MDB INSIGHT

Municipality of Oliver Paipoonge: Strategic Economic Development Plan 2016-2020

Final Report

September 30, 2016

Contents

Executive Summary

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The Municipality of Oliver Paipoonge Strategic Economic Development Plan establishes a strategic approach to growth by developing a shared understanding among local community, business, and political leaders on the priorities of economic development and goals for the future prosperity of Oliver Paipoonge. The Plan provides a fact-based understanding and approach that incorporates the growth challenges for the municipality, the community's leading and emerging economic sectors, and thoughts gleaned from extensive consultation with local and regional stakeholders. The Strategy explores four priority sectors for the economy and presents an action plan for each.

Methodology

The methodology used to develop this Strategy combined research and analysis of the current economic context in Oliver Paipoonge and surrounding regions with a comprehensive consultation and engagement process that included residents, business and community leaders, and regional organizations. These efforts provided a foundation to create informed strategic directions for Oliver Paipoonge and actions to implement those directions.

The detailed components of the methodology include:

- **Project Launch -** Project initiation, work plan, outreach consultation plan, and confirmed report outline
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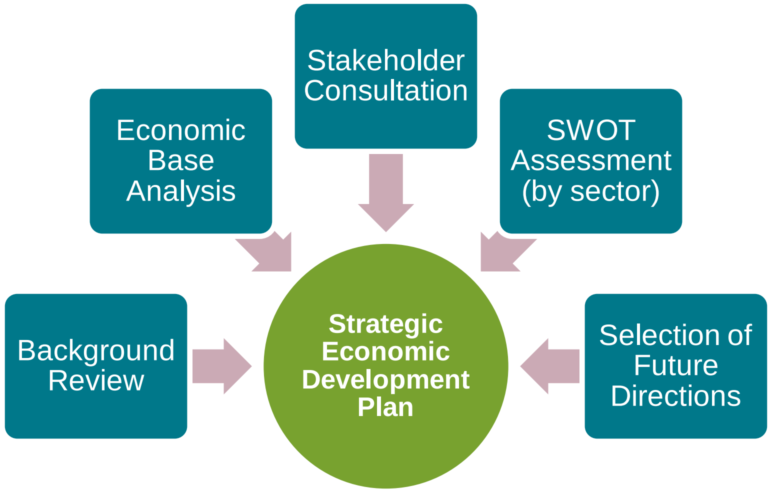
- **Project Conclusion** – Draft final report and presentation to Council and the Economic Development Committee

STRATEGIC PLANNING PROCESS



The Voice of the Community

When asked about their vision for the future economy of Oliver Paipoonge, consultation participants identified a number of important elements. These are highlighted in the word cloud below and include (from most mentioned to least):

- Growth
- Sustainable
- Natural
- Community
- Friendly
- Innovative
- Diverse
- Rural
- Creativity

WHAT TOP THREE WORDS WOULD YOU USE TO DESCRIBE YOUR VISION FOR THE ECONOMY IN THE MUNICIPALITY OF OLIVER PAIPOONGE IN THE NEXT 10 YEARS?

The emphasis within this vision is on increasing the overall development and investment within the municipality. This is for both industrial and commercial businesses, with an emphasis on attracting new and diverse types of businesses to the area. It is hoped that these new businesses would bring new shopping options to the area, add to the tax base, and help to promote the municipality as “open for business”.

Challenges, Opportunities, and Priorities

Both residents and business owners (but most especially residents) identified that they experience **challenges** with the high costs associated with living and operating a business in Oliver Paipoonge. This includes high local prices, high taxes, a feeling of a heavy tax burden on residential residents, business start-up costs, and high hydro rates. Other challenges identified are the location of the municipality relative to Thunder Bay (i.e. Oliver Paipoonge is too far from the city, while at the same time close enough that Thunder Bay is seen as competition for business and residents), ensuring sustainable growth in the municipality, and the lack of money/funding that the Municipality receives. Both residents and business owners identified that they were unsatisfied with the current economic development services being provided by the Municipality.

The biggest **opportunity** for business growth and development identified by residents and business owners are the diversity of new business development or investment in the community that is possible, such as having more local stores, new medical services, alternative energy production, and a manufacturing facility. Other important opportunities identified include the significant agricultural base and natural resources in the municipality, the safe and friendly nature of the community, the attraction of residents to the area, and having land to develop new businesses/ventures.

In terms of **priorities**, consultation participants identified their top priorities for municipal leadership are:

- Increasing the number of commercial or industrial businesses
- Creating more jobs
- Increasing local retail spending

Sectors Creating Economic Growth in Oliver Paipoonge

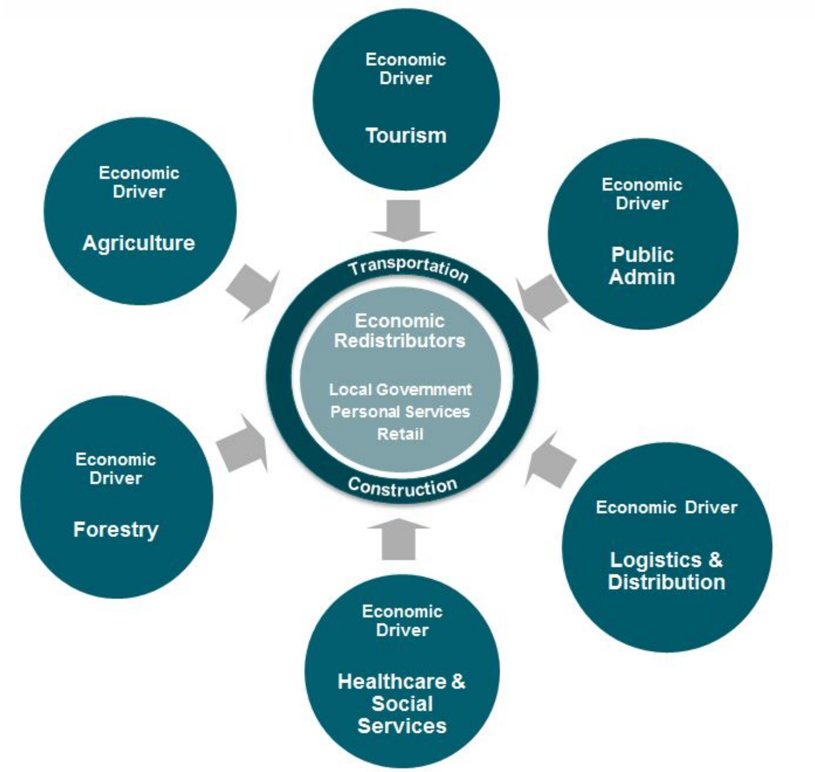
Strong economic development strategies build upon the unique assets and resources of a community, communicating those characteristics to potential investment and development partners to demonstrate unique value propositions. Growing numbers of entrepreneurial 21st century communities are using local advantages to spur innovation, investment and job creation, while retaining their cultural and environmental assets.

The selection of economic development opportunities is rooted in the philosophy that initiatives must ultimately increase the total wealth within a community. This is accomplished in two ways:

- **Export Development** – Initiatives that bring new money into the community such as starting/attracting a business that sells products/services outside the community, attracting visitors who then buy local products/services, and encouraging existing business to sell their product/service outside the community.
- **Import Substitution** – Initiatives that keep money in the community and recirculate it such as encouraging people and businesses to buy their goods/services locally rather than importing them from another community and starting or attracting new businesses that recognize the leakage and provide a product/service to stop it

The concept above is profiled in the figure to the right. The circles on the outside represent sectors that are “driving” wealth into Oliver Paipoonge. This wealth comes

CURRENT ECONOMIC DRIVERS AND REDISTRIBUTORS, OLIVER PAIPOONGE



both from businesses located within the municipality and from residents working outside the area. The businesses in the sectors in the centre benefit from the economic stimulus and keep wealth circulating within the municipality. In strong economies, this wealth changes hands many times before it is spent outside. The impact of these drivers and subsequent circulation is job creation, property investment, and local taxation.

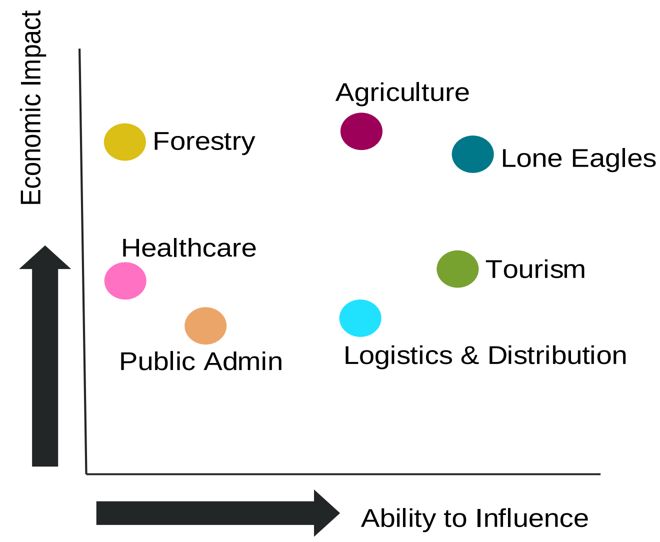
These economic drivers are further refined by setting priorities based on two more criteria:

- The economic impact of the sector in Oliver Paipoonge
- The ability for the municipality to influence growth in the sector

As seen in the figure to the right, agriculture, attracting lone-eagle businesses, and tourism all offer strong economic impacts for the municipality along with a relatively high ability for the municipality to influence the sector. These will form the basis for the highest priority sectors for the municipality to focus on in the Economic Development Plan.

Public administration, healthcare and social services, and forestry, on the other hand, are relatively difficult for the municipality to influence. Despite having important economic impacts, these sectors are not considered high priority focus areas due to the larger forces driving the success of these sectors (such as global market forces or government budget decisions).

ECONOMIC IMPACT VERSUS ABILITY TO INFLUENCE IN THE MUNICIPALITY OF OLIVER PAIPOONGE



Focusing Economic Development Priorities

Building on the economic drivers and redistributors in the Oliver Paipoonge economy, four priority areas have been identified that have the greatest potential of creating positive economic impact in Oliver Paipoonge over the coming years. These strategic priorities are intended to be anchors to set the context for a range of continued economic development planning in the community and will be the focus of action plans in the following sections.

These four priority areas are:

- Economic Development Readiness
- Primary and Value-Added Agriculture
- Tourism
- Attracting "Lone Eagle" Businesses

Establishing an Economic Development Vision and Mission

Economic Development Vision Statement

The Municipality of Oliver Paipoonge has a strong and continually growing economy that is complemented by maintaining the rural charm and environmental integrity that make the municipality a unique place to live, work, and visit.

Economic Development Mission Statement

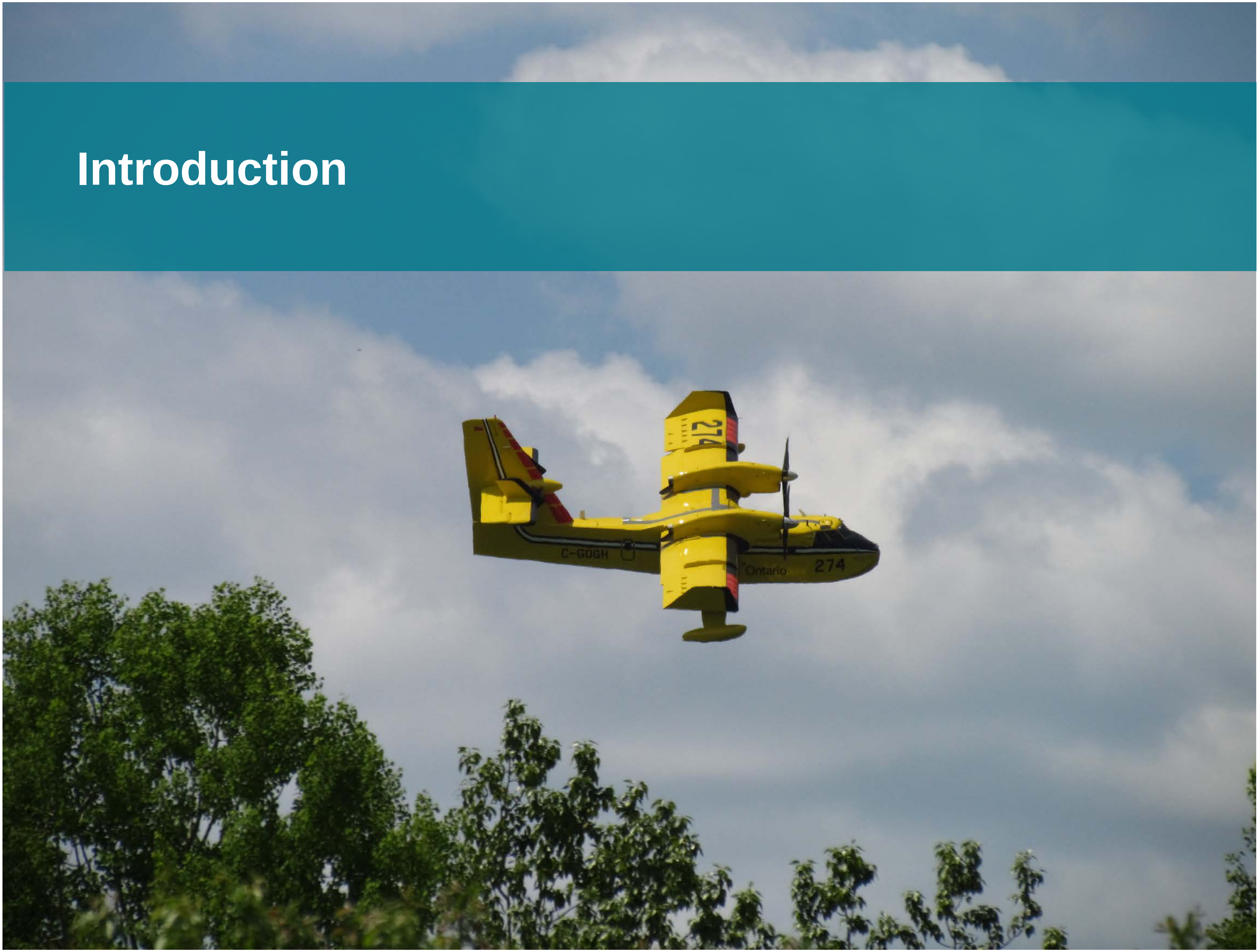
The Municipality of Oliver Paipoonge ensures a highly livable and entrepreneurial environment by being responsive to business needs and adopting a culture of customer first service

The following guiding principles underpin the vision and mission statements:

- High levels of collaboration and partnership between various levels of government are of critical importance in achieving economic success in Oliver Paipoonge
- Oliver Paipoonge needs to be a prosperous choice for business and for families to move into
- Oliver Paipoonge is a top northern tourism destination
- A diversity of small businesses as well as larger industrial and commercial businesses from a variety of industries will create the strongest economic foundation in Oliver Paipoonge
- An explicit culture of 'customer first' service within Oliver Paipoonge will communicate that the municipality is "open for business"
- Rural living and rural-based businesses are a foundational element to the economic success of Oliver Paipoonge
- Improvements in resident quality of life by enhancing recreational, cultural, and social opportunities will create important economic spin-off opportunities
- Attracting visitors to the region is an important aspect of a strong economy in Oliver Paipoonge

FOCUSING OLIVER PAIPOONGE'S ECONOMIC DEVELOPMENT PRIORITIES

Introduction



1 Introduction

The Municipality of Oliver Paipoonge is a community with many opportunities ahead of it. With little municipal debt, strong demand for new residential land, a high concentration of agricultural businesses, very close proximity to one of the premier tourism attractions in all of northwestern Ontario, and access to all the urban amenities of Thunder Bay, Oliver Paipoonge should consider itself ahead of many other communities of comparable size in Ontario.

Despite these opportunities, the economy of Oliver Paipoonge is not operating at its full potential. Large challenges persist (such as capturing tourism dollars from Kakabeka Falls visitation and difficulties selling parcels in the Rubin Industrial Park), that require the Municipality to be very strategic in its actions to help catalyze new growth in its economy.

The Municipality of Oliver Paipoonge Strategic Economic Development Plan establishes a strategic approach to growth by developing a shared understanding among local community, business, and political leaders on the priorities of economic development and goals for the future prosperity of Oliver Paipoonge. The Plan provides a fact-based understanding and approach that incorporates the growth challenges for the municipality, the community's leading and emerging economic sectors, and thoughts gleaned from extensive consultation with local and regional stakeholders. The Strategy explores four priority sectors for the economy and presents an action plan for each.

Economic development as a practice has moved well beyond business attraction towards activities that build economies from within. Increasing emphasis is placed on innovation, knowledge, creativity, talent, and fostering entrepreneurial skills. This shift from the "production of goods and commodities" to less tangible knowledge and creative-based economies has contributed to a diversity of new economic development practices which fall under the umbrella of "economic gardening"[1] and "business retention and expansion". In this light, this Economic Development Plan gives due consideration to attracting new investment to Oliver Paipoonge but also promotes a range of activities designed to bolster the inner workings of the municipality's economy and ensure long term economic prosperity.

What does the Strategic Economic Development Plan do?

- Provides a vision and direction for the economy of Oliver Paipoonge
- Explores Oliver Paipoonge's current and future economic opportunities
- Aligns with Council's goals and objectives, Municipal initiatives, and the goals and aspirations of the community

[1] Economic gardening is an economic development model that embraces the fundamental idea that entrepreneurs drive economies. The model seeks to create jobs by supporting existing companies in a community.

Why this needs to be a Living Document

This Economic Development Plan is a foundation on which to continue to develop a prosperous local economy in Oliver Paipoonge. The activities included in the action plans all have a time line so that they can be prioritized and resources allocated appropriately. That being said, it is important to recognize that the Plan should not be treated as a static document. The findings in this report should continually be re-assessed as the context of Oliver Paipoonge's economy changes, including changes in demographics and provincial and regional developments. By treating the Plan as a living document, the Municipality of Oliver Paipoonge and its Economic Development Office can ensure that the findings remain relevant and contribute towards the overall objectives of supporting the continued economic prosperity of the municipality.

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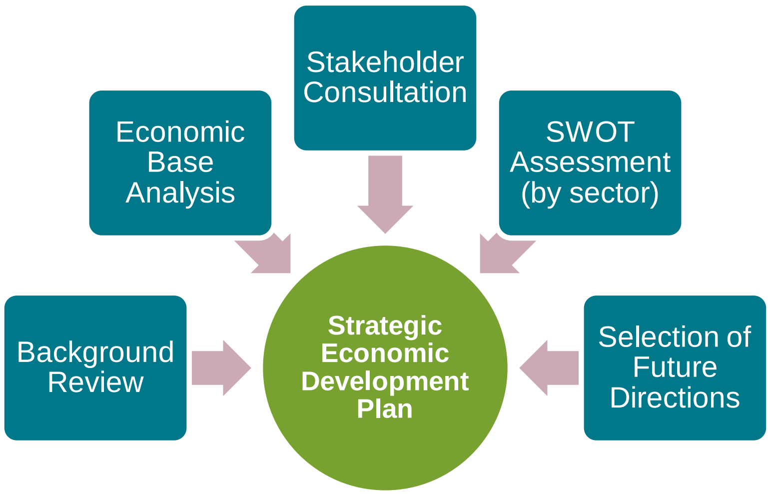
FIGURE 1: STRATEGIC PLANNING PROCESS



Report Structure

The Strategic Economic Development Plan is organized into eight sections:

Section 2 provides an overview of the local and regional economy and how Oliver Paipoonge is situated within that economy. The municipality's demographic, labour force, and business profile is also presented. *The complete base analysis is provided in the Appendix.*

Section 3 outlines the results of the consultation activities conducted as part of this study. Common themes emerging from the survey, interviews, and focus groups are presented in summary form.

Section 4 identifies a path for prioritizing the municipality's economic development opportunities and presents the economic development vision and mission.

Section 5 through 8 presents information on each of the priority sectors recommended by this Plan. Each section includes the context of the sector related back to the economy of Oliver Paipoonge, a SWOT Assessment, and a prioritized action plan.

A number of **Appendices** are also included with additional information that expands on certain sections presented in the main body of the report.

Economic Overview

2 Economic Overview

2.1 Background Review

A number of relevant planning and strategic development plans were reviewed to better understand the economic development work that has been done in the Municipality of Oliver Paipoonge (a sample of these documents can be found in Figure 2).

These plans highlight the interconnected roles that economic development plays in Oliver Paipoonge (and surrounding regions) in relation to:

- **Quality of Life** – Focused on recognizing the rural character of the municipality and its agricultural economy, preserving and enhancing the environment, attracting new residential development, investing in recreational amenities, and preserving cultural heritage resources. These efforts combine to position the municipality as a desirable place to live, work, and do business.
- **Tourism** – Focused on investing to capitalize on existing tourism assets in the region (e.g. Kakabeka Falls) and creating new tourism opportunities. These investments include embarking on a “Main Street” Improvement program, developing a municipal marketing strategy, reforming the Kakabeka Falls Business Association, and investing in more trail development.
- **Business Development** – Focused on supporting existing businesses and attracting new employment opportunities, as well as developing a retention/expansion strategy for local businesses. Sectors of particular focus include environmental technology, agri-tourism, commercial services to support an increasing residential population, forestry, and mining.
- **Collaboration and Partnership** – Focused on collaborating closely with surrounding communities to support more tourism development and economic development initiatives

Of particular note is the Municipality’s forthcoming Official Plan that will help guide economic growth. The Official Plan creates a framework to address the challenge of achieving “balanced growth” in Oliver Paipoonge that incorporates sustainable development, economic diversity, quality of life, preserving the natural environment, and creating a complete community. In essence, the new Official Plan helps provide a roadmap for the Municipality to proactively shape an economy that mixes residential growth with new job-creating investments in a range of industrial and commercial sectors.

FIGURE 2: SAMPLE DOCUMENTS REVIEWED

- Official Plan Draft (2015)
- Master Trails Planning Strategy (2012)
- Community Assets & Priority Market Opportunities (2011)
- Community Survey (2010)
- Options for the Agriplex: Three Possibilities for the Future (2010)
- Community Profiles and Investment Readiness Project: Municipalities of Gillies and Oliver Paipoonge (2008)
- Strategic Economic Development Plan (2001)
- Tourism Development Study for Kakabeka Falls (1998)

2.2 Economic Context

The Northern Ontario Economy

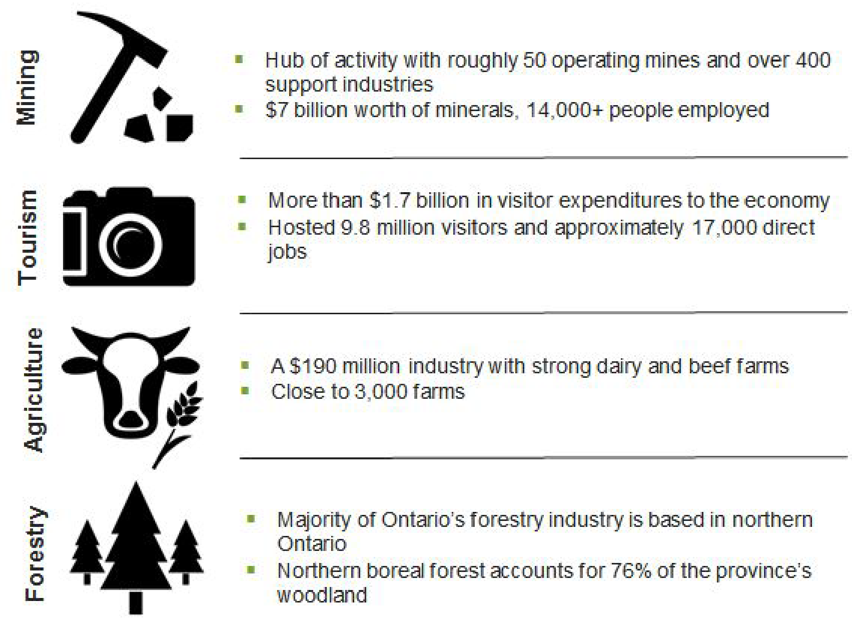
The economy of Northern Ontario is largely driven by primary resource industries with a large focus on the forestry and mining sectors (as seen in Figure 3). This economy, however, has stalled in recent years as commodity prices for these resources have been unfavourable. This stalling in prices has led to a slip in employment for the second consecutive year in Northwestern Ontario.[2] [3]

While economic activity is forecast to stabilize, growth is expected to be minimal throughout the Northwest region for the immediate future. Primary resources are expected to continue to drive the region's economy, but other sectors such as construction, manufacturing, utilities, health care, education, and a variety of service industries will also contribute.[4]

The mining sector is expected to remain in a holding pattern until the global economy begins to pick up steam and commodity prices rise. Mining activity in the region along with the timing of a number of major mining projects will depend heavily on this rise in commodity prices. Over the longer term, however, potential developments around of the Ring of Fire offer significant opportunities for the Northwest economy (though the development has been very slow due to uncertainty around private investor commitment and difficulty in negotiating an agreement with First Nations communities near the deposit).

In terms of the forestry sector, a strengthening United States economy and a rebound in housing markets plays favourable into the Northwest's forest products industry. Ontario producers have increased forest products

FIGURE 3: PROMINENT SECTORS IN THE NORTHERN ONTARIO ECONOMY



[2] Includes the districts of Thunder Bay, Rainy River, and Kenora

[3] Credit Unions of Ontario and the Ontario Chamber of Commerce, "Ontario Economic Update 2016: Northwest Economic Region", http://www.occ.ca/advocacy/ontario-economic-update-2016/northwest-region

[4] Ibid

shipments by 12% in the first nine months of 2015, largely in response to this rising demand in the USA, and more favourable commodity prices.[5]

Job growth is expected to be negligible throughout Northwestern Ontario in the coming years (forecast to decline by 0.2% in 2016) as the labour force continues to decline due to an aging population and limited job prospects. These factors, however, are expected to lead to the regional unemployment rate declining to 5.4% by 2017, with the unemployment rate in the Thunder Bay area declining to 5%. Growth in the Thunder Bay area, in particular, is expected to see modest growth in public sector activities such as health care, education, and public administration, with manufacturing also benefitting from stronger US demand and a weaker Canadian dollar.

Oliver Paipoonge's Demographic and Labour Force Profile

For a more detailed look at the demographic and labour force profile, please see the Appendix

Demographic Characteristics

In 2011, Oliver Paipoonge had a population of 5,732. The population has been relatively stable, with small declines since 2001 (as seen in Figure 4). From 2001 to 2006, the population decreased by 1.8%, and from 2006 to 2011 the population again declined slightly by 0.4%. The stability in population generally correlates with the municipalities within the Thunder Bay Census Metropolitan Area (CMA)[6], although the CMA's population increased slightly between 2001 and 2006. Conversely, the province of Ontario as a whole has seen a much larger population growth of 6.6% between 2001 and 2006, and 5.7% between 2006 and 2011.

Projecting into the future, the population decline within the Thunder Bay CMA is expected to accelerate slightly to a 2.5% decline between 2013 and 2041. Ontario, by contrast is expected to continue to grow, with a 31.3% growth forecasted. Forecasts for Oliver Paipoonge are not available.

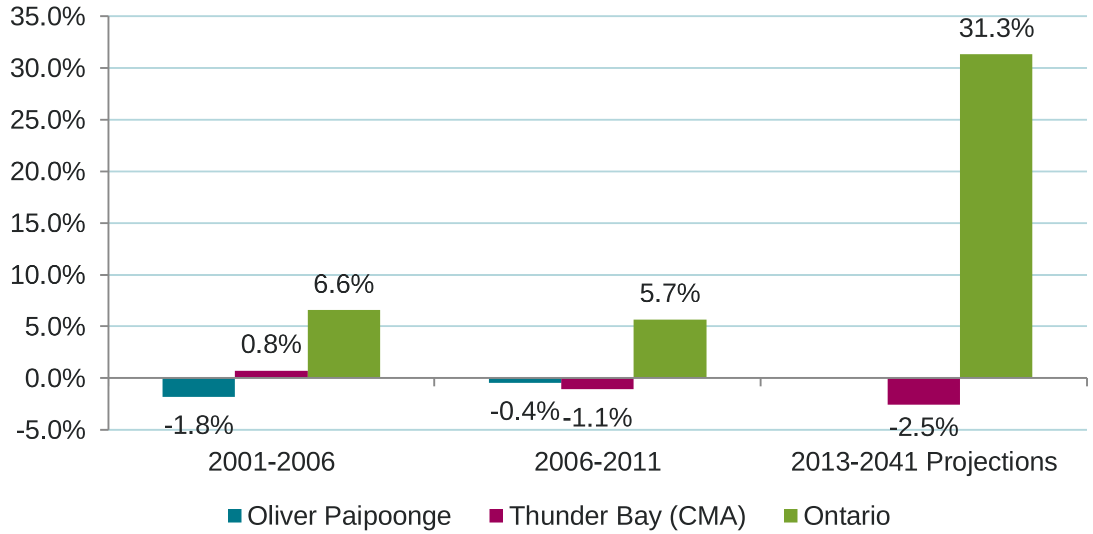
Key Demographic Observations:

- **Population growth** – Relatively stable with small declines since 2011. Population within the broader Thunder Bay region expected to decrease by 2.5% between 2013 and 2041, despite expected increases by 31% in Ontario.
- **Age of workers** – Demographic structure in Oliver Paipoonge displays signs of an aging population with a clear gap in age cohorts from 20 to 45 years old
- **Household incomes** – Oliver Paipoonge has a higher median household income than the Thunder Bay CMA and Ontario, highlighting the relative wealth of the municipality's residents
- **Education** – Oliver Paipoonge had over 80% of its population possessing education higher than a High School diploma (or equivalent). This percentage was comparably higher than both the Thunder Bay CMA and Ontario, highlighting the relatively educated workforce in Oliver Paipoonge.

[5] Ibid

[6] The Thunder Bay CMA includes the Township of Conmee, Fort William 52 Indian reserve, the Township of Gillies, the Municipality of Neebing, the Township of O'Connor, the Municipality of Oliver Paipoonge, the Township of Shuniah, and the City of Thunder Bay.

FIGURE 4: POPULATION GROWTH

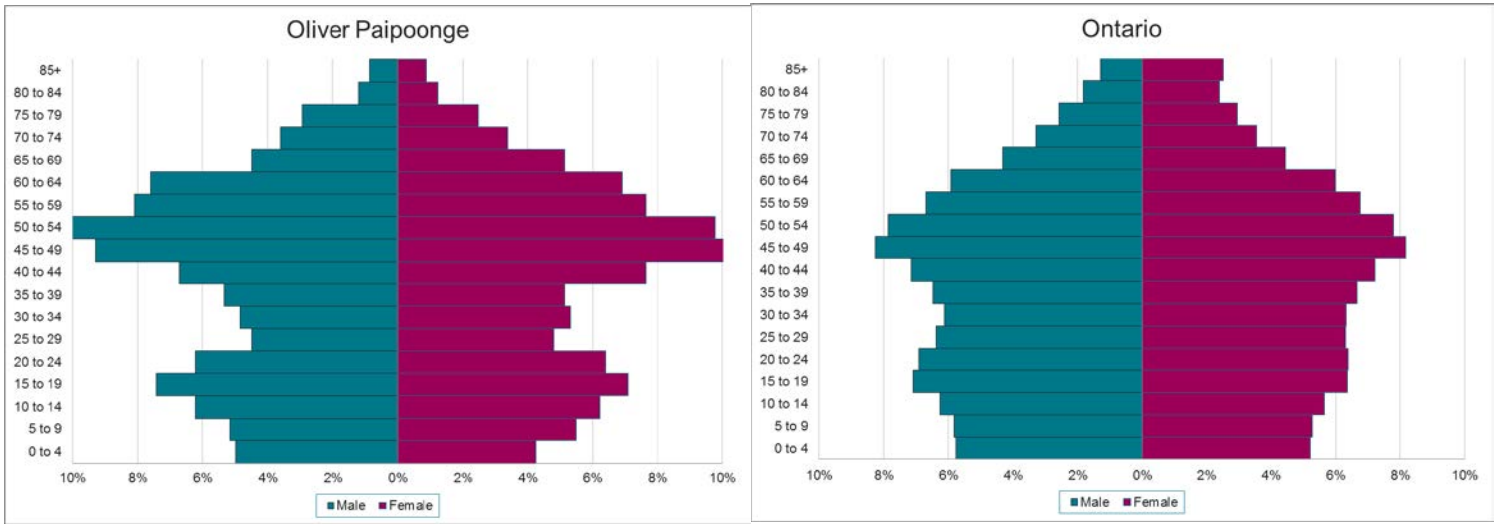


Source: Statistics Canada. 2011 & 2006 Community Profiles

As seen in Figure 5, the demographic structure in Oliver Paipoonge and Ontario displays signs of an aging population. In Oliver Paipoonge especially, there is a clear gap in age cohorts from 20 to 45 years old, indicating a relative gap in the younger, working age cohorts. This suggests that the municipality may be having difficulty in attracting and retaining its young workers (and families) as they may be moving to larger urban centres in search of employment.

When comparing median age between the two population sets (43.5 for Oliver Paipoonge, 40.4 for Ontario), Oliver Paipoonge has a slightly older population than Ontario. As well, the population data between 2006 and 2011 shows both populations tending towards an older population over time. From 2006-2011 the median age in Oliver Paipoonge increased from 41.7 to 43.5 while in the province the median increased from 39.0 to 40.4.

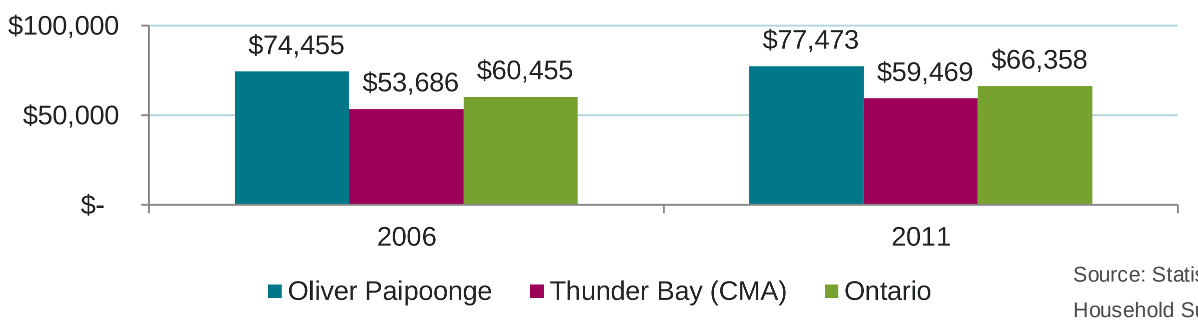
FIGURE 5: POPULATION PYRAMID FOR OLIVER PAIPOONGE AND ONTARIO, 2011



Source: Statistics Canada. 2011. National Household Survey. Community Profiles. Adapted by MDB Insight Inc

As seen in Figure 6, Oliver Paipoonge has a higher median household total income than the Thunder Bay CMA and Ontario. Oliver Paipoonge's median total household income growth rate was 4.1% compared to the Thunder Bay CMA and Ontario which grew by 10.8% and 9.8% from 2006 to 2011.

FIGURE 6: MEDIAN HOUSEHOLD INCOME

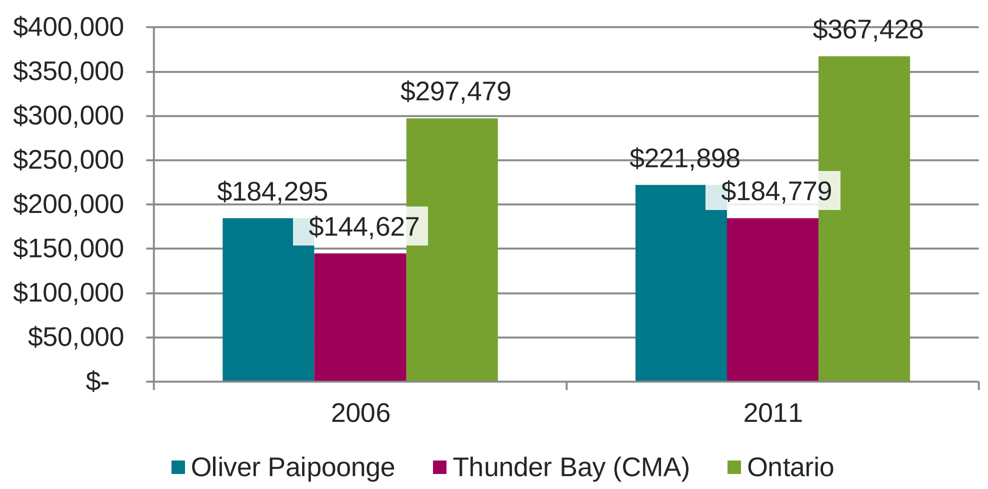


Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles

Along with median income, Oliver Paipoonge also had a lower growth rate for average dwelling values at 20.4% when compared to the Thunder Bay CMA (27.8%) and Ontario (23.5%) between 2006 to 2011 (as seen in Figure 7). In 2006 and 2011, the dwelling values in Oliver Paipoonge were higher than the Thunder Bay CMA and Ontario. The higher median income and higher dwelling value in Oliver Paipoonge compared to the CMA suggests that the cost of living in the municipality is stable, and major increases to housing demand (and likely supply) are occurring elsewhere within the CMA.

The value of dwellings in the Thunder Bay area is not surprisingly significantly lower than Ontario as a whole.

FIGURE 7: AVERAGE VALUE OF DWELLING



Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles

Key Labour Force Observations:

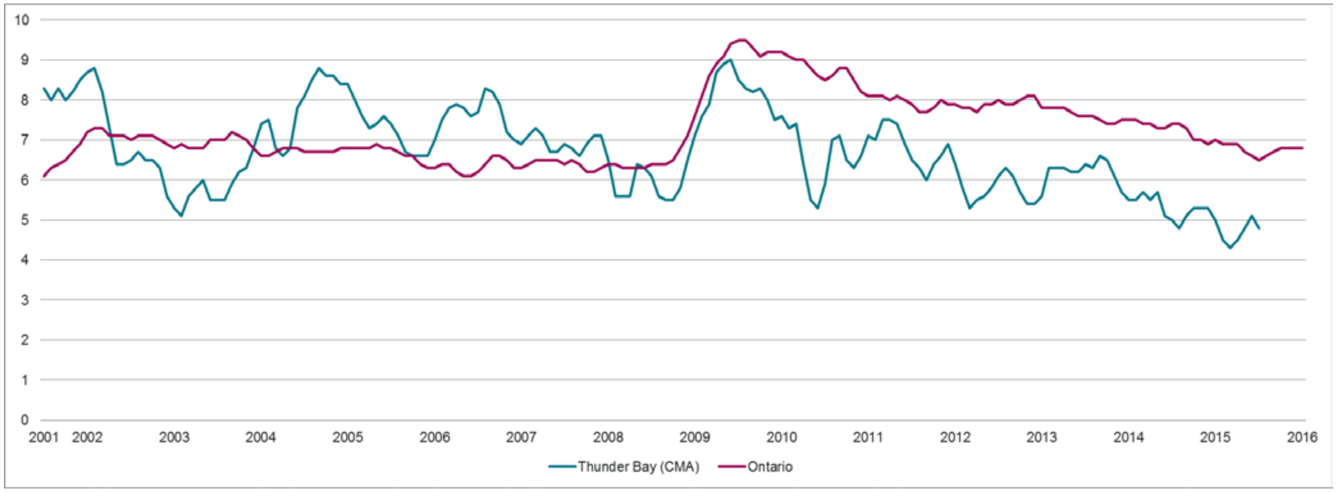
- **Unemployment** – From 2009-2015, the unemployment rate within the Thunder Bay CMA was lower than that of the province highlighting the relatively higher access to employment opportunities that residents of Oliver Paipoonge have
- **Employment by industry** – The leading sources for employment for Oliver Paipoonge's labour force were in "Health Care and Social Assistance" (16.6%) and "Construction" (13.3%). Both of these sectors along with "Agriculture, Forestry, Hunting, and Fishing" employed a higher proportion of workers compared to the labour force in the Thunder Bay CMA and Ontario.
- **Occupational growth** – The largest occupational categories in Oliver Paipoonge were "Trades, transport and equipment operators and related occupations" and "Occupations in management". From 2006 to 2011, the majority of occupational categories declined with the largest declines happening in "Natural resources, agriculture and related production occupations" (decrease of 57%).
- **Commuting flows** – Residents of Oliver Paipoonge predominantly work in the City of Thunder Bay (85.2%). Roughly 13% of residents work within the municipality itself. Roughly 50% of Oliver Paipoonge's workforce lives in the City of Thunder Bay, with a further 34% coming from within Oliver Paipoonge, and 10.9% living in O'Connor and Gillies.

Labour Force and Occupational Characteristics

Oliver Paipoonge's total labour force in 2011 was 4,795 people, which was a small increase of 1.5% from 2006. The municipality's unemployment rate in 2011 was 14.4%, which was significantly higher than the CMA rate of 8.4% and provincial rate of 8.3%. Oliver Paipoonge's unemployment rate jumped significantly from 7.0% in 2006. Although the Thunder Bay CMA (7.4% in 2006) and Ontario (6.4% in 2006) both also experienced increased unemployment between 2006 and 2011, the increases were much less dramatic than in Oliver Paipoonge.

Annual unemployment statistics for the Thunder Bay CMA and from 2001 to 2013 are presented in Figure 8 below. These statistics show that from 2004 to 2008, the CMA's unemployment rate was consistently above that of the province. However, even with a spike in unemployment during the 2009 global recession, the unemployment rate within the Thunder Bay CMA was lower than that of the province and has remained lower into 2015. While not specifically for Oliver Paipoonge, the trend of a relatively low unemployment rate in the Thunder Bay CMA highlights the relatively higher access to employment that residents of the region (including Oliver Paipoonge) have.

FIGURE 8: ANNUAL UNEMPLOYMENT RATE FOR THUNDER BAY CMA AND ONTARIO, 2001 – 2013

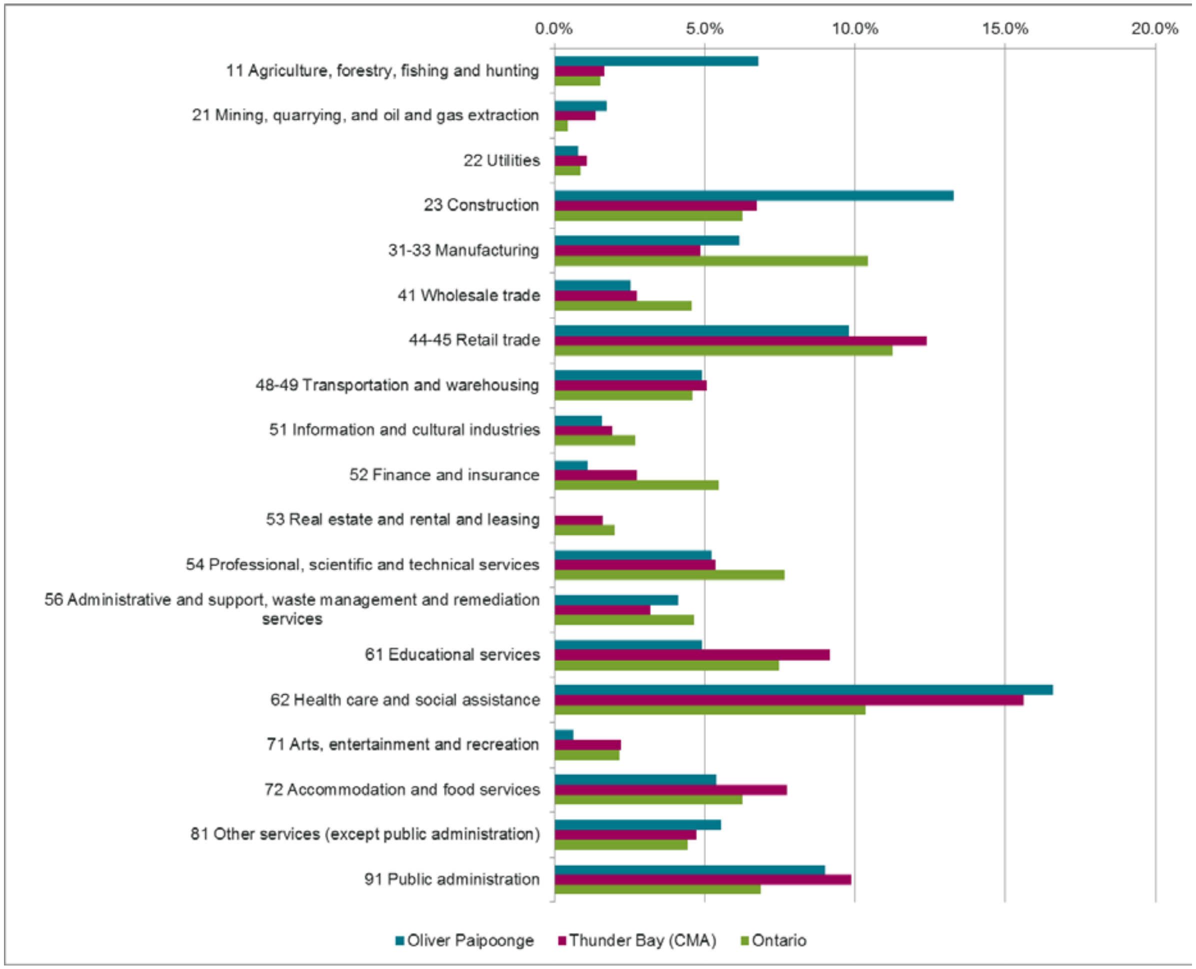


Source: Statistics Canada - Labour force survey estimates (LFS), by provinces, territories and economic regions based on 2006 Census boundaries, annual (persons unless otherwise noted), CANSIM (database)

Labour force employment by industry for all three geographic areas was examined to determine how Oliver Paipoonge's workforce compared to the Thunder Bay CMA and Ontario (as seen in Figure 9). The leading sources for employment for Oliver Paipoonge's labour force were the "Health Care and Social Assistance" and "Construction" sectors which employed 16.6% and 13.3% of the Municipality's work force respectively. "Agriculture, Forestry, Hunting, and Fishing" also employed a much higher proportion of workers compared to the labour force in the Thunder Bay CMA and Ontario.

With the exception of “Educational Services”, the sector data showed overall that Oliver Paipoonge’s labour force makeup was generally equivalent to that of the Thunder Bay CMA, with most sectors within 3 percentage points of each other.

FIGURE 9: CLASS OF WORKER BY SECTOR OLIVER PAIPOONGE, THUNDER BAY CMA AND ONTARIO BY PERCENTAGE, 2011



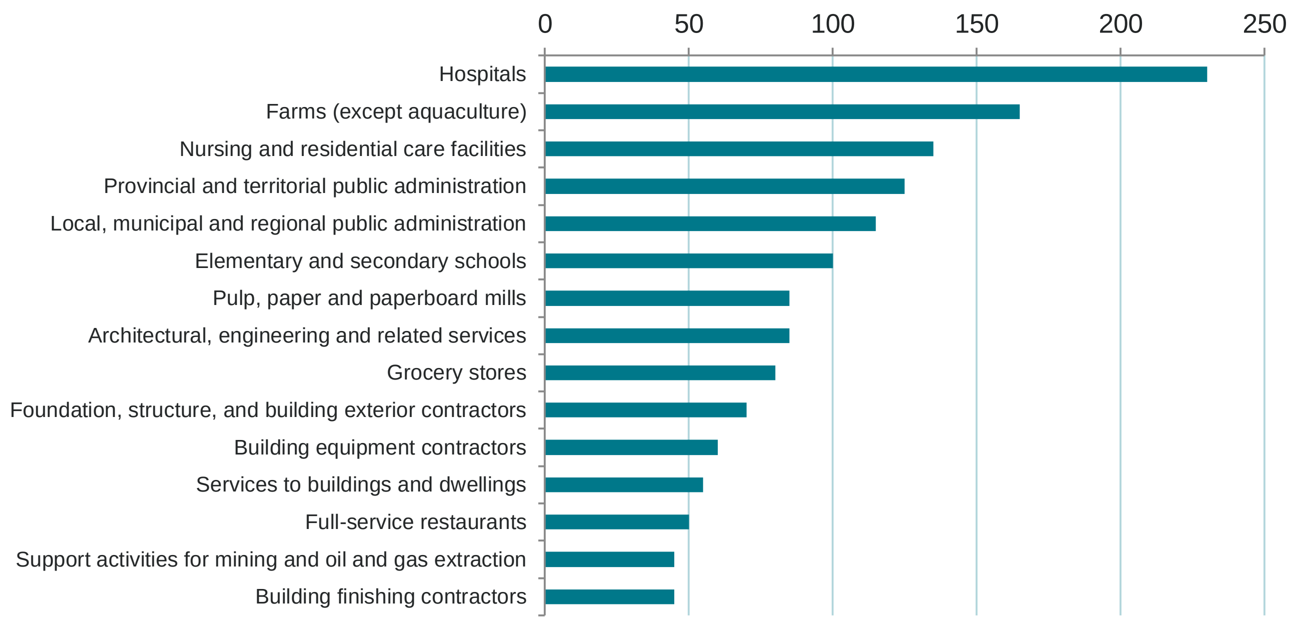
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

As shown in Figure 10, Oliver Paipoonge's employed labour force has experienced growth in certain subsectors from 2006 to 2011 and decline in others. The sectors with the largest growth in workers were:

- Health care and social assistance (150 workers)
- Construction (185 workers)
- Public Administration (70 workers)

The top 15 sub-sectors for Oliver Paipoonge in terms of total employment are shown in Figure 10. As of 2011, hospitals, farms (except aquaculture), nursing and residential care facilities, and provincial and territorial public administration represented the top subsectors in terms of employment.

FIGURE 10: TOP 15 CLASS OF WORKER BY INDUSTRY IN OLIVER PAIPOONGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

Business Characteristics

As seen in Figure 11, industries with the highest proportion of business establishments in Oliver Paipoonge as of December 2015 were:

- Agriculture, Forestry, Fishing and Hunting (98 businesses, 16.9% of total)
- Construction (80 businesses, 13.8% of total)
- Real Estate, Rental and Leasing (53 businesses, 9.1% of total)
- Retail Trade (52 businesses, 9.0% of total)
- Other Services (except Public Administration) (42 businesses, 7.0% of total)

Business establishments in Oliver Paipoonge are overwhelmingly characterized by small companies and enterprises that employ less than 10 people (as seen in Figure 11). In 2015, excluding the businesses consisting of the self-employed (which themselves are small enterprises) there were 124 businesses, or 52.0% of the subtotal, that employ 1-4 people. An additional 58 businesses, or 24.5% of the subtotal, employ 5-9 people. The industries with the highest number of establishments employing fewer than 10 people were:

- Agriculture, Forestry, Fishing and Hunting (35 businesses)
- Construction (29 businesses)
- Retail Trade (20 businesses)
- Transportation and Warehousing (18 businesses)
- Other Services (except Public Administration) (16 businesses)

It is also important to note the scarcity of medium and large firms in the municipality's economy. This is of interest because small, medium, and large firms are generally believed to provide different economic functions within an economic region. Small firms are generally seen as the major source of new products and ideas, while large firms typically develop as products become more homogenous and firms begin to exploit economies of scale. The lack of mid-size and large business in Oliver Paipoonge is notable as these firms are typically more export oriented and generate higher operating surpluses.

Key Business Pattern Observations:

- Oliver Paipoonge currently has 580 unique businesses, of which 237 employ at least one person other than the owner. The top five sectors in terms of number of businesses are:
  - Agriculture, Forestry, Fishing and Hunting (98 businesses, 16.9% of total)
  - Construction (80 businesses, 13.8% of total)
  - Real Estate, Rental and Leasing (53 businesses, 9.1% of total)
  - Retail Trade (52 businesses, 9.0% of total)
  - Other Services (except Public Administration) (42 businesses, 7.0% of total)
- **Business growth** – The number of businesses in Oliver Paipoonge shrank by 105 (35%) between 2008 and 2013. Two sectors saw business growth during this period (though they represent two of the smaller industries within the community):
  - Administrative Support, Waste Management and Remediation Services
  - Real Estate and Rental and Leasing
- **Relative business concentration** – Based on location quotient analysis, the following sectors showed a high local concentration in Oliver Paipoonge in 2013 compared to Ontario:
  - Utilities (LQ of 7.43)
  - Agriculture, Forestry, Fishing and Hunting (LQ of 4.59)
  - Mining, Quarrying, and Oil and Gas Extraction (LQ of 6.80)
  - Public Administration (LQ of 6.69)

FIGURE 11: OLIVER PAIPOONGE BUSINESSES BY LOCATION AND SIZE, DECEMBER 2015

Industry (NAICS)	December 2015								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
11 Agriculture, Forestry, Fishing and Hunting	98	59	39	28	7	0	3	0	1
21 Mining, Quarrying, and Oil and Gas Extraction	8	5	3	1	1	0	0	1	0
22 Utilities	5	5	0	0	0	0	0	0	0
23 Construction	80	39	41	22	7	4	5	3	0
31-33 Manufacturing	16	6	10	2	5	0	3	0	0
41 Wholesale Trade	16	7	9	4	2	1	2	0	0
44-45 Retail Trade	52	23	29	13	7	4	4	1	0
48-49 Transportation and Warehousing	35	16	19	13	5	1	0	0	0
51 Information and Cultural Industries	2	0	2	1	1	0	0	0	0
52 Finance and Insurance	27	22	5	1	1	1	2	0	0
53 Real Estate and Rental and Leasing	53	49	4	4	0	0	0	0	0
54 Professional, Scientific and Technical Services	41	29	12	11	1	0	0	0	0
55 Management of Companies and Enterprises	18	17	1	0	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	19	10	9	3	1	2	3	0	0
61 Educational Services	5	2	3	1	1	0	1	0	0
62 Health Care and Social Assistance	31	17	14	7	6	1	0	0	0
71 Arts, Entertainment and Recreation	4	1	3	1	2	0	0	0	0
72 Accommodation and Food Services	24	11	13	1	4	6	1	1	0
81 Other Services (except Public Administration)	42	25	17	11	5	1	0	0	0
91 Public Administration	4	0	4	0	1	2	1	0	0
Total Economy	**580**	**343**	**237**	**124**	**58**	**23**	**25**	**6**	**1**

Source: Canadian Business Patterns December 2015

Note: Due to changes in Statistics Canada methodology, comparisons between data from 2013 (and earlier) and 2015 cannot be made.

2.2.1 Location Quotients

A "Location Quotient" (LQ) measures the concentration of business activity in a local area (e.g. Oliver Paipoonge) relative to an over-arching area (e.g. Ontario). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector shows a strong concentration relative to the larger area. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

Based on location quotients, the following sectors showed a high local concentration in Oliver Paipoonge in 2013 (as seen in Figure 12):

- Utilities (LQ of 7.43)
- Agriculture, Forestry, Fishing and Hunting (LQ of 4.59)
- Mining, Quarrying, and Oil and Gas Extraction (LQ of 6.80)
- Public Administration (LQ of 6.69)

The following sectors saw a Location Quotient increase greater than 1.25 from 2008 to 2013:

- Utilities (increase of 7.43)
- Mining, Quarrying, and Oil and Gas (increase of 3.08)

FIGURE 12: LABOUR FORCE LQ BY INDUSTRY, OLIVER PAIPOONGE 2008, 2013

Industry (NAICS)	2008 Oliver Paipoonge		2013 Oliver Paipoonge	
	LQ	Classification	LQ	Classification
11 Agriculture, Forestry, Fishing and Hunting	5.64	High	4.59	High
21 Mining, Quarrying, and Oil and Gas Extraction	3.72	High	6.80	High
22 Utilities	0.00	Low	7.43	High
23 Construction	1.53	High	1.47	High
31-33 Manufacturing	0.69	Low	1.24	Average
41 Wholesale Trade	0.59	Low	1.05	Average
44-45 Retail Trade	0.79	Average	0.76	Average
48-49 Transportation and Warehousing	1.94	High	1.12	Average

Industry (NAICS)	2008 Oliver Paipoonge		2013 Oliver Paipoonge	
	LQ	Classification	LQ	Classification
51 Information and Cultural Industries	0.49	Low	0.17	Low
52 Finance and Insurance	0.65	Low	0.72	Low
53 Real Estate and Rental and Leasing	0.53	Low	0.75	Average
54 Professional, Scientific and Technical Services	0.44	Low	0.41	Low
55 Management of Companies and Enterprises	0.84	Average	0.98	Average
56 Administrative and Support, Waste Management and Remediation Services	0.44	Low	0.85	Average
61 Educational Services	0.53	Low	0.86	Average
62 Health Care and Social Assistance	0.30	Low	0.71	Low
71 Arts, Entertainment and Recreation	0.60	Low	0.00	Low
72 Accommodation and Food Services	1.01	Average	0.54	Low
81 Other Services (except Public Administration)	0.80	Average	0.89	Average
91 Public Administration	9.83	High	6.69	High

Source: Canadian Business Patterns December 2013, December 2008

The Voice of the Community

3 The Voice of the Community

A number of consultation activities were used to engage local and regional stakeholders in the creation of the Strategic Economic Development Plan. These consultations incorporated the ideas and opinions of residents, local municipal staff, local community and business leaders, and regional organizations.

Three outreach activities were used during consultations:

- **Online Survey** - An online survey was distributed by the Municipality of Oliver Paipoonge to generate input from residents and business and community leaders on economic development opportunities and priorities for the community. The survey generated a total of 106 responses.
- **Focus Groups** – Five focus group sessions were held in the municipality from March 14 to 16, 2016. Each focus group had a different audience that was invited to participate and included Council, businesses and the general public, the agriculture and forestry industry, the Municipality's Economic Development Committee, and the tourism industry.
- **Stakeholder Interviews** – Ten interviews were conducted with business and community leaders in Oliver Paipoonge. These were open-ended interviews each averaging approximately 20-30 minutes in length and were conducted by telephone.

The main goals for each consultation activity involved generating input on economic development progress in Oliver Paipoonge over the last number of years, opportunities and challenges for the economy, elements that make the municipality a good location for business, defining a future vision for the community, and priority action items for the future.

A summary of those consultation activities is presented in this section. For a more detailed look at findings from the online survey, please refer to the Appendix.

Satisfaction of Residents and the Business Community

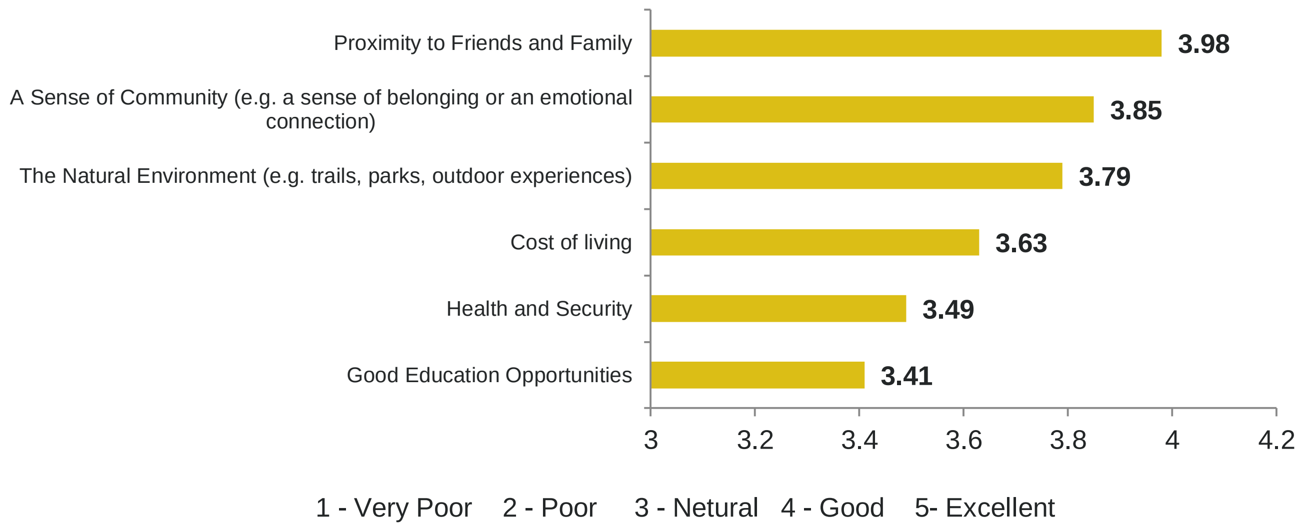
A strong majority (89%) of **residents** that participated in the consultations said that they are happy or very happy to be living in the Municipality of Oliver Paipoonge. This satisfaction comes from many factors, most important of which are:

- The country living, rural setting, and small town feel
- Close proximity and a short commute to Thunder Bay
- Peaceful, quiet and friendly community
- Being born and raised in Oliver Paipoonge or having grown up in the community

Other quality of life factors that rank highly for residents include the proximity to friends and family, the sense of community, and the natural environment (as seen in Figure 13).

This strong satisfaction with living in the municipality is further confirmed by a large majority of residents (that participated in the consultations) identifying that they intend to live in the community for the rest of their lives.

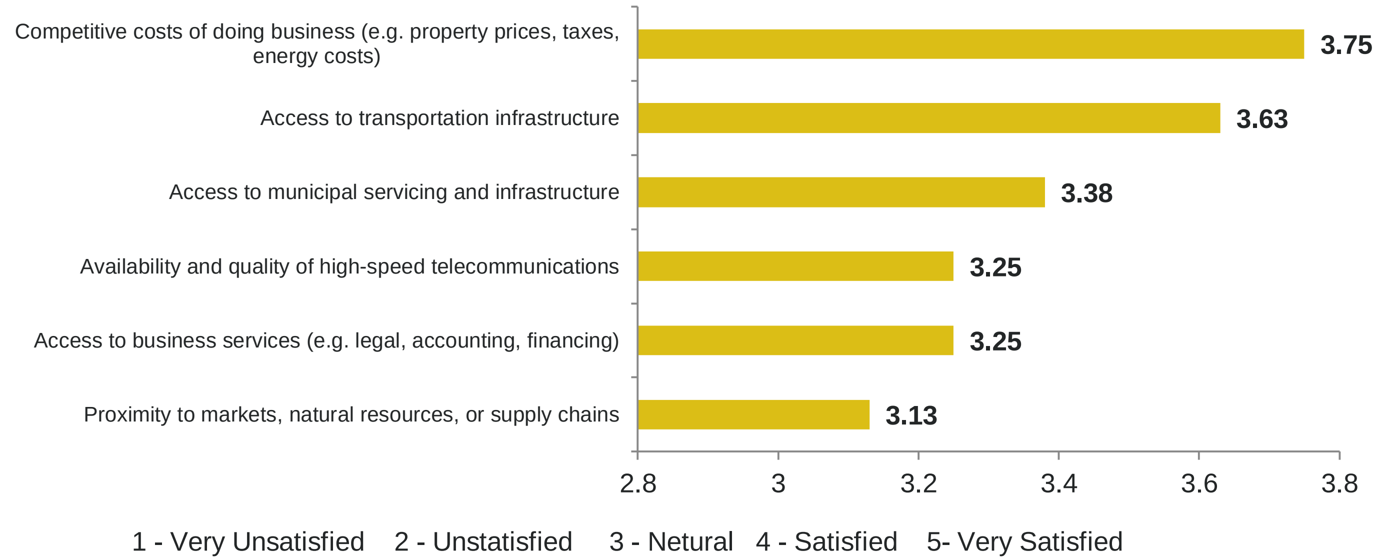
FIGURE 13: HOW WOULD YOU RANK THE FOLLOWING QUALITY OF LIFE CHARACTERISTICS IN OLIVER PAIPOONGE?



A strong majority (94%) of **businesses** participating in the consultation activities identified Oliver Paipoonge as a good location to operate a business. Despite known issues with a poor business climate in the Village of Kakabeka Falls, businesses identified a number of factors that make the municipality a good location for business, including (as seen in Figure 14):

- Competitive cost of doing business (i.e. property prices, taxes, energy costs)
- Access to transportation infrastructure
- Access to municipal servicing and infrastructure

FIGURE 14: SATISFACTION IN MAKING OLIVER PAIPOONGE A GOOD LOCATION FOR BUSINESS



Visions for the Economy

When asked about their vision for the future economy of Oliver Paipoonge, consultation participants identified a number of important elements. These are highlighted in the word cloud in Figure 15 and include (from most mentioned to least):

- Growth
- Sustainable
- Natural
- Community
- Friendly
- Innovative
- Diverse
- Rural
- Creativity

FIGURE 15: WHAT TOP THREE WORDS WOULD YOU USE TO DESCRIBE YOUR VISION FOR THE ECONOMY IN THE MUNICIPALITY OF OLIVER PAIPOONGE IN THE NEXT 10 YEARS?

The emphasis within this vision is on increasing the overall development and investment within the municipality. This is for both industrial and commercial businesses, with an emphasis on attracting new and diverse types of businesses to the area. It is hoped that these new businesses would bring new shopping options to the area, add to the tax base, and help to promote the municipality as “open for business”.

An important component of this increased investment in the community is to ensure that any development is done in a sustainable way and does not negatively impact the environment or the rural feel within the municipality.

Other important components of the vision mentioned include:

- Developing the aesthetic appeal of the Village of Kakabeka Falls and investing in new tourism experiences such as a cycling map or revamped trail system
- Leveraging the bedroom community reputation of the municipality with the potential to attract seniors care facilities to the area
- Tapping into the direct to consumer movement to support the agriculture sector while also diversifying to bring in more food processing to the region

Challenges, Opportunities, and Priorities

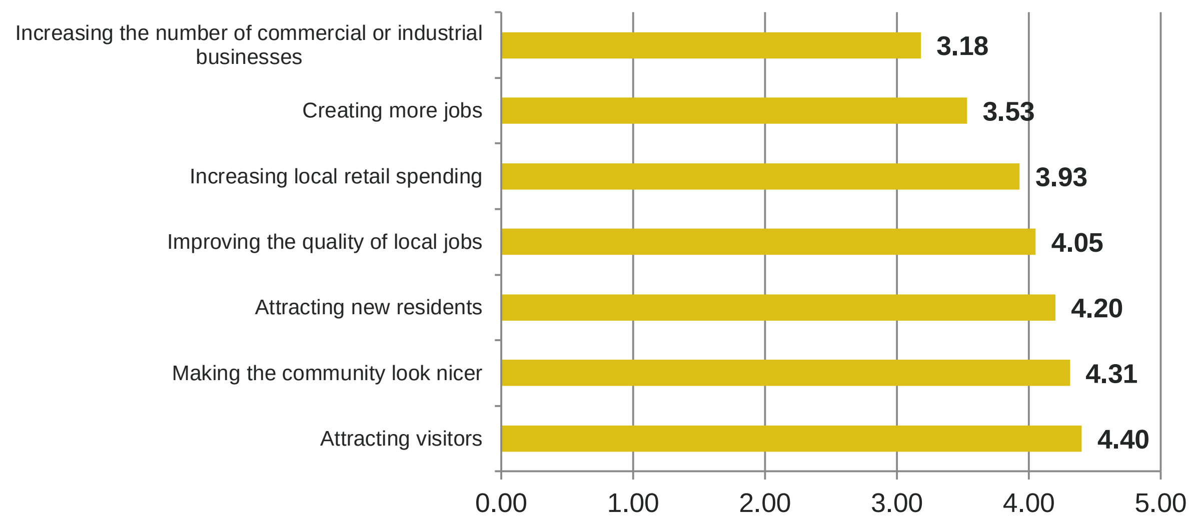
Both residents and business owners (but most especially residents) identified that they experience **challenges** with the high costs associated with living and operating a business in Oliver Paipoonge. This includes high local prices, high taxes, a feeling of a heavy tax burden on residential residents, business start-up costs, and high hydro rates. Other challenges identified are the location of the municipality relative to Thunder Bay (i.e. Oliver Paipoonge is too far from the city, while at the same time close enough that Thunder Bay is seen as competition for business and residents), ensuring sustainable growth in the municipality, and the lack of money/funding that the Municipality receives. Both residents and business owners identified that they were unsatisfied with the current economic development services being provided by the Municipality.

The biggest **opportunity** for business growth and development identified by residents and business owners are the diversity of new business development or investment in the community that is possible, such as having more local stores, new medical services, alternative energy production, and a manufacturing facility. Other important opportunities identified include the significant agricultural base and natural resources in the municipality, the safe and friendly nature of the community, the attraction of residents to the area, and having land to develop new businesses/ventures.

In terms of **priorities**, consultation participants identified their top priorities for municipal leadership are (as seen in Figure 16):

- Increasing the number of commercial or industrial businesses
- Creating more jobs
- Increasing local retail spending

FIGURE 16: IN YOUR OPINION, HOW WOULD YOU RANK THE FOLLOWING AS OBJECTIVES FOR THE MUNICIPALITY OF OLIVER PAIPOONGE? (1 BEING THE HIGHEST PRIORITY, 7 BEING THE LOWEST)



Prioritizing Economic Directions

4 Prioritizing Economic Directions

4.1 Sectors Creating Economic Growth in Oliver Paipoonge

Strong economic development strategies build upon the unique assets and resources of a community, communicating those characteristics to potential investment and development partners to demonstrate unique value propositions. Growing numbers of entrepreneurial 21st century communities are using local advantages to spur innovation, investment and job creation, while retaining their cultural and environmental assets.

The selection of economic development opportunities is rooted in the philosophy that initiatives must ultimately increase the total wealth within a community. This is accomplished in two ways:

- **Export Development** – Initiatives that bring new money into the community such as starting/attracting a business that sells products/services outside the community, attracting visitors who then buy local products/services, and encouraging existing business to sell their product/service outside the community.
- **Import Substitution** – Initiatives that keep money in the community and recirculate it such as encouraging people and businesses to buy their goods/services locally rather than importing them from another community and starting or attracting new businesses that recognize the leakage and provide a product/service to stop it

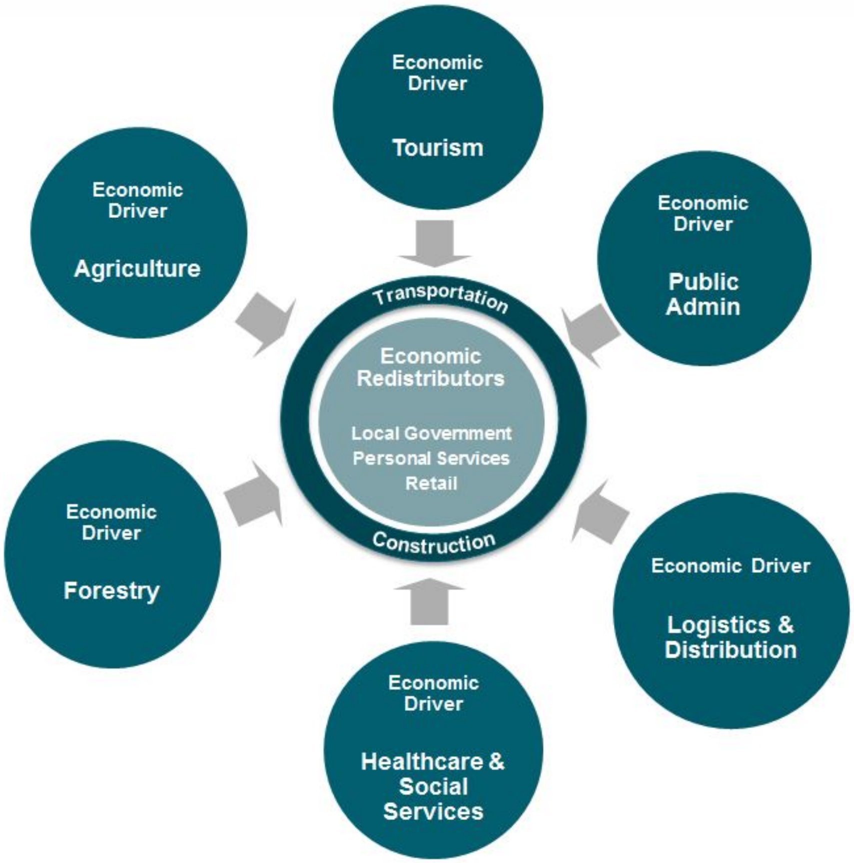
These two philosophies form the fundamental direction for economic development programs. If economic development programs are meant to increase wealth in the community (and for the community) then initiatives should be directed to improving export development (primarily) and improving import substitution (secondarily).

The concept above is profiled in Figure 17, below. The circles on the outside represent sectors that are "driving" wealth into Oliver Paipoonge. This wealth comes both from businesses located within the municipality and from residents working outside the area. The businesses in the sectors in the centre benefit from the economic stimulus and keep wealth circulating within the municipality. In strong economies, this wealth changes hands many times before it is spent outside. The impact of these drivers and subsequent circulation is job creation, property investment, and local taxation.

Export development and import substitution activities bring wealth into the community. Other activities are redistributors – they circulate the money within the community.

Strong economies bring in new money and then keep it in the community as it moves from business to business.

FIGURE 17: CURRENT ECONOMIC DRIVERS AND REDISTRIBUTORS, OLIVER PAIPOONGE



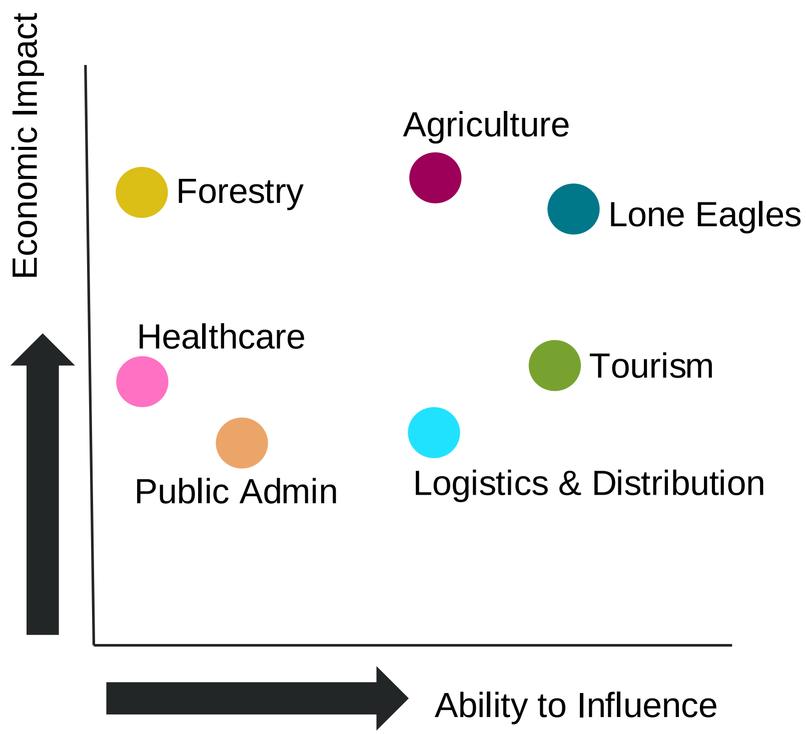
These economic drivers are further refined by setting priorities based on two additional criteria:

- The economic impact of the sector in Oliver Paipoonge
- The ability for the municipality to influence growth in the sector

As seen in Figure 18, agriculture, attracting lone-eagle businesses, and tourism all offer strong economic impacts for the municipality along with a relatively high ability for the municipality to influence the sector. These will form the basis for the highest priority sectors for the municipality to focus on in the Economic Development Plan.

Public administration, healthcare and social services, and forestry, on the other hand, offer relatively low levels of ability to influence for the municipality. Despite having important economic impacts, these sectors are not considered high priority focus areas due to the larger forces driving the success of these sectors (such as global market forces or government budget decisions).

FIGURE 18: ECONOMIC IMPACT VERSUS ABILITY TO INFLUENCE IN THE MUNICIPALITY OF OLIVER PAIPOONGE



4.2 Focusing Economic Development Priorities

Building on the economic drivers and redistributors in the Oliver Paipoonge economy, four priority areas have been identified that have the greatest potential of creating positive economic impact in Oliver Paipoonge over the coming years. These strategic priorities are intended to be anchors to set the context for a range of continued economic development planning in the community and will be the focus of action plans in the following sections.

These four priority areas are:

- Economic Development Readiness
- Primary and Value-Added Agriculture
- Tourism
- Attracting "Lone Eagle" Businesses

FIGURE 19: FOCUSING OLIVER PAIPOONGE'S ECONOMIC DEVELOPMENT PRIORITIES

4.3 Interpreting the Action Plans

The following sections provide a series of action plans which directly support the economic development priorities described above. These actions plans should be interpreted in the following context.

Timing and Priority

In the actions tables to follow, the level of priority has been based on several criteria including:

- The level of immediacy based on the Municipality's economic development objectives
- The potential to contribute to the overall economic vitality and sustainability of Oliver Paipoonge
- The resources required (i.e. the capacity to implement given the current state)

The priority level assigned to each action item also corresponds to a specific timeframe. The time frame for each priority level may be operationalized as:

- Highest – immediately
- High – within a year
- Medium – within 2 years
- Low – 2-4 years

Performance Management

Performance measurement is a tool to determine how well a job has been done using both qualitative and quantitative information and activities. The following reasons make it important to track activity and performance:

- Providing public accountability
- Assisting with human resources management
- Using results to improve performance
- Identifying the return on investment

An effective economic development office must measure and communicate these results.

Unfortunately, performance measurement in economic development is not a common practice. This is something of an unacceptable situation and is slowly changing as economic development professionals see the merits in tracking performance so they can improve their operations. To a large degree though, they are reacting to negative circumstances – only tracking because their stakeholders are forcing them. Governors of municipal dollars cannot be blamed, however, as they are being increasingly pressured by their constituents to do more with less.

Below each of the action plans are several performance metrics. It is recommended that the Municipality carefully consider each metric before their application. A couple questions to consider before their use include:

- Is there enough information to consistently inform this metric over time?
- Are there enough resources to consistently monitor the metric?
- Does the metric effectively demonstrate the success or failure of the action?

If any of these questions cannot be answered with a definite “yes” than the Municipality should consider a different measure.

4.4 Establishing an Economic Development Vision and Mission

A vision statement is meant to capture the goals, aspirations, values, and collective desires of a community and act as a clear guide for choosing future courses of action. An economic development vision for Oliver Paipoonge is meant to capture these attributes through the lens of economic prosperity. It encompasses the desired future state of what the Municipality can ultimately achieve from an employment and business growth perspective. Wealth generation, entrepreneurship, innovation, and increased investment can all directly translate into increased quality of life, fuller and more meaningful employment, improved services, and community well-being.

An economic development mission statement, on the other hand, is present-based and designed to convey a sense of what priorities are and clearly state which markets will be served and how. The mission statement is different from the vision in that the mission is something to be accomplished whereas the vision sets the larger framework for that accomplishment.

An economic development vision statement and mission statement is presented below to guide the economic development efforts of the Municipality of Oliver Paipoonge. Both statements are grounded in input from community stakeholders as well as the challenges and opportunities that the Municipality faces. These statements have been further refined to create short yet informative directions.

Economic Development Vision Statement

The Municipality of Oliver Paipoonge has a strong and continually growing economy that is complemented by maintaining the rural charm and environmental integrity that make the municipality a unique place to live, work, and visit.

Economic Development Mission Statement

The Municipality of Oliver Paipoonge ensures a highly livable and entrepreneurial environment by being responsive to business needs and adopting a culture of customer first service

The following guiding principles underpin the vision and mission statements:

- High levels of collaboration and partnership between various levels of government are of critical importance in achieving economic success in Oliver Paipoonge
- Oliver Paipoonge needs to be a prosperous choice for business and for families to move into

- Oliver Paipoonge is a top northern tourism destination
- A diversity of small businesses as well as larger industrial and commercial businesses from a variety of industries will create the strongest economic foundation in Oliver Paipoonge
- An explicit culture of 'customer first' service within Oliver Paipoonge will communicate that the municipality is "open for business"
- Rural living and rural-based businesses are a foundational element to the economic success of Oliver Paipoonge
- Improvements in resident quality of life by enhancing recreational, cultural, and social opportunities will create important economic spin-off opportunities
- Attracting visitors to the region is an important aspect of a strong economy in Oliver Paipoonge

Building a Strong Foundation: Economic Development Readiness

5 Building a Strong Foundation: Economic Development Readiness

A strong economic foundation focuses on enhancing the building blocks of economic development, such as labour market development, entrepreneurship, communications and marketing, and infrastructure readiness. Growth in specific industry sectors is an outcome from this investment.

Priding itself on being a community that is “open for business” Oliver Paipoonge needs to ensure that it is open and ready for business. Good customer services will leave a positive impression, build and enhance business relationships, and ensure future referrals. The landscape for investment across the region is competitive, with many communities adopting innovative processes to ensure excellence for potential new investors and existing businesses.[7] For Oliver Paipoonge, offering tailored investor services that are flexible and efficient to investor needs is important in attracting and retaining businesses to the municipality. Acting as a one-stop service point of contact for businesses and investors, the municipality’s Economic Development Officer is a critical factor in the competitiveness of Oliver Paipoonge in the region.

Moving beyond the traditional role of a bedroom community to the City of Thunder Bay also requires a focused marketing campaign. This campaign needs to showcase the unique identity of Oliver Paipoonge, highlighting community pride and the opportunities available to new residents that locate to the area. Attracting new residents takes time but with the right building blocks in place, the municipality can continue to differentiate itself from Thunder Bay and surrounding areas as a great place to live and do business.

Strengths	Weaknesses
▪ Good collaboration between neighbouring municipalities ▪ Considered a business friendly community ▪ Land and buildings available for development	▪ Lack of full servicing in Rubin Industrial Park (e.g. water) ▪ Lack of support for existing industry in the area (mentality of a bedroom community) ▪ Poorly located industrial lands ▪ Inconsistent funding to economic development programs
Opportunities	**Threats**
▪ Targeting new industries based on available servicing (e.g. mining) ▪ Raising OP’s profile and increasing marketing efforts ▪ Succession planning for local businesses ▪ Stranded assets (e.g. Heritage Village)	▪ Difficulties working with the provincial government (e.g. policies and red tape, communication, residential expansion) ▪ Demographics (20-45 year old cohorts missing) ▪ Inconsistent support for economic development continues

[7] The Town of Ajax (Ontario), for example, uses the “Ajax Priority Path”, which uses a team of professionals to personally help companies navigate through the site plan approval process, helping to expedite site plan and building approvals and enabling the fast-track of business plans. The Township of North Grenville (Ontario) has also adopted a client-focused initiative that has drawn accolades from Ottawa-based developers.

Competitive Advantages

- Business friendly climate (support from Council, permitting is easy)
- Good access to transportation networks (three provincial highways cross the municipality)

Competitive Disadvantages

- Stranded assets becoming a fiscal burden
- Challenges bringing the business community together for a common goal
- Sale of land in Rubin Industrial Park will take longer because it is poorly located and underserviced
- Underfunded and reactive economic development resources

Action Plan

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Prioritize a Customer First Service Experience	A1	Engage in regular formal and informal communications with businesses to showcase Council support for business development and the importance of having a healthy business culture in Oliver Paipoonge.	Highest	Lead; Thunder Bay and District Entrepreneur Centre, Thunder Bay Chamber of Commerce
	A2	Identify and create new processes that provide tailor-made services to business customers and developers.	Highest	Lead
	A3	Establish a high standard for customer service and investment readiness and build those into the municipal brand and identity.	High	Lead
	A4	Commit to funding the Economic Development Officer position and supporting the Economic Development Committee on a permanent and ongoing basis.	High	Lead

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Refresh Oliver Paipoonge's Image as an Attractive Place for People to Invest, Live, and Visit	A5	Actively work on influencing external and internal perceptions about Oliver Paipoonge including topics such as property tax rates, availability of residential and industrial land (see Action A6), quality of the agricultural land, community commitment to sustainability, and natural beauty including Kakabeka Falls. Writing and distribution of business success stories, videos, and images, online social media and strong website presence are fundamental channels in helping to increase profile. In the early stages it is as important to share this information locally as it is to share it widely – building a sense of belief in community amongst residents is huge. - "Content is King" – it drives traffic to websites – an contracted copywriting specialist or internal capabilities are critical - Consider a separate web portal for promotions – separate it from the 'hard' news that the municipality must communicate to its tax payers (e.g. fire bans, changes to landfill hours, construction updates) - Leduc's "Build with Us" campaign was a successful example of how a partnership with developers and home builders positioned Leduc as a preferred option for new homebuyers in the Edmonton region. - For internal perceptions, the recent award winning initiative "St Thomas Proud" is a good example of an initiative used to generate excitement and pride in the local community that highlights local community opportunities and assets, and encourages residents to get involved (www.stthomasproud.ca).	High	Lead Local business leaders; owners of development property and home builders
	A6	Develop and maintain a vacant land and storefront inventory and a 'shovel ready' development land inventory.	High	Lead Owners of development property and home builders

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Invest in Local Labour Force and Resident Attraction and Retention	A7	Work with surrounding communities to create a regional resident attraction campaign highlighting the benefits of living in Oliver Paipoonge. Professionals (e.g. lone eagles businesses) and families should be the main targets for this campaign, though other groups such as seniors could be targeted as well in tandem with new investments in senior's/retirement housing. *Refer to Section 8 below for more information about attracting lone eagle businesses.*	High	Partner; Immigration Northwestern ON
	A8	Create a seasonal "community tours" program to showcase the quality of life assets of Oliver Paipoonge for those considering living in the municipality.	Medium	Lead
	A9	Partner to develop a Labour Market Supply and Demand Study for the regional economy. This Study should identify what employment will be most in demand in the coming years, as well as attrition rates due to retirement and emerging opportunities. Findings from this Study should be rolled in to the resident attraction campaign (outlined above) to help target certain types of professionals to the area.	Medium	Partner; North Superior Workforce Planning Board
	A10	Support succession and business planning by establishing and managing an inventory of businesses for sale in the region.	Medium	Lead; Immigration Northwestern ON
Collaborate with Communities in the Region to Enhance Regional Competiveness	A11	Fight regional population decline by working collectively with other communities in the region to develop joint initiatives and programs to attract more talent and investment to Northwestern Ontario.	High	Partner; City of Thunder Bay, Township of Conmee, Fort William 52 First Nation, Township of Gillies, Municipality of Neebing, Township of O'Connor, Township of Shuniah
	A12	Identify new business investment opportunities that would enhance the supply chains of existing business in the municipality and the region as a whole.	Low	Partner; Thunder Bay and District Entrepreneur Centre, Thunder Bay Chamber of Commerce

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Catalyze New Growth in the Rubin Industrial Park	A13	Develop a promotional piece that attractively highlights the land and opportunities for development in Rubin Industrial Park. See Action A6 for importance of available properties inventory.	High	Lead
	A14	Develop a master plan for Rubin Industrial Park that lays out a plan for servicing, removes load restrictions on access roads, identifies design standards, and increases visibility.	Medium	Lead

Performance Measures

- Number of new business licenses
- Number of companies that have expanded and been retained
- Number/value of permits
- Jobs created (i.e. fulltime, part-time, contract, seasonal) due to new businesses and start-ups, business relocation and existing businesses expanding
- Residential growth

Priority Opportunity: Primary and Value-Added Agriculture

6 Priority Opportunity: Primary and Value-Added Agriculture

Agriculture in Northern Ontario generated $192 million in 2011 with production coming from 2,600 farms.[8] The most significant contributors to these revenues are dairy, beef, floriculture and nursery, hay, canola, maple products, and potatoes. Dairy and beef production in particular are important sectors in Northern Ontario. Despite only having about 5% of the total farms in the province, Northern Ontario has a beef industry that is larger than that of any Atlantic province in Canada and a dairy industry that is comparable in size to New Brunswick.[9]

The Thunder Bay District has 239 farms, representing about 9% of Northern Ontario's total farms and 17% of total revenues ($32.4 million, second to Temiskaming District further south). Oliver Paipoonge accounts for just under half of the number of farms in the district (109 farms), most of which (55%) are involved in dairy or beef production.[10] Other important farm types in the municipality include hay farming, horse and other equine production, vegetable and melon farming, greenhouse, nursery and floriculture production, and other animal production.[11]

Strengths	Weaknesses
▪ Significant agricultural base with excellent agricultural land ▪ Close ties to Thunder Bay local food strategies ▪ Young farming population ▪ Extended sunshine in the summer months for growing crops	▪ Limited commercial services and capacity to meet local farmer needs and demands (e.g. abattoir at full-capacity, few to no equipment dealers and repair services)
Opportunities	**Threats**
▪ Building a stronger local food economy ▪ Linking clustered agricultural assets for tourism initiatives ▪ Food processing initiatives	▪ Potential future risk of rezoning of agricultural lands to meet residential and/or commercial demands

This strong clustering of farms in Oliver Paipoonge has led to a tight knit farming community in the municipality. With a fairly young farming population, very good soil quality, prime agricultural lands, and direct access to consumers in Thunder Bay (Ontario's third largest farmer's market), Oliver Paipoonge has strong building blocks in place to grow the economic impact of its primary and value-added agriculture sectors.

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[8] Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA), "Northern Ontario Agriculture, Aquaculture and Food Processing Sector Strategy – Discussion Paper", 2016, http://www.omafra.gov.on.ca/english/policy/northernagrifoodpaper.htm

[9] Ibid

[10] Statistics Canada, "Table 004-0200 - Census of Agriculture, farms classified by the North American Industry Classification System (NAICS), every 5 years (number), CANSIM (database)", 2011

[11] Ibid

Opportunities

Immediate opportunities for Oliver Paipoonge's agriculture sector are linked to helping meet the growing demands within the region for local, fresh food. This demand is captured in the "Thunder Bay and Area Food Strategy" in which access to good and nutritious food is established as a human right and support for the creation of a food supply chain linking food purchases that foster local production, processing, and distribution is prioritized.[12] Thunder Bay is also home to Ontario's third largest farmer's market. Connecting the strong farming sector in Oliver Paipoonge with this growing market in Thunder Bay is critical to the continued growth of agriculture in the municipality (this includes both primary agricultural products and value-added products).

In 2015, Slate River Dairy began processing fluid milk and producing yogurt.

This new on-farm milk processor has differentiated itself in the world of artisanal dairies via its milk pasteurization and yogurt making techniques as well as its glass bottle packaging.

Other interesting emerging opportunities in the agricultural sector include:

- **Supplying northern markets with fresh fruits and vegetables** not traditionally produced across the north due to changing climate conditions and use of innovative techniques (e.g. row covers)
- **Growing more cereals crops that are well suited to the Northern Ontario climate** (such as oats, barley, and spring wheat) **to help meet increasing demands by food processors**. For example, demand for milling oats (i.e. oats for human consumption) from the food processing industry within Canada and the United States has increased. These oats generally fetch a premium price due to the quality of oat required to meet milling standards. Also, the processing capacity for malting barley in Northern Ontario has resulted in an opportunity for northern producers.
- **Increasing livestock production to meet the low supply and high demand that the North American beef industry currently finds itself.** With national and international demand for beef products rising, a large beef and cattle industry, and a relatively affordable price of farmland compared to Southern Ontario, Northern Ontario farmers are well positioned to grow their businesses.
- **Growing innovative crops that may have use in the bio-economy**, such as the use of agro-based biomass for heat combustion/co-generation of heat and development of biodiesel. Crops that can be grown in Northern Ontario offering the strongest potential links with the bio-economy include miscanthus, camelina, prairie grass, bluestem grass, hemp, and varieties of short-rotation willow.
- **Harnessing food processing trends throughout the north showing that growth is occurring in processing businesses such as bakeries, fruit and vegetable preserving/specialty food manufacturing, and grain and oilseed milling**. National and international trends in food processing are for healthy, packaged foods as consumers have limited free time and the frequency of sit-down meals is decreasing. Demand for convenient, ready-to-eat, packaged meal options

[12] "Thunder Bay + Area Food Strategy – Implementation Plan", 2014

is expected to increase, with items such as prepackaged salads, low-sodium frozen meals, dried fruit snacks, and frozen organic ingredients expected to see the largest increases. These packaged products generally carry higher profit margins than primary agricultural products.[13]

Competitive Advantages

- Highest concentration of farms in the region (clustering and agribusiness opportunities)
- Population of younger farmers who envision a positive future

Competitive Disadvantages

- Under-serviced commercial sector that supports the agricultural sector (e.g. abattoir at full-capacity, few to no equipment dealers and repair services)
- Reliance for many on the dairy quota system which could stunt new business creation

Action Plan

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Grow Oliver Paipoonge's Reputation as the Source of Fresh, Nutritious Food in the Thunder Bay Region	B1	Create a local food brand for agricultural products coming from Oliver Paipoonge and help to promote the brand within the region. The brand will fit within the municipality's existing branding and should be included on all consumer based agricultural products coming from the municipality.	Highest	Lead
	B2	Tour other municipalities that have successfully leveraged a strong rural and agri-food brand to grow their economy. Example communities in Ontario include Norfolk County (http://www.norfolktourism.ca/norfolk-farms) and the United Counties of Prescott-Russell.	Highest	Lead

[13] Agriculture and Agri-Food Canada, "Industry, Markets, and Trends: Fruits and Vegetables"

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
	B3	Upload and showcase local food from Oliver Paipoonge on the municipality's website. This content should include information on where to buy products, profiles and stories of producers (with videos), and details on the range of available items for purchase throughout the year.	High	Lead
	B4	With regional partners, encourage a buy-local campaign for residents to purchase products directly from farmers within the municipality.	Medium	Partner; Thunder Bay Country Market, Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture
	B5	Support farmers in the municipality to create formal relationships with grocery stores and food markets/outlets in Thunder Bay.	Medium	Partner; Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture
Support New Ideas and Expansion Within the Agriculture Sector	B6	Create a local food working group bringing together agricultural producers in the municipality. This working group should have a main focus on understanding how producers can collaborate with each other to grow the sector, negotiate as a collective, and identify ways that local food can be incorporated into local tourism experiences.	High	Lead; Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture
	B7	Partner to create a regional GIS map of the agricultural value chain. This map should identify where the clusters of agricultural activity are and what types of agricultural operations exist. This map will help to attract new businesses within the agriculture value-chain (i.e. support services, food processing) and can also be used to market the region for tourism purposes.	Medium	Partner; Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture
	B8	Collect information on available funding programs for expanding agricultural production (both primary and value-added) and assemble them into an easy to read "one-stop" shop information resource. Also, help build relationships with relevant funding contacts to help agriculture businesses access the finance and support they need to grow.	Low	Partner; Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
	B9	Conduct a market research study to understand what types of crops can be grown in the region that have strong national and international market potential (e.g. bio-products, food processing trends, energy generation)	Low	Partner; Thunder Bay and Area Food Strategy Committee, Thunder Bay Federation of Agriculture
Establish more Agri-Tourism Experiences	B10	Package agri-tourism experiences with other popular attractions in the region as part of a coordinated marketing program	Medium	Partner; City of Thunder Bay, Township of Conmee, Fort William 52 First Nation, Township of Gillies, Municipality of Neebing, Township of O'Connor, Township of Shuniah
	B11	Develop new agri-tourism experiences to encourage more visitors to the municipality. Experiences could include feeding and riding animals, food tourism and cooking demonstrations/classes, learning to farm, milking a cow, and staying on a farm.	Medium	Lead
	B12	Link agriculture assets throughout the municipality with new tourism initiatives, such as building cycling routes and offering guided tours	Low	Lead

Performance Measures

- Growth in revenues of agricultural producers
- Number of new agriculture experiences
- Number of agriculture related businesses, with a separate focus between primary agriculture and food processing
- Number of partnerships, size of partnerships, type of partnerships

Priority Opportunity: Tourism

7 Priority Opportunity: Tourism

Tourism is an important industry in northwestern Ontario. In 2012, there were 2.5 million visits in the region accounting for $605 million in spending.[14] Visits and spending were each up 24% compared to 2011. More than half of these visitors were from Ontario, with three quarters of Ontario visitors residing in northwestern Ontario.

Kakabeka Falls Provincial Park is one of the premier tourism destinations in northwestern Ontario. With an average of 230,000 visitors each year[15], Kakabeka Falls draws by far the largest number of visitors compared with other provincial parks in the region. Roughly 88% of those visitors are day-visitors, coming for a hike and/or to enjoy Kakabeka Falls.

Despite this large tourism asset sitting within Oliver Paipoonge, businesses within the municipality have been struggling to capitalize on the successes of the provincial park. Difficulties getting the business community to work together, dated and run down storefront aesthetics, and few new tourism experiences have left the Village of Kakabeka Falls as an uninspiring destination. With continued uncertainty around rerouting of the provincial highway in the region, businesses within the village are dealing with a level of perceived risk that is also limiting their investments into the community.

Strengths	Weaknesses
▪ Tourism asset in Kakabeka Falls and others to support (e.g. cheese farm, Founder's Village) ▪ Very accessible from Thunder Bay, TransCanada Highway, and airport ▪ Beautiful landscapes	▪ Difficulties with improving Kakabeka Falls Village (e.g. cooperation, limited activity) ▪ Scattered and disconnected tourism assets ▪ Outdated hospitality products and services ▪ Little focus on the tourism experience
Opportunities	**Threats**
▪ Commercialization of Kakabeka Falls and community planning in the Village ▪ Increased tourism marketing and signage ▪ Creating a unified visitor experience	▪ Potential for transport trucks to travel through Kakabeka Falls and/or highway re-routing ▪ Changing tourism trends (next generation not visiting like their parents used to)

Priority needs to be focused on working to catalyze tourism business in the Village of Kakabeka Falls and using the natural draw of the waterfall as a gateway into other tourism experiences within Oliver Paipoonge. Making Oliver Paipoonge a more "tourism friendly" community by making it easier to walk, cycle, shop, eat, and sleep in the municipality would go a long way in reinventing the tourism experience.

[14] Tourism Research Unit, Ontario Ministry of Tourism, Culture and Sport, "2012 Tourism Statistics: Region 13c", Summer 2014

[15] Average calculated based on visitor statistics from 2005 to 2012

A Movement towards "Tourism Experiences"

The tourism industry has undergone a shift in the past number of years towards "experiential tourism". Experiential tourism prioritizes creating tourism experiences for visitors at a destination rather than simply presenting tourism assets to visitors to make their own experience. Tourism assets such as a waterfall, museum, or boardwalk need to come alive, providing a once in a lifetime experience where people create memories through direct hands on participation. Visitors are looking for opportunities that engage them in memorable and authentic cultural experiences that are personal, engage the senses and make connections on an emotional, spiritual and intellectual level.

Some of the key elements of experiential tourism are:

- **Hands-On Activities** – a participatory experience that provides new knowledge and authentic experiences
- **Local Authentic Community Experts** – engaging with local community members to share in their expertise of their home and history. Visitors want to engage with their destination through the knowledgeable lens of a local guide that can deepen their interaction with the place they are visiting.
- **All Five Senses** – engage all five senses of smell, sight, touch, sound and taste to ingrain the experience with visitors so they will remember it as unique and immediately identifiable with the destination
- **Highlighting Uniqueness** – each destination offers an incredible diversity of experiences and history. Make sure that experiences for visitors are framed around what makes the destination unique (i.e. local nature, culture, history, cuisine)
- **A Personal, Unique, and Intimate Experience for Each Visitor** – match visitor interests and provide a sense of personal accomplishment that creates a unique memory for each visitor

Competitive Advantages

- Huge tourism asset in Kakabeka Falls (attracts 250,000+ visitors/year)
- Unique agri-food and agri-tourism opportunities for Northern Ontario

Competitive Disadvantages

- Dysfunctional level of cooperation in the business community of Kakabeka Falls Village that has resulted in little optimism and few improvements over the last 20 years
- Disconnected attractions that do not offer a compelling destination

Action Plan

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Catalyze Tourism Investment Throughout the Municipality	C1	Work with tourism businesses throughout the municipality (most especially Kakabeka Falls) to form an Oliver Paipoonge Tourism Business Association. This association should work with Council and the Economic Development Committee to voice the needs of the tourism industry to decision-makers, encourage collaboration among tourism businesses, and organize community and tourism events to help raise the profile of the municipality.	Highest	Lead
	C2	Create a Tourism and Marketing Strategic Plan that will support the creation of tourism and marketing initiatives in the municipality. The Plan should include a vision for the sector and a five to ten year capital plan with matching funding to encourage necessary investments and upgrades in the tourism sector, most especially targeted at businesses in the Village of Kakabeka Falls. Examples of these types of investments include trails, signage, aesthetic improvements, recreation and picnic areas, and facility expansions.	High	Lead; North of Superior Tourism Association
	C3	Create a façade improvement program to encourage tourism businesses to improve their store-front aesthetics	High	Lead
	C4	Show strong municipal support for new festivals and events hosted in the municipality. This support could come in the form of funding, staff time, in-kind services, and promotions.	Medium	Lead
	C5	Consider the use of incentives (e.g. free advertising, marketing etc.) to encourage product development or experience enhancement for existing tourism operations/activities	Medium	Lead
	C6	Establish an ongoing tourism visitor survey in the municipality. Build buy in from tourism operators to distribute the survey upon the completion of stays. This information will assist in determining what may encourage people to stay or extend their stay in the area.	Medium	Partner; North of Superior Tourism Association, City of Thunder Bay Tourism Department
	C7	Create an inventory of all funding opportunities that can assist with product development, as well as tourism infrastructure, and capital investments. Provide this information to tourism operators and continue to update and promote it widely.	Medium	Partner; North of Superior Tourism Association, City of Thunder Bay Tourism Department

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Grow the Profile of the Tourism Sector	C8	Support tourism development through increased marketing and promotion efforts. Work with neighbouring municipalities to cross-promote complementary themes and tourist operators and help to broker partnerships between operators.	High	Partner; North of Superior Tourism Association, City of Thunder Bay, Fort William 52 First Nation, Townships Conmee/Gillies/Shuniah/ O'Connor Municipality of Neebing
	C9	Create more unified visitor experiences that link Kakabeka Falls Provincial Park and the Village of Kakabeka Falls. Examples of these experiences could include having a horse and buggy service go from the park to downtown and hosting more festivals in the village.	High	Lead
	C10	Partner with Fort William 52 Reserve (and other Aboriginal communities in the region) to develop and deliver new tourism programming and events specific to local Aboriginal cultures and identity	High	Partner; Fort William 52 Reserve
	C11	Link fragmented tourism assets throughout the municipality (e.g. Founders Pioneer Village, museum, Kakabeka Falls). Offering guided tour services or creating trails or cycling routes connecting them all offer interesting opportunities to do this.	Medium	Lead; City of Thunder Bay, Township of Gillies, Municipality of Neebing, Township of O'Connor
	C12	Explore the feasibility of attracting new and innovative ecotourism experiences to the area, combining the strong outdoor beauty of the area with a desire by many visitors for conservation and environmental sustainability.	Medium	Partner; North of Superior Tourism Association, City of Thunder Bay Tourism Department

Performance Measures

- Growth in the number of tourism businesses
- Growth in the number of visitor nights per visit and spending
- Number of new festivals and events
- Number of businesses accessing municipal incentive systems
- Number of new tourism experiences
- Visitor satisfaction levels

Priority Opportunity: Attracting Lone Eagle Businesses

8 Priority Opportunity: Attracting Lone Eagle Businesses

Freelance professionals and independent entrepreneurs, also known as "Lone Eagles", are knowledge workers with highly transportable skills that can establish their business anywhere. Examples of lone eagles include writers, analysts, artists, accountants, trades people, sales professionals, manufacturers' representatives, consultants, and other advisors.

By definition a lone eagle is someone who:

- Generates 75% or more of their income from outside the local area
- Is mobile and can live wherever they want
- Is leaving large urban environments, rapid development, and environmental degradation
- Wants specific quality of life amenities such as clean air and quiet spaces to enjoy flora and fauna, access to high quality telecommunications services, reasonable access to an airport with scheduled service, to be closer to relatives, outdoor recreational activities, a safe place to live, and employment for their spouse (if applicable)

Strengths	Weaknesses
Adjacent to Thunder Bay and its services Growing "white" and "gold" collar employment and population in the region Strong demand for residential lots and housing Strong quality of life factors	Infrastructure limitations (e.g. broadband) Very limited small office, event, and training spaces Recreation assets scattered throughout the municipality
Opportunities	**Threats**
Potential to expand and grow the resident population of the hamlets including retirees Incentives for more build-in and intensification Stranded assets as business or 'maker' space	Dependence on resource industries to grow the commercial and retail base leads to cyclical and unpredictable economic growth Province's regulatory limits on residential growth within the municipality

Most lone eagles live in large cities but many are moving to small towns and rural areas in search of a better quality of life. An increasing number of rural areas that are near larger urban centers are trying to attract lone eagles to their community, with some communities being quite successful at it.[16]

The benefits of attracting lone eagles to a community are many and include:

[16] For instance, Prince Edward County in Eastern Ontario has focused much of their entire economic development campaign around this class of individual as well as agri-food producers and tourism operators (see www.buildanewlife.ca)

- Business leaders have a way of attracting other business leaders. Lone eagles often act as the informal ambassadors for new investment in the community.
- Lone eagle businesses are often the businesses that often grow quickly into five, ten, or 50-person operations
- People are much more likely to shop in the community in which they work which increases local economic spin-offs
- They provide services and supplies to larger businesses which may make larger investors looking to invest in the community more confident that the key skilled labour they need can be found locally
- They provide a needed level of diversification which keeps the economy stable in tough economic times
- Spouses and/or children of these small business operators offer a ready supply of local employees
- The types of recreational amenities, community improvements, and physical environment they pursue are generally consistent with the desires of tourists or visitors. This means that an investment in attracting lone eagles will also attract visitors/tourists.

Over the past ten years, Oliver Paipoonge has seen a consistently strong demand from people looking to live in the community. This has led to an increase in the amount of homes in the municipality. Many of these new residents are searching for the rural and outdoors lifestyle while still working in Thunder Bay. The municipality's close proximity to city amenities and services combined with its rural charm make it well-suited to attracting lone eagle businesses.

Competitive Advantages

- Residential growth and the close proximity to Thunder Bay and its services including the airport
- Strong quality of life factors that draw people to the area

Competitive Disadvantages

- Disconnected recreation assets
- Lack of access to critical business supports (e.g. high speed internet is inconsistent – strong in some areas of the municipality but not others, business centres)
- Province's regulatory limits on residential growth

Action Plan

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
Foster an Environment for Lone Eagle & Small Business Growth	D1	Partner with the Thunder Bay & District Entrepreneur Centre and other small business support networks to deliver training, business counselling, market research support, business planning, marketing, event planning, and legal and financial assistance	High	Partner; Thunder Bay and District Entrepreneur Centre, Thunder Bay Chamber of Commerce
	D2	Review and update on a regular basis the municipal by-laws and policies as they pertain to home occupations and businesses	High	Lead
	D3	Encourage the development of a local business space that allows for small professional service agencies like engineers, accountants, legal services, public relations, and internet/website services to operate from. For example, the Municipality could encourage this investment by properly zoning land and finding investors. This space should: • Be centrally located with ample parking • Provide internet access • Provide printing and photocopying services • Be tied to business mentoring services	Medium	Partner; Thunder Bay and District Entrepreneur Centre, Thunder Bay Chamber of Commerce
Market and Promote the Lone Eagle Environment of Oliver Paipoonge	D4	Develop a marketing and promotions campaign targeted at attracting lone eagle businesses to Oliver Paipoonge. This campaign should outline the quality of life and business advantages of living and working from the municipality, share success stories from other businesses that have relocated to the area, and clearly list the contact people within the municipality to reach out to for more information. A good example of a web based approach to consider is Prince Edward County's "Build a New Life" campaign (www.buildanewlife.ca).	Highest	Lead

Description of Broader Opportunity	Action #	Recommended Actions	Priority	Municipal Role & Partners
	D5	Distribute frequent information updates about successes in Oliver Paipoonge to groups of people who have ties to the municipality. These groups include citizens and business owners, high school graduates, and people who once worked in the community or visited. Provide ongoing information to this target group through social/interactive media networking, email distribution, website postings, and newspaper/radio/television appearances.	High	Lead
	D6	Create a database of potential lone eagle businesses based in Thunder Bay that have the potential to be attracted to Oliver Paipoonge. Develop relationships with these businesses and include them in periodic information updates on the advantages of living and working in Oliver Paipoonge.	High	Lead; Thunder Bay and District Entrepreneur Centre, Thunder Bay Chamber of Commerce
	D7	Market the municipality to local educational institutions (e.g. universities and colleges) to promote Oliver Paipoonge as an exciting place for new graduates to establish themselves and start a business. Work to spread the success stories of young professionals in Oliver Paipoonge with these graduates to showcase examples of people who have already made the switch.	Medium	Lead; Lakehead University, Confederation College, Thunder Bay and District Entrepreneur Centre

Performance Measures

- Number of new businesses created
- Number of new residents attracted
- Number of inquiries coming from those looking to relocate to the municipality

Appendices

Appendix A – Demographic and Labour Force Analysis

8.1 Demographic Characteristics

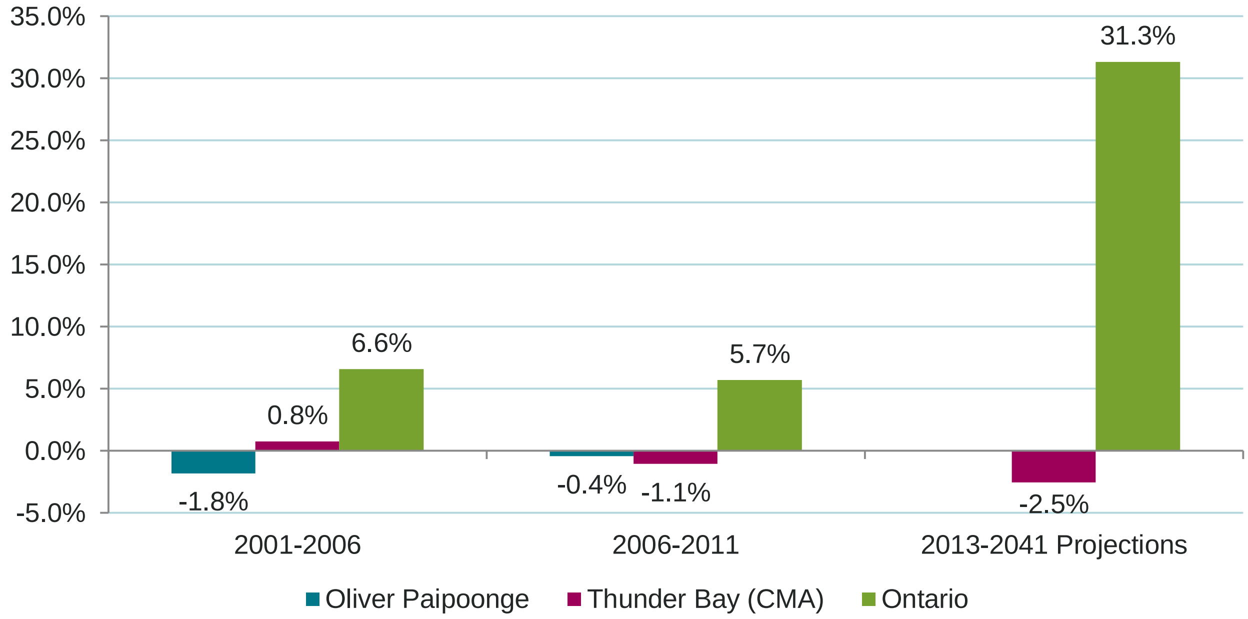
Population

In 2011, Oliver Paipoonge had a population of 5,732. The population has been relatively stable, with small declines since 2001 (as seen in Figure 20). From 2001 to 2006, the population decreased by 1.8%, and from 2006 to 2011 the population again declined slightly by 0.4%. The stability in population generally correlates with the municipalities within the Thunder Bay Census Metropolitan Area (CMA)[17], although the CMA's population increased slightly between 2001 and 2006. Conversely, the province of Ontario as a whole has seen a much larger population growth of 6.6% between 2001 and 2006; and 5.7% between 2006 and 2011.

Projecting into the future, the population decline within the Thunder Bay CMA is expected to accelerate slightly to a 2.5% decline between 2013 and 2041. Ontario, by contrast is expected to continue to grow, with a 31.3% growth forecasted.

[17] The Thunder Bay CMA includes the Township of Conmee, Fort William 52 Indian reserve, the Township of Gillies, the Municipality of Neebing, the Township of O'Connor, the Municipality of Oliver Paipoonge, the Township of Shuniah, and the City of Thunder Bay.

FIGURE 20: POPULATION GROWTH

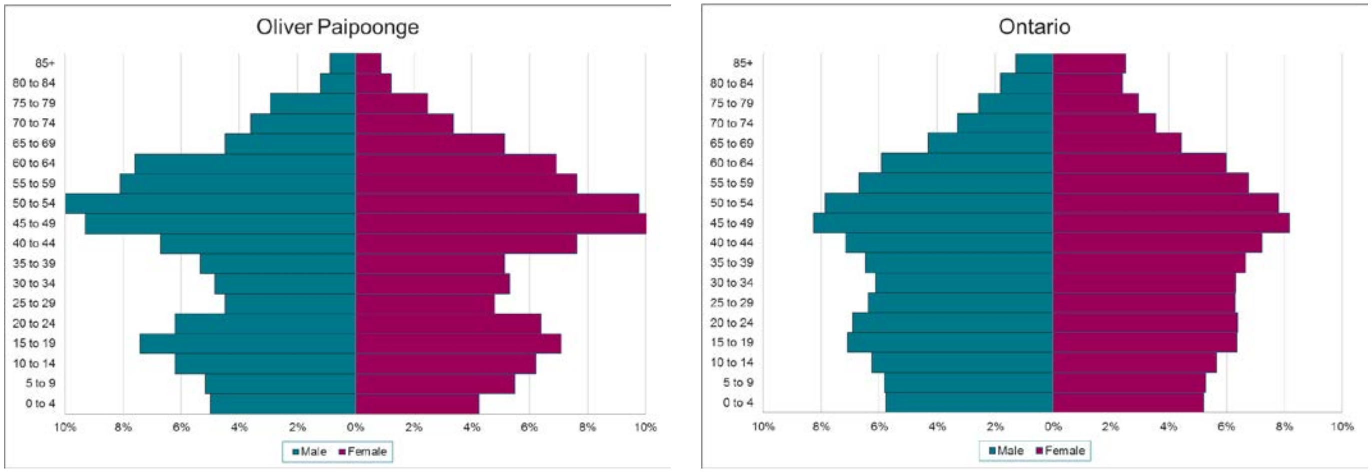


Source: Statistics Canada. 2011 & 2006 Community Profiles

As seen in Figure 21, the demographic structure in Oliver Paipoonge and Ontario displays signs of an aging population. In Oliver Paipoonge especially, there is a clear gap in age cohorts from 20 to 45 years old, indicating a relative gap in the younger, working age cohorts. This suggests that the municipality may be having difficulty in attracting and retaining its young workers (and families) as they may be moving to larger urban centres in search of employment.

When comparing median age between the two population sets (43.5 for Oliver Paipoonge, 40.4 for Ontario), Oliver Paipoonge has a slightly older population than Ontario. As well, the population data between 2006 and 2011 shows both populations tending towards an older population over time. From 2006-2011 the median age in Oliver Paipoonge increased from 41.7 to 43.5 while in the province the median increased from 39.0 to 40.4.

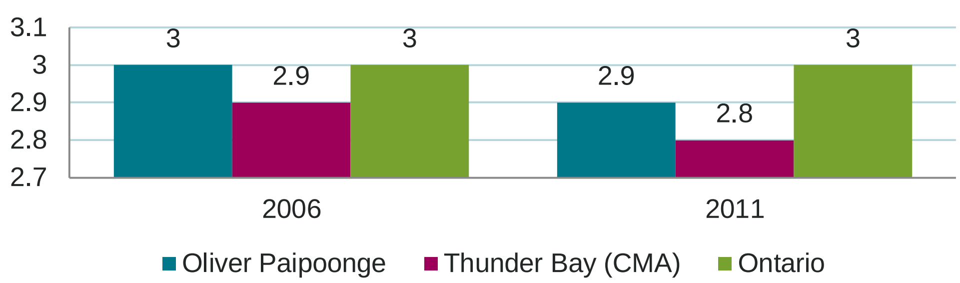
FIGURE 21: POPULATION PYRAMID FOR OLIVER PAIPOONGE AND ONTARIO, 2011



Source: Statistics Canada. 2011. National Household Survey. Community Profiles. Adapted by MDB Insight Inc

Household size data shows that Oliver Paipoonge had slightly larger families than the Thunder Bay CMA and similar size to Ontario from 2006 to 2011 (as seen in Figure 22). The household size declined slightly in Oliver Paipoonge from 3.0 to 2.9 while in the province the size remained stable at 3.0 from 2006 to 2011.

FIGURE 22: AVERAGE NUMBER OF PERSONS IN CENSUS FAMILY IN OLIVER PAIPOONGE, THE THUNDER BAY (CMA), AND ONTARIO, 2006-2011

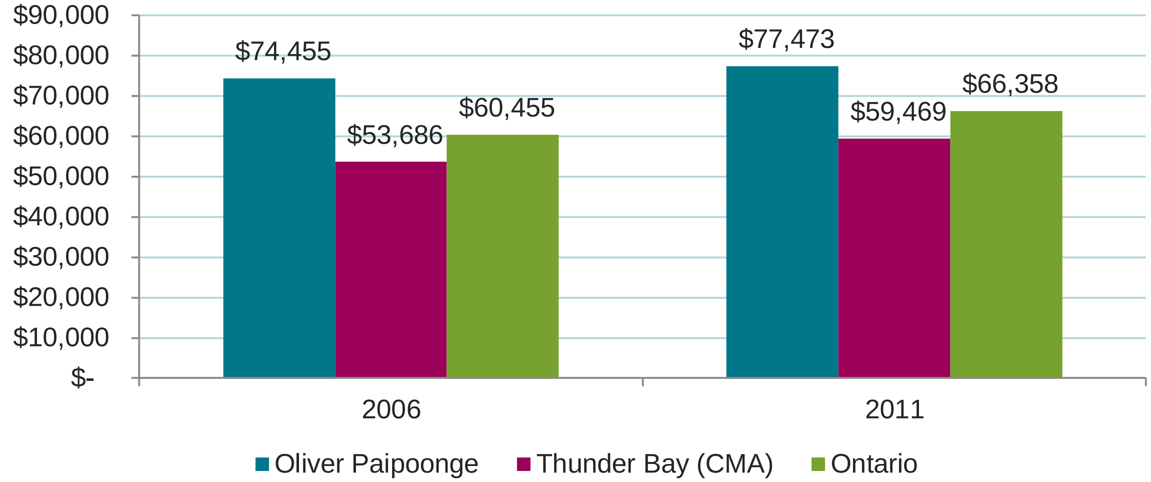


Source: Statistics Canada. 2011 & 2006 Community Profiles

Income

As seen in Figure 23, Oliver Paipoonge has a higher median household total income than the Thunder Bay CMA and Ontario. Oliver Paipoonge's median total household income growth rate was 4.1% compared to the Thunder Bay CMA and Ontario which grew by 10.8% and 9.8% from 2006 to 2011.

FIGURE 23: MEDIAN HOUSEHOLD INCOME

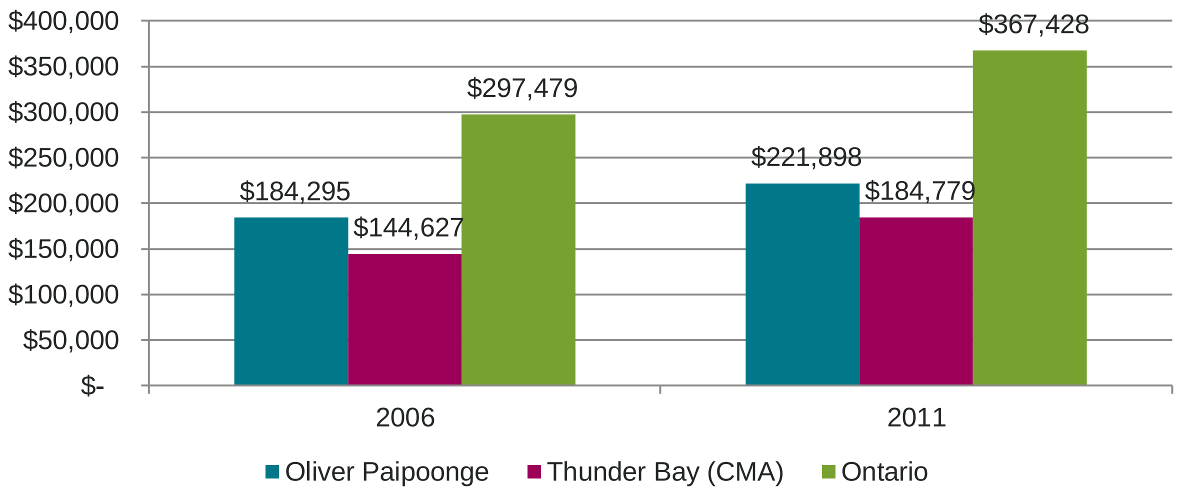


Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles

Along with median income, Oliver Paipoonge also had a lower growth rate for average dwelling values at 20.4% when compared to the Thunder Bay CMA (27.8%) and Ontario (23.5%) between 2006 to 2011 (as seen in Figure 24). In 2006 and 2011, the dwelling values in Oliver Paipoonge were higher than the Thunder Bay CMA and Ontario. The higher median income and higher dwelling value in Oliver Paipoonge compared to the CMA suggests that the cost of living in the municipality is stable, and major increases to housing demand (and likely supply) are occurring elsewhere within the CMA.

The value of dwellings in the Thunder Bay area is not surprisingly significantly lower than Ontario as a whole.

FIGURE 24: AVERAGE VALUE OF DWELLING

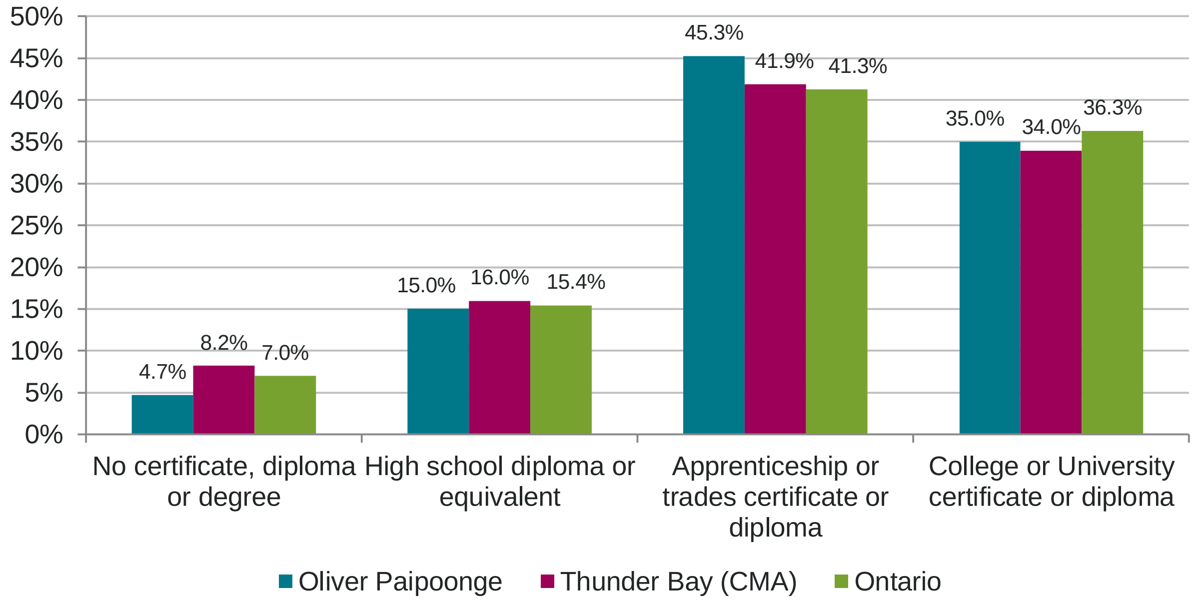


Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles

Educational profile

As seen in Figure 25, in 2011 Oliver Paipoonge had over 80% of its population possessing education higher than a High School diploma (or equivalent). This would either be in the form of a trade or apprenticeship certificate or a college/university diploma. This combined percentage was comparably higher than both the Thunder Bay CMA and Ontario. Conversely, Oliver Paipoonge has lower percentages of persons, compared to the Thunder Bay CMA and Ontario with only a high school diploma (or equivalent) or no certificate/diploma/degree.

FIGURE 25: POPULATION BY EDUCATIONAL ATTAINMENT, AGED 25 TO 64, 2011



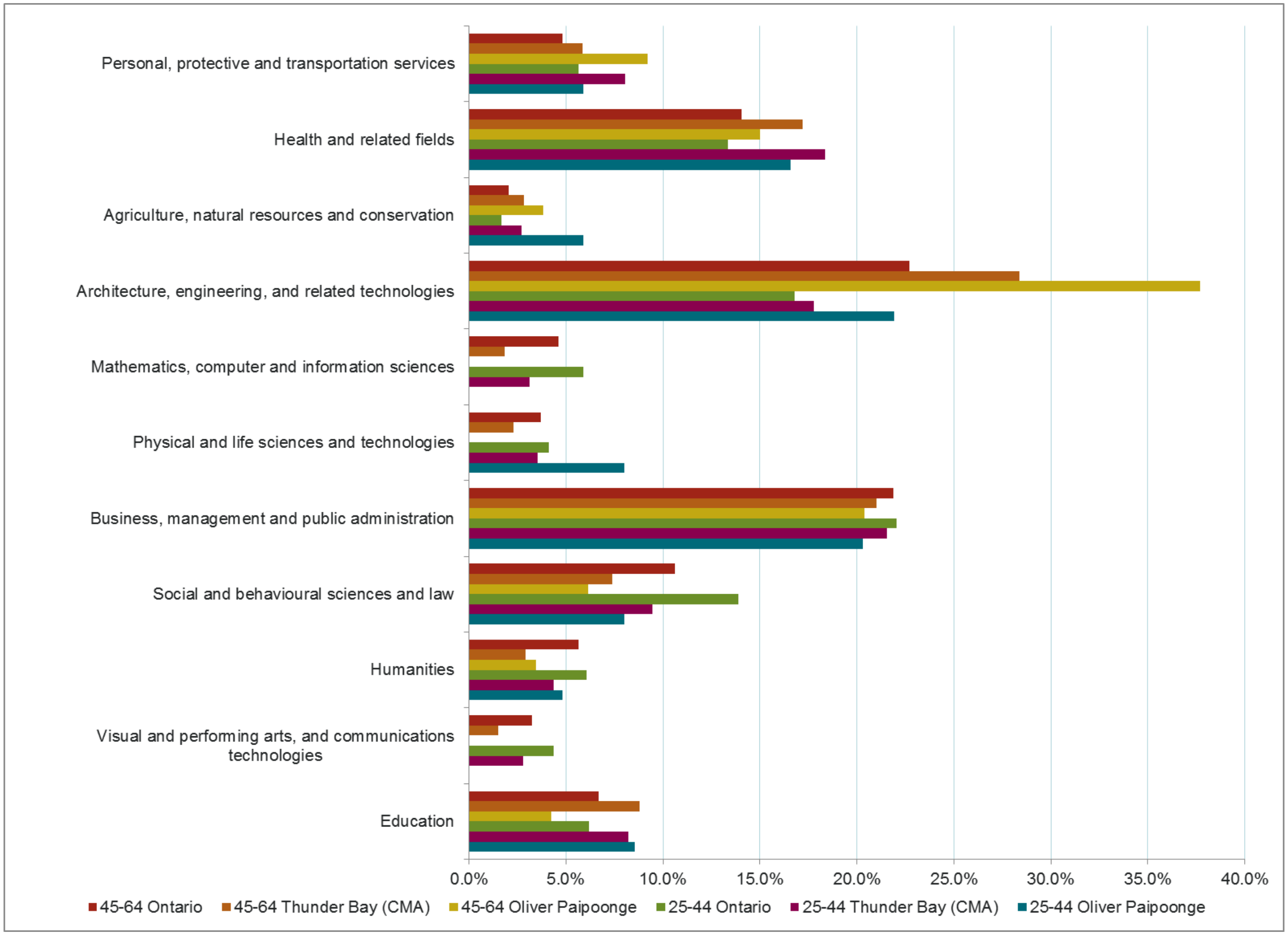
Source: Statistics Canada - 2011 National Household Survey

The largest proportion of Oliver Paipoonge's work force responded to the 2011 National Household Survey as having studied "Architecture, engineering, and related technologies" at 21.9% for the 25-44 age group and 37.7% for the 45-64 age cohort (as seen in Figure 26). This was a higher proportion for both age groups compared to both the Thunder Bay CMA and Ontario as a whole.

The second largest category of study of Oliver Paipoonge respondents was "business, management, and public administration", with 21.6% of the 25-44 age cohort; and 20.4% of the 45-64 age cohort. Both cohorts had a slightly lower proportion compared to both the Thunder Bay CMA and Ontario.

Oliver Paipoonge also had a higher proportion of the labour force that responded with "agriculture, natural resources and conservation" compared to the Thunder Bay CMA and Ontario. 5.9% of the 25-44 age cohort and 2.8% of the 45-64 age cohort responded to this field of study.

FIGURE 26: EDUCATION BY MAJOR FIELD OF STUDY AND AGE COHORT, 2011



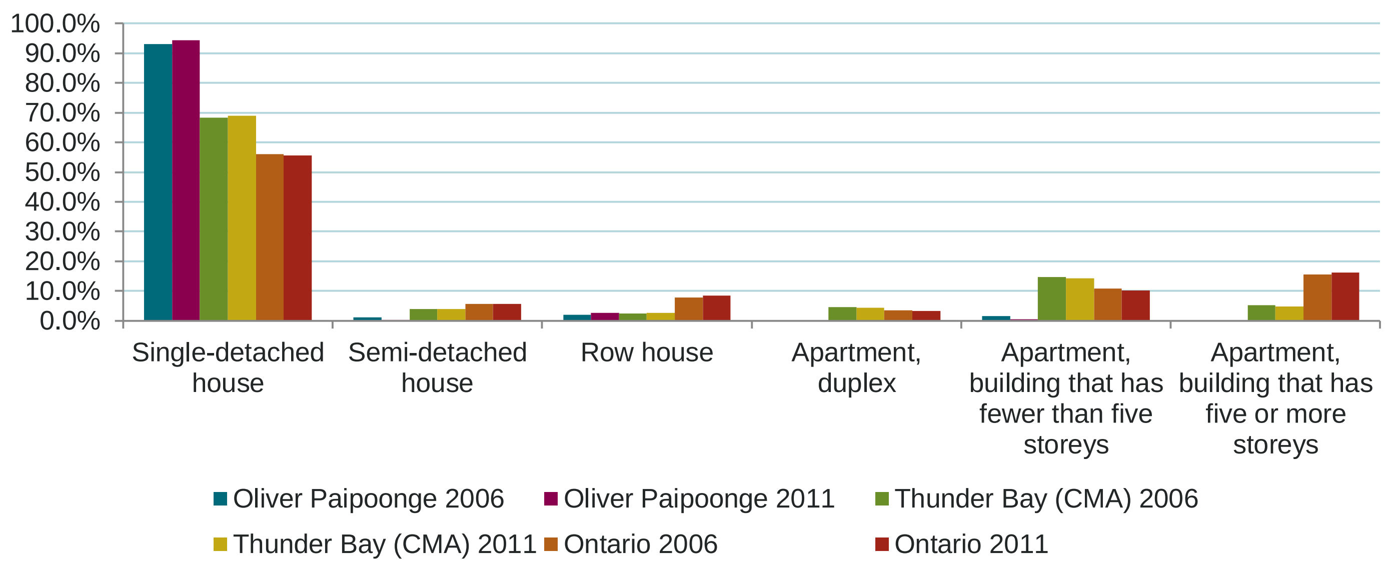
Source: Statistics Canada, 2011 National Household Survey, Statistics Canada Catalogue no. 99-012-X2011055

Dwelling Characteristics

As seen in Figure 27, Oliver Paipoonge had a higher proportion of single detached homes compared to the Thunder Bay CMA and Ontario. In 2011, single detached homes made up 89.1% of the dwellings in Oliver Paipoonge, but these dwellings only made up 55.6% in Ontario. As a rural municipality, it is should be expected that housing types other than single detached homes was significantly smaller than the Thunder Bay CMA or Ontario.

The high rate of single detached homes in Oliver Paipoonge and the rural character of the community also suggest the municipality likely has a lower population density than the Thunder Bay CMA (and likely that of Ontario).

FIGURE 27 DWELLING TYPES IN OLIVER PAIPOONGE, THE THUNDER BAY CMA AND ONTARIO, 2006-2011



Source: Statistics Canada. 2011 and 2006 Census Profile

Mobility Status

Mobility status over the last five years was examined in order to determine how many new residents are coming to Oliver Paipoonge in comparison to the Thunder Bay CMA and Ontario.

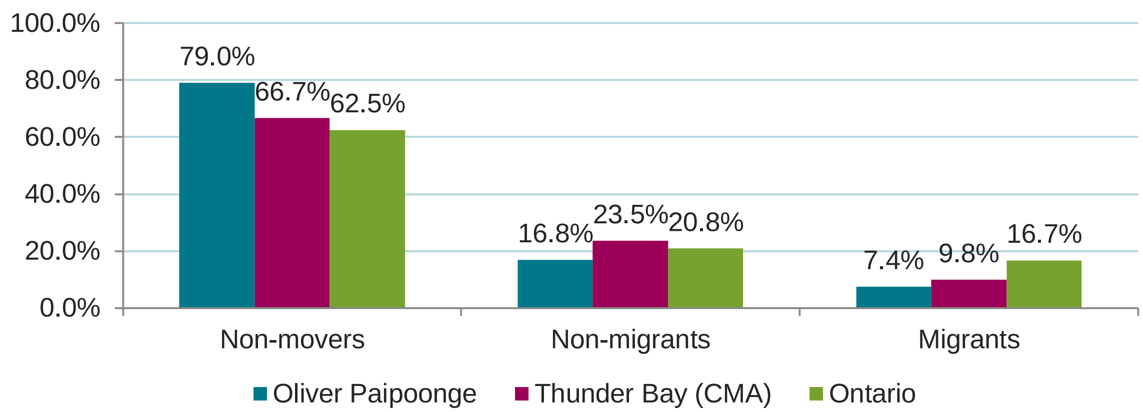
There are three main categories to measure the flow of residents in the municipality:

- **Non-movers** – people who have not moved over the past few years
- **Non-migrants** – people that have moved but remained in the same municipality
- **Migrants** – people who have moved to a different municipality within Canada

As seen in Figure 28 (below) Oliver Paipoonge (79.0%) had a higher proportion of non-movers compared to the Thunder Bay CMA (66.7%) and Ontario (62.5%). Conversely, Oliver Paipoonge (7.4%) had a lower proportion of migrants compared to the Thunder Bay CMA (9.8%) and Ontario (16.7%).

These statistics highlight that both the Municipality and the CMA attracted a lower number of new people to the community than the province as a whole, which may be explained due to the lower proportion of young workers (ages 25-44) within the municipality and the CMA as this age cohort is more likely to move to a new town/city in order to find employment.

FIGURE 28: MOBILITY STATUS OVER THE LAST FIVE YEARS FOR OLIVER PAIPOONGE, THE THUNDER BAY CMA, AND ONTARIO, 2011



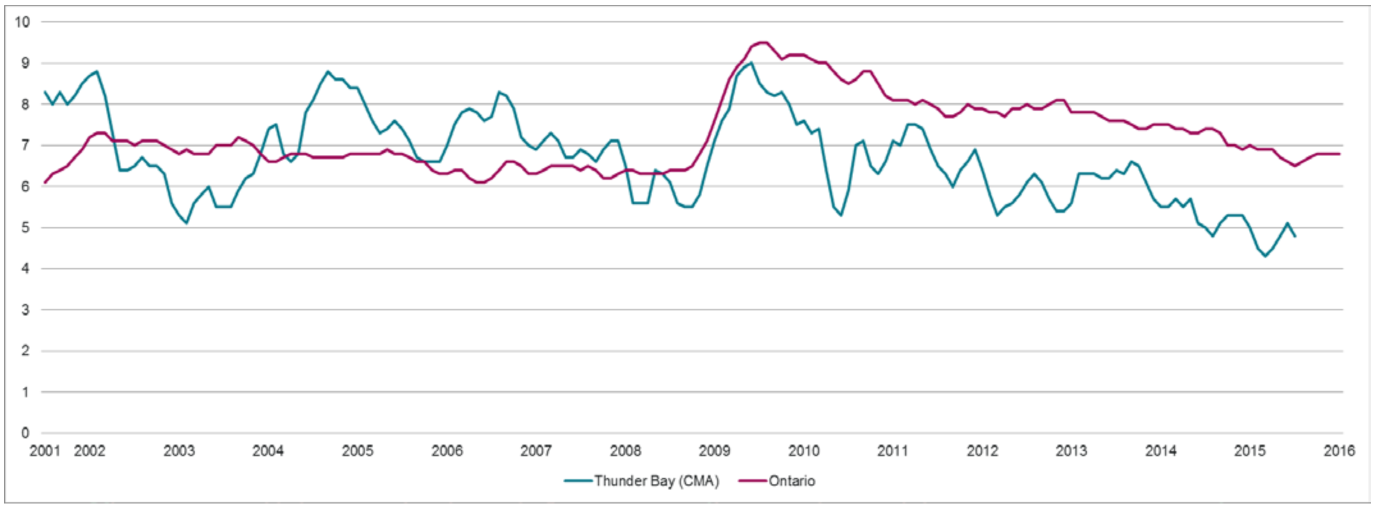
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011054

8.2 Occupational Profile

Oliver Paipoonge's total labour force in 2011 was 4,795 people, which was a small increase of 1.5% from 2006. The municipality's unemployment rate in 2011 was 14.4%, which was significantly higher than the CMA rate of 8.4% and provincial rate of 8.3%. Oliver Paipoonge's unemployment rate jumped significantly from 7.0% in 2006. Although the Thunder Bay CMA (7.4% in 2006) and Ontario (6.4% in 2006) both also experienced increased unemployment between 2006 and 2011, the increases were much less dramatic than in Oliver Paipoonge.

Annual unemployment statistics for the Thunder Bay CMA and from 2001 to 2013 are presented in Figure 29 below. These statistics show that from 2004 to 2008, the CMA's unemployment rate was consistently above that of the province. However, even with a spike in unemployment during the 2009 global recession, the unemployment rate within the Thunder Bay CMA was lower than that of the province and has remained lower into 2015. While not specifically for Oliver Paipoonge, the trend of a relatively low unemployment rate in the Thunder Bay CMA highlights the relatively higher access to employment that residents of the region (including Oliver Paipoonge) have.

FIGURE 29: ANNUAL UNEMPLOYMENT RATE FOR THUNDER BAY CMA AND ONTARIO, 2001 – 2013



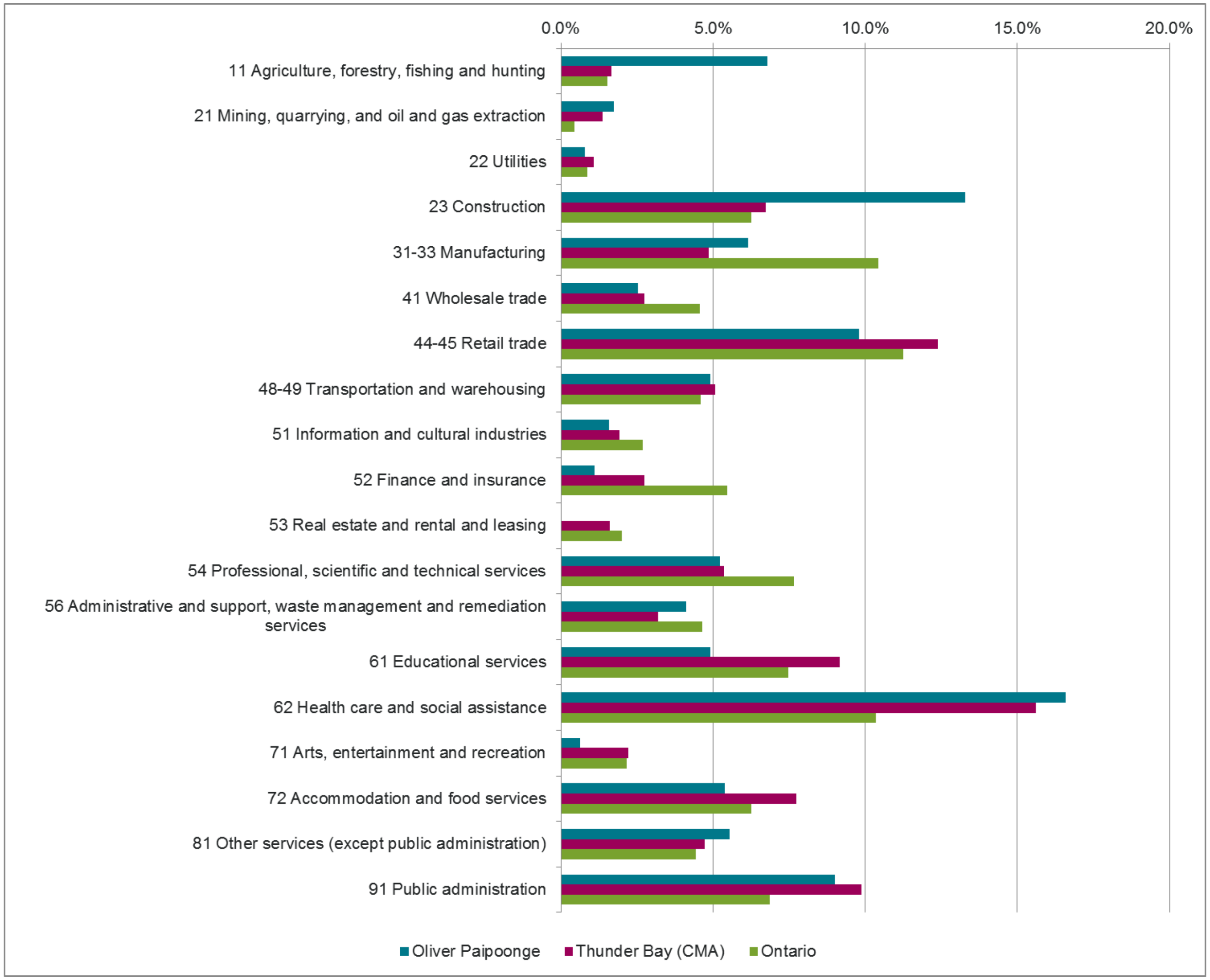
Source: Statistics Canada - Labour force survey estimates (LFS), by provinces, territories and economic regions based on 2006 Census boundaries, annual (persons unless otherwise noted), CANSIM (database)

Labour Force by Industry

Labour force employment by industry for all three geographic areas was examined to determine how Oliver Paipoonge's workforce compared to the Thunder Bay CMA and Ontario. The leading sources for employment for Oliver Paipoonge's labour force were the “Health Care and Social Assistance” and “Construction” sectors which employed 18.4% and 18.1% of the Municipality’s work force respectively. “Agriculture, Forestry, Hunting, and Fishing” also employed a much higher proportion of workers compared to the labour force in the Thunder Bay CMA and Ontario.

With the exception of “Educational Services”, the sector data showed overall that Oliver Paipoonge’s labour force makeup was generally equivalent to that of the Thunder Bay CMA, with most sectors within 3 percentage points of each other.

FIGURE 30: CLASS OF WORKER BY SECTOR OLIVER PAIPOONGE, THUNDER BAY CMA AND ONTARIO BY PERCENTAGE, 2011



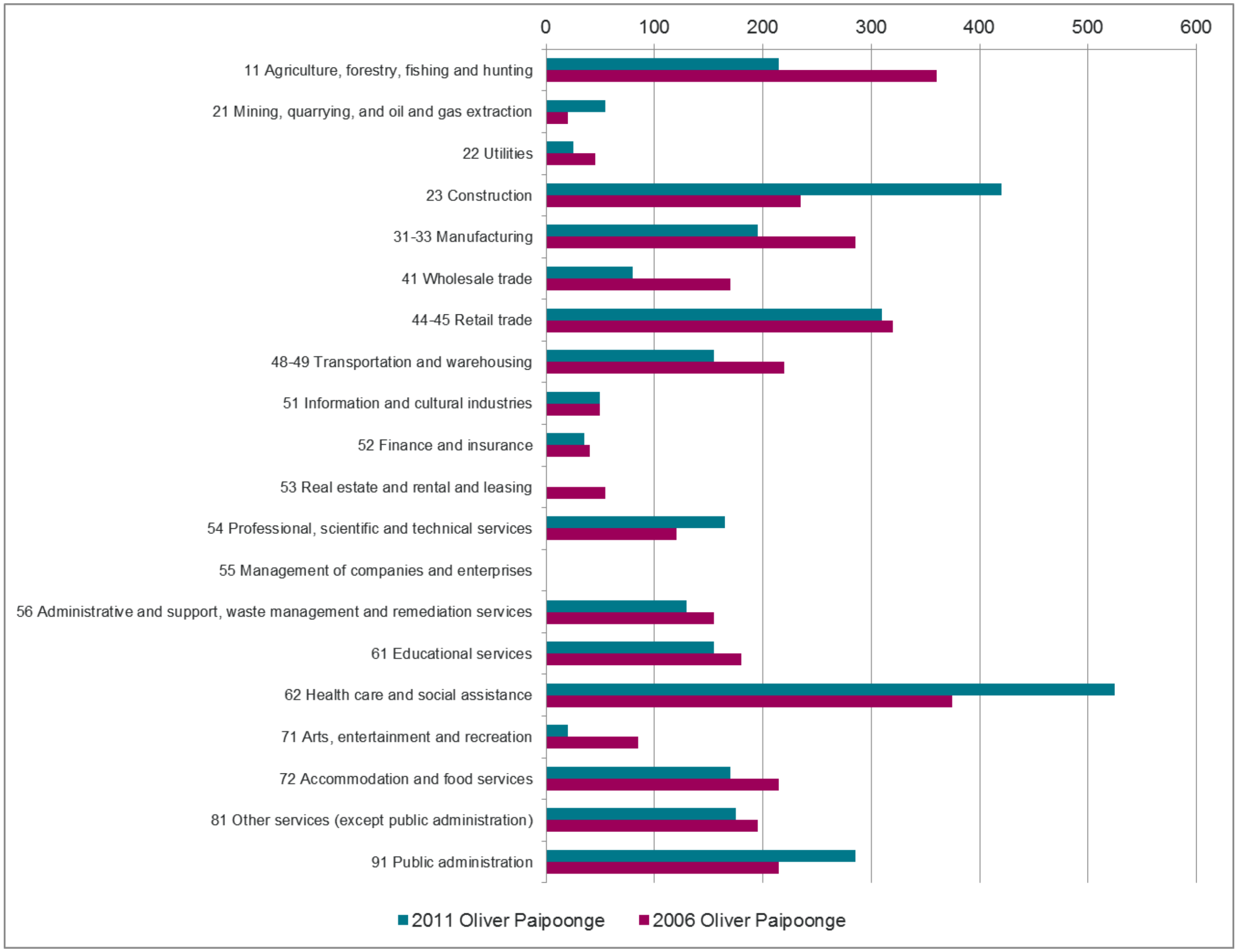
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

As shown in Figure 31, Oliver Paipoonge's employed labour force has experienced growth in certain subsectors from 2006 to 2011 and decline in others. The sectors with the largest growth in workers were:

- Health care and social assistance (150 workers)
- Construction (185 workers)
- Public Administration (70 workers)

The growth in the construction sector was significant for the municipality as this particular industry was adversely affected by the recession in 2008-2009, and yet Oliver Paipoonge was able to create jobs in this sector.

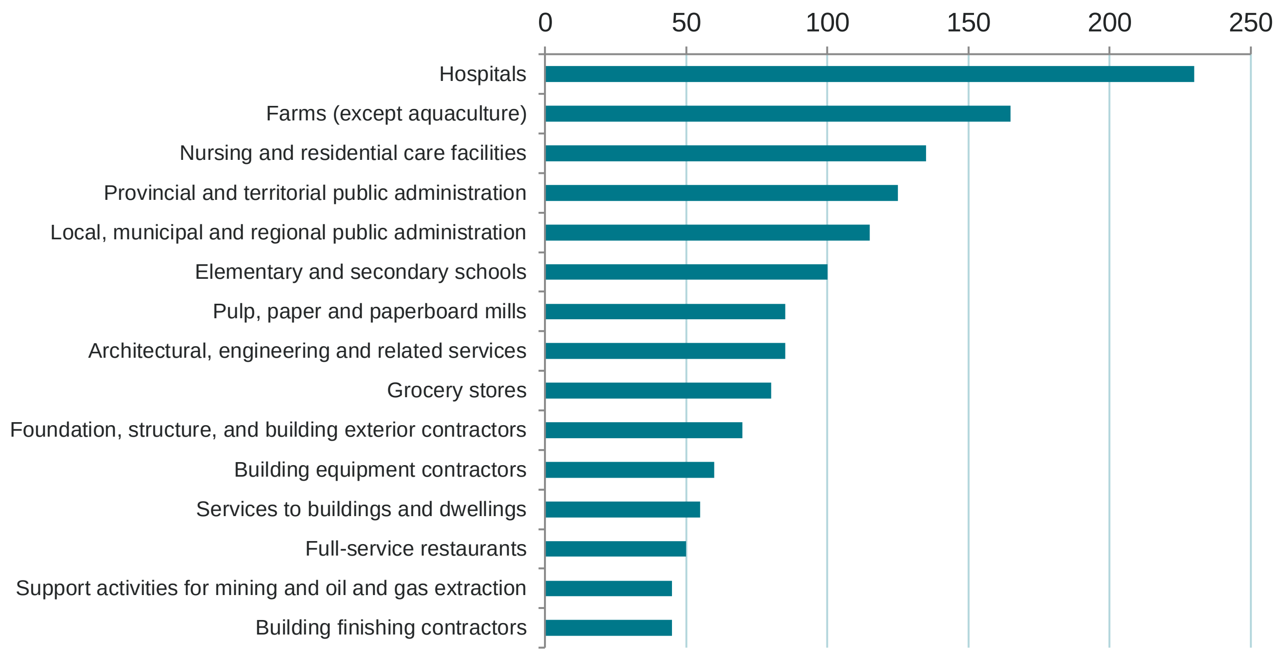
FIGURE 31: CHANGE IN WORKER PARTICIPATION BY OCCUPATION, OLIVER PAIPOONGE, 2006 - 2011



Statistics Canada, 2011 National Household Survey, Statistics Canada catalogue no. 99-012-X2011034 . 2006 Census of Population, Statistics Canada catalogue no. 97-561-XCB2006007

The top 15 sub-sectors for Oliver Paipoonge in terms of total employment are shown in Figure 32. As of 2011, hospitals, farms (except aquaculture), nursing and residential care facilities, and provincial and territorial public administration represented the top subsectors in terms of employment.

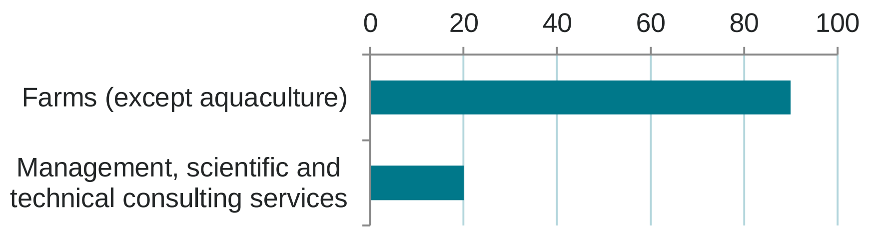
FIGURE 32: TOP 15 CLASS OF WORKER BY INDUSTRY IN OLIVER PAIPOONGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

Unsurprisingly, the top industry for self-employment in Oliver Paipoonge is in farming (as seen in Figure 33). The only other self-employed industry was in "Management, Scientific, and Technical Consulting Services".

FIGURE 33: TOP SELF EMPLOYED WORKER BY INDUSTRY IN OLIVER PAIPOONGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

Labour Force by Occupational Classification

As seen in Figure 34, the largest occupational category (as measured by workers over the age of 15) in Oliver Paipoonge was in trades, transport and equipment operators and related occupations. This is followed by occupations in management. From 2006 to 2011 in Oliver Paipoonge, the majority of occupational categories declined. Natural resources, agriculture and related production occupations had the largest decrease at 57.0%.

Occupational categories that experienced growth included:

- Management occupations (47.7%)
- Natural and applied sciences and related occupations (211.4%)
- Health occupations (35.2%).

FIGURE 34: OLIVER PAIPOONGE EMPLOYED LABOUR FORCE BY OCCUPATIONAL CLASSIFICATION, 2011, 2006

Occupational Category by Major Unit	2006	2006 % of total	2011	2011 % of total	% change from 2006-2011
0 Management occupations	265	7.9%	345	10.8%	30.2%
1 Business, finance and administration occupations	420	12.6%	415	13.0%	-1.2%
2 Natural and applied sciences and related occupations	140	4.2%	140	4.4%	0.0%
3 Health occupations	270	8.1%	265	8.3%	-1.9%
4 Occupations in education, law and social, community and government services	220	6.6%	365	11.4%	65.9%
5 Occupations in art, culture, recreation and sport	65	1.9%	70	2.2%	7.7%

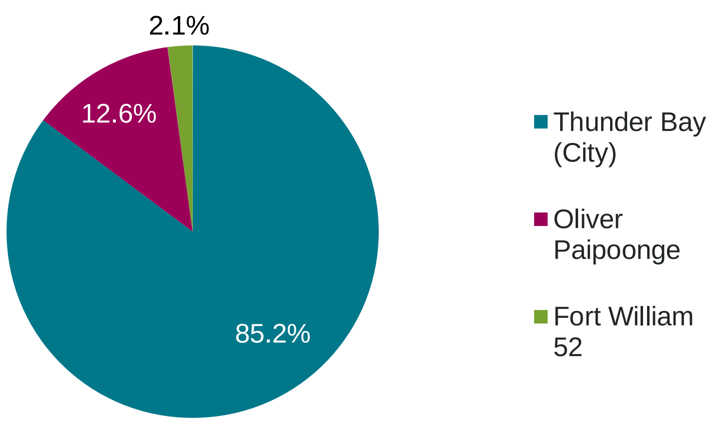
Occupational Category by Major Unit	2006	2006 % of total	2011	2011 % of total	% change from 2006-2011
6 Sales and service occupations	775	23.2%	650	20.4%	-16.1%
7 Trades, transport and equipment operators and related occupations	720	21.6%	690	21.6%	-4.2%
8 Natural resources, agriculture and related production occupations	330	9.9%	100	3.1%	-69.7%
9 Occupations in manufacturing and utilities	130	3.9%	150	4.7%	15.4%
Total	**3335**	**100.0%**	**3190**	**100.0%**	**-4.3%**

Source: Statistics Canada - 2011 National Household Survey. 2006 Census Profile

Commuting Patterns

As seen in Figure 35, residents of Oliver Paipoonge predominantly work in the City of Thunder Bay (85.2%). Roughly 13% of residents work within the municipality itself.

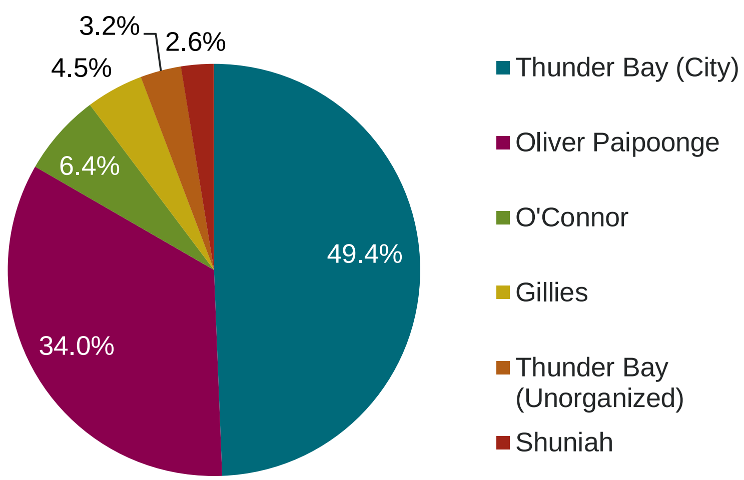
FIGURE 35: PLACE OF WORK FOR RESIDENTS OF OLIVER PAIPOONGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032

As seen in Figure 36, roughly 50% of Oliver Paipoonge's workforce lives in the City of Thunder Bay. A further 34% of the workforce comes from within Oliver Paipoonge, with small proportions also living in O'Connor and Gillies.

FIGURE 36: PLACE OF RESIDENCE FOR WORKERS IN OLIVER PAIPOONGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032

8.3 Business Patterns Assessment

Statistics Canada's Canadian Business Patterns Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for Oliver Paipoonge includes all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of $30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by “Total”, “Indeterminate” and “Subtotal” categories. The establishments in the “Indeterminate” category include the self-employed (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Patterns Data uses the CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.

Key Business Characteristics

A detailed review of the business patterns data for the period between 2008 and 2013 for Oliver Paipoonge provides an understanding of the growth or decline of businesses over the five-year period and the key characteristics that define the municipality’s business community. When combined with the broader industry analysis, the business patterns information will assist in understanding the key industry trends and potential opportunities for Oliver Paipoonge.

As seen in Figure 37, industries with the highest proportion of business establishments in Oliver Paipoonge as of December 2015 were:

- Agriculture, Forestry, Fishing and Hunting (98 businesses, 16.9% of total)
- Construction (80 businesses, 13.8% of total)
- Real Estate, Rental and Leasing (53 businesses, 9.1% of total)
- Retail Trade (52 businesses, 9.0% of total)
- Other Services (except Public Administration) (42 businesses, 7.0% of total)

Notably, when the indeterminate category (i.e. self-employed) is removed, construction becomes the industry with the most number of businesses, with other industries such as transportation and warehousing showing a higher profile within the business community. The rankings with self-employed removed are:

- Construction (41 businesses, 17.3% of total)
- Agriculture, Forestry, Fishing and Hunting (39 businesses, 16.5% of total)
- Retail Trade (29 businesses, 12.2% of total)
- Transportation and Warehousing (19 businesses, 8.0% of total)
- Other Services (except Public Administration) (17 businesses, 7.2% of total)

Business establishments in Oliver Paipoonge are overwhelmingly characterized by small companies and enterprises that employ less than 10 people (as seen in Figure 37). In 2015, excluding the businesses consisting of the self-employed (which themselves are small enterprises) there were 124 businesses, or 52.0% of the subtotal, that employ 1-4 people. An additional 58 businesses, or 24.5% of the subtotal, employ 5-9 people. The industries with the highest number of establishments employing fewer than 10 people were:

- Agriculture, Forestry, Fishing and Hunting (35 businesses)
- Construction (29 businesses)
- Retail Trade (20 businesses)
- Transportation and Warehousing (18 businesses)
- Other Services (except Public Administration) (16 businesses)

It is also important to note the scarcity of medium and large firms in the municipality's economy. This is of interest because small, medium, and large firms are generally believed to provide different economic functions within an economic region. Small firms are generally seen as the major source of new products and ideas, while large firms typically develop as products become more homogenous and firms begin to exploit economies of scale. The lack of mid-size and large business in Oliver Paipoonge is notable as these firms are typically more export oriented and generate higher operating surpluses.

FIGURE 37: OLIVER PAIPOONGE BUSINESSES BY LOCATION AND SIZE, DECEMBER 2015

Industry (NAICS)	December 2015								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
11 Agriculture, Forestry, Fishing and Hunting	98	59	39	28	7	0	3	0	1
21 Mining, Quarrying, and Oil and Gas Extraction	8	5	3	1	1	0	0	1	0
22 Utilities	5	5	0	0	0	0	0	0	0
23 Construction	80	39	41	22	7	4	5	3	0
31-33 Manufacturing	16	6	10	2	5	0	3	0	0
41 Wholesale Trade	16	7	9	4	2	1	2	0	0
44-45 Retail Trade	52	23	29	13	7	4	4	1	0
48-49 Transportation and Warehousing	35	16	19	13	5	1	0	0	0
51 Information and Cultural Industries	2	0	2	1	1	0	0	0	0
52 Finance and Insurance	27	22	5	1	1	1	2	0	0
53 Real Estate and Rental and Leasing	53	49	4	4	0	0	0	0	0
54 Professional, Scientific and Technical Services	41	29	12	11	1	0	0	0	0

Industry (NAICS)	December 2015								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
55 Management of Companies and Enterprises	18	17	1	0	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	19	10	9	3	1	2	3	0	0
61 Educational Services	5	2	3	1	1	0	1	0	0
62 Health Care and Social Assistance	31	17	14	7	6	1	0	0	0
71 Arts, Entertainment and Recreation	4	1	3	1	2	0	0	0	0
72 Accommodation and Food Services	24	11	13	1	4	6	1	1	0
81 Other Services (except Public Administration)	42	25	17	11	5	1	0	0	0
91 Public Administration	4	0	4	0	1	2	1	0	0
Total Economy	**580**	**343**	**237**	**124**	**58**	**23**	**25**	**6**	**1**

Source: Canadian Business Patterns December 2015

Note: Due to changes in Statistics Canada methodology, comparisons between data from 2013 (and earlier) and 2015 cannot be made.

As seen in Figure 38, the businesses with the highest number of business establishments in 2015 were:

- Lessors of residential buildings and dwellings (except social housing projects) (27 businesses)
- Contract logging (26 businesses)
- Residential building construction (20 businesses)
- Miscellaneous intermediation (18 businesses)
- Holding companies (18 businesses)
- Dairy cattle and milk production (17 businesses)

It is interesting to note that none of the subsectors, except site preparation contractors and contract logging, employed more than 20 workers.

FIGURE 38: TOP LOCAL BUSINESSES BY TOTAL NUMBER AND EMPLOYMENT CATEGORY, OLIVER PAIPOONGE, 2015

Industry (NAICS)	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
Lessors of residential buildings and dwellings (except social housing projects)	27	26	1	1	0	0	0	0	0
Contract logging	26	11	15	14	0	0	1	0	0

Industry (NAICS)	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
Residential building construction	20	10	10	7	3	0	0	0	0
Miscellaneous intermediation	18	17	1	0	1	0	0	0	0
Holding companies	18	17	1	0	1	0	0	0	0
Dairy cattle and milk production	17	8	9	8	1	0	0	0	0
Forest products trucking, local	12	4	8	4	4	0	0	0	0
General automotive repair	12	8	4	3	1	0	0	0	0
Offices of physicians	11	6	5	4	1	0	0	0	0
Beef cattle ranching and farming, including feedlots	9	8	1	1	0	0	0	0	0
Plumbing, heating and air-conditioning contractors	9	5	4	3	1	0	0	0	0
Site preparation contractors	9	5	4	2	0	2	0	0	0
Lessors of non-residential buildings (except mini-warehouses)	8	8	0	0	0	0	0	0	0
All other miscellaneous crop farming	7	5	2	2	0	0	0	0	0
Bookkeeping, payroll and related services	7	4	3	3	0	0	0	0	0
All other professional, scientific and technical services	7	5	2	2	0	0	0	0	0
Other support activities for mining	6	5	1	0	1	0	0	0	0
Electrical contractors and other wiring installation contractors	6	3	3	2	1	0	0	0	0
Offices of all other health practitioners	6	4	2	1	1	0	0	0	0
Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	6	3	3	3	0	0	0	0	0

Source: Canadian Business Patterns December 2015

As seen in Figure 39, the number of businesses in Oliver Paipoonge shrank by 105 (35%) between 2008 and 2013. This may have been expected as many communities across Ontario lost businesses in the period as a result of the global recession that began in 2008. Two sectors saw business growth within Oliver Paipoonge during this period; however these were two of the smaller industries within the community:

- Administrative Support, Waste Management and Remediation Services

- Real Estate and Rental and Leasing

FIGURE 39: NUMBER OF BUSINESS ESTABLISHMENTS BY SECTOR, OLIVER PAIPOONGE, 2008 AND 2013

Industry (NAICS)	December 2008			December 2013			2008-2013
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	%Change Total
11 Agriculture, Forestry, Fishing and Hunting	108	45	63	59	28	31	-45.4%
21 Mining, Quarrying, and Oil and Gas Extraction	3	2	1	4	1	3	N/A
22 Utilities	0	0	0	3	1	2	100.0%
23 Construction	87	35	52	54	24	30	-37.9%
31-33 Manufacturing	14	6	8	14	4	10	0.0%
41 Wholesale Trade	15	5	10	14	5	9	-6.7%
44-45 Retail Trade	38	15	23	22	6	16	-42.1%
48-49 Transportation and Warehousing	53	31	22	22	11	11	-58.5%
51 Information and Cultural Industries	4	3	1	1	0	1	-75.0%
52 Finance and Insurance	20	17	3	14	13	1	-30.0%
53 Real Estate and Rental and Leasing	24	17	7	28	24	4	16.7%
54 Professional, Scientific and Technical Services	34	15	19	20	12	8	-41.2%
55 Management of Companies and Enterprises	19	17	2	11	11	0	-42.1%
56 Administrative and Support, Waste Management and Remediation Services	10	2	8	12	3	9	20.0%
61 Educational Services	3	2	1	3	1	2	N/A
62 Health Care and Social Assistance	7	1	6	14	2	12	100.0%
71 Arts, Entertainment and Recreation	5	2	3	0	0	0	-100.0%
72 Accommodation and Food Services	21	5	15	7	5	2	-66.7%
81 Other Services (except Public Administration)	34	15	19	22	11	11	-35.3%
91 Public Administration	7	0	7	3	0	3	-57.1%
Total Economy	**506**	**235**	**270**	**327**	**162**	**165**	**-35.4%**

Source: Canadian Business Patterns December 2013, December 2008

Location Quotients

A "Location Quotient" (LQ) measures the concentration of business activity in a local area (e.g. Oliver Paipoonge) relative to an over-arching area (e.g. Ontario). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector shows a strong concentration relative to the larger area. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

Based on location quotients, the following sectors showed a high local concentration in Oliver Paipoonge in 2013 (as seen in Figure 40):

- Utilities (LQ of 7.43)
- Agriculture, Forestry, Fishing and Hunting (LQ of 4.59)
- Mining, Quarrying, and Oil and Gas Extraction (LQ of 6.80)
- Public Administration (LQ of 6.69)

The following sectors saw a Location Quotient increase greater than 1.25 from 2008 to 2013:

- Utilities (increase of 7.43)
- Mining, Quarrying, and Oil and Gas (increase of 3.08)

FIGURE 40: LABOUR FORCE LQ BY INDUSTRY, OLIVER PAIPOONGE 2008, 2013

Industry (NAICS)	2008 Oliver Paipoonge		2013 Oliver Paipoonge	
	LQ	Classification	LQ	Classification
11 Agriculture, Forestry, Fishing and Hunting	5.64	High	4.59	High
21 Mining, Quarrying, and Oil and Gas Extraction	3.72	High	6.80	High
22 Utilities	0.00	Low	7.43	High
23 Construction	1.53	High	1.47	High
31-33 Manufacturing	0.69	Low	1.24	Average
41 Wholesale Trade	0.59	Low	1.05	Average
44-45 Retail Trade	0.79	Average	0.76	Average

Industry (NAICS)	2008 Oliver Paipoonge		2013 Oliver Paipoonge	
	LQ	Classification	LQ	Classification
48-49 Transportation and Warehousing	1.94	High	1.12	Average
51 Information and Cultural Industries	0.49	Low	0.17	Low
52 Finance and Insurance	0.65	Low	0.72	Low
53 Real Estate and Rental and Leasing	0.53	Low	0.75	Average
54 Professional, Scientific and Technical Services	0.44	Low	0.41	Low
55 Management of Companies and Enterprises	0.84	Average	0.98	Average
56 Administrative and Support, Waste Management and Remediation Services	0.44	Low	0.85	Average
61 Educational Services	0.53	Low	0.86	Average
62 Health Care and Social Assistance	0.30	Low	0.71	Low
71 Arts, Entertainment and Recreation	0.60	Low	0.00	Low
72 Accommodation and Food Services	1.01	Average	0.54	Low
81 Other Services (except Public Administration)	0.80	Average	0.89	Average
91 Public Administration	9.83	High	6.69	High

Source: Canadian Business Patterns December 2013, December 2008

Appendix B – Online Survey Summary

An online survey was distributed to residents, business owners, and community organizations in the Municipality of Oliver Paipoonge. The survey was designed to assist in identifying the Municipality's key strengths, challenges, and opportunities along a variety of question including:

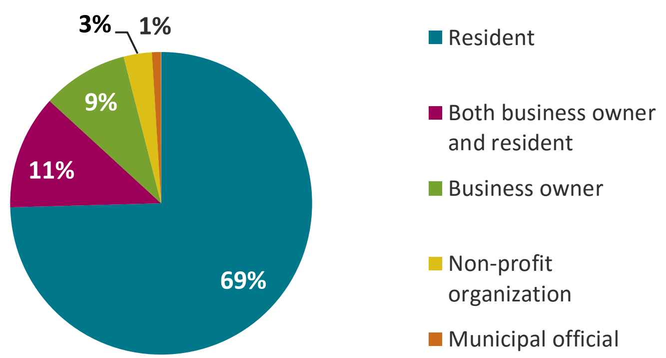
- How satisfied are you with Oliver Paipoonge in terms of being a good location for business
- What are residents and business owners vision for the economy in the next 10 years
- How would residents rank the quality of life in Oliver Paipoonge
- Challenges and opportunities for the business growth and development in the Municipality

The survey was open from December 14, 2015 to March 7th, 2016 and received a total of 106 responses.

A summary of the survey results is presented below.

Note: Throughout the summary analysis below, "N" indicates the number of responses for that specific question. This number will vary by question as survey logic was used that directed respondents to different parts of the survey based on what answers they submitted (e.g. if someone indicated they are a business owner, they would skip over the resident questions to the business owner ones).

Which of the following best describes you?



N=106

- Residents made up 69% of the total survey responses (73 people), while both business owners and residents made up 11% of total responses (12 people), business owners made up 9% (9 people), others (includes shoppers, pas residents, and employees) made up 8% (8 people), non-profit organizations made up 3% (3 people), and municipal official made up 1% (1 person)

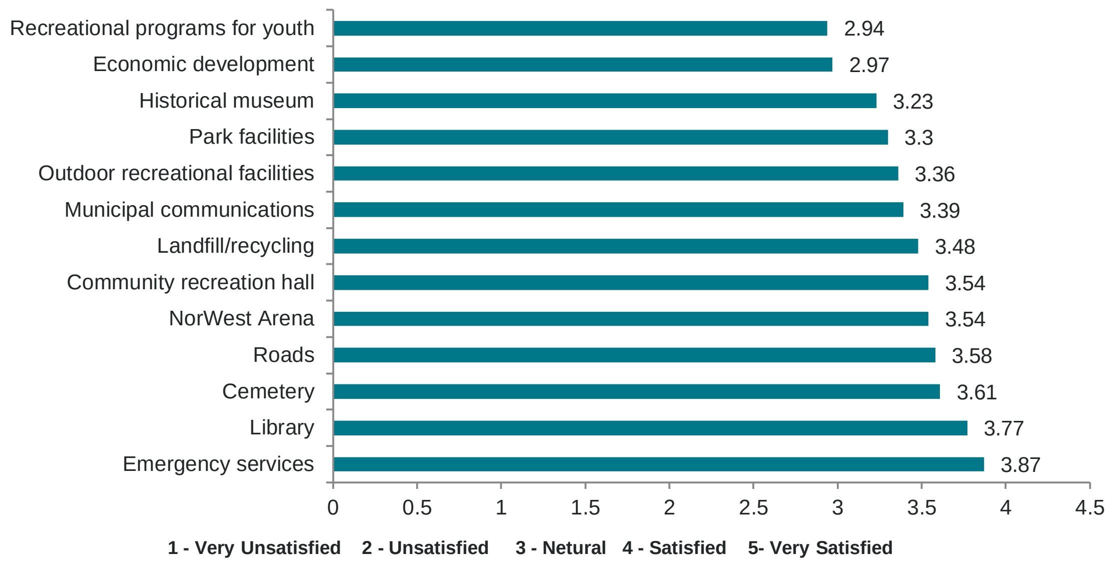
What top three words would you use to describe that vision? / What is your vision for the economy in the Municipality of Oliver Paipoonge in the next 10 years?

N=44

- When asked what top three words would they use, growth (including development, commerce and investment) with 11 responses and sustainable with 7 responses were the top two choices
- Interesting here is the increase emphasis on sustainable, respondents may have a greater preference for a vision that is inherently sustainable rather the vision explicitly stating it.

- Other top responses include:
  - Natural (6 responses) *including natural resources, environment, eco-friendly)*
  - Community (5 responses)
  - Friendly (5 responses) *including kindness, positive, know everyone, gentle*
  - Diverse (4 responses) *including diversity*
  - Beautiful (4 responses) *including beauty and beautification*
  - Innovative (4 responses) *including change, forward thinking, potential*
  - Rural (4 responses) *including agriculture and farming*
- Significant emphasis on increasing overall development and investment (i.e. industrial, commercial, small businesses and entrepreneurs local employment and industrial park development), in order to add to the tax base, with some reservations on ensuring that development is sustainable and does not negatively impact the environment or natural areas. (Over 55% of responses were related to industry development, small business development and support, increasing the tax base, residential development and growth, local employment growth and development of Kakabeka).
- Interesting to note is the emphasis respondents had on attracting new and different industries and commercial development for employment but also for new shopping options or retail stores.
- Local Business Development and Support was highlighted where respondents wanted more and diverse small businesses in their community and believe there should be more support for small business owners and entrepreneurs.

How satisfied are you with the following services delivered by the Municipality of Oliver Paipoonge? (Where a rating of 1 being very unsatisfied and a rating of 5 being very satisfied)



N=72

- Emergency Services was rated as the having the best service delivery (3.87), while recreational programming for youth was rated as the worst service delivery (2.94)
- Of note is that economic development received the most very unsatisfied responses (9) of all services
- The following top suggestions were provided as to how service delivery can be improved:
  - More recreational activities, events, facilities/parks aimed at youth and seniors (i.e. trails, bike paths, free access to Kakabeka Park for residents)
  - Better Town communications (i.e. notices and updates) through utilizing Town website and use of social media
  - Road improvements (i.e. conversion of dirt roads, lower speed limits)
  - Better and more medical services
  - Expansion of recycling and garbage pick-up (i.e. allowing for glass and plastics)

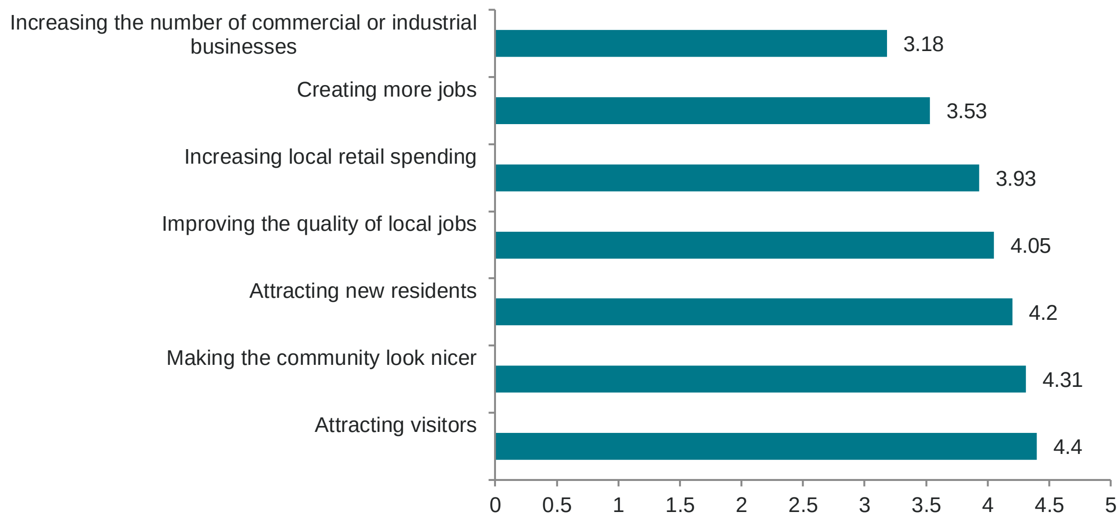
Please describe the top three CHALLENGES you see for business growth and development in the Municipality of Oliver Paipoonge.

- Almost a third (32%) of respondents identified that one of the top three challenges for business growth and development is the high cost of living and doing business in the Municipality (i.e. high local prices, high taxes, heavy tax burden on residential residents, business start-up costs, and high hydro rates).
- The near location and distance from Oliver Paipoonge to Thunder Bay was also seen as a challenge by respondents (26%), where Oliver Paipoonge is too far from the city and as well where Thunder Bay is seen as competition for businesses and residents.
- Other challenges include:
  - Ensuring sustainable growth (17% of responses)
  - Lack of money/funding (15% of responses)
  - Negative people (13% of responses)
  - Lack of Town promotion (13% of responses)
  - Economic development (13% of responses)

Please describe the top three OPPORTUNITIES you see for business growth and development in the Municipality of Oliver Paipoonge.

- Almost a third (32%) of respondents identified that new business development and investment (i.e. more local shopping and service options, new medical services, and attracting investment for things likes a manufacturing facility, alternative energy production and a medical/legalized marijuana production facility.
- As well, another third (32%) of respondents identified the agricultural base and natural resources (i.e. abundance of productive farmland, chicken production and processing, forestry and mining potential, natural beauty and eco-tourism) of Oliver Paipoonge as an opportunity for business growth and development.
- Other opportunities include:
  - Friendly, safe, and committed community (21% of responses)
  - Population growth/attraction of residents (19% of responses)
  - Vacant land/room to grow (19% of responses)
  - New recreational facilities and activities (15% of responses)
  - Low/fair taxes (15% of responses)

In your opinion, how would you rank the following as objectives for the Municipality of Oliver Paipoonge? (Where a rating of 1 being most important and a rating of 7 being least important)



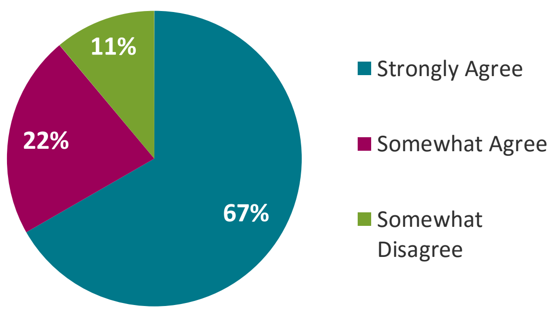
N=62

- When asked to rank the following objectives, respondents ranked increasing the number of commercial or industrial businesses as the most important objective of the Municipality
    - Received the most #1 rankings of the objectives and is emphasised in previously questions in regards to the vision for economic development.
- Overall respondents indicated that the growth and development of businesses and jobs is the most important objective of the Municipality of Oliver Paipoonge according to respondents.

Business Owners

A total of 9 business owners responded to the survey.

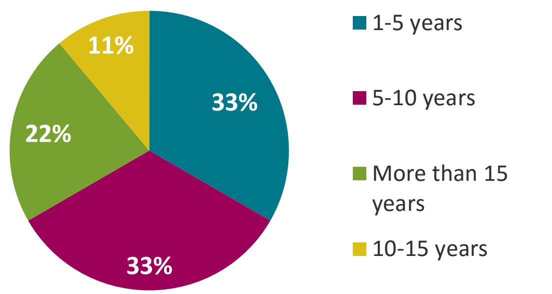
Please indicate to what level you agree or disagree with the following statement: "The Municipality of Oliver Paipoonge is a good location to operate a business."



N=9

- Almost 90% of business owners agree that Oliver Paipoonge is a good location to operate a business
- No business owner strongly disagreed, and only one somewhat disagree.

How long have you owned or operated a business in the Municipality of Oliver Paipoonge?

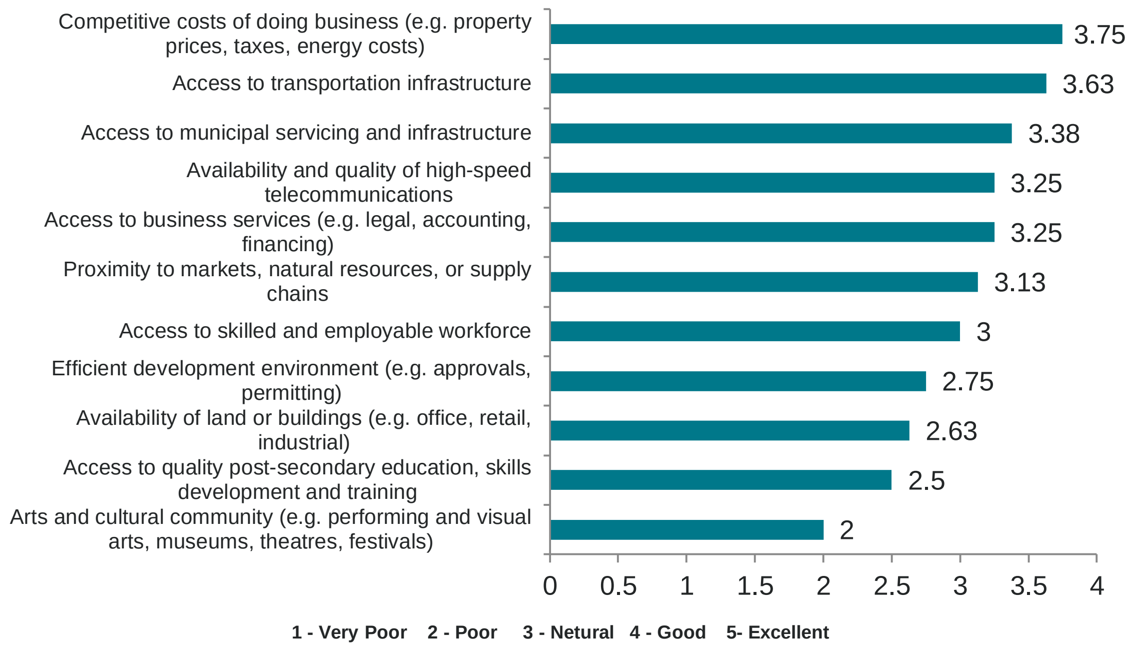


N=9

- Over two thirds of business owners (66%) have owned or operated a business in the Municipality for over 5 years.

- A third (33%) of business owners have been operating for between one to five years, with no business owners operating for less than a year.

As a business owner, how would you rank your satisfaction with each of the following criteria based on their role in making the Municipality of Oliver Paipoonge a good location for business? (Where a rating of 1 being very poor and a rating of 5 being excellent)



N=8

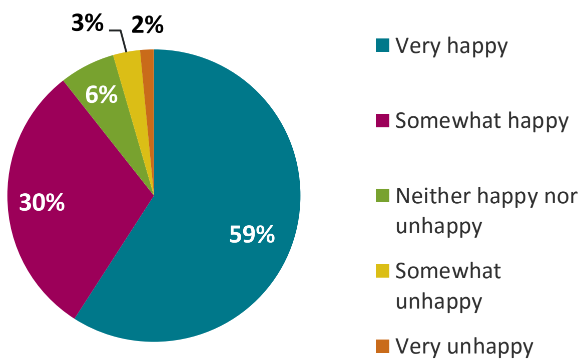
- Respondents indicated that they are most satisfied with the competitive costs of doing business (e.g. property prices, taxes, and energy costs) and its role in making the Municipality a good location for business.
    - Interesting to note is that high costs and prices were identified as the biggest challenge for business growth and development in the Municipality. Business owners and residents may have a different idea on what high costs/prices are.

- Overall, respondents indicated that they are satisfied with the access offerings Oliver Paipoonge provides in transportation infrastructure, land servicing, and business services.
    - Access to transportation was the only criteria that received no very poor or poor ranking.

Residents

A total of 73 residents responded to the survey.

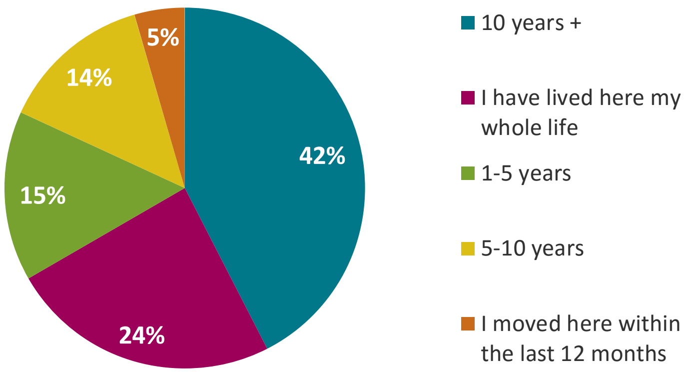
How happy are you living in the Municipality of Oliver Paipoonge?



N=66

- Almost a third (59%) of respondents indicated that they were very happy living in the municipality, and almost 90% of respondents were happy living in the Municipality.
- Less than 10% of respondents were unhappy living in the Municipality.

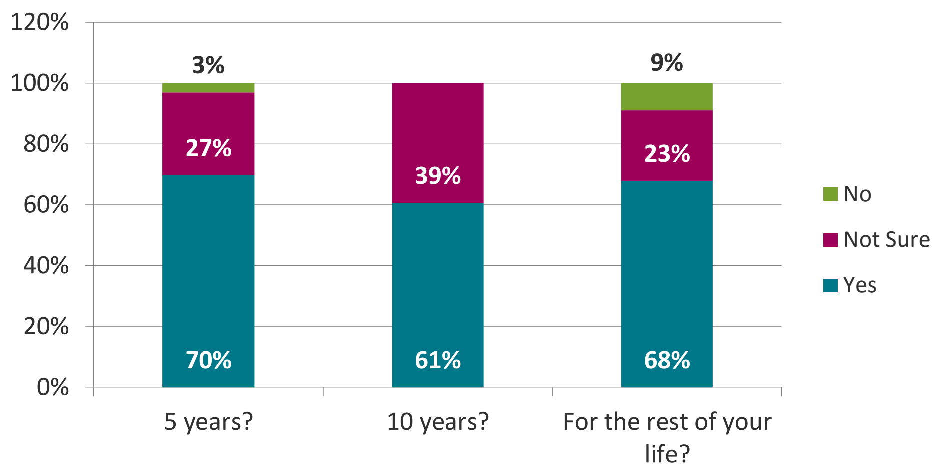
How long have you lived in the Municipality of Oliver Paipoonge?



N=66

- Almost half (42%) of respondents indicated that they have lived in the community for 10 or more years. Interestingly, a quarter (24%) of respondents has lived in the community their whole life.
- Less than 20% of respondents have lived in the community for less than 5 years.
- When asked what drew them to the Municipality and what continues to keep them there, respondents provided the following top responses:
  - Enjoy the country living, rural setting and small town feel of Oliver Paipoonge
  - Close proximity and short commute to Thunder Bay
  - Like the peaceful, quiet and friendly community of Oliver Paipoonge
  - Either born and raised or grew up in the community and will continue to do so

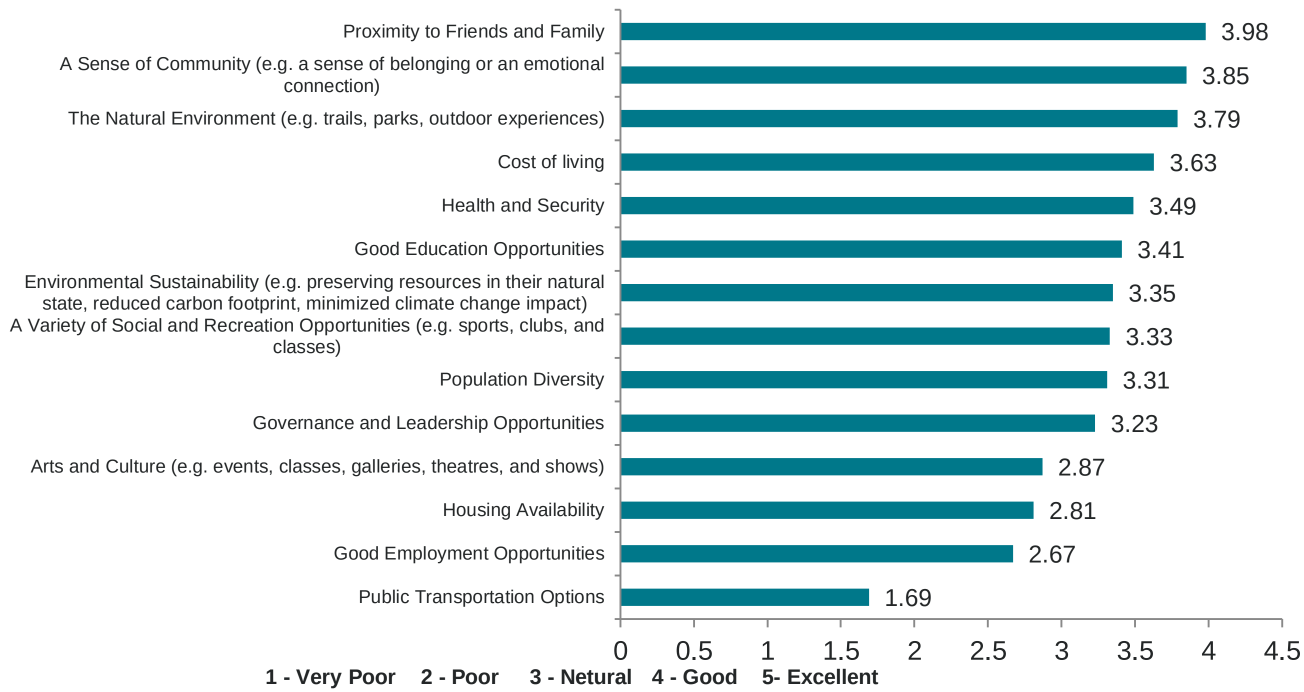
Do you plan on living in the Municipality in 5 years, 10 years, or the rest of your life?



N=66

- Overwhelmingly, a strong majority of respondents indicated that they intend to continue on living within the Municipality.
- Over two thirds (68%) of respondents indicated that they plan on living in the Municipality for the rest of their life, with only 9% indicating that they would not.
- Respondents provided the following reasons to their selections
    - Yes: no plans on moving, love the location, born and raised here, and want to own property
    - Not Sure: might move for retirement living, will need to live in a nursing home, and potential career opportunities
    - No: health and retirement reasons

In your opinion, how would you rank the following quality of life characteristics in Oliver Paipoonge? (Where a rating of 1 being very poor and a rating of 5 being excellent)



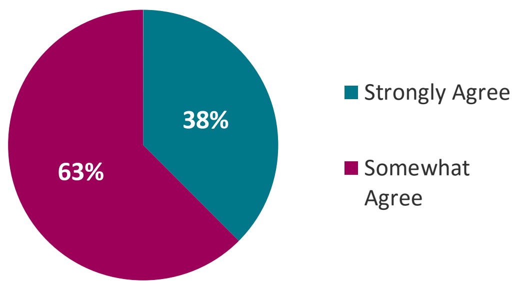
N=63

- Respondents indicated that the proximity to friends and family was the best quality of life characteristics of Oliver Paipoonge.
  - Received only one poor or very poor ranking
- Public transportation was ranked the worst quality of life characteristic by respondents, and only received one good or excellent ranking

Both Business Owner and Resident

A total of 12 individuals who are both business owners and residents responded to the survey.

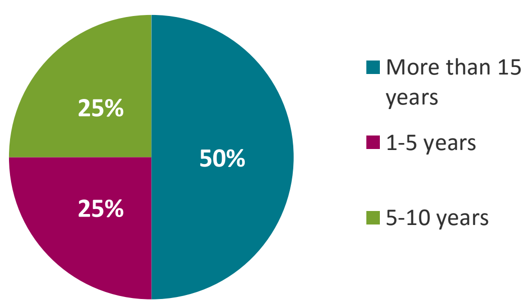
Please indicate to what level you agree or disagree with the following statement: "The Municipality of Oliver Paipoonge is a good location to operate a business."



N=8

- All respondents either strongly or somewhat agree that the Municipality of Oliver Paipoonge is a good location to operate a business.

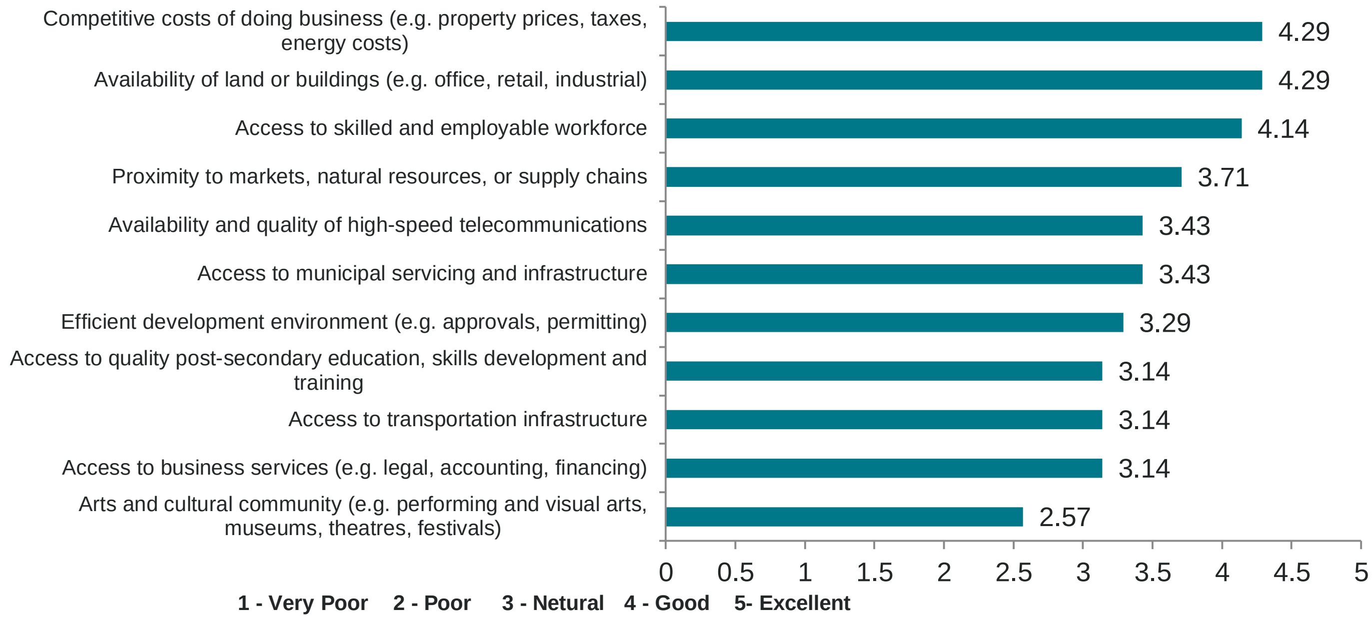
How long have you owned or operated a business in the Municipality of Oliver Paipoonge?



N=8

- Half of the respondents indicated that they have owned or operated a business in the community for more than 15 years.
- No respondent have owned or operated a business in the community for less than one year.
- The following reasons were provided when respondents were asked why they decided to own/operate a business in Oliver Paipoonge:
    - Great location
    - Rural setting and type of clientele (i.e. rugged/outdoor)

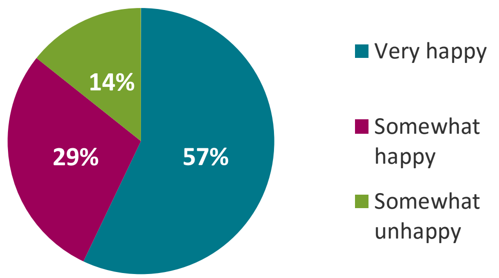
As a business owner, how would you rank your satisfaction with each of the following criteria based on their role in making the Municipality of Oliver Paipoonge a good location for business? (Where a rating of 1 being very poor and a rating of 5 being excellent)



N=7

- Respondents indicated that they are most satisfied with the availability of land or buildings and the competitive costs of doing business within the Municipality of Oliver Paipoonge. (both received no very poor or poor rankings)
- Respondents also indicated that they are most dissatisfied with the arts and cultural community within the Municipality (only criteria to receive no excellent rankings)

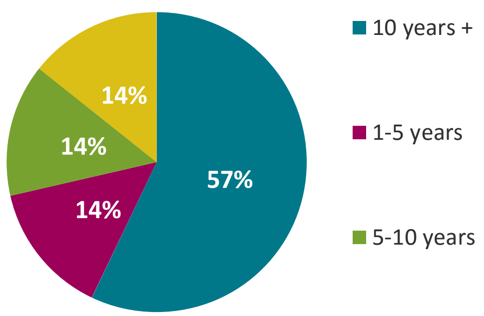
How happy are you living in the Municipality of Oliver Paipoonge?



N=7

- Overwhelmingly (86%), respondents indicated that they are either very happy or somewhat happy living in the Municipality.

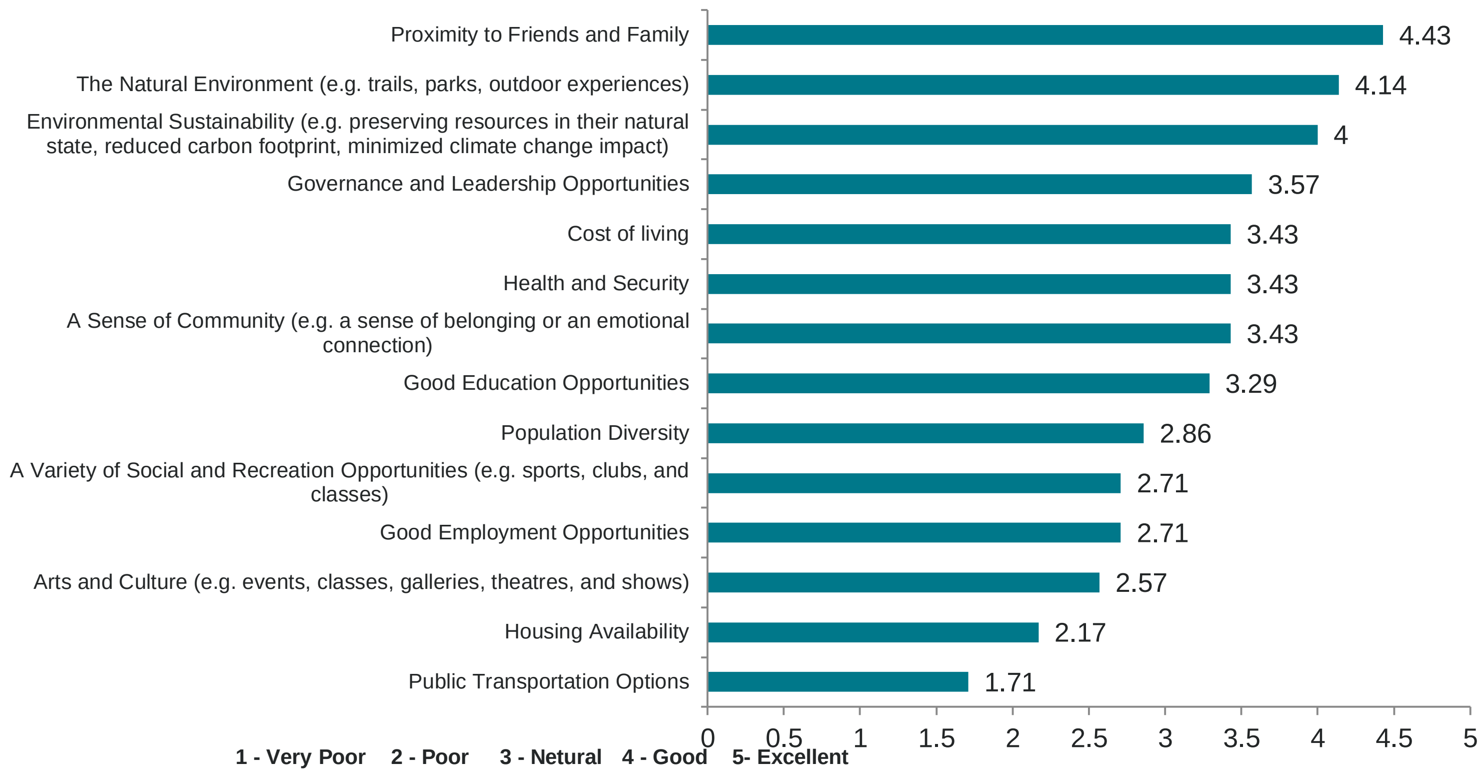
How long have you livid in the Municiplaity of Oliver Paipoonge?



N=7

- Over half of respondents indicated that they have lived here more than 10 years
- No respondent indicated that they have moved here within the last 12 months

In your opinion, how would you rank the following quality of life characteristics in Oliver Paipoonge? (Where a rating of 1 being very poor and a rating of 5 being excellent)

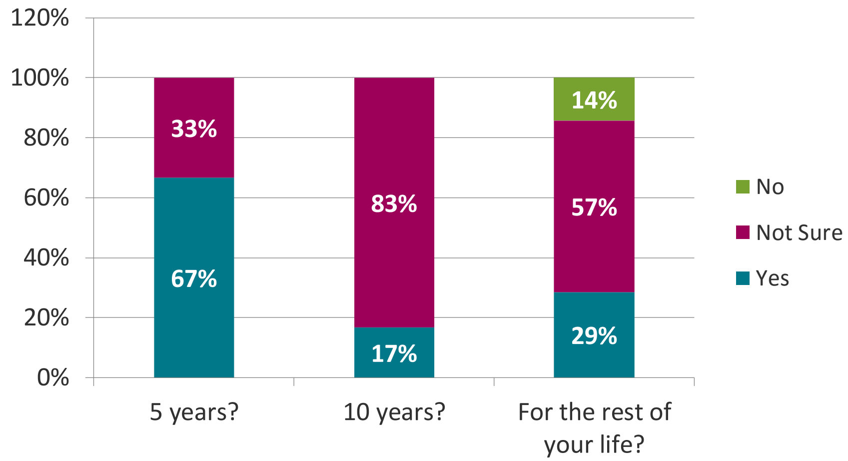


N=7

- Respondents indicated that the best quality of life characteristic in Oliver Paipoonge is the proximity to friends and family.

- Overall respondents indicated that the best quality of life characteristics are those in regards to a friendly and close knit community and the natural environment and its beauty.
- Respondents also indicated that the worst quality of life characteristic of Oliver Paipoonge is the lack of public transportation options.

Do you plan on living in the Municipality in 5 years, 10 years or for the rest of your life?



N=7

- Two thirds (67%) of respondents indicated that they plan on living in the Municipality in the next five years.
- However, an overwhelming majority of respondents indicated that they were either unsure or had no plans on living in the Municipality in 10 years or for the rest of their life.
- This is in stark contrast to the responses provided by just residents, where they overwhelming indicated that they would live here the rest of their life.