



**Municipality of Oliver Paipoonge**

**Community Assets & Priority Market Opportunities**

**Final Report**

**Prepared by Firedog Communications Inc.**

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## 1. Preface

Following the recent economic downturn and other global changes, the model for future economic prosperity is changing for Northwestern Ontario's communities. Some of the global changes impacting northern communities have occurred as a result of human actions, whereas others are due to circumstances beyond man's control.

Rural areas in Northwestern Ontario in particular are facing some significant challenges in terms of their economic and social sustainability during these times of change. Due to limited resources and influence, it is more difficult for rural communities to anticipate and adapt to changing global trends. Climate change and falling commodity prices around the world for example have and will continue to impact economic stability in Northwestern Ontario's rural communities that depend heavily on agriculture and other natural resource based industries. On the other hand, the arrival of new Information & Communications Technology (ICT) infrastructure to rural areas is changing the very concept of what rural really means.

Clearly, change can be for the better or for the worse. What is most important however is how change is managed to maximize the opportunities that it can bring. The future model for economic prosperity in Northwestern Ontario will be founded on the ability of communities to shift their traditional focus and adapt to emerging and forecasted change. The new economic model is being built upon the concepts of creativity, innovation and collaboration.

Regardless of how Northwestern Ontario's communities evolve through changing times, there is recognition that the collective 'we' – government, industry and society - need to maintain and support a vibrant economic future for rural communities. Healthy economies in rural Canada are integral to social balance and ensure that regions, provinces, nations and the world work.

## 2. Introduction

This report has been funded by Northern Communities Investment Readiness (NCIR) and aims to identify the major community assets in Oliver Paipooonge and how they might be leveraged to pursue new economic opportunities.

There has not previously been a lot of research or planning about what the future economic and social potential of Oliver Paipooonge might be. The Municipality does not have a permanent Economic Development Officer (EDO) and has very limited community-based resources dedicated to the pursuit of economic development opportunities. As a result, this report comes about at the right time. It aims to inform and inspire new ideas, creativity and innovation for this northern, rural community. It is intended to encourage local debate and to allow the Municipality to consider new sources of economic and social growth potential for the future.

The report takes account of the key community assets and characteristics that have been identified in Oliver Paipooonge; the ways these assets are currently being used and how emerging trends and changes might affect them. It takes into consideration the influences of social and demographic trends, climate change, developments in Information and Communications Technologies (ICT), globalization and shifts in the regional economy, as well as the way governments make and deliver programs.

As the second largest municipality in Northwestern Ontario<sup>1</sup>, the municipal government and residents of Oliver Paipooonge know that their communities and businesses have the potential to contribute more to the economy of Northwestern Ontario than they currently do. Generally, it is proposed that this will be achieved by:

- Introducing and encouraging new industries, technologies and businesses that break down geographic boundaries;
- Actively participating in the dynamic, knowledge-based economy that is emerging in Thunder Bay and District; and:
- Encouraging inward investment into Oliver Paipooonge through residential, business and visitor attraction and retention.

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<sup>1</sup> Source: Northwestern Ontario Immigration Portal [www.immigrationnorthwesternontario.ca](http://www.immigrationnorthwesternontario.ca)

The purpose of this report is to summarize the key assets that were detailed in the Oliver Paipoonge Community Asset Inventory and identify some priority opportunities that the Municipality should be pursuing in future years. Within the report, the consultants have identified 3 specific opportunities that offer growth potential for Oliver Paipoonge. They are:

- Environmental Technology;
- Agricultural Tourism; and
- Bedroom Community.

Even though each of these recommendations focus on just one specific area, each one assumes that other segments of the economy will play an important supporting role to make the recommendations work. For example, retail and service businesses are still essential to a plan with an emphasis on agricultural tourism.

This collaborative approach aims to further support the development of sustainable rural communities in Oliver Paipoonge and to make sure that the Municipality is a place where people of all backgrounds want, and are able, to live, work, invest and visit.

### 3. Socio-Economic Trends Overview

Socio-economic trends must be strategically considered when identifying new priority market opportunities. Changes in society and the economy have the potential to impact the progress of any new business initiative or investment, whether positively or negatively. This report acknowledges that the main sources of socio-economic change in Oliver Paipoonge are as follows.

- International and national financial recession, fall in commodity prices and drop in aggregate demand of 2009;
- Forestry crisis (80% of regional mill capacity down in 2009)<sup>2</sup>;
- Global climate change;
- The decline in agriculture reversing itself;
- Regional towns and cities working together more collaboratively;
- Further development in information and technology (ICT);
- Economic migrants seeking better quality of life in Northwestern Ontario;
- An aging regional population and youth out-migration;
- Low attainment of post-secondary credentials compared to Ontario and Canada<sup>3</sup>;
- Growth in health, education and other knowledge-based industries;
- Increasing domestic travel and staycationing;
- Sustained housing market, housing starts and increasing property sale prices<sup>4</sup>; and:
- An unemployment rate in Thunder Bay & District that is consistently lower than average<sup>5</sup>.

The result of these changes in Oliver Paipoonge and across the region is that Northwestern Ontario is a regional society and economy in transition. The economic future lies in the ability of regional communities to adapt to changes and new socio-economic trends.

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<sup>2</sup> Source: Economic Trends and Issues Analysis for Northwestern Ontario; Livio Di Matteo, Department of Economics, Lakehead University.

<sup>3</sup> Source: Statistics Canada, Census 2006 – Oliver Paipoonge Community Profile.

<sup>4</sup> Source: Thunder Bay Fall Housing Market Outlook 2010, Canadian Mortgage & Housing Corporation.

<sup>5</sup> Source: Economic Trends and Issues Analysis for Northwestern Ontario; Livio Di Matteo, Department of Economics, Lakehead University.

## 4. Key Assets

Rather than focusing on the challenges facing Oliver Paipoonge, the Community Asset Inventory and this report acknowledge the strengths and opportunities that are present in the Municipality. As much as possible, this approach promotes planning and programs that build on key strengths. It also indicates what assets the Municipality can leverage, in conjunction with Government and other partners, to improve future economic and social sustainability.

Community assets are the resources that improve the quality of life in Oliver Paipoonge and provide an advantageous environment for both residents and businesses to flourish. Assets include physical structures and organizations, as well as people and services. Physical structures and organizations may include parks, green space, schools, libraries, community centres, businesses and social clubs. People and services may take into account entrepreneurs, ethnically diverse populations, employment & training services and seniors care facilities as examples.

In analyzing its Community Asset Inventory, Oliver Paipoonge clearly has a variety of community assets, more than the average rural municipality. For the purposes of this report, it is valuable to summarize which of these community assets are the most significant and can be leveraged to create new socio-economic opportunities.

### 4.1 Location

Location is one of Oliver Paipoonge's key assets. The Municipality is located in the geographic centre of Canada and just 25 kilometres from the City of Thunder Bay. Its strategic location gives it proximity to both eastern and western Canadian markets, as well as the mid-west United States – the Canada/U.S. border is a convenient 45 minutes drive away at the Pigeon River (Thunder Bay) border crossing. This means there is a market area population of 21.5 million within 800km<sup>6</sup> of the Municipality, with Duluth and then Minneapolis/St. Paul as the closest U.S. cities.

Proximity to the City of Thunder Bay is certainly one of the Municipality's unique features as well as one of its main competitive advantages over other rural communities in the Northwestern Ontario region. While municipalities like Nipigon or Greenstone offer comparative assets in terms of natural resources

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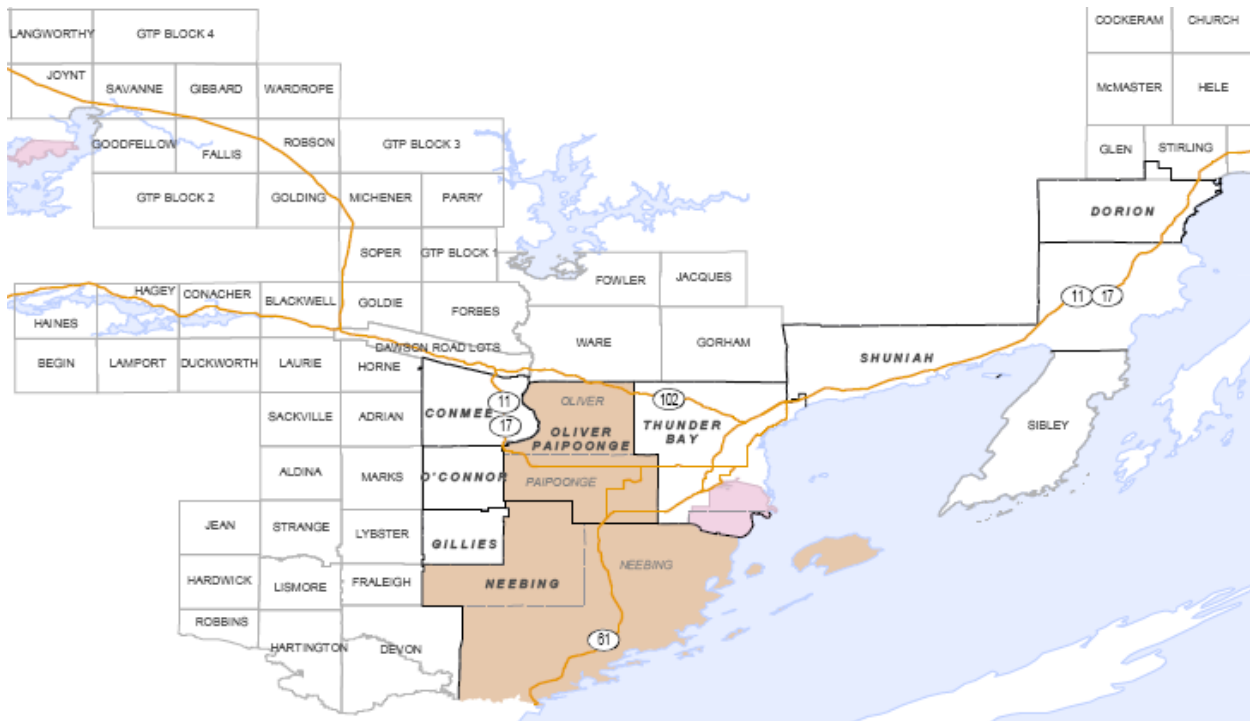
<sup>6</sup> Source: The City Around Innova, The Innova Business Park, Doing Business in Thunder Bay, [www.thunderbay.ca](http://www.thunderbay.ca)



and Highway access, they are respectively 100 kilometres and 300 kilometres away from the nearest urban service centre – the City of Thunder Bay.

The strengths of being located close to the City of Thunder Bay are numerous and include access to a large population base (109,140 population)<sup>7</sup>, which makes it the most well-known and populous urban centre in Northwestern Ontario. Thunder Bay is also the regional centre of government, medical, business and educational services, as well as cultural, recreational and entertainment activities.

In addition, the City of Thunder Bay is internationally known as one of the world's largest grain handling ports and is an important part of the St. Lawrence Seaway. Traditionally, it has also received recognition for its strong forestry and manufacturing industries.



**Map 1: Select Municipalities in Thunder Bay District.<sup>8</sup>**

<sup>7</sup> Source: Statistics Canada, Census 2006, Thunder Bay & District.

<sup>8</sup> Source: Ministry of Municipal Affairs and Housing, 2009.



In more recent years, the Thunder Bay District has received renewed attention from around the world for its successful transition from an economy that was heavily dependent on traditional industries to a knowledge-based economy, based on medical research in molecular medicine and genomics, health sciences and education.

Thunder Bay is now the home of the Northern Ontario Medical School (NOSM) and Thunder Bay Regional Research Institute (TBRRI). These are two of numerous organizations that are attracting the world's best scientists, educators and new value-added business partnerships to the area. The most recent development is the establishment of Tornado Medical Systems in Thunder Bay which is drawing more than 200<sup>9</sup> professional experts to the area.

On a local and regional level, an important economic focus for 2011 has become potential mineral developments and related spin-off opportunities in the Ring of Fire; an area well endowed with mineral deposits such as gold, chromite, diamonds and others. In fact, exploration activities in recent years have given national mining companies cause to believe that there are enough chromite deposits in the Ring of Fire to support production for 150 to 200 years.

In 2010, the Province of Ontario identified the Ring of Fire as an area that can revive the Northwestern Ontario economy with Premier Dalton McGuinty stating that developing the natural resources in the Ring of Fire is a key government priority. It was announced in the budget of 2010, that the Province would commit \$45 million in funding over three years for the Ring of Fire.<sup>10</sup>

The minerals found in the Ring of Fire are of great demand from Canadian and world financial markets. This is an exciting sector whose opportunities are giving many northwest municipalities belief that they will benefit from new jobs, investment and the new ancillary infrastructures, such as processing smelters, transmission corridors and railways, that may be required to support the mining development and extraction processes. The City of Thunder Bay is proactively positioning itself to act as a regional service centre for the Ring of Fire and is garnering support at the political and industry level.

Proximity to these new types of industries, skilled workers, knowledge centres and infrastructures presents new and unrealized growth opportunities for the Municipality of Oliver Paipooonge. The future regional economy is clearly being founded upon knowledge, collaboration and innovation. Moreover, creativity and innovation, when combined with entrepreneurship and investment capital partnerships, will

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<sup>9</sup> Source: City of Thunder Bay Community Economic Development Commission, Deputation to City of Thunder Bay by Steve Demmings, February 7, 2011.

<sup>10</sup> Source: The Open Ontario Plan – A 5 Year Plan for Our Economy, Government of Ontario, 2010.

generate value-added products, which in turn generate higher margins, better paying jobs and more community wealth.

A skilled workforce will be imperative in this new type of economic model that is emerging locally and regionally. In the old model, the production of goods was based upon proximity to raw materials and limited distribution channels. There was always abundant labour chasing growing businesses and capital superseded labour to increase productivity and, in turn, profits and wages.

In the future, successful businesses will face a very different reality. They will chase a scarcity of skilled workers in Northwestern Ontario's communities. Moreover, skilled workers will need to be actively recruited and retained from other parts of the country and world. Educated and in-migrant workers will be more attracted to those communities that offer a high quality of life. Oliver Paipoonge must embrace this type of socio-economic development theory in order to identify and maximize upon emerging opportunities.

#### 4.2 Accessibility

Closely related and an important component of location is another one of Oliver Paipoonge's key assets - accessibility. This rural Municipality is a highly accessible place to transport people and goods in and out of by air, port, railways and highways.

##### **From Oliver Paipoonge to major markets<sup>11</sup>:**

<b>Destination</b>	<b>Distance in km</b>
Thunder Bay, ON	21 kilometres
Sault St. Marie, ON	718 kilometres
Duluth, MN	302 kilometres
Minneapolis, MN	550 kilometres

This Municipality is extremely well connected to key commercial markets by major highway corridors that cross the region, Ontario, Canada and the United States. Three major highways serve the Municipality,

<sup>11</sup> Source: Information was extracted from the Oliver Paipoonge Community Asset Inventory, Section 11 – Distances from Major Markets, page 30.

making it one of the most well connected and serviced areas in the region. These are: Highways 61, 130 (which connects to the Trans Canada Highway 11/17), and 102.<sup>12</sup>

Approximately 50% of the population of Oliver Paipoonge lives within five kilometres of Highway 11/17, which provides convenient access to work, business and lifestyle opportunities around the region and beyond.

When it comes to accessibility, the Municipality's proximity to the City of Thunder Bay is an asset once again. The City of Thunder Bay provides Oliver Paipoonge with access to international transportation infrastructure and services including Thunder Bay International Airport, which was the 3rd busiest airport in Ontario in 2007<sup>13</sup>, and offers both direct and connecting regional, domestic and international flights.

Residents and businesses from Oliver Paipoonge also have access to important freight railway links, served by both the Canadian National (CN) and Canadian Pacific (CP) Railway in the City of Thunder Bay.

Most significantly from a transportation perspective, its nearby access to port services is a key asset for Oliver Paipoonge. The Port of Thunder Bay is the largest outbound port on the St. Lawrence Seaway System and the sixth largest port in Canada.<sup>14</sup> The Thunder Bay Port Authority manages Keefer Terminal on Lake Superior and is known as the Gateway to the West.

Reports from the City of Thunder Bay Community Economic Development Commission (CEDC)<sup>15</sup> note a growing number of over-sized shipments coming through the Port of Thunder Bay including turbines for wind farms and other heavy equipment. Expanding the capacity of the Port of Thunder Bay and improving the Trans-Canada Highway infrastructure to the West is a strategic area of economic focus for the City of Thunder Bay<sup>16</sup> that will ultimately bring advantages to the Municipality of Oliver Paipoonge also.

Other assets that fall under the accessibility umbrella include the sophisticated media and telecommunications infrastructures that serve the Municipality and allow both residents and businesses to connect with the world 24 hours per day, 7 days per week.

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<sup>12</sup> Source: The Official Road Map of Ontario, Ministry of Transportation, [www.mto.gov.on.ca](http://www.mto.gov.on.ca)

<sup>13</sup> Source: Thunder Bay Airport Authority, [www.tbairport.ca](http://www.tbairport.ca)

<sup>14</sup> Source: Thunder Bay Port Authority, [www.portofthunderbay.ca](http://www.portofthunderbay.ca)

<sup>15</sup> Source: Presentation to the Waterfront District Business Improvement Area, City of Thunder Bay Community Economic Development Commission (CEDC) by Steve Demmings, February 8, 2011.

<sup>16</sup> Source: Thunder Bay Community Economic Development Commission (CEDC) 2010-2012 Strategic Action Plan.

Despite being classified as a rural community, there are several providers who offer high quality and affordable local and long distance telephone, mobility, High Speed internet, and digital TV including reputable corporations like tbaytel, SHAW and Bell Canada. There is also a relatively dynamic media presence in Oliver Paipooonge through locally distributed newspapers, radio, television and online media.

Traditionally, the major barriers to socio-economic success for rural communities are geographic isolation and lack of access. These are clearly barriers that Oliver Paipooonge does not have to overcome and can become unique selling propositions for the area with potential residents and industry.

### **4.3. Natural Resources**

Like many communities in Northwestern Ontario, natural resources are one of the Municipality's primary assets. However, what makes Oliver Paipooonge unique is the diversity of its natural resources which include surface and ground water resources, biological resources, agricultural and forestry lands, mountains, hills, open spaces, parklands, wetlands and other natural habitats, soils and aggregates - all within a 25 minutes drive of an urban city centre.

Natural resources are a vital component of community life in Oliver Paipooonge because they service environmental, commercial and human needs. The environmental functions provided by the area's natural resources are critical to the beauty, health, safety and quality of life found in the Municipality. As well, they service commercial needs as sources of raw materials for product and service development. Lastly, they cater to human needs as a source of food supply and other lifestyle and recreation opportunities.

It is generally accepted that natural resources become increasingly important assets for a community when people have rights to access their benefits. This is clearly the case here. Some of the most noteworthy natural resource assets in Oliver Paipooonge that are being accessed for their benefits are:

- **Agricultural lands**

Oliver Paipooonge's agricultural and forested lands are among its most visible and treasured resources. They play a long-standing role in the economy, environment and heritage of the area. Agriculture and forestry are major contributors to the economy through farming, market sales, small business and the generation of value-added activities.

One of the Municipality's most valued resources is its farmland. In 2006, just short of 11,000 hectares of the land in the Municipality was in agricultural use and there were approximately 109 farm operators. The total farm capital market value was \$74,477,703; comparatively more than half the value of the entire City of Thunder Bay.<sup>17</sup>

Throughout the Municipality, the largest numbers of livestock operators are involved in cattle and calves operations. Farmers in cow-calf operations are also growing their own cattle feed including: tame hay, corn and other fodder. Feed grains for dairy cattle are the major crops found in Oliver Paipoonge, but other crops are also grown such as trees, corn and vegetables and are of great economic importance to the area.<sup>18</sup>

In addition to providing a resource base for agricultural and forestry uses, lands and forests provide the rural character and scenic quality that distinguish this area from other communities. Additionally, protection of agricultural and forestry resources provides related benefits such as quality of life benefits for residents and visitors, wildlife habitats, air quality and encourages tourism.

Finally, agricultural lands and forests provide a fiscal benefit to the Municipality because they provide the basis for economic activities related to agriculture, forestry and tourism, and yet demand so little in Municipal services.

- **Scenery**

Oliver Paipoonge's outstanding scenic resources include natural landscape features like rolling topography, mountains, waterfalls, rivers, ponds, boreal forests and wildlife; and cultural landscape features like farmer's fields with grazing livestock, farm buildings, historic agricultural architecture, and vegetable displays.

The scenic resources in this area are held in high value by its residents and businesses and therefore contribute to the community's desirability as a place to live, work and visit. Without a doubt, the scenic resources enhance and protect property values, and contribute to the overall quality of life.

The scenic resources are equally important to visitors. From Government entities like Kakabeka Falls Provincial Park, and small-medium enterprises (SMEs) like Gammondale Farm and Belluz Farm, to

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<sup>17</sup> Source: Statistics Canada, 2006 Census of Agriculture, Oliver Paipoonge.

<sup>18</sup> Source: Thunder Bay District Agricultural Economic Impact Study, October 2009.

volunteer-run annual equestrian and agricultural events, the scenery of Oliver Paipoonge supports a year-round tourism industry.

Whitewater Golf Course also capitalizes on its natural setting. Its slogan is: ***Historic in Nature, Everlasting by Design***. Nestled between the Kaministiquia River and Rosslyn Oxbow Wetland, Whitewater was specifically designed by Tom McBroom to capture the unique beauty of the river valley. The course sits on a 550-acre property and is a dramatic collage of unusual topographical features. The river valley creates dramatic plateaus, steep cliffs, ravines, and wetlands, creeks and ponds.<sup>19</sup>

Aesthetics is undoubtedly an important component of life and business quality in Oliver Paipoonge.

- **Surface and ground water resources**

Surface and ground water resources in Oliver Paipoonge serve many purposes: drinking water supplies, recreation (swimming, fishing, boating), agriculture (irrigation, livestock), industrial and commercial uses (hydro electricity generation, bottled water and river rafting), scenic beauty and open space (Kakabeka Falls), aquatic and shoreline habitat, and drainage (Kaministiquia River).

Oliver Paipoonge has numerous rivers, tributaries, ponds and streams. The Kaministiquia River and its many tributaries form the most significant drainage system in the Thunder Bay District<sup>20</sup> and flow into Lake Superior, the world's largest freshwater lake. The Kaministiquia River is not only the historic and cultural artery of Oliver Paipoonge but is provides the most significant natural resource asset in the area. It is known as one of the first rivers in the Province of Ontario to be used to produce electricity. Ontario Power Generation controls dams at Kakabeka Falls and Silver Falls on the Kaministiquia River which are utilized to generate hydroelectricity for the region.<sup>21</sup>

Groundwater is almost the exclusive source of drinking water for the Municipality. Therefore, the area's groundwater quality is very important to the overall health of the community, future development options and to the sustainability of the area's natural water features.

The ways that Oliver Paipoonge currently uses and protects its local natural resources will determine whether the Municipality will be able to maintain its current quality of life into the future. Most natural

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<sup>19</sup> Source: Information extracted from [www.whitewatergolf.com](http://www.whitewatergolf.com)

<sup>20</sup> Source: Lakehead Source Protection Area Watershed Characterization Report, Lakehead Region Conservation Authority.

<sup>21</sup> Source: Kakabeka Station, Northwest Plant Group, Ontario Power Generation, [www.opg.com](http://www.opg.com)



resources are non-renewable which means they can be depleted, such as through the conversion of farmland, degradation, extraction and pollution. These characteristics increase the importance of promoting economic and social development opportunities that adapt to the natural environment, rather than unnecessarily modifying the natural environment with unknown consequences to accommodate development and human activities. Indeed, in the future economic and social sustainability model, rural communities must recognize that natural systems are essential to providing both economic needs and quality of life appeal.

#### 4.4 Quality of Life

The quality of life in Oliver Paipoonge is highly desirable yet largely unknown outside of its boundaries. With a catchment area of 350 square kilometres, it is now the second-largest municipality in Northwestern Ontario but benefits from a very low population density of just 16.7 people per square kilometre.<sup>22</sup>

The Municipality borders the culturally diverse City of Thunder Bay to the west and is just 25 kilometres inland from Lake Superior, the world's largest fresh water lake. To the east, it borders the outlying rural municipalities of Neebing, O'Connor, Conmee and Kaministiquia.<sup>23</sup>

Oliver Paipoonge has hundreds of kilometres of fresh water river systems, over 10,000 acres<sup>24</sup> of farm lands and some of Canada's most spectacular scenery. This Municipality has a considerable amount of green space throughout its communities. In fact, a large area of the Municipality in Kakabeka Falls is designated as a Provincial Park and is home to recreational trails and a 40 foot waterfall that has been nicknamed the 'Niagara of the North'<sup>25</sup>. Elsewhere in the Municipality are many places designated as Areas of Natural and Scientific Interest. Here you'll find secluded forests, hidden ravines, multi-coloured mountain sides and river side beaches.

The Municipality of Oliver Paipoonge offers its residents many opportunities for recreation through its widely available parks and open spaces. Public recreation grounds include beaches, ball diamonds, ice rinks and children's playgrounds.

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<sup>22</sup> Source: Canada, Census 2006 – Oliver Paipoonge Community Profile.

<sup>23</sup> Source: Municipality of Oliver Paipoonge website, [www.oliverpaipoonge.ca](http://www.oliverpaipoonge.ca)

<sup>24</sup> Source: Statistics Canada, 2006 Census of Agriculture, Oliver Paipoonge.

<sup>25</sup> Source: Kakabeka Falls, [www.gowaterfalling.com](http://www.gowaterfalling.com)



The outstanding environment and landscape in Oliver Paipoonge also acts as an inspiration for the Municipality's entrepreneurs and innovators. One of most spectacular tourism attractions is the new Whitewater Golf Club - a 27-hole championship calibre golf course located along the Kaministiquia River. The award-winning course takes full advantage of the area's unique scenery to attract golfers from the surrounding areas and across North America.

One the most attractive quality of life assets in Oliver Paipoonge is the many affordable housing options. Residents can choose to live in a lively tourist town, a small farming village, a gated upscale golf resort or in sophisticated riverfront properties. Over 93% of the homes in the Municipality are large, single family detached homes with an average value of \$184,295. The average monthly payment on an owned home of this description is an inexpensive \$790.00 per month.<sup>26</sup> Another advantage to living in Oliver Paipoonge is that the larger home sizes are situated on comparatively large lots giving children and families room to enjoy the outdoors in their own private environment.

The average family residing in the Municipality is also considered to be relatively affluent. The median income of a married couple with a family in 2005 was \$81,699<sup>27</sup>. Add to this the lower than average cost of living and this is one of the major contributing factors to the superior quality of life that is experienced locally and increasingly becoming a draw for newcomers.

Property tax rates are also significantly lower in Oliver Paipoonge than those of other regional suburban centres. Yet, the quality and variety of municipal services are higher than in other small, less-populated rural areas. There are four excellent quality elementary schools in the Municipality itself and reliable bussing services are provided which generally pick up and drop off children at their own homes. First-class venues for recreation and culture are also provided by the Municipality through facilities like the Duke Hunt Historical Museum, the Norwest Arena, a Seniors Centre and two state-of-the-art public libraries.

Additional exposure to world-class arts and culture, post-secondary education institutions, music and fine dining can be conveniently found in Thunder Bay, just 25 minutes drive away. Oliver Paipoonge's 5,800 residents clearly enjoy a high quality of life and the best of both suburban and rural living. This is an area that enjoys low crime, small-town friendliness, a clean environment with city life on the doorstep. This high quality of life will be essential to attracting and retaining highly educated and skilled employees at a competitive price in the new economy.

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<sup>26</sup> Source: Economic Development Ontario (Statistics Canada)

<sup>27</sup> Source: Statistics Canada, Census 2006 – Oliver Paipoonge Community Profile.

## 5. SWOT Analysis

Strengths, Weaknesses, Opportunities, and Threats or SWOT analysis is a process used to assess the possibilities for an area for economic development. The SWOT analysis reveals much about the potential of an area under the circumstances that currently exist in that area. The Oliver Paipoonge SWOT analysis was determined from the combination of information compiled into the Community Asset Inventory, research of published statistics and reports and the consultant's knowledge of local, regional, national and international trends.

Below, the SWOT analysis results are presented by category. It is not uncommon for a Strength to also be a Weakness, or an Opportunity to also present as a Threat. This result usually occurs when an area becomes too dependent on a particular business or industry, leaving the community vulnerable to a decline or loss of that business or industry for unforeseen reasons. As examples, one only has to consider the impact that the decline of the pulp and paper industry has had on many small Northern Ontario communities or the boom and bust cycles of mining.

Below is a listing of the SWOT categories and the items that register within each category. These are the general themes that will most effect Oliver Paipoonge's economic development in the future.

### Strengths

Quality of Life	Natural Resources
Environmental Features	Modern Telecommunications
Geographic Location	Highway Infrastructure
Proximity to the City	Manufacturing Base
Recreational Assets	Accessible Export Markets
Industrial Park	Low Residential and Commercial Tax Rates

## Weaknesses

No Public Transit	Available Water Utilities
Community Planning	Image and Marketing
Access to Capital	Local Entrepreneurial Support
Educational Attainment	Municipal Human and Financial Resources
Lack of Industry/Expertise	Long-term Vision

## Opportunities

Regional Developments	Proximity to Thunder Bay
Low Cost of Living	Low Cost of Doing Business
Natural Resources	Environmental Features
In-Migration	Manufacturing Base
Availability of Land	Value-added Product Development

## Threats

Aging Population	Traditional Economy Mindset
Regional Competition	Migrating Youth
Manufacturing Dependence	Climate Change
Lack of Skilled Workers	Municipal Human & Financial Resources
Municipal Utilities	Environmentalists/NIMBYs

## Key Issues Arising:

- The most valuable strength in Oliver Paipoonge is the quality of life.
- Key assets in the community are natural resources, plentiful land for sale, low taxation rates, cost low of living, good K-9 education, quality outdoor recreational opportunities, and more.
- Weaknesses are low number of knowledge based industries, number of year-round high-paying jobs, services and capital access for entrepreneurs and technical expertise.
- The assets commonly identified as vital for attracting fast growing businesses and skilled people are quality of life and available workforce.
- Opportunities exist in the under-utilized forest and agricultural land resources, as well as in the proximity to Thunder Bay and its growing knowledge-based economy which is attracting skilled migrants who desire a better quality of life.
- Improving Municipal utilities, specifically water utilities, should be a particular priority.
- A foundation for attracting new business development and sectoral clusters has been initiated with the establishment of the Rubin Business Park.
- A strategic marketing and image development plan for Oliver Paipoonge will be required to pursue any new market opportunities.

## 6. Priority Market Opportunities

Based on an analysis of the Community Asset Inventory, economic trends and the key selling features of Oliver Paipoonge, the consultants have identified two priority industry sectors that offer immediate growth potential for the Municipality as well as a market opportunity.

The development of business clusters in these two sectors could be a key generator of local economic wealth. A cluster develops when businesses in interrelated industries choose to locate in close proximity to take advantage of an area's key assets. These businesses then become interdependent on each other, enhance their operating environments, and ultimately become more competitive on the global landscape. When this happens, these businesses become the experts in their field. They become more profitable, grow faster and pay higher wages.

The two industry clusters and one market opportunity which the Municipality of Oliver Paipoonge specifically can devote resources and time to become an increasingly competitive and desirable location for are as follows:

- Environmental Technology;
- Agricultural Tourism; and
- Bedroom Community.

This report briefly profiles each industry and outlines Oliver Paipoonge's key strengths and opportunities in each industry.

## 6.1 Environmental Technology

### ❖ What is Environmental Technology?

The term “environmental technology” is also referred to as “clean” or green” technology. It describes the use of environmental sciences in manufacturing and industrial processes to conserve natural resources and the environment. Environmental technology covers all kinds of processes, products and companies that are all linked by the common business theme of “sustainable development”.

Environmental technologies not only help to reduce energy and resource consumption, and therefore create less emissions and waste—they also offer real business benefits by cutting costs and improving competitiveness. With the global drive towards cleaner and more sustainable production and consumption, the sector has expanded to embrace resource management and low-carbon technologies.

Environmental technology is used in almost every industry and demand for new innovation is growing among Governments, industry and the general public. Types of environmental technology applications include air pollution control, waste management, contaminated land remediation, energy management, renewable and low-carbon energy, noise and vibrations control; recovery and recycling; aqua pollution; and cleaner technologies and processes, among others.

For Oliver Paipoonge, it is recommended that the most opportunities exist in the following areas:

1. **Farming and Agriculture** – design and the manufacturing of new processes or products, or the use of natural product fertilizers and pesticides, and innovative farming techniques that are low in energy use.
2. **Renewable Energy** – manufacturing of products, or the use of products or processes that employ naturally occurring and renewable energy sources such as solar energy using cells, panels and mirrors; a variety of styles of wind turbines; biomass fuels; and free-flowing water.
3. **Recycling** – design and the manufacturing of products or processes, or use of these products and processes that involve recycling or reusing waste materials from one process in the same or in another process.

### ❖ Why Environmental Technology in Oliver Paipoonge?

- The Municipality has all of the natural resources at its doorstep to be a leading centre for creativity, innovation and collaboration in Environmental Technology;
- The Thunder Bay District is the sunniest location in Ontario with over 2200 hundred hours of sunshine per year.<sup>28</sup>
- The Municipality's large agricultural land base could be used to grow biomass for energy and used to replace overreliance on fossil-fuel based energy sources;
- Regional expertise and success stories are growing in clean energy technologies i.e. Atikokan Wood Pellet Plant;
- The appetite among local and regional investors for clean energy technology deal flow is increasing;
- Demand for cheaper and clean energy sources is increasing to secure regional economic development opportunities in the mining, manufacturing and forestry industries;<sup>29</sup>
- The Provincial Government is actively seeking clean energy solutions for Ontario and is providing incentives for entrepreneurs and investors;
- Kakabeka Falls is recognized as one of Ontario's first rivers used to produce hydroelectricity;
- Provincial and Federal incentive programs are available to help the Municipality attract innovators, entrepreneurs and investment for renewable energy development;
- Post-secondary Environmental Technology programs are offered at nearby Lakehead University and Confederation College;
- Commercial tax rates, land prices and real estate are highly affordable in the Municipality and are good site selection incentives for new business start-ups;
- Bio-crop, wind farm and solar initiatives are already being piloted around the region with significant success;
- Oliver Paipoonge provides an environment in which businesses can easily and frequently interact with the natural environment to conduct field testing and research.

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<sup>28</sup> Source: Northwestern Ontario Immigration Portal, About Us, Weather, [www.immigrationnorthwesternontario.ca](http://www.immigrationnorthwesternontario.ca)

<sup>29</sup> Source: Cliffs Resources announced in February 2011 that hydro-electricity rates are a serious obstacle for selecting Ontario as the site for its proposed chromite smelter processing plant related to mining in the Ring of Fire.



## ❖ Biomass Potential

The term 'biomass' refers to the use of organic matter, such as plants and trees, as a renewable energy fuel source to create electric and heat energy. If the harvested biomass is replaced by replanting then its use as a fuel tends to be carbon neutral on the environment and not contribute to global warming.

Biomass fuel can generally be used in the form of wood fibre such as from waste wood and other sources, or dried wood pellets. The decline of the paper and wood industry in Northern Ontario has reduced the supply of waste wood and focused much greater interest in wood pellets as a biomass fuel source.

Oliver Paipoonge already has many factors required for a biomass fuel industry including trained forestry workers, a wealth of forest and agricultural land resources, access to road, rail and shipping transportation systems, land and infrastructure available for manufacturing facility development, and access to wood and pulp mills that can be converted to produce biomass fuel.

In addition, the Provincial Government's energy policies have promoted the biomass industry by requiring Ontario Power Generation's (OPG) hydroelectric generating station in Thunder Bay and Atikokan to eliminate coal as their fuel source in the near-term. A demonstration wood pellet plant is planned for construction in the Atikoken area, and several other pellet plants are under consideration at several locations across northern Ontario including Whitesand First Nation and also Rainy River.

Traditional forms of agriculture have been slowly declining for the last 50 years and the struggle of farmers to make a living out of farming is well documented worldwide. In recent years, farmers have become more innovative and many have started producing new crops such as biofuels. Biofuels are seen as part of the answer to the crisis affecting fossil fuels such as gas and coal and this trend is expected to increase.

#### ❖ **Government of Canada Incentive Program**

In addition to the companies that excel at employing environmental technologies in their manufacturing and industrial processes are those that excel in developing new environmental technologies. The Government of Canada has created a tax credit program called the *Scientific Research and Experimental Development* program that may be available to some of these companies.

The incentives that are provided in this not widely known program provide assistance to companies that are engaged in scientific and technology-oriented product or process research and development. This program is not widely known, but it has the ability to offer a significant benefit to those able to make use of it.

On January 19, 2011, FedNor also released its new funding guidelines with a specific area focused on innovation.<sup>30</sup> FedNor is encouraging communities and businesses to become more innovative, productive and competitive through the adoption, adaptation and commercialization of new technologies, advancing technological research and development, and promoting community innovation initiatives.

#### ❖ **What can Oliver Paipoonge do to advance in the Environmental Technology sector?**

The Municipality must ensure that its communities are able to benefit fully from the economic opportunities which arise from environmental legislation, required energy and resource efficiencies, and climate change targets. Recommended actions include:

- Inventory environmental technology assets in detail;
- Create a branded corporation to deliver the Municipality's objectives in environmental technology;
- Establish a leadership role in the development of a green economy for the entire Northwest region;
- Enhance the reputation of Oliver Paipoonge as an international centre for environmental technology;
- Develop marketing collateral for the Environmental Technology industry and investors;
- Build strategic partnerships with the Northwestern Ontario Innovation Centre, SR&D consultants and accountants who regularly work with new innovators;
- Recruit and retain innovators and entrepreneurs;

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<sup>30</sup> Source: FedNor-Industry Canada, Northern Ontario Programs, Innovation. [www.ic.gc.ca](http://www.ic.gc.ca)

- Host Fam Tours for potential entrepreneurs and investors;
- Support and invest in existing and new local businesses that are developing innovative environmental technologies;
- Provide market information and connections to the relevant contacts to help businesses access finance and the support they need to grow;
- Promote trading, networking and information sharing through locally hosted industry forums;
- Establish a rural business incubator for start-up and growing environmental technology entrepreneurs and businesses;
- The Highway Corridor through Oliver Paipoonge could be developed as the "Green" Corridor with a cluster of energy, bio-based and wood based value-added products producers;
- Initiate greater collaboration between all educational, training and research institutions and Innovation Centres in the region.

## 6.2. Agricultural Tourism

Agricultural tourism offers growth potential for the Municipality of Oliver Paipoonge. It could bring together two of the Municipality's top industries; agriculture and tourism and is considered to be a growth industry in Canada and the United States.

### ❖ What is Agritourism?

Agritourism (Agricultural tourism) is a form of niche tourism and involves any agriculturally-based operation or activity that brings visitors to a farm for the purpose of enjoyment, education or active involvement in the farm's operations. It can include a variety of farm activities such as farm stays, buying produce direct from a farm stand, navigating a corn maze, picking fruit or feeding animals.

Common types of agritourism include:

- Roadside stands;
- Farm stands & wineries;
- U-pick operations;
- Farmers' markets;
- Farm visits & farm stays;
- Petting stables; and:
- Special events: corn mazes, sleigh rides, festivals etc.

Agritourism has grown rapidly across North America in recent years as a result of economic and social changes. The financial crisis of 2009 and other changes cited previously in this report have resulted in the following tourism trends<sup>31</sup>:

- Taking shorter but more regular trips;
- Traveling more by car;
- Looking for new and unique experiences that are closer to home;
- Adding diversity and culture to experiences;
- Traveling to help reconnect family and build relationships;
- Getting back to roots, food and land;

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<sup>31</sup> Source: Ontario Tourism Marketing Reports.

- Enjoy rural scenery; and:
- Seeking interactivity and education through recreation.

#### ❖ **Why Agricultural Tourism in Oliver Paipoonge?**

With increasing production costs and tighter margins, farm families in Oliver Paipoonge are constantly seeking new ways to diversify and add value to their business operations. They need to be able to better utilize their human and capital resource base to be more competitive and profitable.

Farm operators in Oliver Paipoonge can generate income from agritourism by opening their farm for part or all of each year. They may offer accommodations, tours or produce sales. For example, visitors to a working farm property might sample activities including:

- visit farm animals;
- taste local wine or cheese;
- pick fresh produce;
- ride a pony;
- milk a cow;
- enjoy a hay ride;
- see a shearing demonstration;
- stay on the farm;
- use a camping site;
- feed animals;
- cooking demonstrations/classes;
- learn about some aspect of farming;
- shadow a farmer for a day;
- learn about local agricultural history;
- visit stocked ponds for fishing; and:
- learn about the benefits of locally grown/harvested food products.

Agri-tourism can help increase local farm income, but also can promote and serve as a sales outlet for both raw and value-added agricultural products. The entire agriculture industry of the Municipality and region also benefits by enhancing agriculture awareness and appreciation among the general public.

Given the enormous agricultural assets present in the Municipality, agritourism has the potential to diversify the local economic base and opportunities are rapidly growing because people are increasingly interested in how food is produced. They also want to meet farmers and processors and talk with them about what goes into food growing processes.

In Northwestern Ontario, families take for granted the natural resources that are available to them daily. Many children who come from urban areas in other parts of Canada and the world have often never seen farm animals up close. They may also be unaware of how food is grown.

The agritourism industry will allow the Municipality and its local farm operators to leverage the resources that are already available to house and entertain rural tourists and to assist in growing farm-based operations.

#### ❖ **What can Oliver Paipoonge do to advance in the Agricultural Tourism market?**

Agritourism already exists, to a significant extent, in Oliver Paipoonge. Some examples of these businesses include Gammondale Farm and Belluz Farm. Both operators open their farms to visitors throughout the year. The fall and winter seasons are particularly busy agritourism seasons for these and other operators and the summer months also host other agricultural festivals and events.

Agricultural businesses have however not yet linked with the broader agritourism sector or other attractions to package their services as part of a coordinated marketing program. Farm stays in particular are not being promoted and neither are experiences associated with other rural activities like horse-riding, ballooning, mountain biking, fishing and so on. This means that there is enormous development potential in this sector. Tourism statistics show that both Canadians and North Americans are visiting Northwestern Ontario for outdoor activities.<sup>32</sup> Just some examples of sectoral product development opportunities are:

- **Accommodations – farms, camping, cottages, Bed & Breakfast.**

Many farms have several acres of land that could be an ideal location for guest accommodations. The land may overlook water or the surrounding scenery and be close enough to the farm for housekeeping services. Often, farm accommodations are rented on a weekly basis which minimizes the workload with regards to housekeeping. These types of accommodations are popular with school groups and families.

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<sup>32</sup> Source: FedNor – Tourism in Northern Ontario Study 2007 by Judy Rogers, Research Resolutions & Consulting Ltd.



- **Farm-Based Recreation Activities**

A number of farm based activities could be operated in conjunction with accommodations to help increase the activities offered to guests on a pay as you go basis. Unique experiences like animal birthing, greenhouse tours, u-grow vegetables, food preserving and plant your own tree will be more appealing and offer marketing opportunity.

- **Direct Sales**

Other agritourism projects on the farm may include the direct sale of farm products. Innovative ideas using farm-based products have the greatest potential to earn the most money. Finding the niche markets and expanding on these unique opportunities can create the most rewarding and successful business ventures, particularly if the products are organic and all natural.

- **Value-added products**

Value-added products may include specialty meats and cheeses, pumpkin pies, or dried flower arrangements. These types of products, when marketed on or near the farm, can draw people to the rural location and enhance the community's economy.

- **Packaging the Agritourism Experience**

The packaging of an Agritourism experience has the potential to attract more visitors. An example of package could be a Municipal effort whereby the entrepreneur's farm is one of many destinations within a local tour. A stay at a farm can include admission to the local agricultural fair, a game of golf and a local guided tour. Group packages could also be developed for company executives who are seeking retreats for team building or organizational planning purposes. School groups, boy scouts and other youth groups would also be potential target audiences for packaged experiences.

- **Commercial Farm Tours**

There may be just one farm hosting the tour, or a group of farms may be included, providing the tourist with an overall picture of agriculture in the area.

Tours may be operated individually, where a family or group of people may choose to participate in the tour on their own, or they may be operated on a large scale, where tour buses have worked the farm tour into their agenda in advance. A packaged tour may include



a tour of a farm and a processing plant so that the tourist will have a fuller understanding the food chain. Other regions have established various trails or driving routes, where a number of like enterprises may be seen along the route such as a Pumpkin Route.

- **Marketing**

The Municipality and its businesses should be collectively promoting the agritourism experiences in Oliver Paipoonge to establish a marketing presence and raise awareness of its agritourism offering to target audiences. These means community-wide branding and cooperating locally as well as with regional and provincial tourism partners like North of Superior Tourism Association (NOSTA) and Ontario Tourism Marketing Partnership (OTMP).

The agritourism industry in Oliver Paipoonge can benefit from this type of cluster development by using agriculture as a theme to link operators. Through cluster partnerships, farm operators can access new markets, boost profile and awareness, and increase the overall appeal and draw to the Municipality, ultimately resulting in increased profits and a more healthy socio-economic foundation.

❖ **Industry Contacts**

Ministry of Agriculture, Food & Rural Affairs	<a href="http://www.omafra.gov.on.ca">www.omafra.gov.on.ca</a>
Ontario Tourism	<a href="http://www.ontariotravel.net">www.ontariotravel.net</a>
Ontario Tourism Marketing Partnership Corporation	<a href="http://www.tourismpartners.com">www.tourismpartners.com</a>
Ontario Farm Fresh Marketing Association	<a href="http://www.ontariofarmfresh.com">www.ontariofarmfresh.com</a>
Ontario Farm and Country Accommodations	<a href="http://www.countryhosts.com">www.countryhosts.com</a>
Ontario Federation of Agriculture	<a href="http://www.ofa.on.ca">www.ofa.on.ca</a>
Canadian Farm Business Management Council	<a href="http://www.farmcentre.com">www.farmcentre.com</a>
North American Farmer's Direct Marketing Association	<a href="http://www.nafdma.com">www.nafdma.com</a>
Harvest Ontario	<a href="http://www.harvestontario.ca">www.harvestontario.ca</a>
North of Superior Tourism Association	<a href="http://www.nosta.ca">www.nosta.ca</a>

Thunder Bay Federation of Agriculture	<a href="http://www.tbfarminfo.org">www.tbfarminfo.org</a>
Thunder Bay Co-op and Farm Supplies	<a href="http://www.tbcoop.com">www.tbcoop.com</a>
Oliver Agricultural Society	<i>Not applicable</i>
Slate River Ploughman's Association	<i>Not applicable</i>
Thunder Bay Agricultural Research Station	<a href="http://www.tbars.net">www.tbars.net</a>

### **6.3. Become a Bedroom Community**

In considering all the data and available information about Oliver Paipoonge and its assets, it seems clear that the Municipality has a major market opportunity to become a vibrant bedroom community for the City of Thunder Bay. Although many residents currently do live in Oliver Paipoonge and work in the City, there is no formal strategy or approach to establishing and promoting the Municipality as the place to live to skilled workers who are migrating to the emerging knowledge-based economy in Thunder Bay.

#### **❖ What is a bedroom community?**

A bedroom community is rural or urban community that is primarily residential, from which most of the workforce commutes out to earn their livelihood. Many commuter towns act as suburbs of a nearby city that workers travel to daily.

There is enormous potential for Oliver Paipoonge to transition to a popular bedroom community for the City of Thunder Bay. Many conditions and best practices exist for the Municipality to succeed as a bedroom community including:

- Close proximity to the City of Thunder Bay – the largest centre in Northern Ontario;
- New Highway infrastructure connecting Oliver Paipoonge to the Thunder Bay Express Way;
- Quality of life advantages including: lower property taxes, affordable housing, large areas of land for sale, safety, and outdoor recreation;
- Quality public facilities including sports facilities, community centres, schools and libraries; and:
- A world-class golf course and residential community in the Municipality.

#### **❖ Business contacts**

Establishing and marketing Oliver Paipoonge as a bedroom community will require the completion of a comprehensive opportunity study and marketing plan. It would be incumbent upon the Municipality to build stronger partnerships with the City of Thunder Bay and its agencies who are working directly to recruit new industry and skilled workers to the City of Thunder Bay.

The City of Thunder Bay CEDC for example is actively working to recruit and attract new industry to its growing knowledge-based economy and companies like Tornado and ICR are bringing hundreds of new professionals to the area. These are the types of professionals who are usually relocating from larger city centres and are used to longer commuting times. They have disposable incomes, young families and are looking for many of the quality of life attributes that can be found in Oliver Paipoonge. The high property prices and lack of new home builds within the City of Thunder Bay gives Oliver Paipoonge an immediate competitive advantage to attract these types of families to its communities.

Other key contacts include: banks, real estate agents, wealth managers, entities like the Thunder Bay Professional Advisors Group, Thunder Bay Regional Health Sciences Centre (TBRHSC) and Thunder Bay Physician Recruitment and Retention Council. These are the types of groups, institutions and businesses who are working with newcomers before and immediately after they arrive in the area.

Oliver Paipoonge is without a doubt in the enviable position of both being in close proximity to the City of Thunder Bay and providing a high overall quality of life for its residents. Its communities enjoy a variety of strengths that will give the area a competitive edge during recruitment efforts, including a reliable transportation infrastructure, and close proximity to the Port of Thunder Bay and major international airports. Looking at examples like Markham and Burlington, which are suburbs close to Toronto, it is easy to see how a bedroom community can quickly become a major business and residential centre in its own right.

## 7. Opportunity Summary Analysis

	<b>EnviroTech</b>	<b>AgriTourism</b>	<b>Bedroom Community</b>
<b>Anticipated near-term sector growth</b>	<b>Average to Strong</b>	<b>Average</b>	<b>Strong</b>
<b>Supported by regional development efforts</b>	<b>Ontario, Canada and International</b>	<b>NOSTA, Ontario and Canada</b>	<b>Regional and Provincial</b>
<b>Complements existing local economic base</b>	<b>Strong</b>	<b>Very Strong</b>	<b>Strong</b>
<b>Have a sustaining impact on local economy</b>	<b>Strong</b>	<b>Strong</b>	<b>Very Strong</b>
<b>Municipal investment required to attract new business</b>	<b>Moderate</b>	<b>Minimal</b>	<b>Moderate</b>

## 8. Conclusion

Clearly any work on future opportunities is, by definition, subject to change. It is nevertheless hoped that the assets and opportunities identified here inform debate with decision-makers into possible new areas of growth for Oliver Paipoonge and how the most sustainable scenarios for future community development might be achieved.

It is very difficult to predict the future economic picture and in itself, it will be affected by the drivers of change referred to earlier. What seems to be certain is that there will be a need for substantial investment into resources and measures to both combat and deal with the effects of regional socio-economic change. There will undoubtedly come a point at which decisions have to be made that will dictate the level of investment that is to be put into these areas and the resulting implications.

The positive opportunities for social and economic development should not be underestimated. Communities across Northwestern Ontario are diversifying their economies rapidly and becoming drivers of change to bring new investment, businesses and people to their communities. Larger centres like Thunder Bay, Greenstone, Timmins and Sudbury are aggressively pushing their own economic agendas, economic strategic plans and marketing their emerging industries to the investment world.

What actually happens in the Northwestern Ontario's larger centres over the next 5 years will significantly affect the actual scenarios that are possible for rural communities like Oliver Paipoonge.



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- ❖ Ontario Power Generation: [www.opg.com](http://www.opg.com)
- ❖ The City Around Innova, The Innova Business Park, Doing Business in Thunder Bay: [www.thunderbay.ca](http://www.thunderbay.ca)
- ❖ The Official Road Map of Ontario, Ministry of Transportation, [www.mto.gov.on.ca](http://www.mto.gov.on.ca)
- ❖ Thunder Bay Airport Authority, [www.tbairport.ca](http://www.tbairport.ca)
- ❖ Thunder Bay Port Authority, [www.portofthunderbay.ca](http://www.portofthunderbay.ca)

❖ Whitewater Golf Club: [www.whitewatergolf.com](http://www.whitewatergolf.com)