Business, management and public administration was also high, but smaller than that of Ontario.

Figure 7: Post-Secondary Field of Study, Powassan vs. Ontario, 2012[13]



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

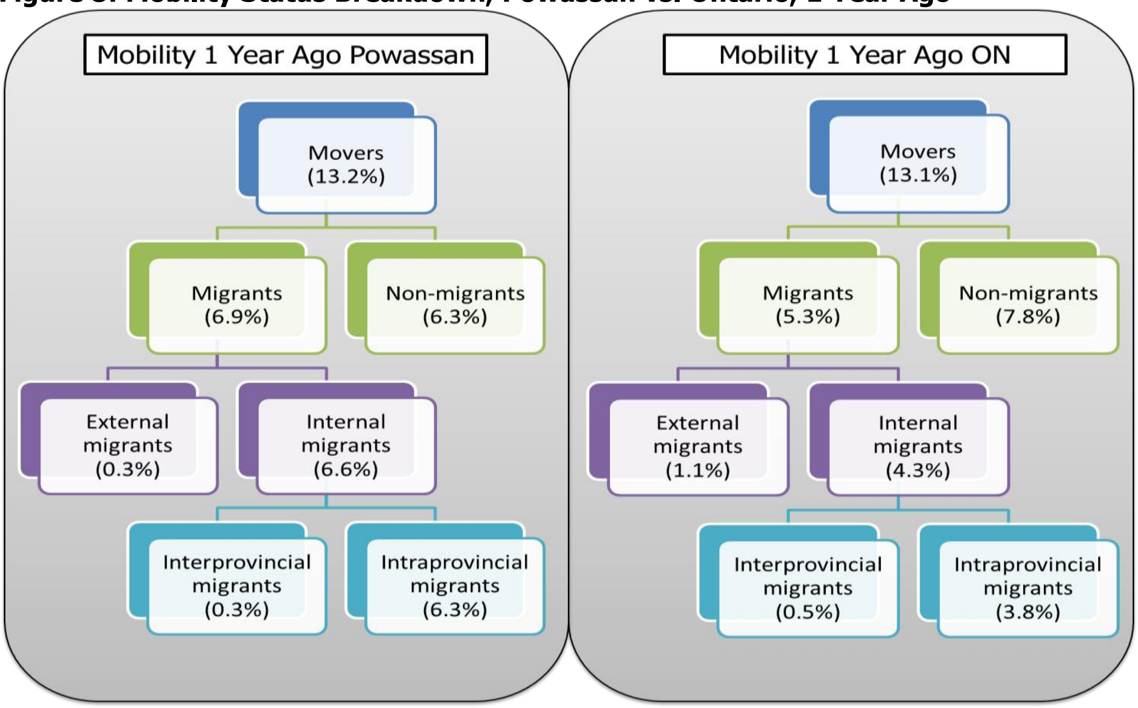
[12] Changes in census variables do not allow a direct comparison of 2001 and 2006 post-secondary fields of study.
[13] 'Field of study' is defined as the main discipline or subject of learning. It is collected for the highest certificate, diploma or degree above the high school or secondary school level.

7.5 Migration to Powassan

The mobility (refers to whether or not people lived in the same dwelling unit either one year or five years ago) of Powassan residents in 2010 can be seen in Figures 8 to 9, and Table 20 (in the Appendix).

The following figure is a visual breakdown of the mobility status in Powassan (2012 estimates data). Definitions may be found in the footnotes.

Figure 8: Mobility Status Breakdown, Powassan vs. Ontario, 1 Year Ago [14]

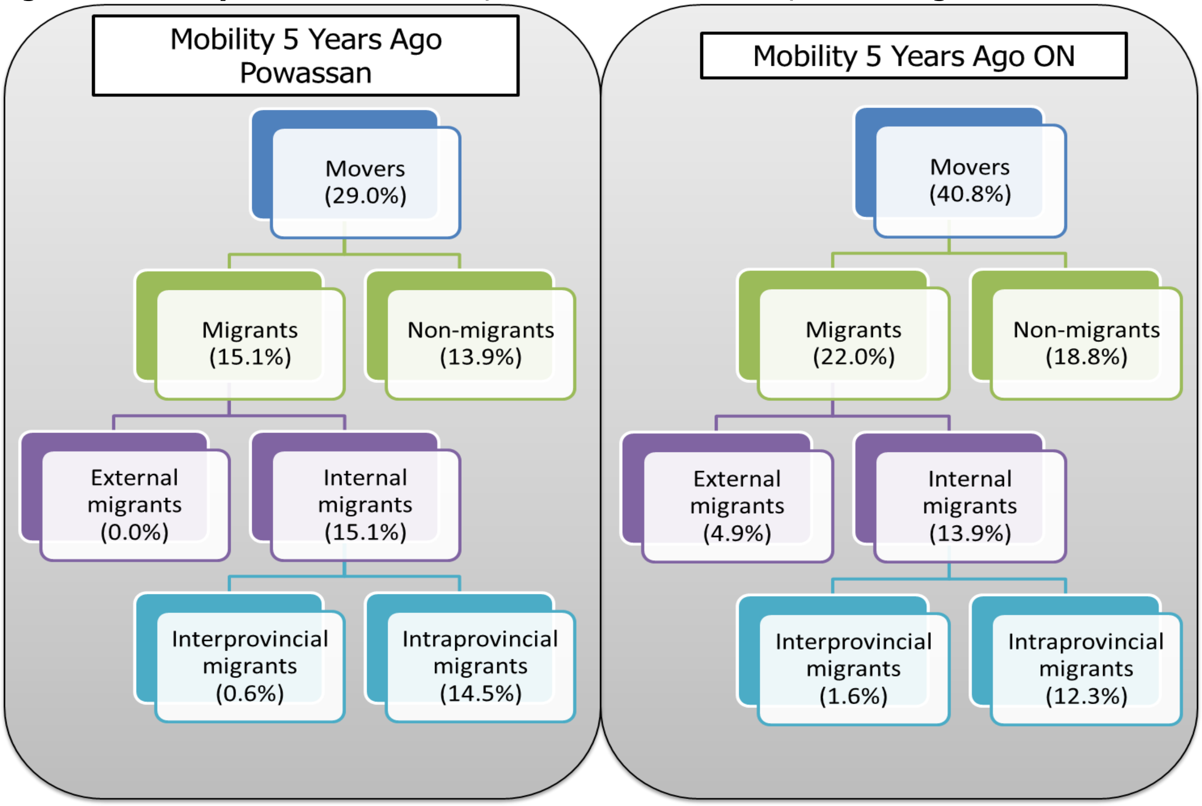


Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012

In 2012, the percentage of Powassan residents that had moved within the previous year (13.2% movers) was slightly larger than the percentage of "movers" in Ontario. People moving to Powassan were more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province.

- [14] Non-movers are persons who were living at the same address as the one at which they resided one year earlier.
- Movers are persons who were living at a different address from the one at which they resided one year earlier.
- Non-migrants are movers who were living at a different address, but in the same census subdivision (CSD) as the one they lived in one year earlier.
- Migrants are movers who were residing in a different CSD one year earlier (internal migrants) or who were living outside Canada one year earlier (external migrants).
- Intraprovincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in the same province.
- Interprovincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in a different province.

Figure 9: Mobility Status Breakdown, Powassan vs. Ontario, 5 Years Ago



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

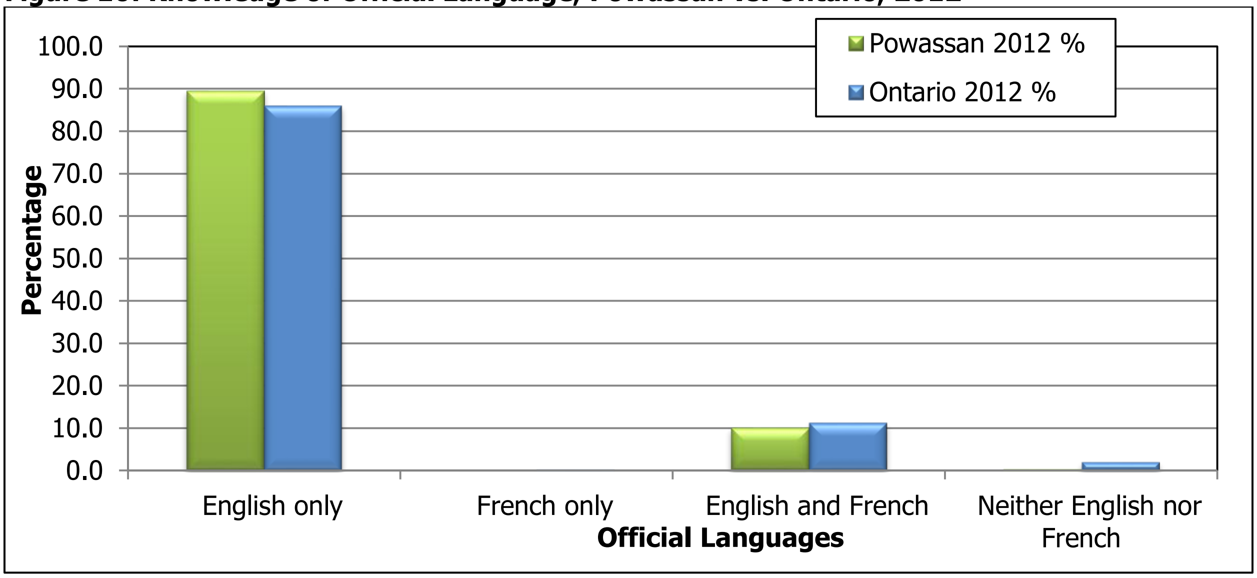
Figure 9 compares the mobility of Powassan residents five years ago to that of Ontario. The percentage of Powassan residents that had moved within the past five years was significantly smaller than the percentage of "movers" in Ontario. People moving to Powassan were still more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province. The absence of external migrants (immigrants) to Powassan is notable.

7.6 Knowledge of Official Languages

Figure 10 and Table 21 (in the Appendix) illustrate the official languages spoken in Powassan compared to the averages for Ontario in 2010:

- Almost all residents in Powassan speak English only (89.6%).
- The percentage of bilingual (English and French) residents in Powassan is slightly lower than in Ontario.

Figure 10: Knowledge of Official Language, Powassan vs. Ontario, 2012



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012

7.7 Dwelling Characteristics

Table 4 and Figure 11 present dwelling characteristics in Powassan for 2001, 2006 and 2012 as compared to Ontario:

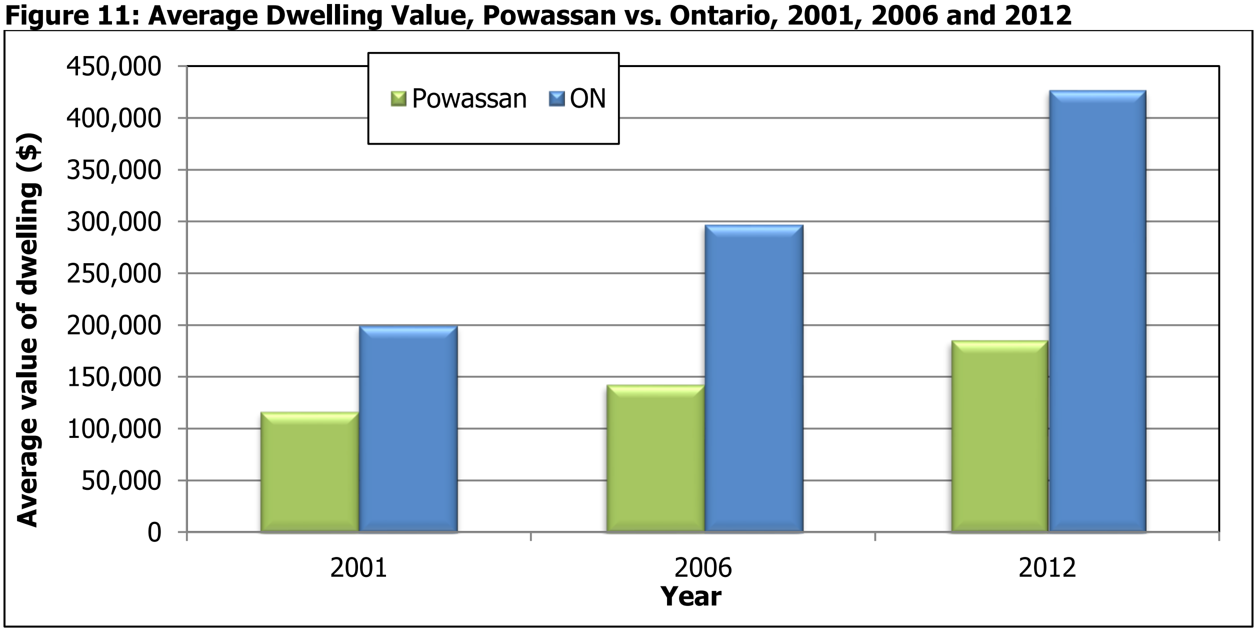
- The total number of dwellings in Powassan increased from 1,220 in 2001 to 1,333 in 2012.
- The average value of dwellings in Powassan increased from $116,316 in 2001 to $184,943 in 2012, and is significantly lower than that of Ontario.

Table 4: Dwelling Characteristics, Powassan vs. Ontario, 2001, 2006 and 2012

	2001		2006		2012	
	Powassan	**ON**	**Powassan**	**ON**	**Powassan**	**ON**
Total number of dwellings	1,220	4,219,410	1,245	4,555,030	1,333	4,980,115
% of owned dwellings	80.3	67.8	83.9	71.0	84.4	71.6
% of rented dwellings	19.7	32.0	16.5	28.8	15.6	28.3
Average value of dwelling ($)	116,316	199,884	142,458	297,479	184,943	371,018

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

Figure 11: Average Dwelling Value, Powassan vs. Ontario, 2001, 2006 and 2012



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

8 Labour Force Analysis

Section 8, Labour Force Analysis, examines the characteristics of the labour force that resides in Powassan, regardless of work location.

Highlights

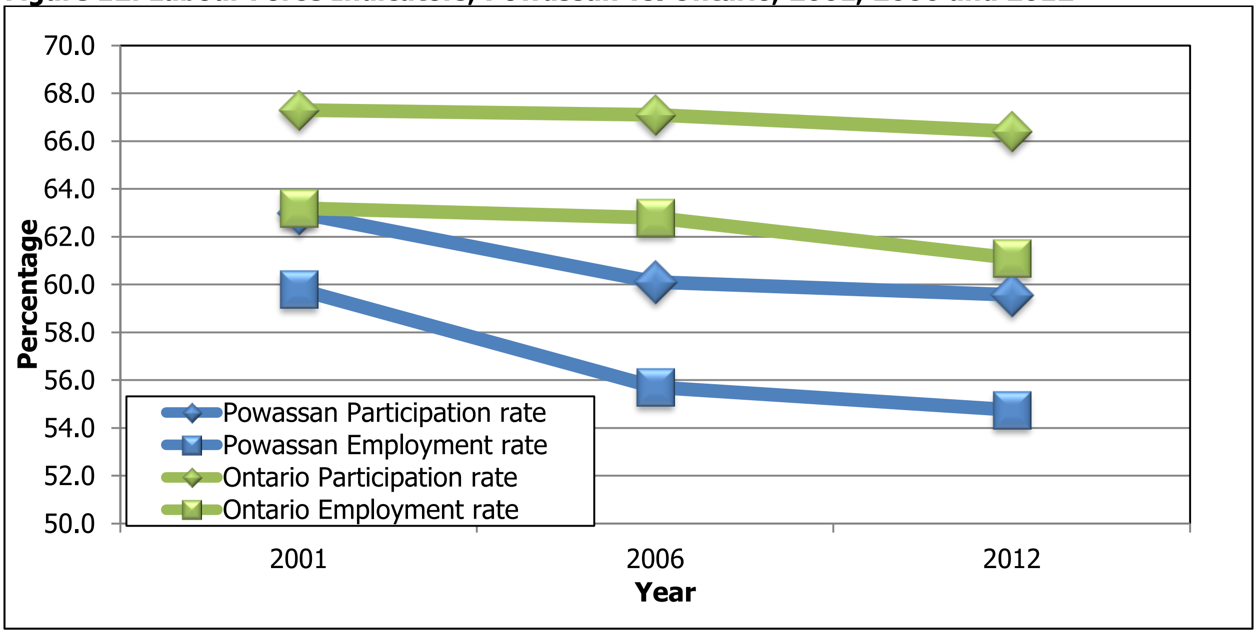
- *In 2012, the employment rate and participation rate in Powassan were significantly lower than that of Ontario; while the unemployment rate was slightly higher than that of Ontario (8.1% vs. 8.0%).*
- *A higher percentage of the labour force in Powassan worked in the following industries than in Ontario:*
    - *Agriculture, forestry, fishing and hunting*
    - *Construction*
    - *Retail trade*
    - *Education services*
    - *Health care and social assistance.*
- *In 2006, the size of Powassan's labour force working in almost all industry sectors greatly exceeded the number of jobs available in those industries, thus making Powassan a net 'exporter' of at least 490 employees to other communities.*
- *The majority of Powassan's labour force commutes to work outside of Powassan, primarily to North Bay.*
- *Powassan residents who commute to work outside of Powassan work in almost all industries, the most common of which are the following (in decreasing order based on the number of people):*
    - *Educational services*
    - *Administration and support, waste management and remediation services*
    - *Construction.*
- *The following industry sectors have more jobs than resident labour force in Powassan:*
    - *Wholesale trade*
    - *Finance and insurance*
    - *Arts, entertainment and recreation.*

8.1 Key Indicators

Figures 12 and 13, along with Table 22, provide a comparison of key labour force indicators for Powassan and Ontario from 2001 to 2012 (2012 estimates). The following observations can be made[15]:

- In 2001, 2006, and 2012, the labour force participation rates and employment rates were lower in Powassan compared to the Provincial rate.
- The unemployment rate in Powassan was lower than Ontario's in 2001, but was higher than the Ontario rate in 2006 and 2012.

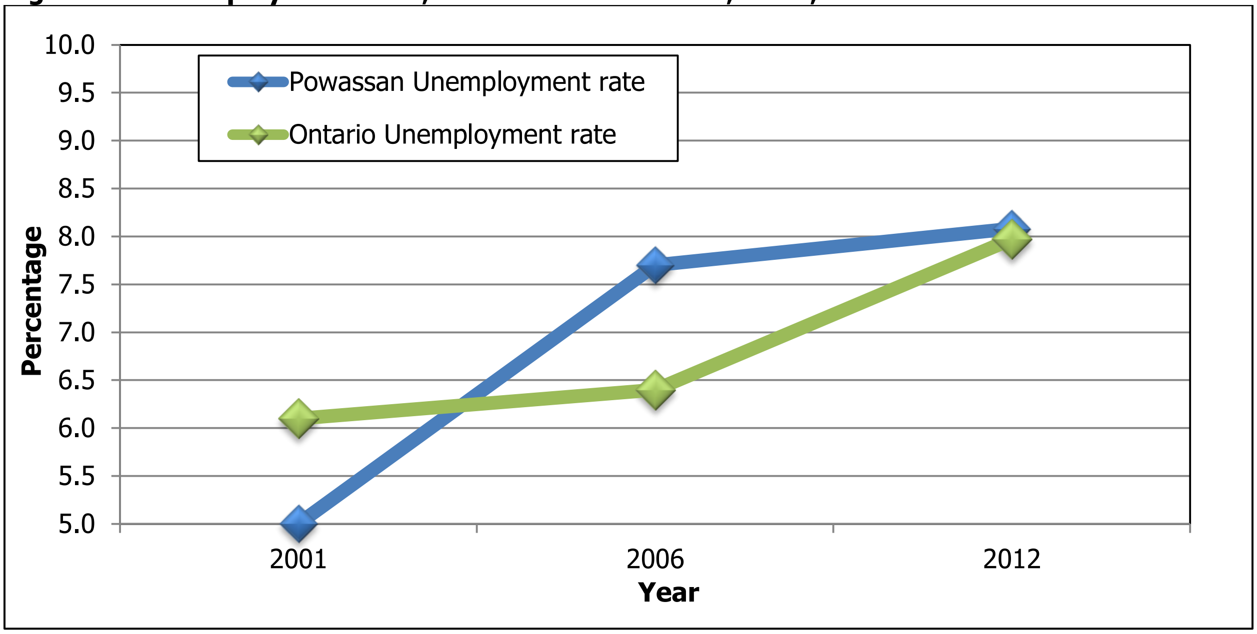
Figure 12: Labour Force Indicators, Powassan vs. Ontario, 2001, 2006 and 2012



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

[15] Participation rate %=labour force/total population 15+
Employment rate %= employed/total population 15+
Unemployment rate %=unemployed/labour force

Figure 13: Unemployment Rate, Powassan vs. Ontario, 2001, 2006 and 2012

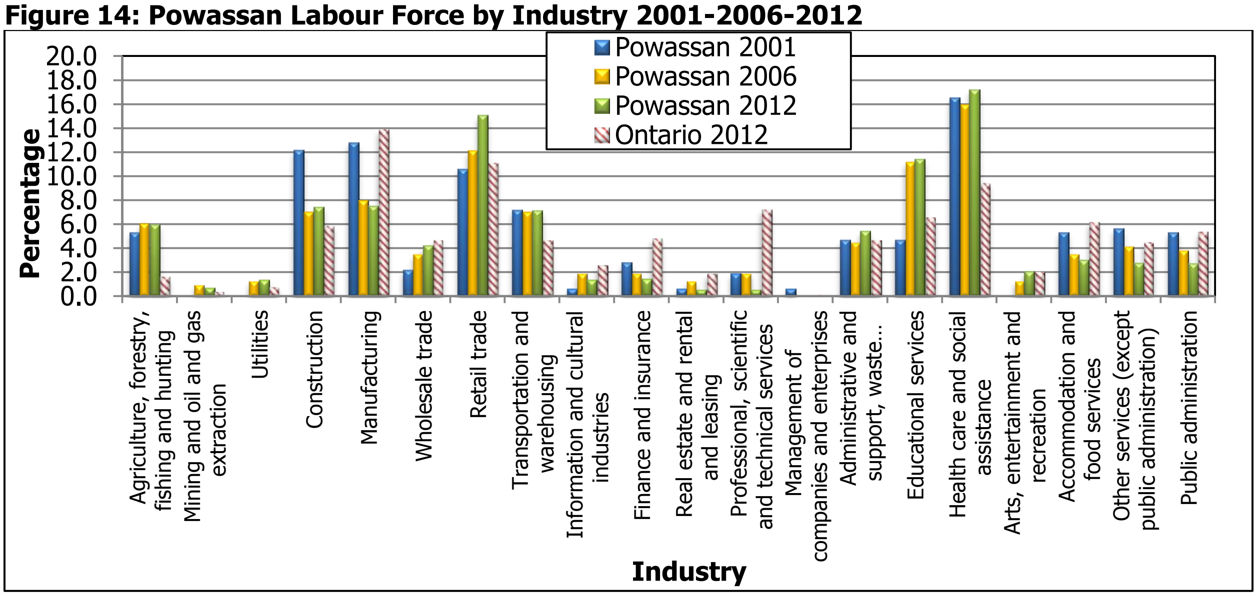


Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

8.2 Labour Force by Industry

Figure 14 and Table 23 (in the Appendix) indicate that the experienced labour force in the education industry had the largest percentage increase between 2001 and 2012, with an estimated increase of 126 labour force participants. However, the percentage of labour force in construction and manufacturing significantly declined during the same period.

Figure 14: Powassan Labour Force by Industry 2001-2006-2012



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

Figure 14 and Table 24 (in the Appendix) demonstrate the estimated percentage of the labour force employed by industry in 2012 relative to Ontario.

In 2012, a larger percentage of Powassan's resident labour force worked in the following industries as compared to Ontario:

- Agriculture, forestry, fishing and hunting
- Construction
- Retail trade
- Education services
- Health care and social assistance.

A smaller percentage of Powassan's resident labour force, as compared to Ontario, worked in:

- Manufacturing
- Information and cultural industries
- Finance and insurance
- Real estate and rental and leasing
- Professional, scientific and technical services
- Accommodation and food services
- Other services (except public administration)
- Public administration.

8.3 Labour Force by Occupation

Figure 15 and Table 25 (in the Appendix) compares the estimated percentages of the labour forces in Powassan and Ontario by occupation for 2012.

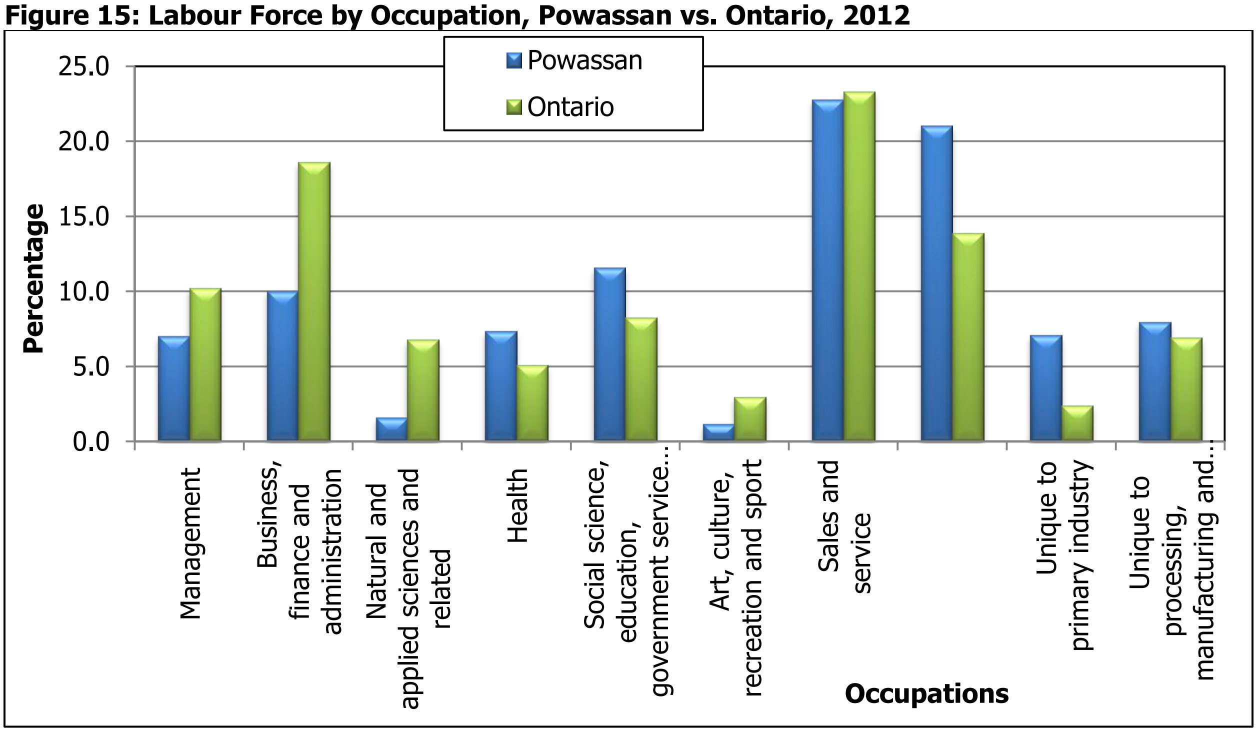
In comparison to Ontario, Powassan has had larger percentages of its labour force working in:

- Health
- Social science, education, government service and religion
- Trades, transport and equipment operators and related
- Unique to primary industry
- Unique to processing, manufacturing and utilities.

In contrast, Powassan has had smaller percentages of its labour force, as compared to Ontario, working in:

- Business, finance and administration
- Natural and applied sciences and related
- Management
- Art, culture, recreation and sport.

Figure 15: Labour Force by Occupation, Powassan vs. Ontario, 2012



Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2012.

8.4 Commuting Patterns

Tables 5 and 6 provide information on persons reporting a "usual place of work other than in their home or outside of Canada", and reveal the following regarding labour force commuting patterns with respect to Powassan in 2006[16]:

- The majority of the Powassan resident labour force who worked outside of Powassan commuted to work in North Bay.
- The largest percentage of the non-resident labour force commuting to work in Powassan travelled from Nipissing and North Bay.
- 60.7% of the workers living in Powassan had a usual place of work outside of Powassan.
- 49.7% of workers declaring a usual place of work in Powassan lived outside of Powassan.

Table 5: Where the Powassan Resident Labour Force Works, 2006

Place of Work	Total	Male	Female
Powassan	385	150	235
North Bay	465	215	245
South River	40	0	30
Sundridge	35	15	15
Callander	35	20	20
East Ferris	20	0	15
Total Resident Labour Force	**980**	**400**	**560**
Total resident labour force with a usual place of work outside of Powassan	*595*	*250*	*325*
Percent of residents declaring a place of work outside of Powassan	*60.7%*	*62.5%*	*58.0%*

Source: McSweeney & Associates, Statistic Canada, Commuting Flow Census Subdivisions: Sex (3) for the Employed Labour Force 15 Years and Over Having a Usual Place of Work of Census Subdivisions, Flows Greater than or Equal to 20, 2006 Census - 20% Sample Data. http://www12.statcan.gc.ca/census-recensement/2006/dp-pd/tbt/Rp-eng.cfm?TABID=1&LANG=E&A=R&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=3549060&GK=0&GRP=1&O=D&PID=90656&PRID=0&PTYPE=88971,97154&S=1&SHOWALL=0&SUB=0&Temporal=2006&THEME=76&VID=0&VNAMEE=&VNAMEF=

Table 6: **Place of Residence for Persons Working in Powassan, 2006**

Place of Residence	Total	Male	Female
Powassan	385	150	235
Nipissing	115	55	60
North Bay	85	30	50
Chisholm	65	25	40
Callander	50	25	25
Parry Sound, Unorganized, Centre Part	40	15	20
East Ferris	25	10	15
Total workforce working in Powassan	**765**	**310**	**445**
Total non-resident workforce commuting to work to Powassan	*380*	*160*	*210*
Percent of workers (non-residents) commuting to work to Powassan	*49.7%*	*51.6%*	*47.2%*

Source: McSweeney & Associates, Statistic Canada, Commuting Flow Census Subdivisions: Sex (3) for the Employed Labour Force 15 Years and Over Having a Usual Place of Work of Census Subdivisions, Flows Greater than or Equal to 20, 2006 Census - 20% Sample Data. http://www12.statcan.gc.ca/census-recensement/2006/dp-pd/tbt/Rp-eng.cfm?TABID=1&LANG=E&A=W&APATH=3&DETAIL=0&DIM=0&FL=A&FREE=0&GC=0&GID=3549060&GK=0&GRP=1&O=D&PID=90656&PRID=0&PTYPE=88971,97154&S=1&SHOWALL=0&SUB=0&Temporal=2006&THEME=76&VID=0&VNAMEE=&VNAMEF=

[16] Only 2006 year commuting data is available.

8.5 Net Import and Export of Labour Force

The next table highlights industry sectors in which there is a net "export" or "import" of labour. The net export/import calculation is simply the number of jobs in each Powassan's industry minus the number of Powassan's residents working in that particular industry. It is important to note that the export/import numbers indicated under-represent the actual numbers of employees, as this calculation assumes all of the employed resident labour force in that industry works in Powassan.

In 2006, the size of the Powassan resident labour force (1,445) greatly exceeded the number of jobs (955) available in almost all industry sectors in Powassan, indicating that Powassan was a net "exporter" of at least 490 employees. From the economic development point of view, this represents a potential opportunity to attract these industries, as there is a resident labour force commuting elsewhere to work in those industries. Exceptionally, the following industry sectors have more jobs than resident labour force in Powassan: Wholesale trade; Finance and insurance and Arts, entertainment and recreation.

Table 7: Net Import-Export of Labour Force for Powassan, 2006

Sectors (NAICS classification)	Jobs in Powassan	Employed Resident Labour Force Powassan	Net export(-) or import(+) of Labour
Total - Industry - North American Industry Classification System 2002	955	1,445	-490
Agriculture, forestry, fishing and hunting	80	85	-5
Mining and oil and gas extraction	0	15	-15
Utilities	0	20	-20
Construction	40	100	-60
Manufacturing	50	125	-75
Wholesale trade	65	60	5
Retail trade	140	185	-45
Transportation and warehousing	50	95	-45
Information and cultural industries	20	30	-10
Finance and insurance	35	25	10
Real estate and rental and leasing	20	25	-5
Professional, scientific and technical services	0	20	-20
Management of companies and enterprises	0	0	0
Administrative and support, waste management and remediation services	0	65	-65
Educational services	100	170	-70
Health care and social assistance	230	245	-15
Arts, entertainment and recreation	35	20	15
Accommodation and food services	25	40	-15
Other services (except public administration)	35	65	-30
Public administration	30	55	-25

Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs.

9 Economic Base Analysis

Highlights

- *The most highly concentrated employment in Powassan was in the Agriculture, forestry, fishing and hunting sector. In addition, employment in the Educational services, Health care and Arts, entertainment and recreation sectors were also very highly concentrated in 2006.*
- *In Powassan, at sub-sector level, the Heavy and civil engineering construction, Nursing and residential care facilities, Building material and supplies wholesaler-distributors, as well as the Building material and garden equipment and supplies dealers sub-sectors were very highly concentrated.*
- *The largest job increase between 2001 and 2006 in Powassan was in the Educational services sector (35 jobs) , while the largest job losses in the same period were in construction and accommodation and food services.*

This section uses the number of "jobs" in Powassan as input for the economic base analysis. More specifically, by "jobs" we are referring to the employed labour force declaring a usual place of work in Powassan (outside of the home), versus labour force by place of residence. The employed labour force therefore includes Powassan residents and non-residents.

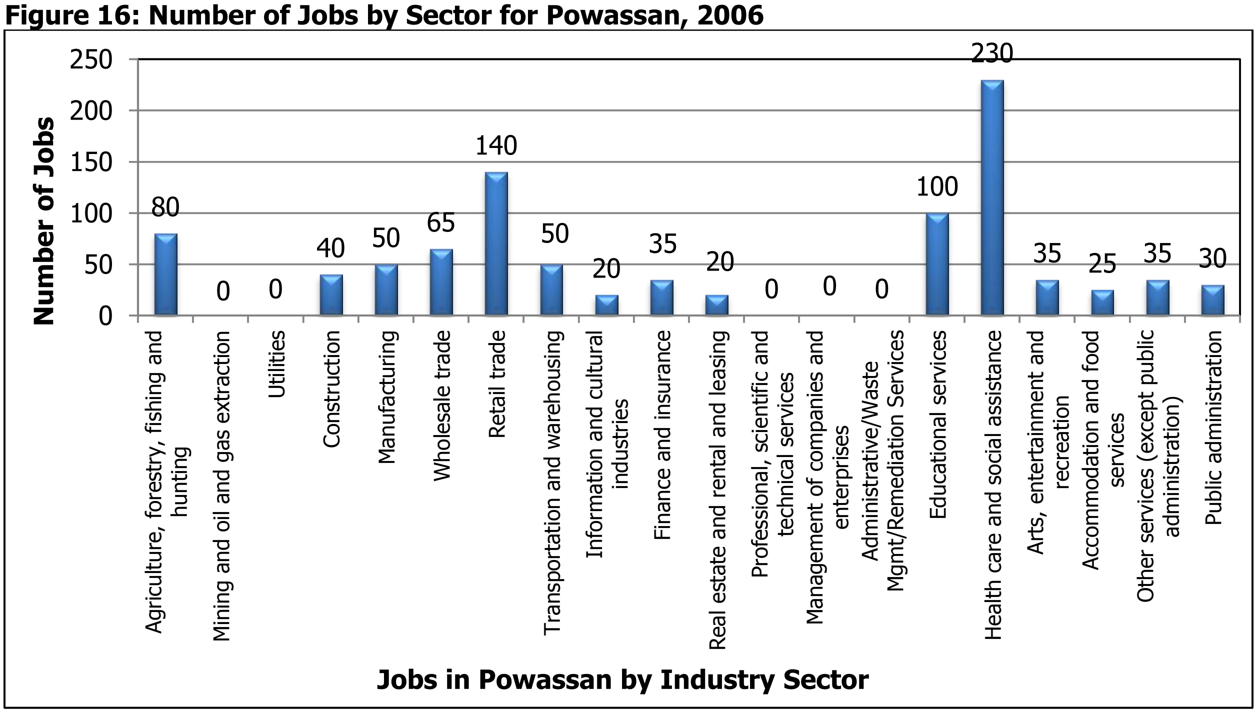
9.1 Employment Profile

The Statistics Canada "North American Industry Classification System" (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industries categories are called Sectors, which are broken down into Sub-sectors, which are then further broken down into Industries. An example of this breakdown follows:

The following figure illustrates that there were 955 jobs in Powassan in 2006.[17] With 230 employees in 2006, the health care and social assistance sector was the largest industry sector employer in Powassan. Other sectors with a large number of jobs were:

- Retail trade
- Educational services.

Figure 16: Number of Jobs by Sector for Powassan, 2006



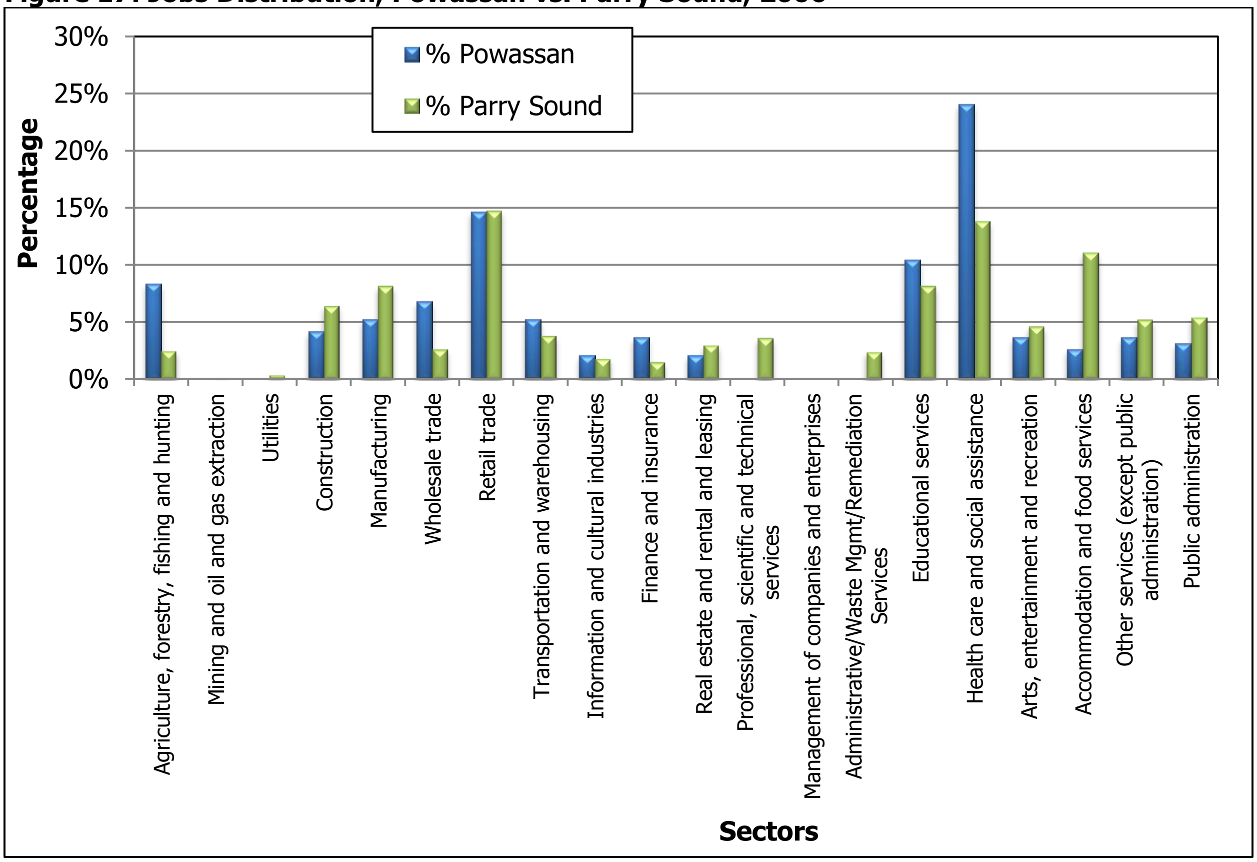
Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs.

[17] The "jobs" statistic indicates people who report to a usual place of work at the beginning of each work shift, whereas we know that construction workers more frequently report directly at various job sites, and therefore are usually excluded statistically. Persons working at home or outside of Canada are also excluded.

The following figure presents the percentage of jobs in each industry sector for Powassan and Parry Sound. Powassan, when compared to Parry Sound, has a higher percentage of jobs in the following sectors:

- Agriculture, forestry, fishing and hunting
- Educational services
- Health care and social assistance.

Figure 17: Jobs Distribution, Powassan vs. Parry Sound, 2006



Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs.

9.2 Location Quotient Analysis

An economic base analysis is an analysis of how the local economy functions. It does not provide solutions to economic problems, but instead provides useful information required for decision-making about economic strategies.

The economic base analysis helps determine which economic activities "bring money in", and where money might be "leaking out". While the actual flow of money in and out of Powassan would be the most accurate means of describing the economic base of the area, however data or statistics for this form of cash flow analysis are not available. As such, a surrogate for cash flow is required, and the most common substitute is employment which uses an economic base analysis tool called "Location Quotient Analysis". This method compares the level of employment concentration (or specialization) in Powassan to the level of employment concentration in one or more benchmark areas. In other words, does Powassan have proportionately more or less employees in specific industries than the benchmark area?

"Benchmarking" employment in Powassan to Ontario and Canada provides information on:

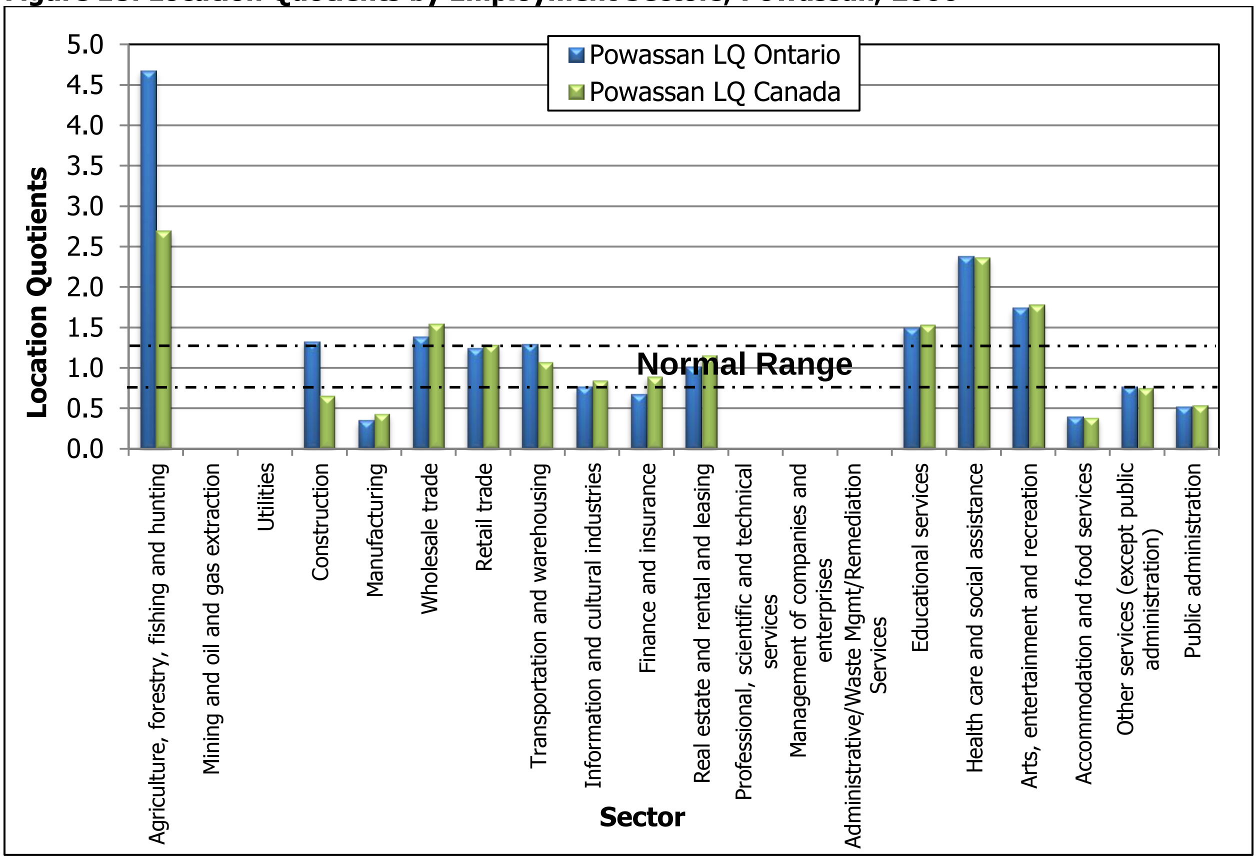
- The extent to which Powassan is producing all of the goods or services required for consumption in Powassan (this potentially identifies opportunities to replace the imports with locally provided goods and services).
- Whether the Powassan economy is producing goods or services in excess of quantities required for local consumption, indicating a high degree of development and specialization (or industry concentration) that results from the goods or services being consumed by non-residents.

The location quotient method is a "first cut" analysis that requires interpretation of the results, but it will point to the economic sectors that deserve a more thorough and in-depth analysis and "street-level" validation. A location quotient of between 0.75 and 1.25 generally indicates the local economy is self-sufficient in that industry. A 1.0 would indicate the exact same proportion of that industry's jobs to all Powassan jobs as that of the benchmark, in this case, Canada. A location quotient of less than 0.75 usually indicates a lack of self-sufficiency, requiring an importation of goods or services, as there is insufficient local employment to produce the required goods/services. A location quotient of greater than 1.25 usually indicates the industry has more local employment than is required to sustain the needs of Powassan, and is therefore exporting its goods or services, and is bringing money into Powassan.

9.2.1 Location Quotients Analysis by Sector

The next figure illustrates the location quotients for Powassan by employment sector compared to Ontario and Canada as benchmarks.

Figure 18: Location Quotients by Employment Sectors, Powassan, 2006



Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs.

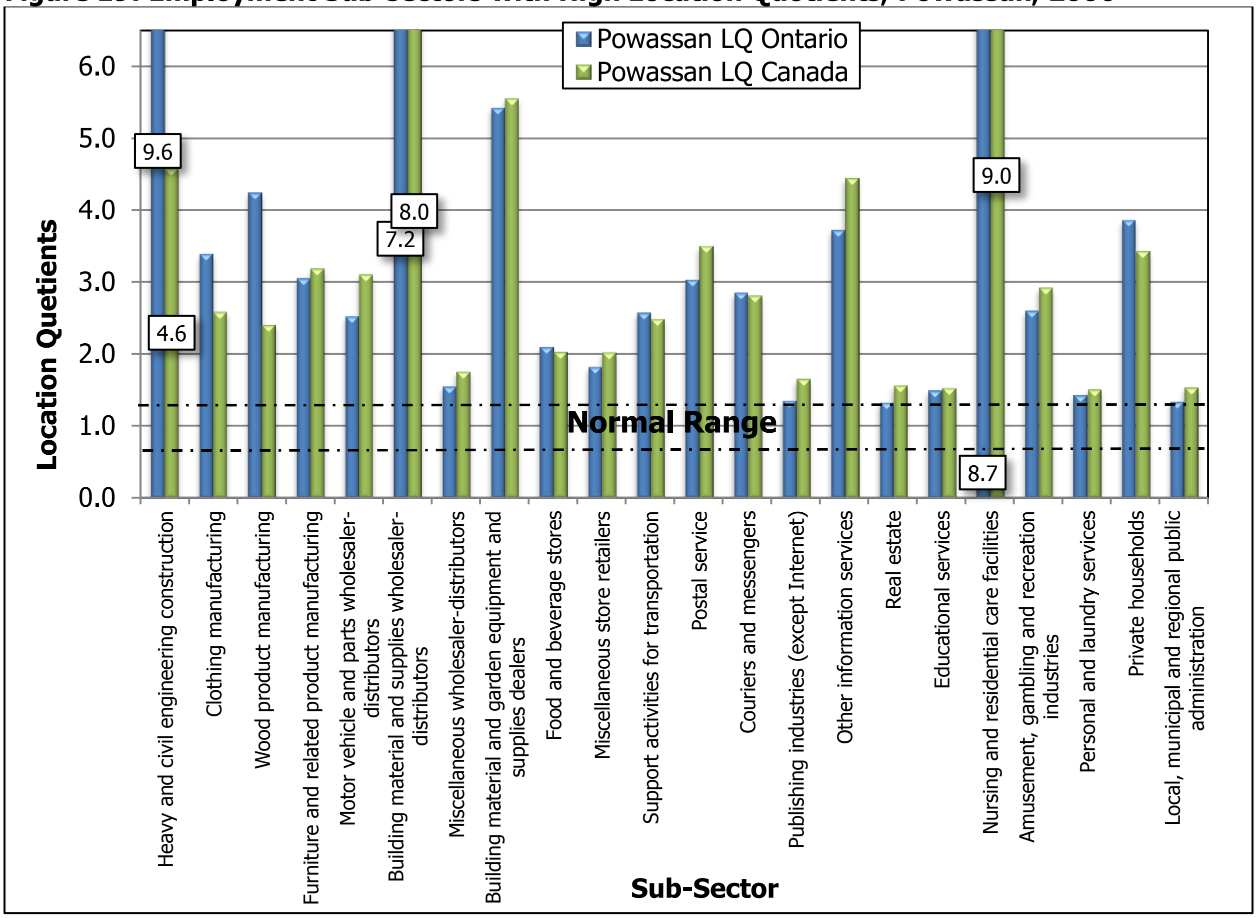
Sector location quotients for Powassan vary when compared to Ontario and Canada, however most sectors are below the average. Employment in the Agriculture, forestry, fishing and hunting sector is the most highly concentrated sector in Powassan. Other highly concentrated employment sectors in Powassan as compared to Ontario and Canada are:

- Educational services
- Health care and social assistance
- Arts, entertainment and recreation.

9.2.2 Dominant Sub-Sectors

The following figure illustrates the sub-sectors that have a significant number of jobs (percentage of jobs exceeding 0.5%) and a significant concentration in Powassan (location quotient exceeding 1.5 vs. Canada).

Figure 19: Employment Sub-sectors with High Location Quotients, Powassan, 2006



Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

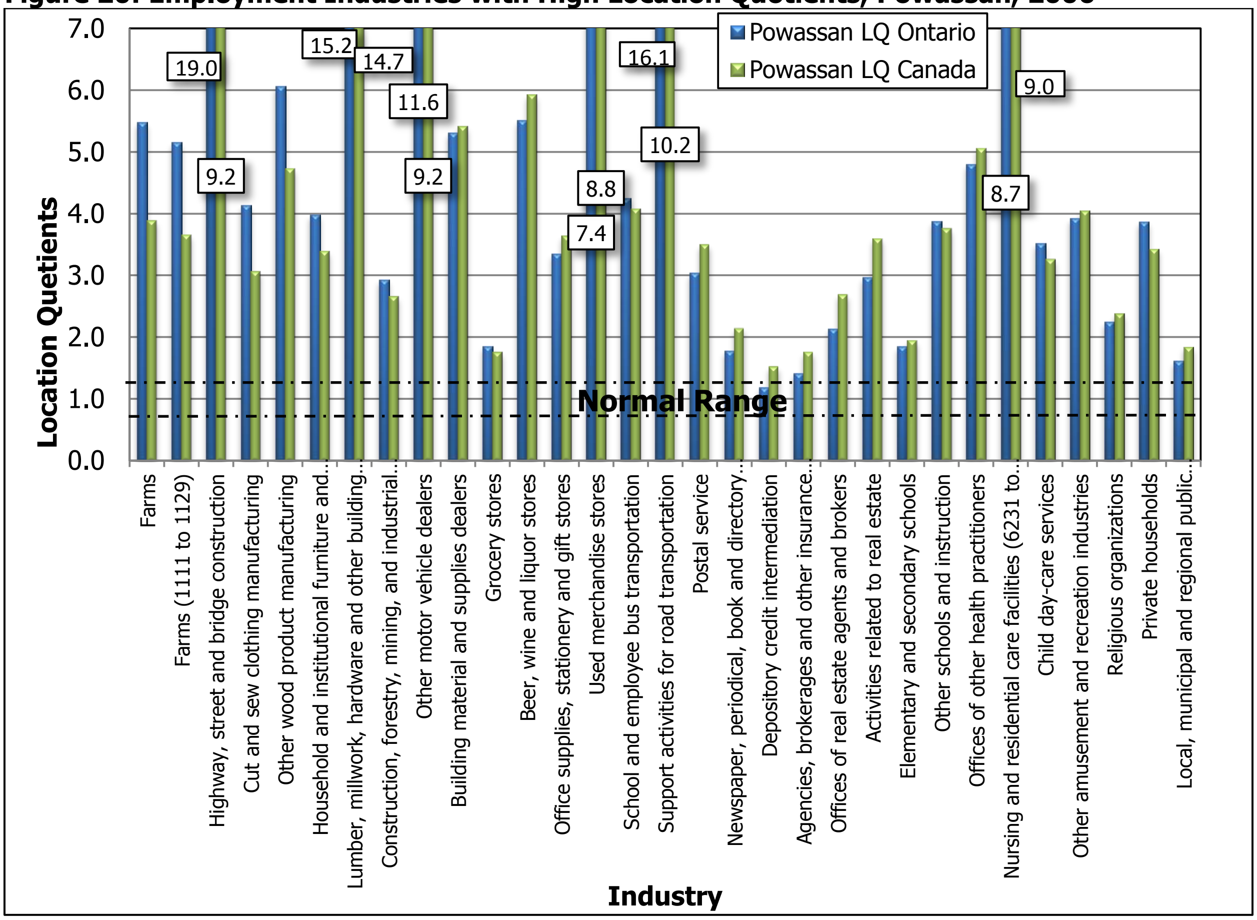
In terms of jobs at the sub-sector level, the Heavy and civil engineering construction sub-sector dominates employment levels (30 jobs) relative to other sub-sectors. Other sub-sectors with high employment concentrations when compared to Ontario and Canada are as follows:

- Nursing and residential care facilities (160 jobs)
- Building material and supplies wholesaler-distributors (50 jobs)
- Building material and garden equipment and supplies dealers (40 jobs).

9.2.3 Location Quotients Analysis by Industry Level

The figure below demonstrates the employment figures by industries that have a significant number of jobs (percentage of jobs exceeding 1%) and a significant concentration in Powassan (location quotient exceeding 1.5 vs. Canada). (LQ concentration indicated in boxes).

Figure 20: Employment Industries with High Location Quotients, Powassan, 2006



Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

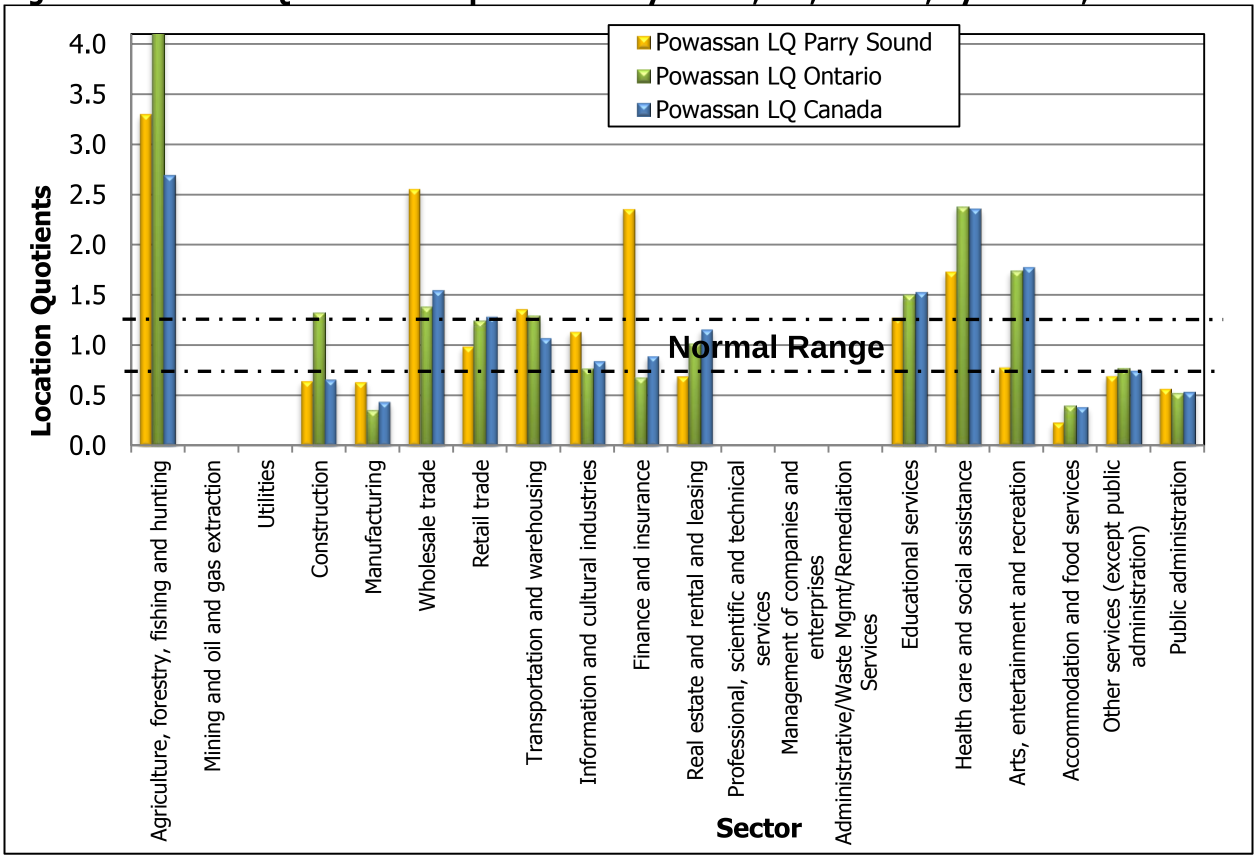
In terms of employment at the industry level, the following industries have high concentrations:

- Highway, street and bridge construction
- Lumber, mill work, hardware and other building supplies wholesaler-distributors
- Other motor vehicle dealers
- Used merchandise stores
- Support activities for road transportation
- Nursing and residential care facilities (6231 to 6239).

9.2.4 Location Quotients Compared to Benchmarks

The next figure presents the location quotients by employment sectors for Powassan when compared to Parry Sound, Ontario and Canada as benchmarks. This analysis compares the employment structure of Powassan to the employment structure of Parry Sound, Ontario and Canada. This analysis points out any particular employment concentrations of Powassan compared to Parry Sound that might not be evident when compared to the Ontario or Canadian economies.

Figure 21: Location Quotients Compared to Parry Sound, ON, Canada, by Sectors, 2006



Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

As compared to Parry Sound (as a benchmark area), employment in most sectors is below the normal range. Employment in the Agriculture, forestry, fishing and hunting sector is the most highly concentrated in Powassan compared to Parry Sound.

Other higher concentrations in comparison to Parry Sound include:

- Wholesale trade
- Health care and social assistance
- Finance and insurance.

A comparison of Powassan's employment structure to that of Parry Sound and North Bay at the more detailed level, or sub-sector level, follows. The following table illustrates the sub-sectors that have a significant number of jobs (percentage of jobs exceeding 0.5%) and also having a significant concentration in Powassan, North Bay and Parry Sound compared to Canada as the benchmark (location quotient exceeding 1.5 to Canada). In the Powassan column, sub-sector concentrations that are not found in North Bay and Parry Sound are in bold. In other words, the concentration is at least somewhat unique in Powassan when compared to North Bay and Parry Sound.

Table 8: Employment Sub-sectors with High LQ for Powassan vs. North Bay vs. Parry Sound, 2006

Powassan	North Bay	Parry Sound
• Heavy and civil engineering construction • Clothing manufacturing • Wood product manufacturing • Furniture and related product manufacturing • Motor vehicle and parts wholesaler-distributors • Building material and supplies wholesaler-distributors • Miscellaneous wholesaler-distributors • Building material and garden equipment and supplies dealers • Food and beverage stores • Miscellaneous store retailers • Support activities for transportation • Postal service • Couriers and messengers • Publishing industries (except Internet) • Other information services • **Real estate** • **Educational services** • Nursing and residential care facilities • Amusement, gambling and recreation industries • Personal and laundry services • Private households • **Local, municipal and regional public administration**	• Heavy and civil engineering construction • Clothing manufacturing • Furniture and related product manufacturing • Motor vehicle and parts wholesaler-distributors • Building material and supplies wholesaler-distributors • Machinery, equipment and supplies wholesaler-distributors • Miscellaneous wholesaler-distributors • Building material and garden equipment and supplies dealers • Miscellaneous store retailers • Support activities for transportation • Couriers and messengers • Telecommunications • Other information services • Credit intermediation and related activities • Insurance carriers and related activities • Nursing and residential care facilities • Personal and laundry services • Private households	• Heavy and civil engineering construction • Clothing manufacturing • Wood product manufacturing • Furniture and related product manufacturing • Motor vehicle and parts wholesaler-distributors • Building material and supplies wholesaler-distributors • Miscellaneous wholesaler-distributors • Building material and garden equipment and supplies dealers • Food and beverage stores • Support activities for transportation • Postal service • Couriers and messengers • Publishing industries (except Internet) • Other information services • Nursing and residential care facilities • Amusement, gambling and recreation industries • Personal and laundry services • Private households

Source: McSweeney & Associates from Statistics Canada Census data 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

Compared to North Bay and Parry Sound, Powassan has higher concentrations in the following dominated sub-sectors (bold in the table):

- Real estate
- Educational services
- Local, municipal and regional public administration.

9.3 Shift-Share Analysis

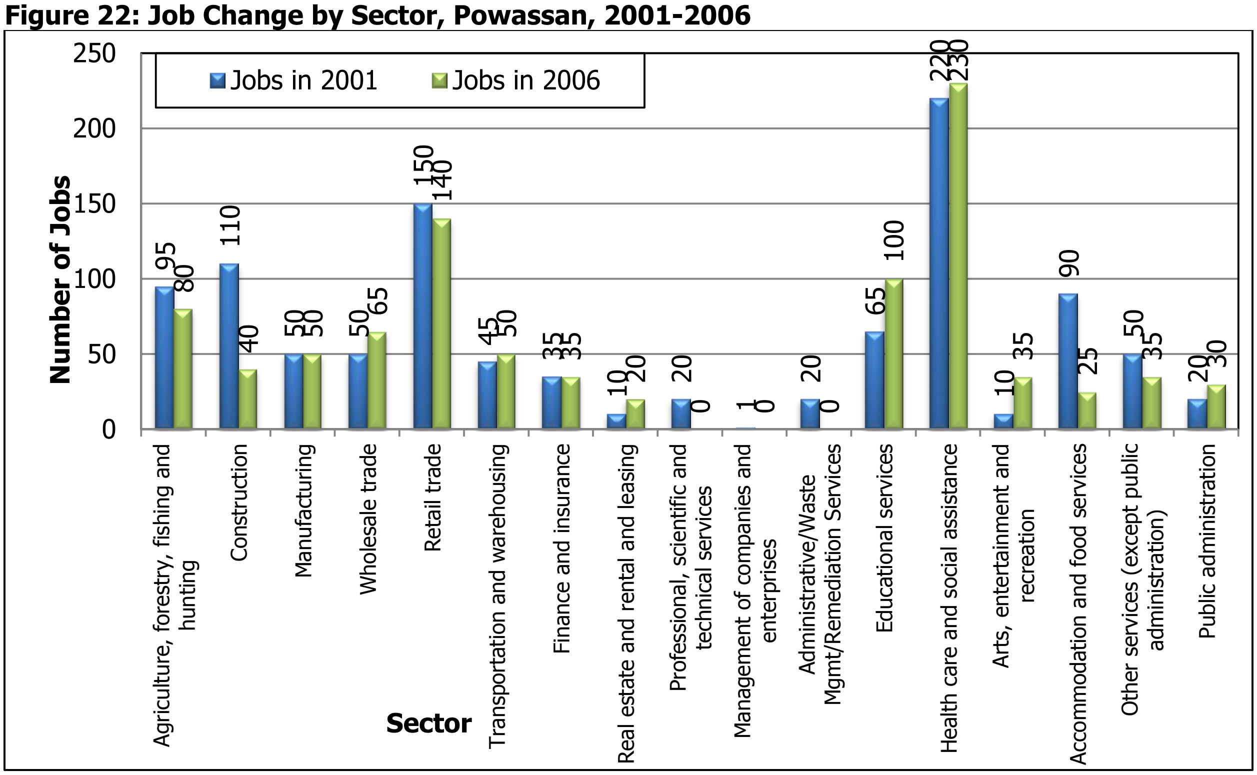
Shift-share analysis compares local employment growth/decline of Powassan jobs by industry to the employment growth/decline of that industry within Canada, as well as the job growth overall for Canada. More specifically, this analytical tool examines the job growth/decline by attributing growth, stability, or decline in particular industries over time to three distinct forces:

- Canadian economic growth: regional job growth/decline that is attributable to growth, stability, or decline of the entire Canadian economy.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed).
- Regional economic growth: regional job growth/decline that is attributable to the regional economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to all NAICS Industry Sectors using place of work statistics. Shift-share analysis allows examination of changes through time (trends) versus the static snapshot of location quotients. To begin, the change in absolute job numbers between 2001 and 2006 by sector will be examined.

The following chart illustrates changes in job numbers by Sector in Powassan between 2001 and 2006.

Figure 22: Job Change by Sector, Powassan, 2001-2006



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs.

The above figure points out that the largest increase in jobs between 2001 and 2006 was in the educational services sector, which increased from 65 to 100 jobs. The largest decline in jobs was in the construction sector, which decreased from 110 in 2001 to 40 in 2006.

Table 9: Shift Share Analysis for Powassan Jobs by Sector, 2001-2006

Sectors (NAICS classification)	Growth / Decline	% Growth / Decline	Canada % Growth / Decline	National Economic Effect	Industry Growth Effect	Regional / Local Effect
Agriculture, forestry, fishing and hunting	-15	-15.79%	-2.44%	8	-10	-13
Construction	**-70**	**-63.6%**	**22.0%**	**9**	**15**	**-94**
Manufacturing	0	0.0%	-8.1%	4	-8	4
Wholesale trade	15	30.0%	7.6%	4	0	11
Retail trade	-10	-6.7%	10.9%	13	4	-26
Transportation and warehousing	5	11.1%	5.8%	4	-1	2
Finance and insurance	0	0.0%	8.4%	3	0	-3
Real estate and rental and leasing	10	100.0%	15.2%	1	1	8
Professional, scientific and technical services	-20	-100.0%	14.1%	2	1	-23
Management of companies and enterprises	-1	-100.0%	30.8%	0	0	-1
Administrative/Waste Mgmt/Remediation Services	-20	-100.0%	21.4%	2	3	-24
Educational services	**35**	**53.8%**	**12.5%**	**6**	**3**	**27**
Health care and social assistance	10	4.5%	14.6%	19	13	-22
Arts, entertainment and recreation	25	250.0%	14.8%	1	1	24
Accommodation and food services	-65	-72.2%	8.5%	8	0	-73
Other services (except public administration)	-15	-30.0%	8.7%	4	0	-19
Public administration	10	50.0%	8.2%	2	0	8

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

The shift-share analysis table above explains 2001-2006 job growth in Powassan for each industry sector by attributing absolute changes in job numbers to national, industry and regional growth effects.

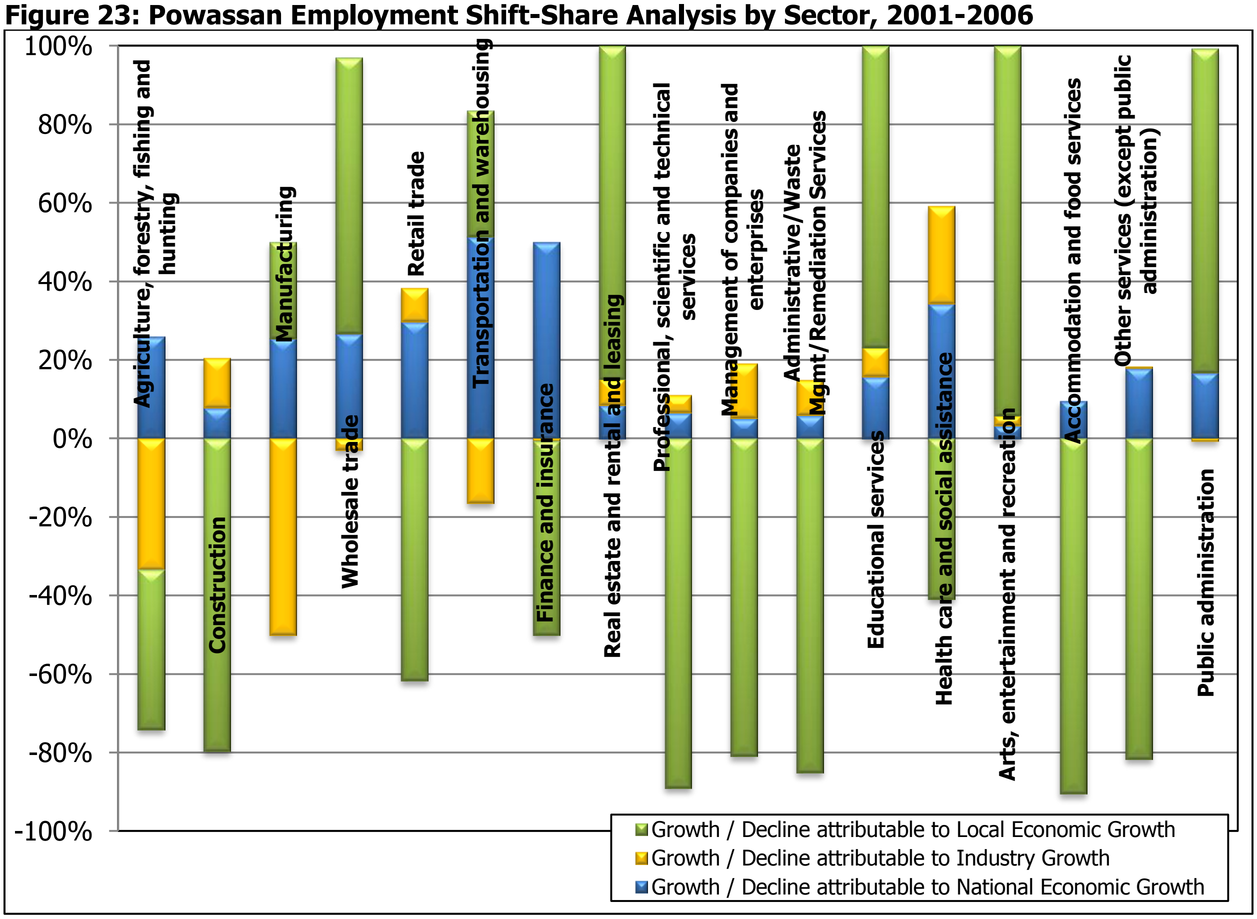
An example of how to interpret the table follows:

- The educational services sector experienced the largest increase of 35 jobs between 2001 and 2006. This increase may be attributed to the following:
  - Overall job growth in the national economy would have resulted in the growth of 6 educational services jobs;
  - Jobs in the educational services industry in Canada increased during this period as well, therefore job increases (3) can be contributed to the industry's overall positive growth;
  - The educational services job increase in Powassan was 35, of which 6 can be attributed to the national economic growth and 3 attributed to growth in the educational services industry. Thus, 27 new jobs were created that can be attributed to local growth.

- With a loss of 70 jobs between 2001 and 2006, the construction sector experienced the largest decrease between 2001 and 2006. This loss may be attributed as follows:
  - Overall job growth in the national economy would have resulted in a growth of 9 construction jobs;
  - Jobs in the construction industry in Canada increased during this period as well, therefore job increases (15) can be contributed to the industry's overall positive growth;
  - There were 70 jobs lost in Powassan while growth in the national economy should have resulted in the creation of 9 jobs plus growth in the manufacturing industry should have contributed 15 more jobs. Therefore, Powassan effectively suffered a job loss (-94) when considering national growth and construction industry growth between 2001 and 2006.

The following figure graphically depicts the preceding table for Powassan:

Figure 23: Powassan Employment Shift-Share Analysis by Sector, 2001-2006



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006; Analysis support: Rural Development Division, Ontario Ministry of Agriculture, Food, and Rural Affairs

The shift-share analysis reveals the following:

- The following sectors are growing at a more rapid rate than can be explained by national and industry growth combined, and were an area of strength between 2001 and 2006:
    - Wholesale trade
    - Real estate and rental and leasing
    - Educational services
    - Arts, entertainment and recreation
    - Public administration.

- The employment in the following sectors in Powassan suffered local weakness after considering both national and industry growth:
    - Construction
    - Retail trade
    - Finance and insurance
    - Professional scientific and technical services
    - Management of companies and enterprises
    - Administrative/Waste management/Remediation services
    - Accommodation and food services
    - Other services (except public administration).

10 Employer Structure Analysis

Highlights

- *In 2008, the construction sector had the largest number of employers (47 businesses).*
- *The top two highest concentrations of businesses in Powassan were in the Construction and Agriculture, forestry, fishing and hunting sectors.*
- *The Public administration sector had a higher per capita concentration than Ontario and a higher concentration relative to other sectors.*
- *In 2008, at sub-sector level, the largest number of employers in Powassan was in the Specialty Trade Contractors sub-sector, compared to Ontario's largest sub-sector which was Professional, Scientific and Technical Services.*
- *At the industry level, the largest number of employers in Powassan was in the Cattle Ranching and Farming industry compared to Ontario which was Lessors of Real Estate industry in Ontario.*

The business structure analysis was based on *Business Pattern Data, June 2008* from Statistics Canada.

10.1 Business Sector Analysis

Table 26 (in the Appendix) profiles Powassan businesses in 2008. It is important to note that in order for a business to be included in the Canadian Business Register, a business must meet at least one of the following three criteria:

1. Have an employee workforce for which they submit payroll remittances to Canada Revenue Agency (CRA); or
2. Have a minimum of $30,000 in annual sales revenue; or
3. Are incorporated under a federal or provincial act and have filed a federal corporate income tax return within the past three years.

Businesses that are not registered are not included in this section's data, the number of which can be significant if they are small businesses.

Data is based on June 2008 business pattern data, and determined in the following manner:

- Businesses Concentration - the percentage of local businesses in the selected sector/industry.
- Concentration Per Capita - this value is derived by the following formula:

  - The number of local businesses per capita in the selected sector/industry, divided by the number of businesses per capita in Ontario, for the same sector.
- Concentration, Sector Mix - this value is derived by the formula that follows:
  - The percentage of local businesses in the selected sector/industry, divided by the percentage of businesses in Ontario, for the same sector.

Business Sector Numbers
Based on Table 26 (in the Appendix), in 2008, the Construction sector had the largest number of employers (47 businesses).

Business Concentration
Table 26 (in the Appendix) indicates the percentage of businesses by sector in 2008. The top two sectors with the highest concentration of businesses in Powassan were:

- Construction
- Agriculture, Forestry, Fishing and Hunting.

Business Concentration per Capita
Concentration per capita is the ratio of local businesses per capita to provincial businesses per capita, and indicates the relative concentration or specialization of businesses in different sectors in the municipality. Any value higher than 1.0 indicates that the local economy has a higher per capita number of businesses than the provincial ratio.

In Table 26 in the Appendix, we observe that in 2008, the following businesses had a higher concentration per capita:

- Agriculture, Forestry, Fishing and Hunting
- Construction
- Public Administration.

Business Concentration by Sector Mix
Concentration by sector is a ratio indicating the relative specialization of businesses in different industry sectors across a municipality. Values greater than 1.0 indicate that the local concentration of businesses in a sector, relative to other sectors in Powassan, is higher than the provincial average, indicating a relative local specialization in that sector.

As identified in Table 26 in the Appendix, the following businesses had a higher than average concentration in Powassan:

- Agriculture, Forestry, Fishing and Hunting
- Construction
- Public Administration.

10.2 Business Pattern Analysis

As an indicator of employer structure, business pattern data for Powassan was examined up until June 2008, when the last available municipal level data was collected.

Business pattern data is available for sector, sub-sector and industry levels. Tables 27 to 29 demonstrate Powassan's sector and top 15 sub-sectors and industries by total number of employers and by employee size range compared to Ontario in June 2008[18].

- In 2008, the largest percentage of employers in Powassan was in the Construction sector while the largest percentage of employers in Ontario is in the Professional, Scientific and Technical Services sector.
- At sub-sector level, the largest number of employers in Powassan was in the Specialty Trade Contractors sub-sector, while it was in the Professional, Scientific and Technical Services sub-sector in Ontario.
- At industry level, the largest number of employers in Powassan was in the Cattle Ranching and Farming industry while it was in the Lessors of Real Estate industry in Ontario.

[18] June 2008 Canadian Business Pattern data is the latest data for CSD level, after this edition all CSD level data for Canadian Business Pattern date are no longer available.

11 Economic Development Trends Analysis

11.1 Site Selection Factors

In 2011, the 26th Annual Corporate Survey [8] was conducted to rate site selection factors and the impact these factors have on planning decisions.[19] Highlighted points of the survey are as follows:

- *Highway accessibility* and *labour costs* were consistently the top two most important site selection factors.
- *The availability of skilled labour* was the third-place factor, jumping from seventh place in 2010 and receiving a combined 88.4% importance rating.
- *Tax exemptions* dropped from the third in 2010 to the 8th in 2011.
- *Energy availability and cost was* the 7th important site selection factor.
- *Proximity to major markets* and *low union profile* jumped into top 10 site selection factors from 17th and 11th in 2010 to 9th and 10th in 2011.
- In 2011, *low crime rate*, which is historically ranked as the primary quality-of-life concern as borne out by the survey's 26-year record, received an 82% importance rating.

The following two figures provide more detailed results of the 2011 Corporate Survey.

[19] For more information about the survey please go to : http://www.areadevelopment-digital.com/areadevelopment/201202#pg48

Figure 24: Site Selection Factors

Site Selection Factors	Corporate Survey 2011			
	Very Important %	Important %	Minor Consideration %	No Importance %
Labor				
Availability of skilled labor	51.6	36.8	6.3	5.3
Availability of unskilled labor	16.8	42.1	27.1	14.0
Training programs	22.6	28.0	37.6	11.8
Labor costs	56.8	31.6	7.4	4.2
Low union profile	58.9	22.1	6.3	12.6
Right-to-work state	53.8	23.7	16.1	6.4
Transportation/ Telecommunications				
Highway accessibility	66.0	27.8	5.2	1.0
Railroad service	14.7	18.9	31.6	34.7
Accessibility to major airport	18.9	36.8	28.4	15.8
Waterway or oceanport accessibility	6.4	18.1	30.9	44.7
Availability of advanced ICT services	45.7	30.9	16.0	7.4
Finance				
Availability of long-term financing	42.2	27.8	20.0	10.0
Corporate tax rate	50.5	35.5	9.7	4.3
Tax exemptions	41.8	41.8	11.0	5.5
State and local incentives	41.3	44.6	9.8	4.3
Other				
Available buildings	29.0	47.3	20.4	3.2
Available land	29.3	44.6	20.7	5.4
Occupancy or construction costs	42.4	43.5	10.9	3.3
Expedited or "fast-track" permitting	25.3	47.1	24.1	3.4
Raw materials availability	22.5	30.3	30.3	16.9
Energy availability and costs	44.6	40.2	13.0	2.2
Environmental regulations	35.5	40.9	21.5	2.2
Proximity to major markets	40.4	42.6	16.0	1.1
Proximity to suppliers	23.7	44.1	28.0	4.3
Inbound/outbound shipping costs	44.0	35.2	11.0	9.9
Proximity to technical college/training	6.5	33.7	45.7	14.1
Quality-of-life factors				
Climate	9.8	42.4	39.1	8.7
Housing availability	15.2	48.9	27.2	8.7
Housing costs	18.3	51.6	21.5	8.6
Healthcare facilities	19.4	51.6	18.3	10.8
Ratings of public schools	18.3	50.5	22.6	8.6
Cultural opportunities	4.9	37.9	45.6	11.7
Recreational opportunities	5.3	47.9	34.0	12.8
Colleges and universities in area	10.9	45.7	31.5	12.0
Low crime rate	31.0	51.0	14.0	4.0

Source: The 26th Annual Corporate Survey & 8th Annual Consultants Survey-2011

Figure 25: Site Selection Factors – Combined Rating of 2011 Factors

Combined Ratings* of 2011 Factors		Corporate Survey 2011	
		2011	2010
Ranking			
1.	Highway accessibility	93.8	97.3 (1)**
2.	Labor costs	88.4	91.0 (2)
2T.	Availability of skilled labor	88.4	85.9 (7)
4.	Corporate tax rate	86.0	86.3 (6)
5.	Occupancy or construction costs	85.9	89.8 (4)
5T.	State and local incentives	85.9	89.3 (5)
7.	Energy availability and costs	84.8	82.1 (9)
8.	Tax exemptions	83.6	90.9 (3)
9.	Proximity to major markets	83.0	66.4 (17)
10.	Low union profile	81.0	75.4 (11)
11.	Inbound/outbound shipping costs	79.2	84.0 (8)
12.	Right-to-work state	77.5	67.9 (16)
13.	Availability of advanced ICT services	76.6	72.9 (14)
14.	Environmental regulations	76.4	74.8 (12)
15.	Available buildings	76.3	81.0 (10)
16.	Available land	73.9	73.4 (13)
17.	Expedited or "fast-track" permitting	72.4	68.2 (15)
18.	Availability of long-term financing	70.0	58.5 (20)
19.	Proximity to suppliers	67.8	63.6 (18)
20.	Availability of unskilled labor	58.9	45.4 (23)
21.	Accessibility to major airport	55.7	50.0 (22)
22.	Raw materials availability	52.8	61.5 (19)
23.	Training programs	50.6	56.7 (21)
24.	Proximity to technical college/training	40.2	36.1 (24)
25.	Railroad service	33.6	36.0 (25)
26.	Waterway or oceanport accessibility	24.5	21.9 (26)
Quality-of-life factors			
Ranking			
1.	Low crime rate	82.0	84.6 (1)
2.	Healthcare facilities	71.0	72.2 (2)
3.	Housing costs	69.9	68.4 (3)
4.	Ratings of public schools	68.8	61.2 (5)
5.	Housing availability	64.1	66.4 (4)
6.	Colleges and universities in area	56.6	53.2 (7)
7.	Recreational opportunities	53.2	48.2 (9)
8.	Climate	52.2	56.3 (6)
9.	Cultural opportunities	42.8	48.7 (8)

**All figures are percentages and are the total of "very important" and "important" ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent.*
***(2010 ranking)*

Source: The 26th Annual Corporate Survey & 8th Annual Consultants Survey-2011

11.2 Economic Forecast[20]

Table 30 in Appendix A provides the major economic indicators outlook for Canada and Ontario. The following forecast can be observed:

Canada

- Canada's position as a small open economy will make it vulnerable to the global economic slowdown expected over 2012. Even as global growth rebounds in 2013, there are limits to how fast the Canadian economy can grow over the long term. [11] In 2013, Canadian GDP has a positive forecasted outlook with a growth range of 2.1% to 2.6%.
- Canadian employers report positive hiring plans for Quarter 3 2012 with a net employment outlook of 18%. [4] Employment is forecasted to increase about 1.2% to 2.1% in 2012 and 1.1% to 1.6% in 2013. The unemployment rate is expected to be between 7.2% to 7.4% in 2012 and 7.0% to 7.4% in 2013.
- After enjoying a solid recovery over the last two years, the Canadian economy is transitioning into a period of softer economic growth of around 2% – a pace that we anticipate will continue over the next couple of years. On the domestic front, households and governments will likely act as constraints on real GDP growth. Households are expected to grow their spending at a tepid pace as they temper their willingness to take on additional debt. Governments are likely to rely on outright real spending cuts to get budgets back on track over the next few years. [2]
- Relatively high unemployment rates and moderating wage gains will continue to tame inflation pressures over the next two years. The Consumer Price Index is forecasted to be 1.7 to 2.3 in 2012, and 1.8 to 2.1 in 2013.

Ontario

- Ontario's economic growth rate will close much of the gap with the national average in 2012. RBC expects real GDP growth in Ontario to accelerate to 2.5% in 2012. This stronger pace of advance will result in large part from improvement in the provincial export performance, whereby net external trade will add to growth rather than subtract from it. [3] Overall, Ontario's GDP growth rate is estimated at 1.9% to 3.3% in 2012 and 2.3% to 2.4% in 2013.
- Employment growth is projected to be between 0.7% to 2.1% in 2012 and 1.0% - 1.4% in 2013.
- In the first quarter of 2012, the value of new home construction in Ontario was up by more than 17% from a year ago. RBC expects Ontario housing starts to rise from 67,800 units in 2011 to 74,800 units in 2012 before easing to 68,500 units in 2013. [3]

Industrial Outlook

Tables 31 to 35 in Appendix A provide the Industrial Outlook for Canada and Ontario. The following forecast can be observed:

- With a Net Employment Outlook of +15%, job seekers are likely to benefit from a favorable hiring climate in Quarter 3, 2012. The most optimistic hiring prospects are reported in Mining sector with an outlook of +25%. Elsewhere, Wholesale & Retail Trade sector employers report solid hiring intentions with an outlook of +21%, and

[20] All references in the [] for this section are at the end of Appendix.

Transportation & Public Utilities sector employers report the strongest hiring prospects since Quarter 3 2008 with an outlook of +20%. The Construction sector Outlook stands at +19% and Services sector employers report an Outlook of +17%. Meanwhile, employers in two sectors anticipate negative headcount growth, including the Education sector where the Outlook stands at -3%. [4]

- EDC Economics is forecasting a 15% gain in 2011 and a further 6% increase in 2012. [7] Over the next few years, Ontario will benefit from strong export demand—particularly for autos and parts, which typically account for about 30 per cent of the province's total international exports. [9]
- Construction is likely to be a significant engine of growth in 2013, as a robust expansion in non-residential expenditures far outweighs the drop in residential investment. [6]
- The expansion in manufacturing output is largely attributable to industries related to business investment - namely machinery and computer and electronics – as demand for these products is expected to grow robustly over the next few years.[6]
- The goods-producing sector should outperform the economy as a whole as it continues to make up ground lost during the recession. [6]
- Growth in the services sector was downgraded slightly, as export-related services will be hit during the first half of the year. [6] The medium and heavy-duty truck segment will benefit from the cyclical recovery in demand over the forecast horizon. The truck industry continues to deal with slower demand as higher costs associated with new emissions standards are causing companies to focus on maintenance rather than replacement. [7]
- Looking beyond the medium term, real economic growth will average slightly above 2 per cent a year. Energy related projects, the development of the mining sector in the northern part of the province, and high commodity prices will continue to encourage non-residential investment. Furthermore, public spending commitments to upgrade transportation and energy infrastructure will also support investment. In the long term, residential construction will increase at a steady pace as the number of new households rises in step with increasing net international migration and an aging population demanding more multiple-unit housing. [9]

Appendix A

Table 10: Percentage Population by Age for Years 2001, 2006 and 2012, Powassan

	Powassan 2001 %	Powassan 2006 %	Powassan 2012 %
Total population by age groups	3,255	3,310	3,478
Population age 0-4	4.6	3.9	4.9
Population age 5-9	5.8	4.8	4.9
Population age 10-14	7.1	5.6	5.3
Population age 15-19	6.5	6.8	5.2
Population age 20-24	4.8	3.6	4.5
Population age 25-29	4.5	3.5	4.6
Population age 30-34	5.8	4.4	4.9
Population age 35-39	7.1	6.5	5.7
Population age 40-44	7.5	7.6	7.1
Population age 45-49	8.1	7.9	7.6
Population age 50-54	6.9	8.2	7.5
Population age 55-59	6.3	7.1	7.7
Population age 60-64	6.0	6.6	7.3
Population age 65-69	5.5	6.0	6.0
Population age 70-74	3.5	5.4	5.2
Population age 75-79	4.0	3.6	4.5
Population age 80-84	3.1	3.5	2.6
Population age 85+	3.4	5.0	4.4

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

Table 11: Percentage Population by Age, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total population	3,478		13,324,854
Population age 0-4	169	4.9	5.7
Population age 5-9	172	4.9	5.4
Population age 10-14	186	5.3	5.6
Population age 15-19	180	5.2	6.4
Population age 20-24	155	4.5	7.1
Population age 25-29	161	4.6	6.9
Population age 30-34	172	4.9	6.6
Population age 35-39	199	5.7	6.7
Population age 40-44	246	7.1	7.1
Population age 45-49	263	7.6	7.9
Population age 50-54	262	7.5	7.7
Population age 55-59	269	7.7	6.7
Population age 60-64	254	7.3	5.7
Population age 65-69	207	6.0	4.5
Population age 70-74	180	5.2	3.4
Population age 75-79	158	4.5	2.7
Population age 80-84	92	2.6	2.1
Population age 85+	152	4.4	2.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012

Table 12: Income Levels with % Change, Powassan vs. Ontario, 2000, 2005 and 2011

	Powassan 2000	Ontario 2000	Powassan 2005	Ontario 2005	Powassan 2011	Ontario 2011
Total income of population 15 years and over	2,540	9,048,040	2,605	9,819,420	2,950	11,106,547
% change from 2000			2.6	8.5	16.1	22.8
Average income $	25,555	32,865	28,057	38,099	33,720	45,692
% change from 2000			9.8	15.9	32.0	39.0
Median income $	20,769	24,816	21,110	27,258	22,919	31,800
% change from 2000			1.6	9.8	10.4	28.1
Census family income of all families	940	3,190,990	960	3,347,610	1,007	3,767,315
% change from 2000			2.1	4.9	7.1	18.1
Average family income $	58,783	73,849	63,445	90,526	75,342	110,037
% change from 2000			7.9	22.6	28.2	49.0
Median family income $	54,019	61,024	55,676	72,734	62,863	89,040
% change from 2000			3.1	19.2	16.4	45.9
Household income of all private households	1,225	4,219,410	1,245	4,555,025	1,333	5,082,414
% change from 2000			1.6	8.0	8.8	20.5
Average household income $	50,814	66,836	56,010	77,967	65,622	90,979
% change from 2000			10.2	16.7	29.1	36.1
Median household income $	43,047	53,626	48,693	60,455	52,681	70,135
% change from 2000			13.1	12.7	22.4	30.8

Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Table 13: Total Income Levels, Powassan vs. Ontario, 2011

	Powassan	Powassan %	Ontario %
Total income of population 15 years and over	2,950		11,106,547
Without income	132	4.5	4.7
With income	2,818	95.5	95.3
Under $1,000	42	1.4	4.0
$ 1,000 - $ 2,999	135	4.6	3.3
$ 3,000 - $ 4,999	103	3.5	3.1
$ 5,000 - $ 6,999	79	2.7	3.3
$ 7,000 - $ 9,999	149	5.1	5.4
$10,000 - $11,999	96	3.3	3.9
$12,000 - $14,999	293	9.9	5.6
$15,000 - $19,999	416	14.1	8.4
$20,000 - $24,999	240	8.1	7.0
$25,000 - $29,999	164	5.6	6.2
$30,000 - $34,999	208	7.1	6.3
$35,000 - $39,999	220	7.5	5.7
$40,000 - $44,999	160	5.4	5.0
$45,000 - $49,999	82	2.8	4.2
$50,000 - $59,999	176	6.0	6.7
$60,000 and over	256	8.7	17.2
Median Total Income ($)	22,919		31,800
Average Total Income ($)	33,720		45,692

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Table 14: Total Income Levels, Powassan vs. Ontario, 2000, 2005 and 2011

	Powassan 2000 %	Ontario 2000 %	Powassan 2005 %	Ontario 2005 %	Powassan 2011 %	Ontario 2011 %
Total income of population 15 years and over	2,540	9,048,040	2,605	9,819,420	2,950	11,106,547
Without income	3.9	5.0	4.4	4.9	4.5	4.7
With income	95.9	95.0	95.6	95.1	95.5	95.3
Under $1,000	4.5	4.1	2.7	4.1	1.4	4.0
$ 1,000 - $ 2,999	3.5	4.3	5.2	3.4	4.6	3.3
$ 3,000 - $ 4,999	4.1	3.6	4.2	3.2	3.5	3.1
$ 5,000 - $ 6,999	3.7	3.9	2.5	3.4	2.7	3.3
$ 7,000 - $ 9,999	5.7	5.4	5.4	5.5	5.1	5.4
$10,000 - $11,999	4.9	4.1	3.3	3.9	3.3	3.9
$12,000 - $14,999	10.6	6.4	8.8	5.7	9.9	5.6
$15,000 - $19,999	7.3	8.5	14.0	8.5	14.1	8.4
$20,000 - $24,999	10.6	7.4	7.9	7.0	8.1	7.0
$25,000 - $29,999	8.9	6.8	4.8	6.2	5.6	6.2
$30,000 - $34,999	7.1	7.1	7.7	6.3	7.1	6.3
$35,000 - $39,999	5.7	5.7	7.3	5.7	7.5	5.7
$40,000 - $44,999	3.0	5.2	5.4	5.0	5.4	5.0
$45,000 - $49,999	3.0	3.8	3.1	4.2	2.8	4.2
$50,000 - $59,999	6.9	6.2	5.6	6.6	6.0	6.7
$60,000 and over	6.1	12.5	8.1	16.5	8.7	17.2

Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Table 15: Family Income Levels, Powassan vs. Ontario, 2011

	Powassan	Powassan %	Ontario %
Census family income of all families	1,007		3,767,315
Under $10,000	21	2.1	2.3
$ 10,000 - $19,999	50	5.0	3.8
$ 20,000 - $29,999	129	12.8	6.6
$ 30,000 - $39,999	132	13.1	8.4
$ 40,000 - $49,999	107	10.6	8.7
$ 50,000 - $59,999	138	13.7	8.5
$ 60,000 - $69,999	70	7.0	8.4
$ 70,000 - $79,999	99	9.8	8.0
$ 80,000 - $89,999	82	8.1	7.3
$ 90,000 - $99,999	30	3.0	6.4
$100,000 and over	150	14.9	31.8
Median Family Income ($)	62863		89,040
Average Family Income ($)	75342		110,037

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Table 16: Household Income Levels, Powassan vs. Ontario, 2011

	Powassan	Powassan %	Ontario %
Household income of all private households	1,333		5,082,414
Under $10,000	47	3.5	4.1
$ 10,000 - $19,999	182	13.7	8.4
$ 20,000 - $29,999	176	13.2	8.9
$ 30,000 - $39,999	154	11.6	9.7
$ 40,000 - $49,999	137	10.3	9.2
$ 50,000 - $59,999	168	12.6	8.4
$ 60,000 - $69,999	105	7.9	7.9
$ 70,000 - $79,999	105	7.9	7.1
$ 80,000 - $89,999	93	7.0	6.2
$ 90,000 - $99,999	28	2.1	5.2
$100,000 and over	137	10.3	25.0
Median Household Income ($)	52,681		70,135
Average Household Income ($)	65,622		90,979

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012 (2011 incomes)

Table 17: Highest Level of Schooling, Powassan vs. Ontario, 2001

	Powassan	Powassan %	Ontario %
Total population 20 years and over by highest level of schooling	2,325		8,282,160
Less than grade 9	275	11.8	8.7
Grades 9 to 13	915	39.4	31.1
Without high school graduation certificate	520	22.4	16.9
With high school graduation certificate	395	17.0	14.2
Trades certificate or diploma	315	13.5	10.2
College	565	24.3	23.7
Without certificate or diploma	180	7.7	6.6
With certificate or diploma	385	16.6	17.1
University	255	11.0	26.3
Without degree	65	2.8	7.1
Without certificate or diploma	45	1.9	4.9
With certificate or diploma	20	0.9	2.3
With bachelor's degree or higher	190	8.2	19.2

Source: McSweeney & Associates from Statistics Canada Census data 2001.

Table 18: Education Attainment, Powassan vs. Ontario, 2006-2012

	2006 Powassan %	2006 Ontario %	2012 Powassan %	2012 Ontario %
Total population 25 to 64 years by highest certificate, diploma or degree	1,690	6,638,330	1,826	7,359,625
No certificate, diploma or degree	15.7	13.6	15.9	13.4
Certificate, diploma or degree	84.3	86.4	84.1	86.6
High school certificate or equivalent	29.6	25.0	29.8	25.1
Apprenticeship or trades certificate or diploma	12.1	8.8	12.1	8.6
College, CEGEP or other non-university certificate or diploma	32.0	22.0	31.7	22.0
University certificate, diploma or degree	10.4	30.7	10.5	30.9
University certificate or diploma below bachelor level	0.9	4.7	0.5	4.6
University certificate or degree	9.8	26.0	9.9	26.3
Bachelor's degree	3.8	15.9	4.2	16.3
University certificate or diploma above bachelor level	5.0	3.2	4.4	3.1
Degree in medicine, dentistry, veterinary medicine or optometry	0.0	0.7	0.0	0.7
Master's degree	0.9	5.3	1.3	5.3
Earned doctorate	0.0	0.9	0.0	0.8

Source: McSweeney & Associates from Statistics Canada Census data 2006 and Manifold Data Mining Inc. Superdemographics 2012.

Table 19: Post-secondary Qualifications by Major Field of Study, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total population with postsecondary qualifications by major field of study	991		
Educational, recreational and counselling services	111	11.2	6.4
Fine and applied arts	12	1.2	3.7
Humanities and related fields	10	1.0	5.6
Social and behavioural sciences and law	91	9.2	11.9
Business, management and public administration	201	20.3	22.0
Physical and life sciences and technologies	0	0.0	3.5
Mathematics, computer and information sciences	20	2.0	5.4
Architecture, engineering, and related technologies	268	27.0	21.7
Agriculture, natural resources and conservation	12	1.2	1.7
Health, parks, recreation and fitness	209	21.1	13.2
Personal, protective and transportation services	58	5.9	4.9
Other fields of study	0	0.0	0.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

Table 20: Mobility Status, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total population 1 year and over by mobility status 1 year ago	3,478		
Non-movers	3,018	86.8	86.9
Movers	460	13.2	13.1
Non-migrants	219	6.3	7.8
Migrants	241	6.9	5.3
Internal migrants	230	6.6	4.2
Intraprovincial migrants	219	6.3	3.8
Interprovincial migrants	11	0.3	0.5
External migrants	11	0.3	1.1
Total population 5 years and over by mobility status 5 years ago	3,478		
Non-movers	2,468	71.0	59.2
Movers	1,010	29.0	40.8
Non-migrants	485	13.9	22.0
Migrants	525	15.1	18.8
Internal migrants	525	15.1	13.9
Intraprovincial migrants	504	14.5	12.3
Interprovincial migrants	21	0.6	1.6
External migrants	0	0.0	4.9

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2012.

Table 21: Knowledge of Official Language, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total population by knowledge of official languages	3,478		13,324,854
English only	3,116	89.6	86.0
French only	0	0.0	0.4
English and French	352	10.1	11.4
Neither English nor French	10	0.3	2.2

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2012

Table 22: Key Labour Force Indicators, Powassan vs. Ontario, 2001-2006-2012

	Powassan			Ontario		
Characteristic	**2001**	**2006**	**2012**	**2001**	**2006**	**2012**
Total population 15 years and over by labour force activity	2,540	2,605	2,950	9,048,040	9,819,420	11,106,547
In the labour force	1,600	1,565	1,757	6,086,815	6,587,575	7,374,818
Employed	1,520	1,450	1,615	5,713,900	6,164,245	6,787,409
Unemployed	80	120	142	372,915	423,335	587,409
Not in the labour force	940	1,035	1,193	2,961,220	3,231,840	3,731,728
Participation rate (%)	63.0	60.1	59.6	67.3	67.1	66.4
Employment rate (%)	59.8	55.7	54.8	63.2	62.8	61.1
Unemployment rate (%)	5.0	7.7	8.1	6.1	6.4	8.0

Source: McSweeney & Associates from Statistics Canada 2001, 2006 Census data and Manifold Data Mining Inc. Superdemographics 2012.

Table 23: Labour Force by Industry, Powassan, 2001-2006-2012

	Powassan 2001 %	**Powassan 2006 %**	**Powassan 2012 %**
Total labour force 15 years and over by industry - 1997 North American Industry Classification System	1,600	1,565	1,757
Industry - Not applicable	0.6	2.2	2.2
All industries	99.4	97.8	97.8
11 Agriculture, forestry, fishing and hunting	5.3	6.1	6.0
21 Mining and oil and gas extraction	0.0	1.0	0.7
22 Utilities	0.0	1.3	1.4
23 Construction	12.2	7.0	7.5
31-33 Manufacturing	12.8	8.0	7.5
41 Wholesale trade	2.2	3.5	4.2
44-45 Retail trade	10.6	12.1	15.1
48-49 Transportation and warehousing	7.2	7.0	7.1
51 Information and cultural industries	0.6	1.9	1.4
52 Finance and insurance	2.8	1.9	1.4
53 Real estate and rental and leasing	0.6	1.3	0.5
54 Professional, scientific and technical services	1.9	1.9	0.5
55 Management of companies and enterprises	0.6	0.0	0.0
56 Administrative and support, waste management and remediation services	4.7	4.5	5.4
61 Educational services	4.7	11.2	11.4
62 Health care and social assistance	16.6	16.0	17.2
71 Arts, entertainment and recreation	0.0	1.3	2.0
72 Accommodation and food services	5.3	3.5	3.0
81 Other services (except public administration)	5.6	4.2	2.8
91 Public administration	5.3	3.8	2.7

Source: McSweeney & Associates from Manifold Data Mining's Superdemographics 2012.

Table 24: Labour Force by Industry, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total labour force 15 years and over by industry - 1997 North American Industry Classification System	1,757		7,374,818
Industry - Not applicable	39	2.2	1.5
All industries	1,718	97.8	98.4
Agriculture, forestry, fishing and hunting	105	6.0	1.6
Mining and oil and gas extraction	12	0.7	0.4
Utilities	24	1.4	0.7
Construction	131	7.5	5.9
Manufacturing	132	7.5	13.9
Wholesale trade	74	4.2	4.7
Retail trade	265	15.1	11.1
Transportation and warehousing	125	7.1	4.7
Information and cultural industries	24	1.4	2.6
Finance and insurance	25	1.4	4.8
Real estate and rental and leasing	9	0.5	1.9
Professional, scientific and technical services	9	0.5	7.2
Management of companies and enterprises	0	0.0	0.1
Administrative and support, waste management and remediation services	95	5.4	4.7
Educational services	201	11.4	6.6
Health care and social assistance	302	17.2	9.4
Arts, entertainment and recreation	36	2.0	2.1
Accommodation and food services	53	3.0	6.2
Other services (except public administration)	49	2.8	4.5
Public administration	48	2.7	5.4

Source: McSweeney & Associates from Manifold Data Mining's Superdemographics 2012.

Table 25: Labour Force by Occupation, Powassan vs. Ontario, 2012

	Powassan	Powassan %	Ontario %
Total labour force 15 years and over by occupation - 2006 National Occupational Classification for Statistics	1,757		7,374,818
Occupation - Not applicable	43	2.4	1.5
All occupations	1,714	97.6	98.4
A Management occupations	123	7.0	10.2
A0 Senior management occupations	13	0.7	1.3
A1 Specialist managers	38	2.2	3.0
A2 Managers in retail trade, food and accommodation services	36	2.0	2.7
A3 Other managers, n.e.c.	36	2.0	3.2
B Business, finance and administration occupations	176	10.0	18.6
B0 Professional occupations in business and finance	5	0.3	2.8
B1 Finance and insurance administration occupations	11	0.6	1.2
B2 Secretaries	17	1.0	1.4
B3 Administrative and regulatory occupations	14	0.8	2.2
B4 Clerical supervisors	1	0.1	0.5
B5 Clerical occupations	128	7.3	10.5
C Natural and applied sciences and related occupations	28	1.6	6.8
C0 Professional occupations in natural and applied sciences	9	0.5	4.1
C1 Technical occupations related to natural and applied sciences	19	1.1	2.7
D Health occupations	129	7.3	5.1
D0 Professional occupations in health	6	0.3	1.1
D1 Nurse supervisors and registered nurses	24	1.4	1.5
D2 Technical and related occupations in health	3	0.2	1.1
D3 Assisting occupations in support of health services	97	5.5	1.4
E Occupations in social science, education, government service and religion	203	11.6	8.2
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	25	1.4	2.3
E1 Teachers and professors	96	5.5	4.0
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	82	4.7	2.0
F Occupations in art, culture, recreation and sport	20	1.1	3.0
F0 Professional occupations in art and culture	20	1.1	1.3
F1 Technical occupations in art, culture, recreation and sport	0	0.0	1.6
G Sales and service occupations	400	22.8	23.3
G0 Sales and service supervisors	11	0.6	0.8
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	20	1.1	2.2

	Powassan	Powassan %	Ontario %
G2 Retail salespersons and sales clerks	59	3.4	4.5
G3 Cashiers	24	1.4	1.8
G4 Chefs and cooks	0	0.0	1.2
G5 Occupations in food and beverage service	10	0.6	1.4
G6 Occupations in protective services	45	2.6	1.6
G7 Occupations in travel and accommodation, including attendants in recreation and sport	0	0.0	0.8
G8 Child care and home support workers	89	5.1	1.4
G9 Sales and service occupations, n.e.c.	141	8.0	7.7
H Trades, transport and equipment operators and related occupations	370	21.1	13.9
H0 Contractors and supervisors in trades and transportation	14	0.8	0.7
H1 Construction trades	48	2.7	2.3
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	35	2.0	0.9
H3 Machinists, metal forming, shaping and erecting occupations	9	0.5	1.3
H4 Mechanics	75	4.3	2.1
H5 Other trades, n.e.c.	10	0.6	0.7
H6 Heavy equipment and crane operators, including drillers	21	1.2	0.4
H7 Transportation equipment operators and related workers, excluding labourers	100	5.7	3.2
H8 Trades helpers, construction and transportation labourers and related occupations	57	3.2	2.3
I Occupations unique to primary industry	124	7.1	2.4
I0 Occupations unique to agriculture, excluding labourers	86	4.9	1.4
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	15	0.9	0.2
I2 Primary production labourers	23	1.3	0.7
J Occupations unique to processing, manufacturing and utilities	140	8.0	6.9
J0 Supervisors in manufacturing	0	0.0	0.4
J1 Machine operators in manufacturing	73	4.2	2.5
J2 Assemblers in manufacturing	14	0.8	2.4
J3 Labourers in processing, manufacturing and utilities	53	3.0	1.6

Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2012.

Table 26: Powassan Business Profile, June 2008

	Number of Businesses	% of Local Businesses	Concentration per Capita	Concentration Sector Mix
Total	271			
11 - Agriculture, Forestry, Fishing and Hunting	35	12.9	3.9	3.4
21 - Mining, Quarrying, and Oil and Gas Extraction	0	0.0	0.0	0.0
22 - Utilities	1	0.4	4.5	4.0
23 - Construction	47	17.3	1.7	1.5
31-33 - Manufacturing	18	6.6	1.8	1.6
41 - Wholesale Trade	9	3.3	0.7	0.6
44-45 - Retail Trade	27	10.0	1.2	1.1
48-49 - Transportation and Warehousing	24	8.9	1.8	1.6
51 - Information and Cultural Industries	1	0.4	0.2	0.2
52 - Finance and Insurance	10	3.7	0.7	0.6
53 - Real Estate and Rental and Leasing	17	6.3	0.8	0.7
54 - Professional, Scientific and Technical Services	15	5.5	0.4	0.4
55 - Management of Companies and Enterprises	4	1.5	0.4	0.3
56 - Administrative and Support, Waste Management and Remediation Services	11	4.1	1.0	0.9
61 - Educational Services	2	0.7	0.7	0.7
62 - Health Care and Social Assistance	8	3.0	0.8	0.7
71 - Arts, Entertainment and Recreation	6	2.2	1.5	1.3
72 - Accommodation and Food Services	10	3.7	1.0	0.9
81 - Other Services (except Public Administration)	24	8.9	1.2	1.1
91 - Public Administration	2	0.7	6.1	5.4

Source: McSweeney & Associates from Statistic Canada, Canadian Business Pattern June 2008.

Table 27: Sector by Number of Employers, Powassan vs. Ontario, June 2008

	Powassan				Ontario			
	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total
Total	271	149	122		904,019	533,885	370,134	
11 - Agriculture, Forestry, Fishing and Hunting	35	27	8	12.9	33,957	25,067	8,890	3.8
21 - Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0.0	1,465	723	742	0.2
22 - Utilities	1	1	0	0.4	835	343	492	0.1
23 - Construction	47	25	22	17.3	101,953	63,897	38,056	11.3
31-33 - Manufacturing	18	7	11	6.6	37,600	15,385	22,215	4.2
41 - Wholesale Trade	9	5	4	3.3	46,814	23,537	23,277	5.2
44-45 - Retail Trade	27	11	16	10.0	82,384	35,974	46,410	9.1
48-49 - Transportation and Warehousing	24	15	9	8.9	49,699	36,050	13,649	5.5
51 - Information and Cultural Industries	1	0	1	0.4	15,193	10,051	5,142	1.7
52 - Finance and Insurance	10	7	3	3.7	52,910	39,339	13,571	5.9
53 - Real Estate and Rental and Leasing	17	12	5	6.3	80,727	66,925	13,802	8.9
54 - Professional, Scientific and Technical Services	15	11	4	5.5	139,272	93,419	45,853	15.4
55 - Management of Companies and Enterprises	4	4	0	1.5	40,348	35,464	4,884	4.5
56 - Administrative and Support, Waste Management and Remediation Services	11	10	1	4.1	40,924	22,879	18,045	4.5
61 - Educational Services	2	1	1	0.7	10,099	5,536	4,563	1.1
62 - Health Care and Social Assistance	8	0	8	3.0	39,103	7,786	31,317	4.3
71 - Arts, Entertainment and Recreation	6	1	5	2.2	15,207	9,811	5,396	1.7
72 - Accommodation and Food Services	10	4	6	3.7	39,120	13,904	25,216	4.3
81 - Other Services (except Public Administration)	24	8	16	8.9	75,180	27,712	47,468	8.3
91 - Public Administration	2	0	2	0.7	1,229	83	1,146	0.1

Source: McSweeney & Associates from Statistic Canada, Canadian Business Pattern June 2008.

Table 28: Top 15 Sub-Sectors by Number of Employers Powassan vs. ON, June 2008

	Powassan				Ontario			
	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total
Total	271	149	122		904,019	533,885	370,134	
238 - Specialty Trade Contractors	28	14	14	10.3	59,605	34,306	25,299	6.6
112 - Animal Production	23	18	5	8.5	19,461	15,678	3,783	2.2
484 - Truck Transportation	17	10	7	6.3	31,281	23,258	8,023	3.5
236 - Construction of Buildings	16	9	7	5.9	31,495	20,920	10,575	3.5
541 - Professional, Scientific and Technical Services	15	11	4	5.5	139,272	93,419	45,853	15.4
531 - Real Estate	14	11	3	5.2	74,185	62,998	11,187	8.2
561 - Administrative and Support Services	11	10	1	4.1	39,616	22,304	17,312	4.4
811 - Repair and Maintenance	9	3	6	3.3	23,468	11,952	11,516	2.6
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	9	1	8	3.3	18,590	6,519	12,071	2.1

111 - Crop Production	8	6	2	3.0	10,621	7,084	3,537	1.2
445 - Food and Beverage Stores	7	1	6	2.6	14,146	6,117	8,029	1.6
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	7	7	0	2.6	38,614	32,995	5,619	4.3
721 - Accommodation Services	6	3	3	2.2	5,007	2,373	2,634	0.6
812 - Personal and Laundry Services	6	4	2	2.2	17,376	8,792	8,584	1.9
444 - Building Material and Garden Equipment and Supplies Dealers	5	3	2	1.8	4,113	1,522	2,591	0.5

Source: McSweeney & Associates from Statistic Canada, Canadian Business Pattern June 2008.

Table 29: Top 15 Industries by Number of Employers Powassan vs. ON, June 2008

	Powassan				Ontario			
	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total	Total (A)	Indeterminate (B)	Subtotal (A - B)	% of Total
Total	271	149	122		904,019	533,885	370,134	
238 - Specialty Trade Contractors	15	13	2	5.5	8,962	7,163	1,799	1.0
112 - Animal Production	14	7	7	5.2	26,925	18,293	8,632	3.0
484 - Truck Transportation	11	6	5	4.1	12,199	6,107	6,092	1.3
236 - Construction of Buildings	11	7	4	4.1	24,737	19,040	5,697	2.7
541 - Professional, Scientific and Technical Services	10	9	1	3.7	38,194	32,292	5,902	4.2
531 - Real Estate	7	4	3	2.6	7,357	6,267	1,090	0.8
561 - Administrative and Support Services	7	2	5	2.6	17,930	8,814	9,116	2.0
811 - Repair and Maintenance	7	7	0	2.6	36,338	31,632	4,706	4.0
813 - Religious, Grant-Making, Civic, and Professional and Similar Organizations	7	6	1	2.6	15,989	8,390	7,599	1.8
111 - Crop Production	6	3	3	2.2	6,881	3,460	3,421	0.8
445 - Food and Beverage Stores	6	3	3	2.2	6,544	4,218	2,326	0.7
523 - Securities, Commodity Contracts, and Other Financial Investment and Related Activities	6	0	6	2.2	5,627	193	5,434	0.6
721 - Accommodation Services	5	3	2	1.8	3,356	1,212	2,144	0.4
812 - Personal and Laundry Services	4	3	1	1.5	3,948	2,713	1,235	0.4
444 - Building Material and Garden Equipment and Supplies Dealers	4	3	1	1.5	22,595	15,925	6,670	2.5

Source: McSweeney & Associates from Statistic Canada, Canadian Business Pattern June 2008.

Table 30: Canadian and Ontario Economic Indicators Outlook

Annual average percent change	Canada 2011f	2012f	2013f	Ontario 2011f	2012f	2013f
Real GDP	2.3-3.2	2.1-3.1	2.0-2.6	1.9-3.3	2.1-3.1	1.9-2.4
Employment	1.5	0.8-2.1	1.1-1.6	1.8	0.7-2.1	1.0-1.4
Unemployment (%)	7.5	7.2-7.6	7.0-7.4	7.8	7.5-8.1	7.4-7.8
CPI	2.9	1.7-2.3	1.8-2.1	3.1	1.5-2.1	1.7-2.2
Retail Trade	3.6-4.1	4.3-4.4	4.4-4.6	3.0-3.6	3.7-4.6	3.9
Housing Starts	1.0	9.4	-11.6	11.4	-15.1	-18.8

Existing home sales	2.4	2.5	-4.2	2.5	2.7	-5.8
Average Existing Home Price	7.1	1.9	-3.1	6.9	6.2	-3.8

Source: McSweeney & Associates from RBC, *Provincial outlook*, June 2012 and TD Economics, *Provincial Economic Forecast*, July 9, 2012 and BMO *Provincial Economic Outlook*, Feb., 2012 and BMO *Canadian Economic Outlook*, Feb., 2012

Table 31: Canadian Export Forecast by Sector (% Growth)

Main Sectors	% Share of Total Exports (2010)	Export Outlook (% growth)		
		2010	2011f	2012 f
Agri-food	8.8	1.3	15	6
Energy	21.2	16.1	20	0
Forestry	6.0	9.8	4	17
Chemicals, plastics,	7.3	5.8	6	9
Fertilizers	1.5	27.7	27	15
Ores, metals and Other industrial products	14.0	28.6	16	3
Aircraft & parts	2.3	-10.1	0	22
Advanced Technology	3.2	-7.3	-2	1
Industrial Machinery and Equipment	5.4	-5.1	11	8
Motor Vehicles and Parts	11.8	32.0	6	19
Consumer Goods	1.7	-0.2	3	3
Special transactions*	0.8	-41.4	-31	10
Total Goods Sector	**84.0**	**11.9**	**12**	**7**
Total Services Sector	**16.0**	**4.3**	**4**	**4**
Total Exports	**100.0**	**10.6**	**11**	**7**

Source: EDC *Global Export Forecast Fall 2011*, p. 27

Table 32: Ontario Merchandise Export Outlook

Main Sectors	% Share of Exports(2010)	Global Outlook (% growth)		
		2010	2011f	2012 f
Industrial Goods	34.7	24.6	16	6
Motor Vehicle	33.5	35.4	5	19
M & E	13.9	-4.9	5	6
Agri-Food	6.3	5.9	8	5
Forestry	3.2	2.5	2	10
Consumer Goods	2.8	-0.5	5	4
All others	5.6	-18.6	0	7
Total	**100.0**	**16.3**	**9**	**10**
Total excl. energy	**98.2**	**16.8**	**9**	**11**

Source: EDC *Global Export Forecast Fall 2011*, p. 52

Table 33: Canadian Industrial Outlook – GDP by Industry

Industry	% change (Y/Y) 2012f	% change (Y/Y) 2013f
All industries (GDP)	1.7	2.2
Good Industries	2.1	3.4
Primary Industries	2.0	2.8
Manufacturing	2.3	3.8
Construction	1.6	4.1
Residential	0.3	-0.7
Non-res. & Engineering	2.2	6.2
Utilities	2.9	1.2
Service Industries	1.5	1.8
Wholesale Trade	2.6	3.4
Retail Trade	1.8	2.1
Transportation & Warehousing	2.3	3.0
Information & Cultural Industries	0.3	0.9
Finance, Insurance & Real Estate	1.5	1.4
Professional Services	1.7	3.5
Accommodation & Food Services	1.4	1.8
Public services*	0.8	0.7
Other Services	1.5	2.4

Source: TD Economics *Industrial Outlook, Dec. 2011*

Table 34: GDP by Industry Ontario

Percentage change	2011f	2012f	2013f
Agriculture	0.9	2.7	3.1
Forestry	4.5	7.0	8.4
Fishing & trapping	2.6	7.6	4.2
Mining	15.4	8.2	8.5
Manufacturing	1.6	3.8	3.7
Construction	3.2	-0.7	6.4
Utilities	0.6	2.3	3.6
Goods-producing industries	2.1	2.8	4.4
Transportation, warehousing & information	2.5	2.4	3.0
Wholesale & retail trade	0.5	2.0	3.2
Finance, insurance & real estate	2.1	2.2	3.2
Community, business & personal services	1.7	2.1	3.1
Public administration & defence	1.2	0.9	1.0
Service-producing industries	1.7	2.1	3.0
All industries	1.8	2.2	3.3

Source: McSweeney & Associates from CBC *Provincial outlook 2012*, (2002 $; forecast completed: November 2, 2011) p.134

Table 35: Canada and Ontario Employment Outlook by Industry – Q3/2012

	Canada	Ontario
Industry	**Net Employment Outlook (%)**	**Net Employment Outlook (%)**
All Industries	18	15
Construction	22	19
Education	-1	-3
Finance, Insurance & Real Estate	17	12
Manufacturing - Durables	20	15
Manufacturing – Non-Durables	10	-2
Mining	27	25
Public Administration	17	15
Services	17	17
Transportation & Public Utilities	23	20
Wholesale & Retail Trade	21	21

Source: Manpower Employment Outlook Survey – Q3/2012

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