

BURK'S FALLS & AREA **SITUATIONAL ANALYSIS**

A Situational Analysis for the Village of Burk's Falls, Township of Armour, and Township of Ryerson.



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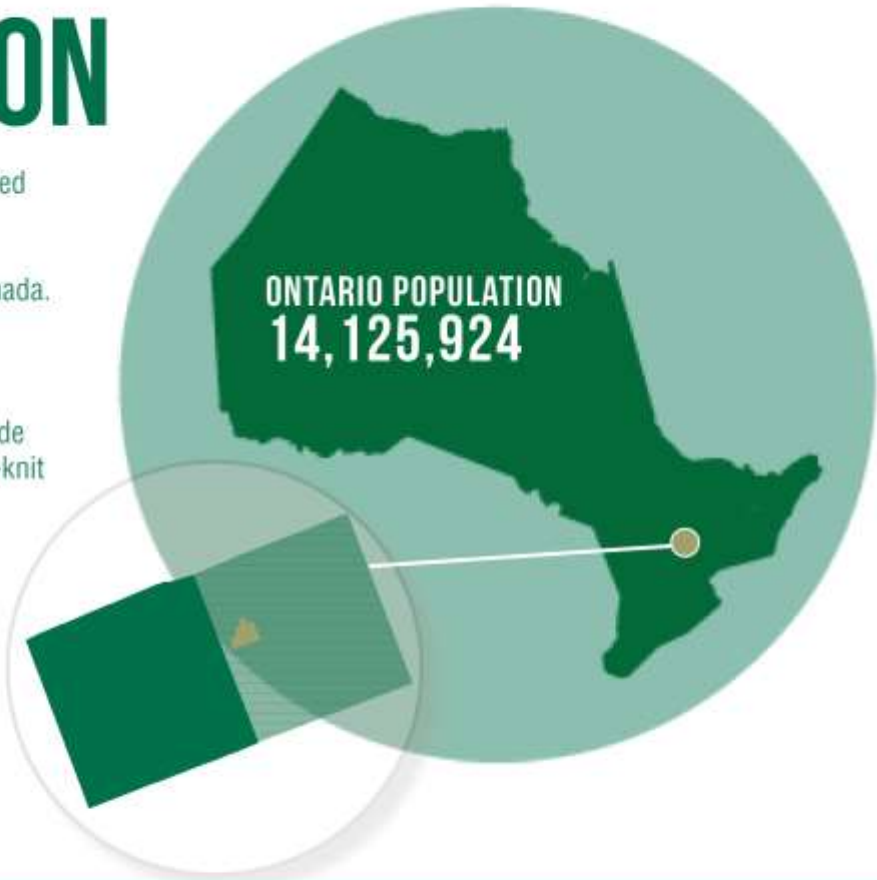
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A SNAPSHOT OF BURK'S FALLS & AREA

LOCATION

Burk's Falls is an incorporated village in the Almaguin Highlands region of Parry Sound District, Ontario, Canada.

Burk's Falls, Armour and Ryerson is an appealing community-as-a-whole, made up of several smaller, close-knit communities.



MARKET ACCESS

90km	.....	North Bay
210km	.....	Sudbury
270km	.....	Toronto
430km	.....	Ottawa
520km	.....	Sault Ste. Marie

POPULATION

3,180* 2017 ESTIMATE

BURK'S FALLS & AREA

1,479	ARMOUR
1,023	BURK'S FALLS
676	RYERSON

DEMOGRAPHICS



CENSUS POPULATION



MEDIAN AGE



AGE PROFILE



POPULATION BY GENDER



12.1%

1 YEAR MOBILITY

Residents that had moved within the previous year

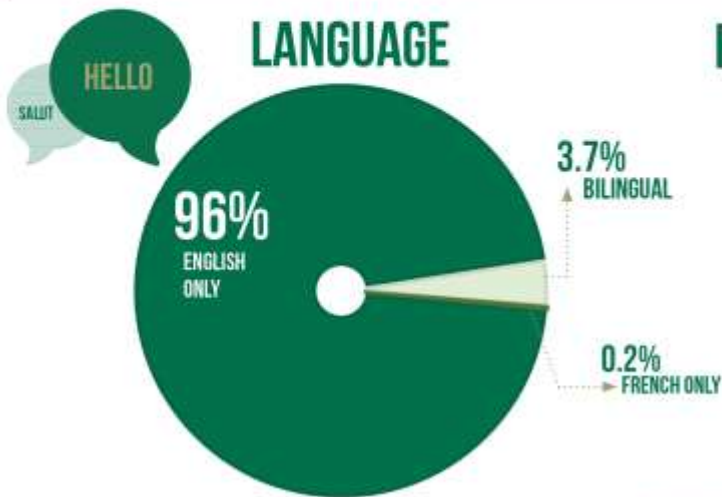


34.7%

5 YEAR MOBILITY

Residents that had moved within the previous 5 years

LANGUAGE

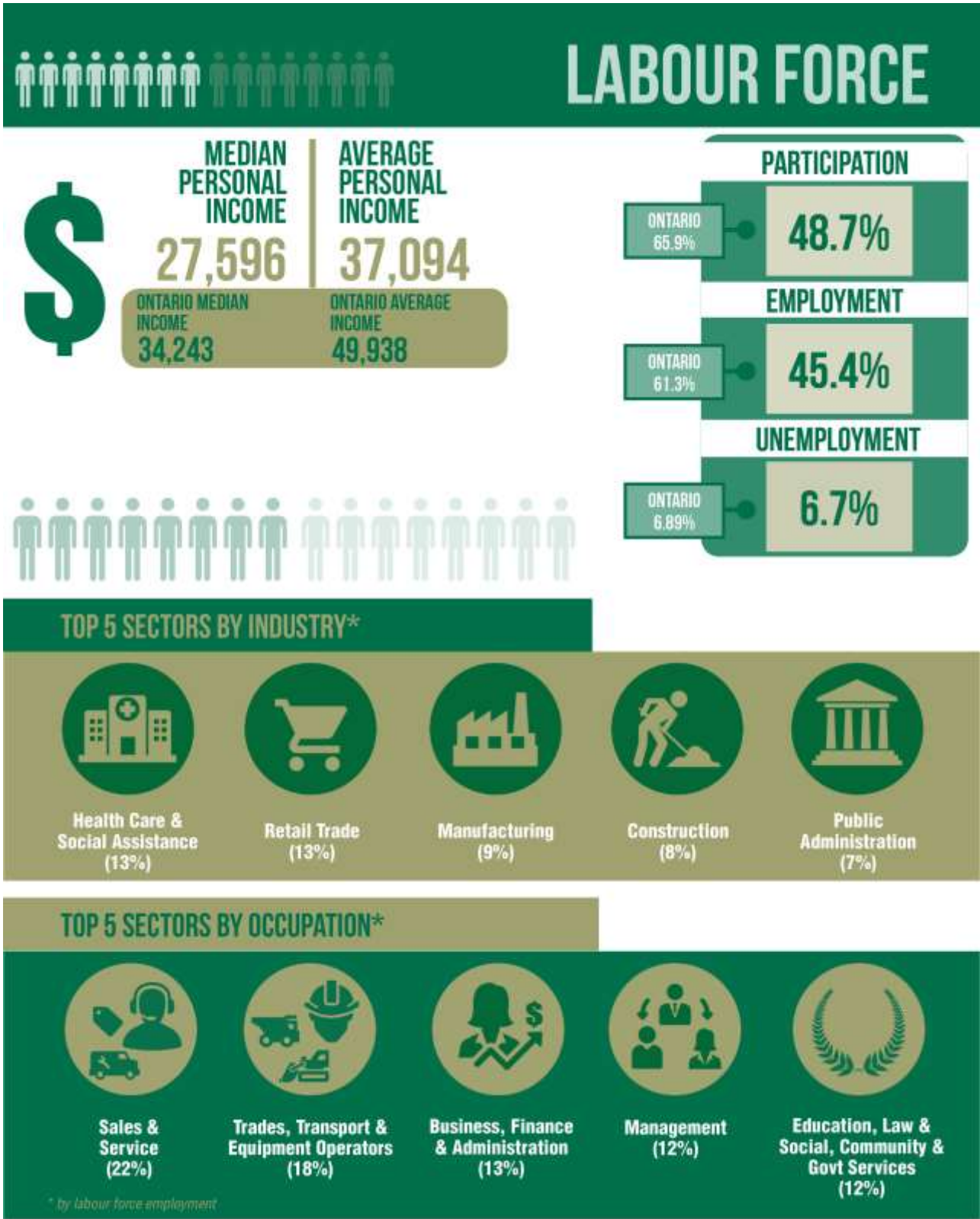


HIGHEST EDUCATION LEVEL

28.2% SECONDARY | **56.3%** POST-SECONDARY



All data sourced from Manifold SuperDemographics unless otherwise specified.





1 Statistical Overview

This document studies economic and demographic trends in the Village of Burk's Falls, Township of Armour, and Township of Ryerson. The three municipalities will be referred to as Burk's Falls & Area for the remainder of the document.

This section provides an overview of the three municipalities, from a numbers perspective. Table 1 provides an overview of 2017 population estimates, which are partially based on 2016 and 2011 Census data.

Table 1: Statistical Overview of Burk's Falls & Area, 2017¹

Topic	Demographic Variable	Armour	Burk's Falls	Ryerson
Population	Total population ²	1,479	1,023	676
	Projected population 2022	1,522	1,037	690
	Projected population 2027	1,562	1,049	703
Labour Force³	Total population 15 years and over	1,325	877	610
	In the labour force	546	415	435
	Participation rate (%)	41.24	47.36	71.32
	Employment rate (%)	38.47	44.27	66.07
	Unemployment rate (%)	6.72	6.53	7.36
Income (\$) ⁴	Average total income, aged 15+ (2016)	\$27,596	\$20,890	\$31,220
	Median total income, aged 15+ (2016)	\$34,462	\$38,427	\$40,861
	Average household income (2016)	\$60,068	\$36,332	\$60,068
	Median household income (2016)	\$64,755	\$61,907	\$64,755
Households	Total number of private households	635	488	319
Dwelling	Median value of dwellings	\$448,462	\$354,993	\$558,854

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

¹ The content of the report is derived from Manifold's proprietary postal code information. No confidential information about an individual, household, organization or business has been obtained from Statistics Canada.

² 2017 data is obtained through Manifold and is not directly comparable to Census data. Typically, Manifold estimates of total population are slightly higher than the Census.

³ **Labour force** - Refers to persons who were either employed or unemployed. **Participation rate** - Refers to the labour force expressed as a percentage of the population 15 years and over excluding institutional residents. **Employment rate** - Refers to the number of persons employed expressed as a percentage of the total population 15 years and over, excluding institutional residents. **Unemployment rate** - Refers to the unemployed expressed as a percentage of the labour force.

⁴ Note that Income variables always use the data from the previous year and are considered before taxes.

The following two tables provide an overview of demographics changes between 2006 and 2016, according to the census, for the three municipalities.

Table 2: Census Overview of Demographic Changes for Burk's Falls & Area

	Demographic Variable	Armour		Burk's Falls		Ryerson	
		2006	2016	2006	2016	2006	2016
Population	Total Population	1,249	1,414	893	981	686	648
	Children & Youth (age 0-14)	Increased		Increased		Decreased	
	Adult (age 15-64)	Increased		Increased		Decreased	
	Segments aged 65 and up	Increased		Increased		Decreased	

Source: McSweeney & Associates from Statistics Canada 2006 and 2016 Census data.

Table 3: Statistical Overview of Demographic Changes for Burk's Falls & Area

Topic	Variable	Armour		Burk's Falls		Ryerson	
		2006	2016	2006	2016	2006	2016
Labour Force	Participation rate (%)	52.8		53.1		55.4	
	Employment rate (%)	51.4		48.3		50.4	
	Unemployment rate (%)	3.5		7.9		9.0	
Income (\$)	Median family income (\$)	43,351	70,336	36,580	53,504	57,535	63,744
	Median household income (\$)	39,826	59,648	34,457	40,288	44,353	57,344
Households	Total number of private households	545	610	425	465	290	300

Source: McSweeney & Associates from Statistics Canada 2006 and 2016 Census data

***Note: the missing data in Table 3 will be filled November 29th with final Census data release.**



2 Data Sources

Please note that every effort has been made to use the most current data available. There are three major sources of information for the remainder of this document:

- The 2011 and 2016 Census from Statistics Canada
- SuperDemographics 2017 from Manifold Data Mining Inc.
- Emsi Analyst 2017
- Canadian Business Patterns (CBP) form detailed geographic estimates of employment. The major sources of information for the Business Register are updates from the Statistics Canada survey program and from Canada Revenue Agency's (CRA) Business Number account files. This CRA administrative data source allows for the creation of a universe of all business entities.

Manifold Projection Method

Production of 2017 Demographic data estimates from population statistics collected by Statistics Canada via Census every five years. Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold methodologies are based on the following techniques:

- Enhanced cohort survival methods
- Nearest neighborhood and regression techniques
- Structural coherence techniques.

Manifold Data Sources include:

Statistics Canada	Real Estate Boards/Companies
Health Canada	Canadian Bankers Association
Regional Health Ministries	Bank of Canada
Citizenship and Immigration Canada	Canada Post Corporation
Regional School Boards	Consumer and business directories books
Brisco International Inc.	Publication of hospitals, CMHC, BBM and partners
Flyer Distribution Association	Proprietary survey and research

Demographics (Section 3) and labour force (Section 4) analysis are primarily based on Manifold SuperDemographics 2017, unless otherwise indicated. The economic base analysis (Section 5) is based on labour market data provided by Emsi Analyst. Lastly, the employer structure analysis (Section 6) is based on Canadian Business Patterns data, produced by Statistics Canada and acquired through Emsi Analyst.



3 Demographic Analysis

3.1 Population and Age Structure Profile

The demographics analysis utilizes population estimates to highlight key trends in Burk's Falls & Area (B.A.R.), relative to Almaguin Highlands (AH) and Ontario, which are used as benchmark regions. For a complete list of municipalities included in this region see Appendix A, Table 9.

Table 4: Estimated Populations, 2017

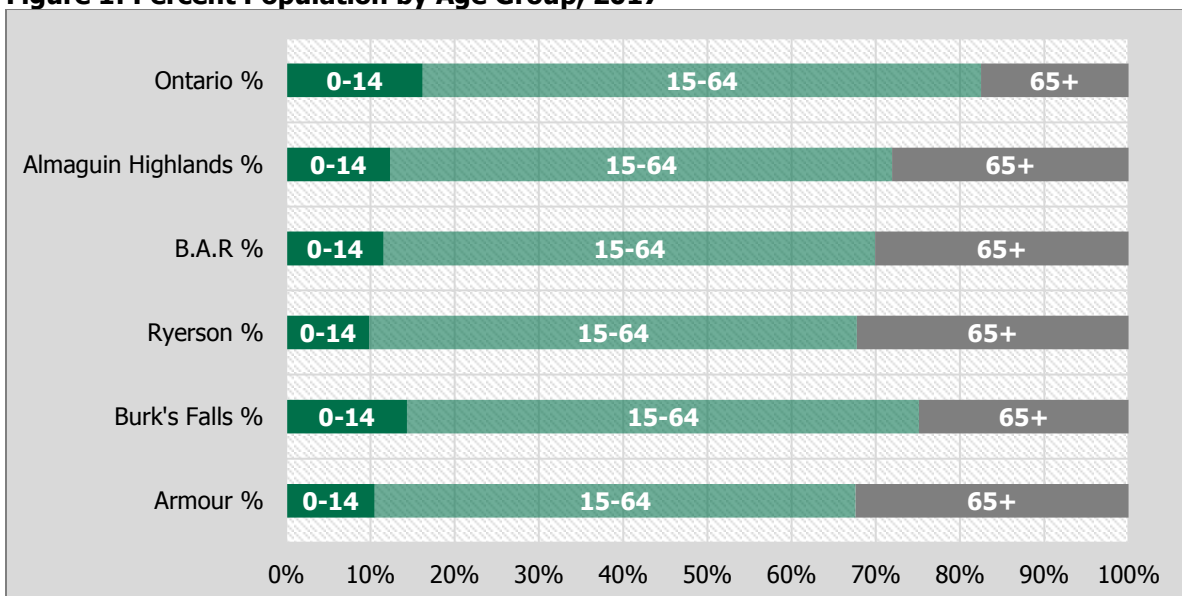
Variable	Armour	Burk's Falls	Ryerson	B.A.R	Almaguin Highlands	Ontario
Population	1,479	1,023	676	3,180	20,632	14,125,924
Median Age	56.5	45.0	55.8	53.1	51.9	42.2
Average Age	50.6	44.3	50.0	48.4	47.7	41.6

Source: McSweeney & Associates Manifold 2017

Figure 1, Tables 4 and 10 (in the Appendix), illustrate the age profile of Burk's Falls & Area compared to Ontario. Looking at the age distribution patterns, it can be said that:

- Burk's Falls & Area has a slightly older profile than the compared regions, as measured by the median age (53 median age, versus 52 in Almaguin Highlands, and 42 in Ontario).
- The Burk's Falls Area has nearly 12% of it's population in the ages of 0-14. There is nearly 60% of the population between 15-64, of which 24% are between the ages of 50-64. Those in the age of retirement (65 years and over) represent 30% of the population in Burk's Falls & Area.

Figure 1: Percent Population by Age Group, 2017



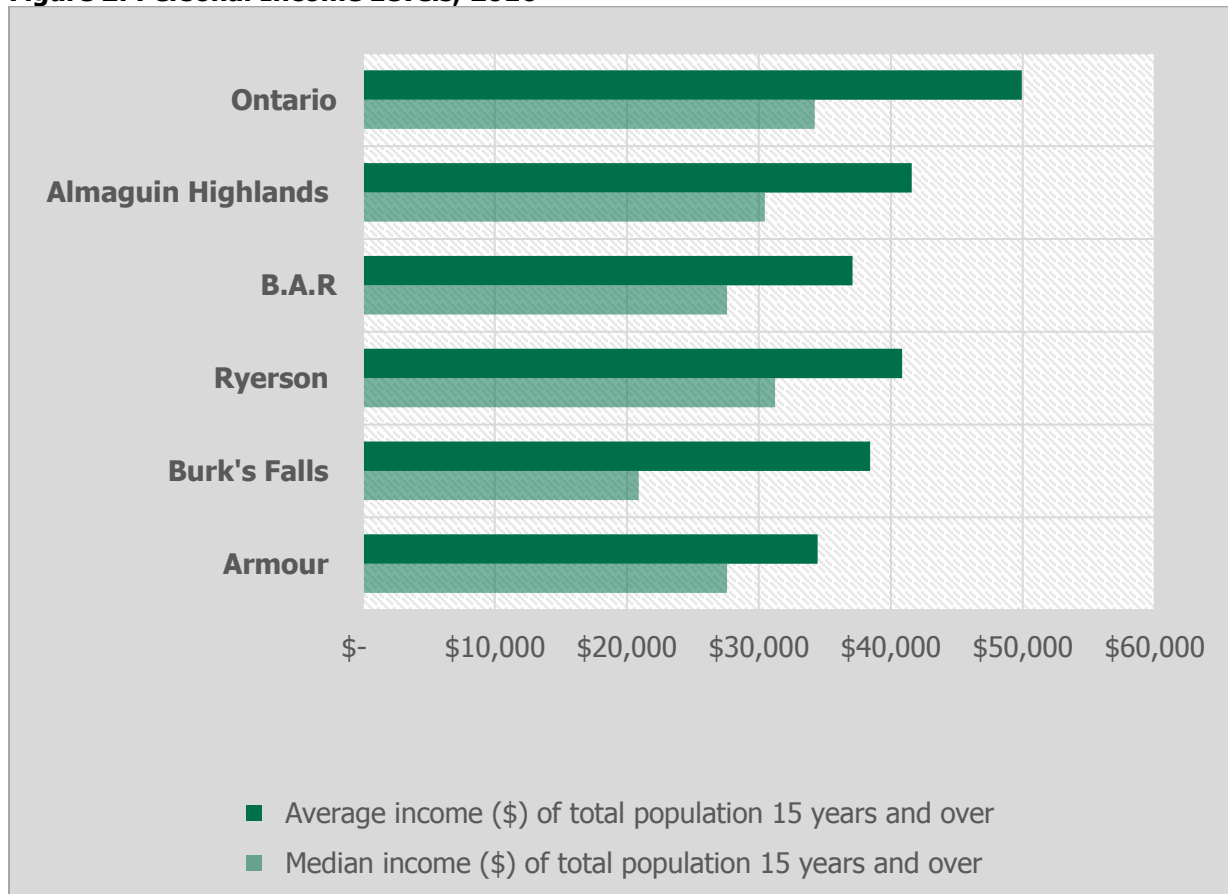
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

3.2 Incomes

Using the information in Figure 2, as well Table 11 (in the Appendix), the following observations can be made with respect to personal incomes:

- Ontario and the Township of Burk's Falls have the highest gaps between median and average income. This indicates a larger income gap, as few outliers at the high end of the distribution increase the average but not the median income levels.
- The most common income bracket in the Burk's Falls & Area is between \$20,000 and \$29,999 annually, same as Ontario.
- The Median total personal income level for the Burk's Falls Area is \$27,596, or \$37,094 for the average.

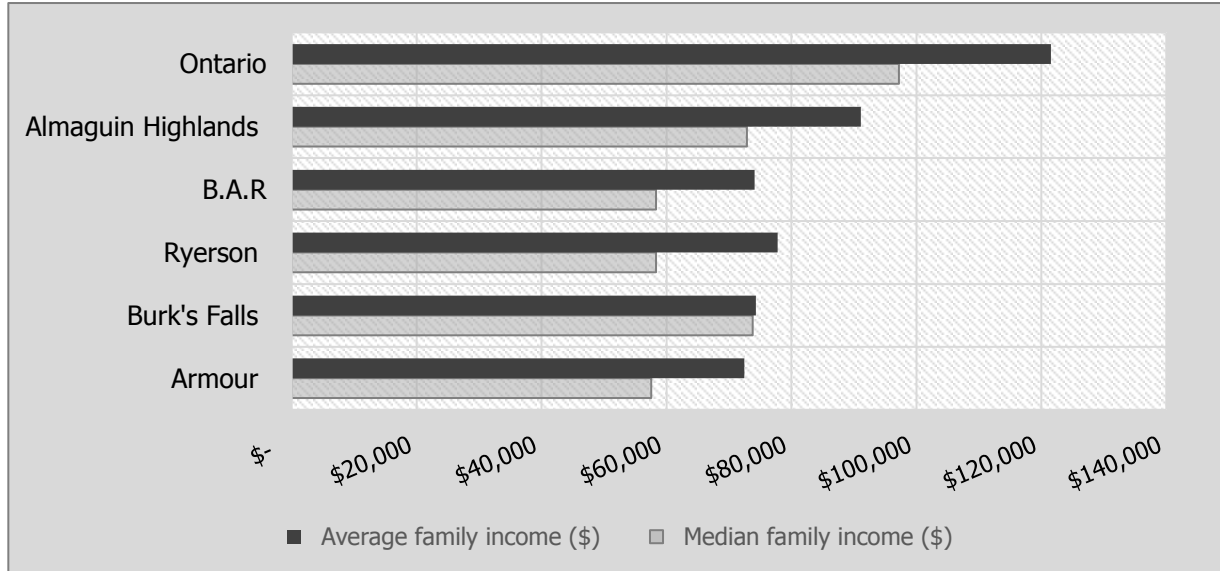
Figure 2: Personal Income Levels, 2016



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017 (2016 incomes).

Figure 3 and 4 (and Table 12-13, Appendix A) show descriptive statistics (average and median) of family, and household income levels. Almaguin Highlands and Ontario generally have higher income levels than Burk's Falls & Area.

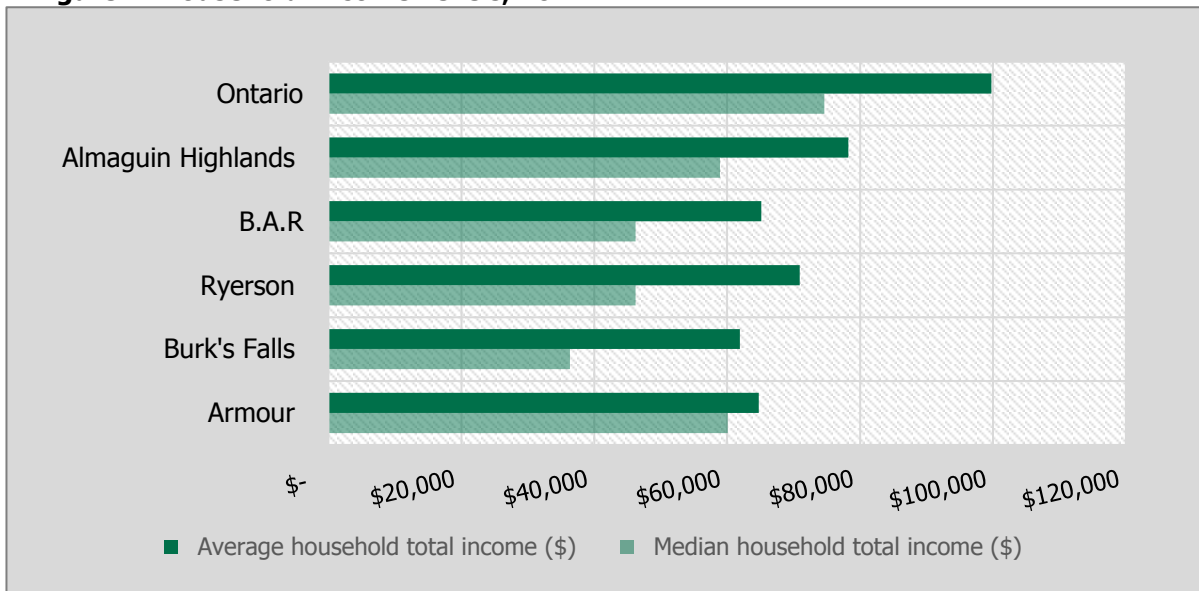
Figure 3: Economic Family Income Levels, 2017



Source: McSweeney & Associates from Manifold 2017 (2016 incomes)

The Township of Armour has the smallest gaps between average and median income (personal, family, and household), and thus, it likely has the most equitable income distribution among the regions compared here.

Figure 4: Household Income Levels, 2017



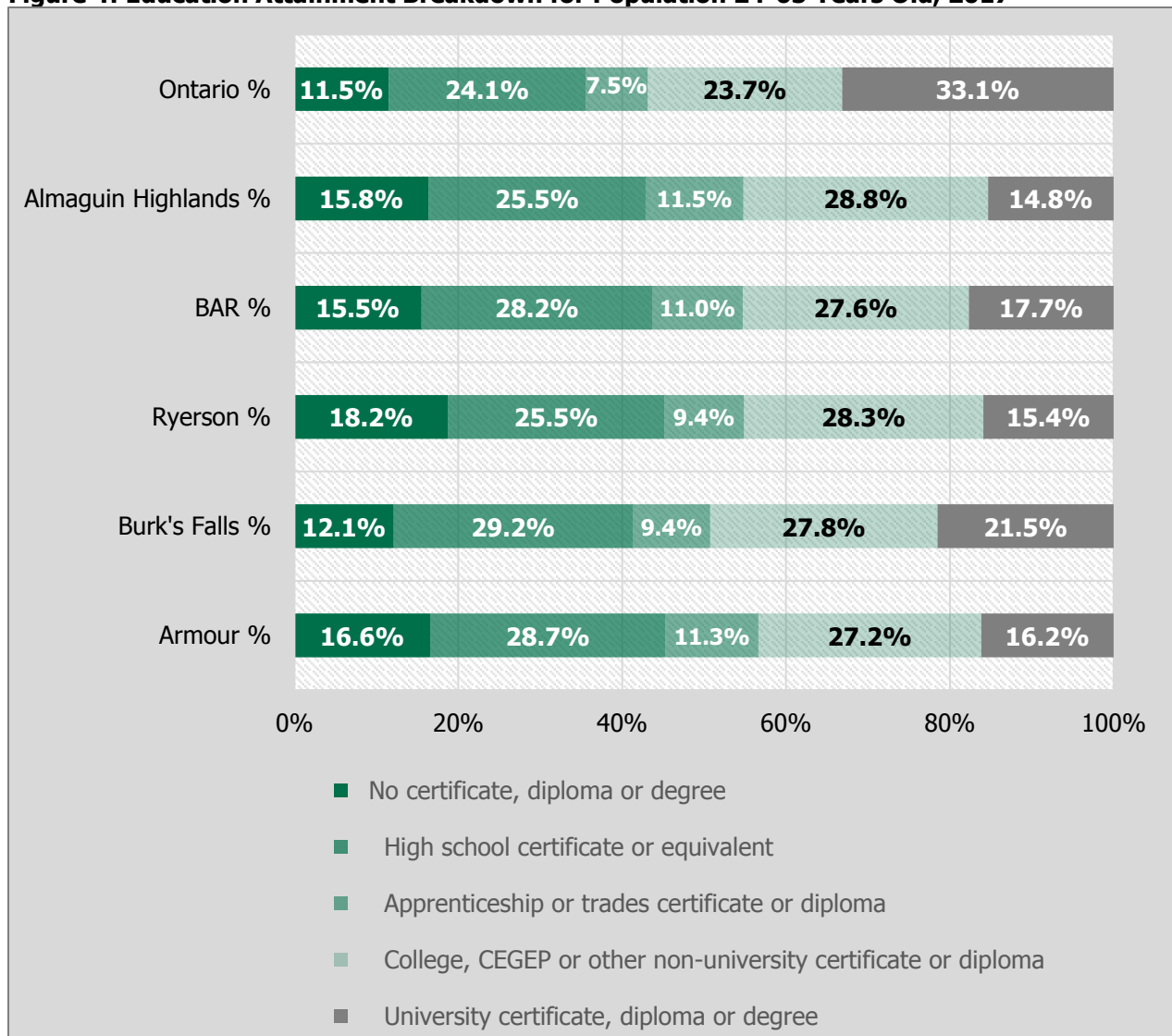
Source: McSweeney & Associates from Manifold 2017 (2016 incomes)

3.3 Education

This section outlines the education levels obtained by residents (aged 25-64) for the regions of study. The following can be said, based on Figure 4, and Table 13-14 in the Appendix:

- The Village of Burk's Falls has the highest level of university graduates (22% of resident) after Ontario (33%).
- Burk's Falls & Area (BAR) has a strength/concentration in College graduates (28%), although Almaguin Highland has more of these (29%).
- The Burk's Falls region has a relatively low supply (and plausibly an untapped market) for professions related to apprenticeships, and trades. This is a common trend in Ontario and Almaguin Highland; short supply of blue collar workers.

Figure 4: Education Attainment Breakdown for Population 24-65 Years Old, 2017



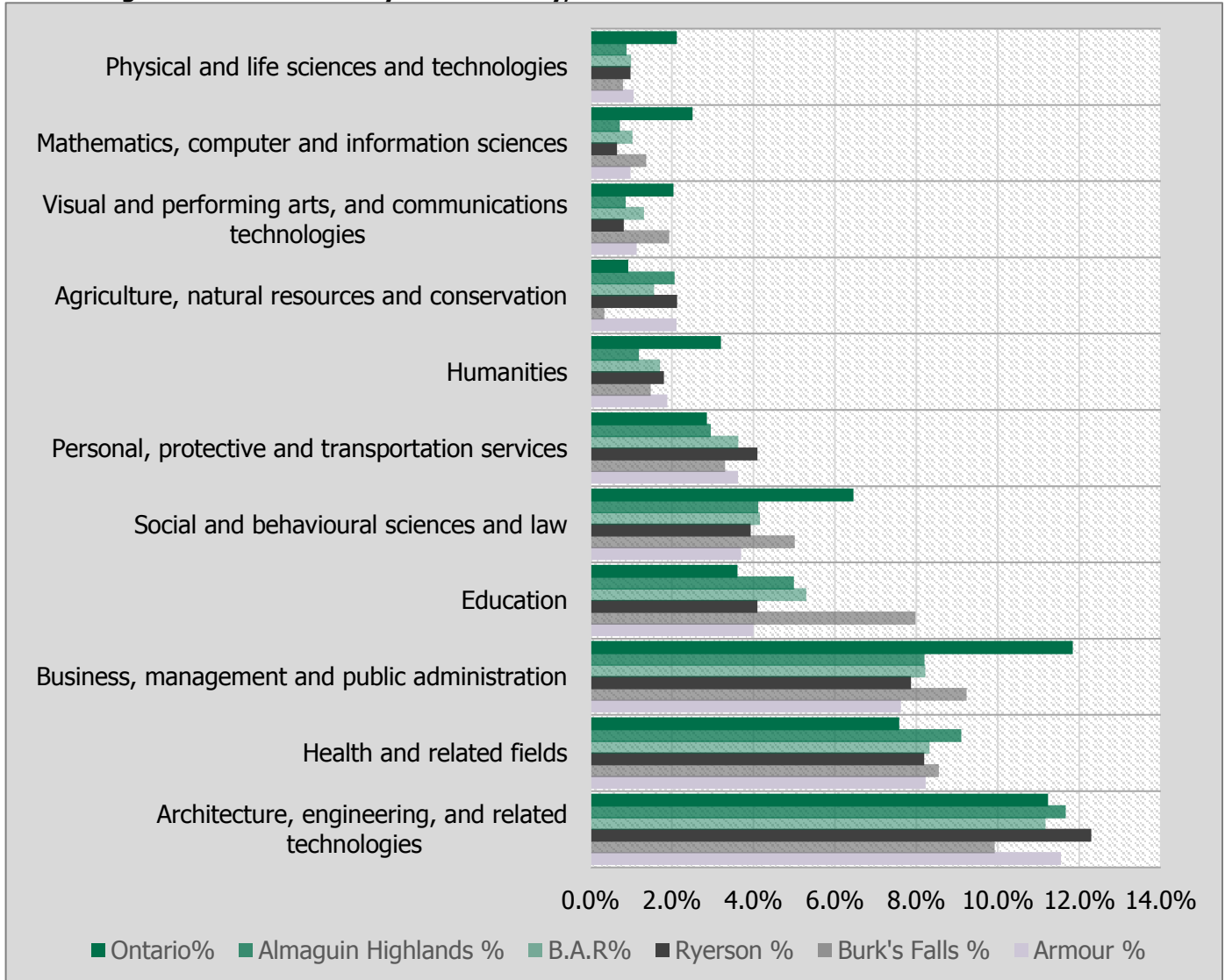
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

3.4 Post-Secondary Field of Study

Based on Figure 5 and Table 15 (in the Appendix), the following observations can be made:

- The largest post-secondary field of study in Burk's Falls & Area by percentage of resident 15 and older, was architecture, engineering and related technologies⁵
- The Burk's Falls Area has a concentration in Education, which is larger than in Ontario and in Almaguin Highland.

Figure 5: Post-Secondary Field of Study, 2017⁶



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

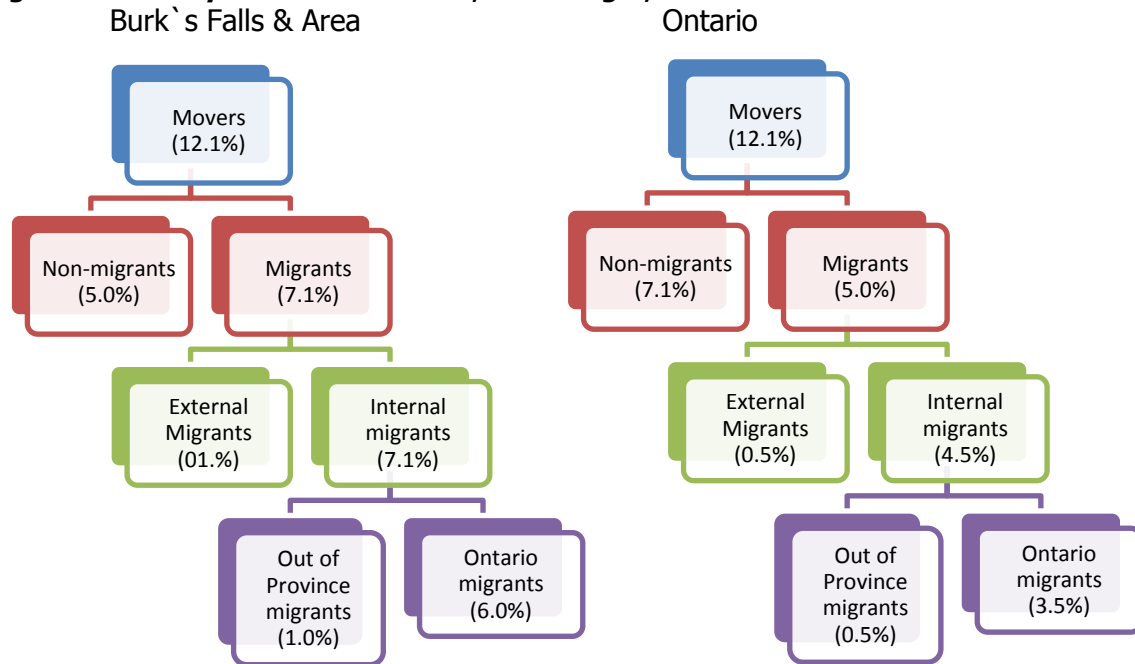
⁵ This field includes: Architecture and related services; Engineering; Engineering technologies and engineering-related fields; Historic preservation and conservation; Construction trades; Mechanic and repair technologies/technicians; and Precision production

⁶ 'Major Field of study' is defined as the main discipline or subject of learning, and it is collected for the highest certificate diploma or degree above the high school or secondary school level completed, and classified according to the Classification of Instructional Programs (CIP) Canada 2016.

3.5 Migration

Mobility (refers to whether or not people lived in the same dwelling unit either one year or five years ago) of Burk's Falls & Area residents in 2017 can be seen in Figures 6 and 7, as well as in Table 16 (in the Appendix) for the other regions of interest. The following diagram is a visual breakdown of the mobility in the community compared to Ontario. Definitions may be found in the footnotes.

Figure 6: Mobility Status Breakdown, 1 Year Ago⁷, 2017

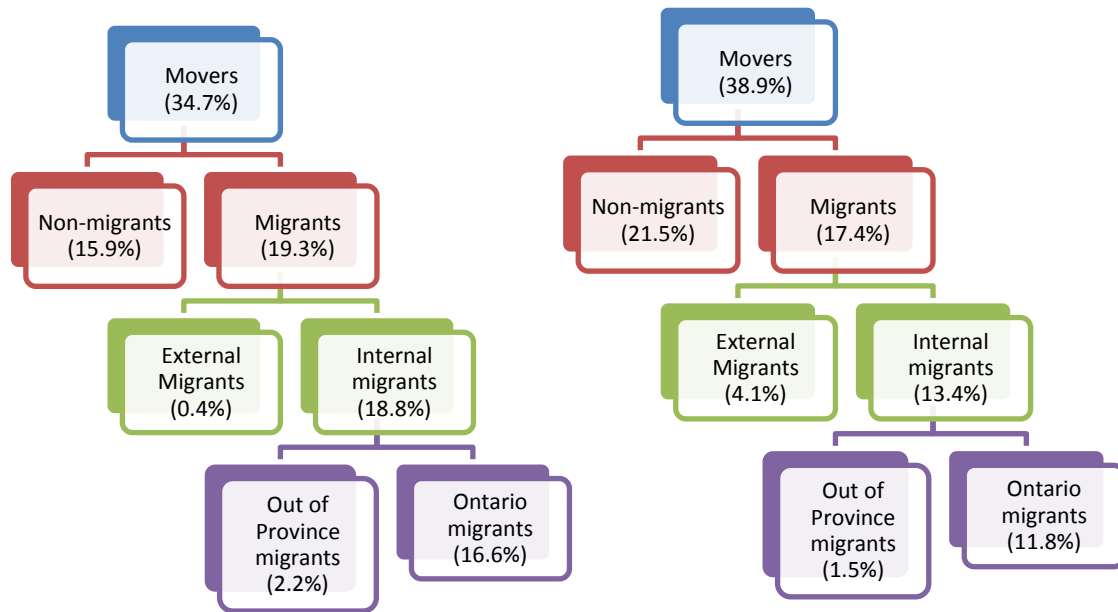


Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

In 2017, the percentage (12.1%) of residents in Burk's Falls & Area that moved within the previous year is the same as the percentage of "movers" in Ontario (12.1%). People moving to the Burk's Falls Area were much more likely to be relocating from other parts of Ontario as opposed to moving from within of the region or outside of the country or the province.

⁷ Non-movers are persons who were living at the same address as the one at which they resided one year earlier. Movers are persons who were living at a different address from the one at which they resided one year earlier. Non-migrants are movers who were living at a different address, but in the same census subdivision (CSD) as the one they lived in one year earlier. Migrants are movers who were residing in a different CSD in Canada (internal migrants) one year earlier, or who were living outside Canada one year earlier (external migrants). Intra-provincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in the same province. Interprovincial migrants are movers who were living in a different CSD from the one at which they resided one year earlier, in a different province.

Figure 7: Mobility Status Breakdown, 5 Years Ago, 2017
Burk's Falls & Area Ontario



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Figure 7 compares the mobility of Burk's Fall Area residents five years ago to that of Ontario. The percentage (35%) of residents that had moved within the past five years was lower than the percentage of "movers" in the province (39%). People moving to Burk's Falls & Area were more likely to be relocating from within the province as opposed to moving from outside of Ontario.

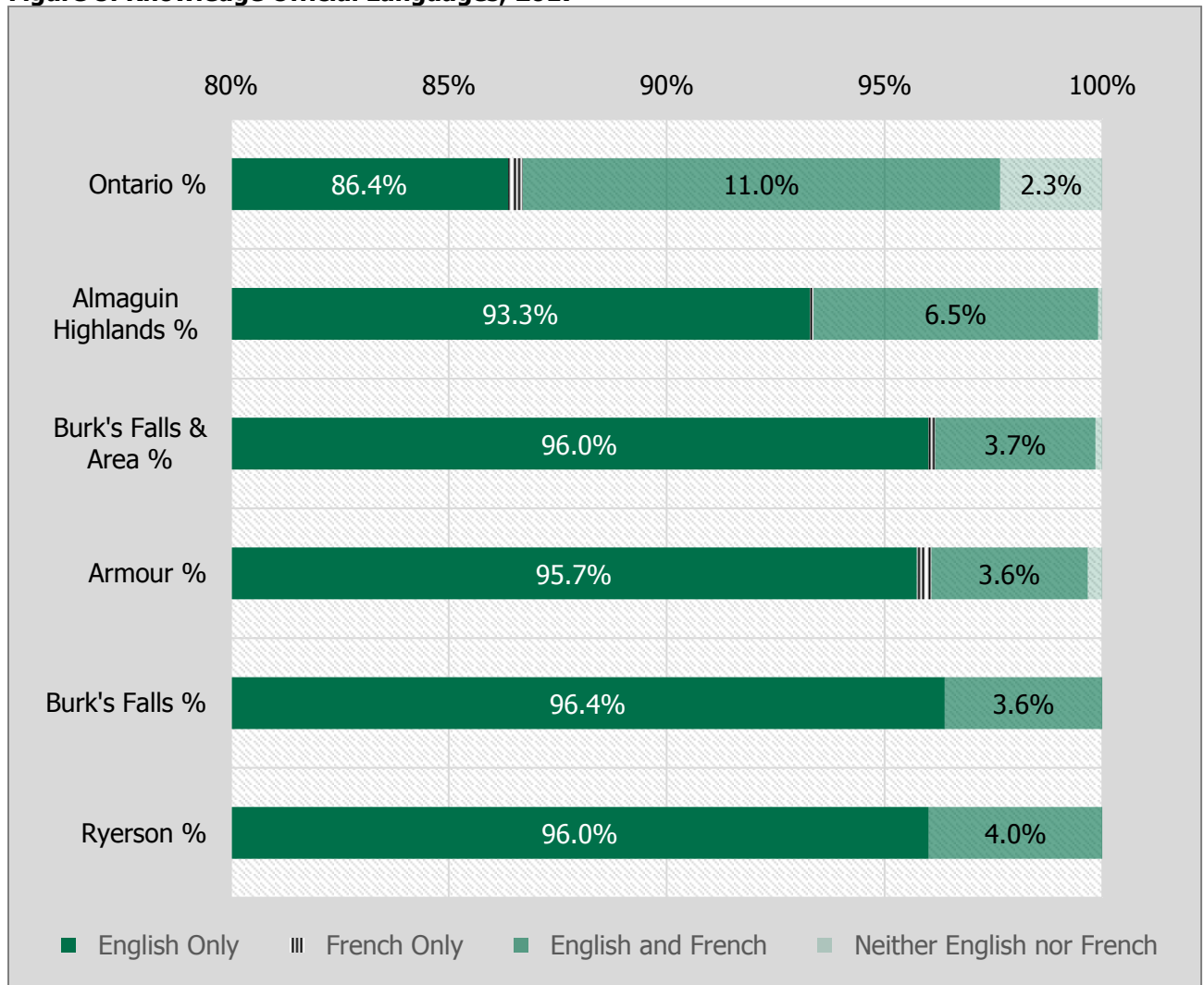
3.6 Knowledge of Official Languages

Figure 8 and Table 17 (in the Appendix) illustrate the knowledge of official languages in in the Burk's Falls & Area region compared to Ontario in 2017:

- 96% of residents Burk's Falls & Area speak English only, which is above the provincial average (86%).
- The percentage of Burk's Falls & Area residents that speak French only is 0.2% compared to 0.3% Ontario.
- Less than 4% of the population speaks both English and French in Burk's Falls & Area, which is lower than the province (11%).

Figure 8 shows a breakdown of the percentage of the population with knowledge of Canada's official languages. Note that data labels have not been added for percentages below 1%.

Figure 8: Knowledge Official Languages, 2017



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.



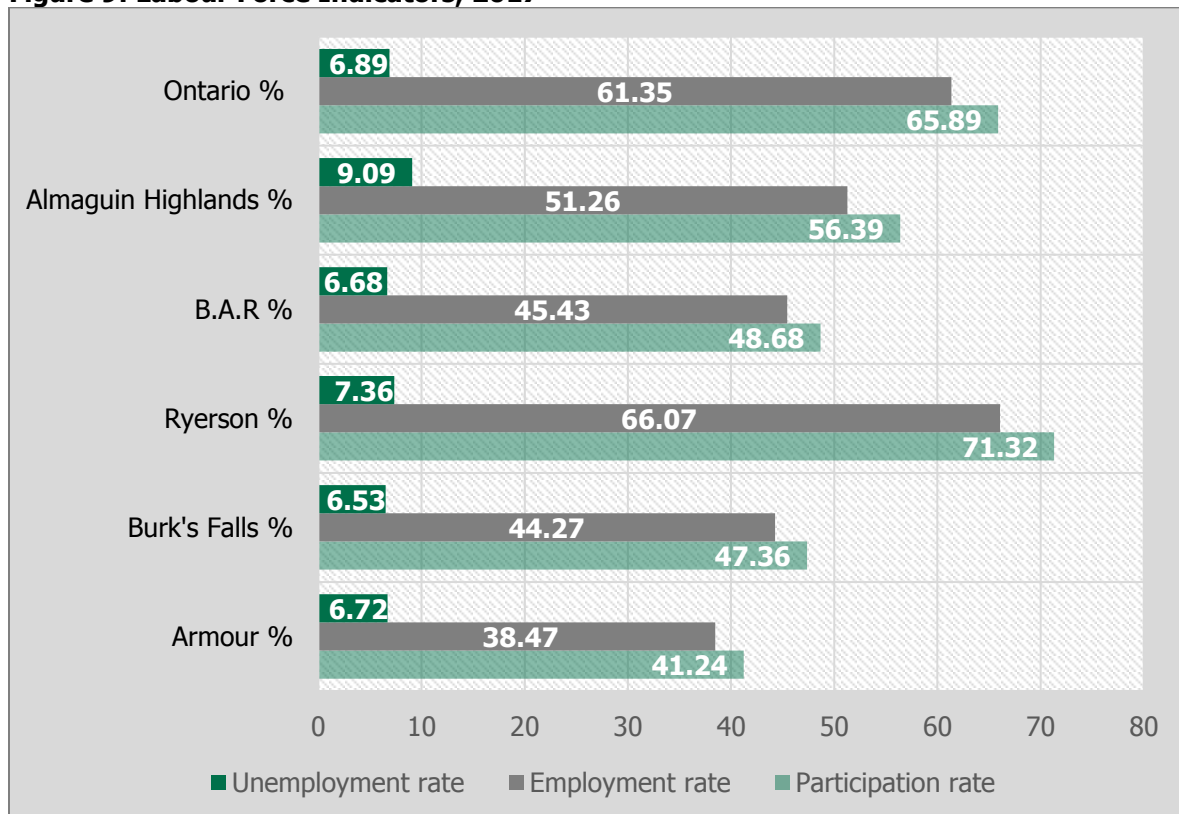
4 Labour Force Analysis

4.1 Key Indicators

Figures 9, along with Table 18 in the Appendix, provide a comparison of key labour force indicators for Burk's Falls & Area and comparing areas. The following observations can be made:⁸

- Township of Ryerson has the highest rates of employment and participation in the labour force compared to the all other regions, including Ontario and Almaguin Highland.
- Employment and participation rates are significantly lower in the Township of Armour and Village of Burk's Falls, compared to Township of Ryerson and Ontario.
- Unemployment Rate is highest in Almaguin Highland, relative to all other regions of study.
- Burk's Falls & Area has a lower unemployment rate compared to the province.

Figure 9: Labour Force Indicators, 2017



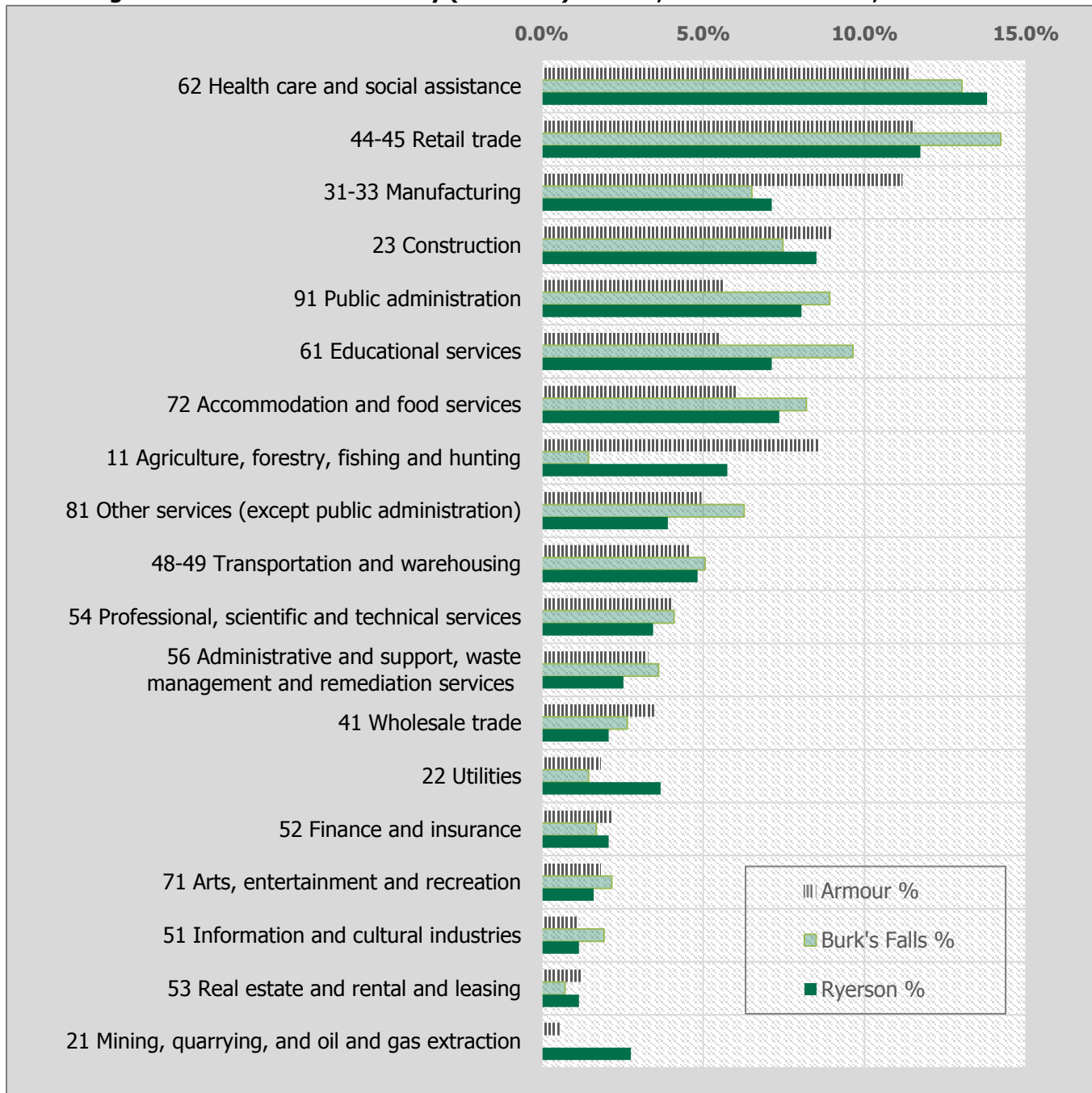
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017

⁸ Participation rate %=labour force/total population 15+. Employment rate %= employed/total population 15+. Unemployment rate %=unemployed/labour force

4.2 Labour Force by Industry

Figure 10, and Table 19 (in the Appendix), indicate the sectors where the Burk's Falls & Area resident labour force, aged 15 years and over, is employed. Figure 10 shows percentage of the population working within each sector (notes the sector code appears before the name).

Figure 10: Local Labour Force by (NAICS⁹ #) Sectors, Burks' Falls & Area, 2017



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

⁹ For more information see: <https://www.statcan.gc.ca/pub/12-501-x/12-501-x2016001-eng.pdf>

In 2017, the top employment sectors (ordered from largest to smallest) for the Burk's Falls & Area resident labour force (regardless of job location) are as follows:

Armour	Burk's Falls	Ryerson
Retail trade	Retail trade	Health care and social assistance
Health care and social assistance	Health care and social assistance	Retail trade
Manufacturing	Educational services	Construction
Construction	Public administration	Public administration
Agriculture, forestry, fishing and hunting	Accommodation and food services	Accommodation and food services

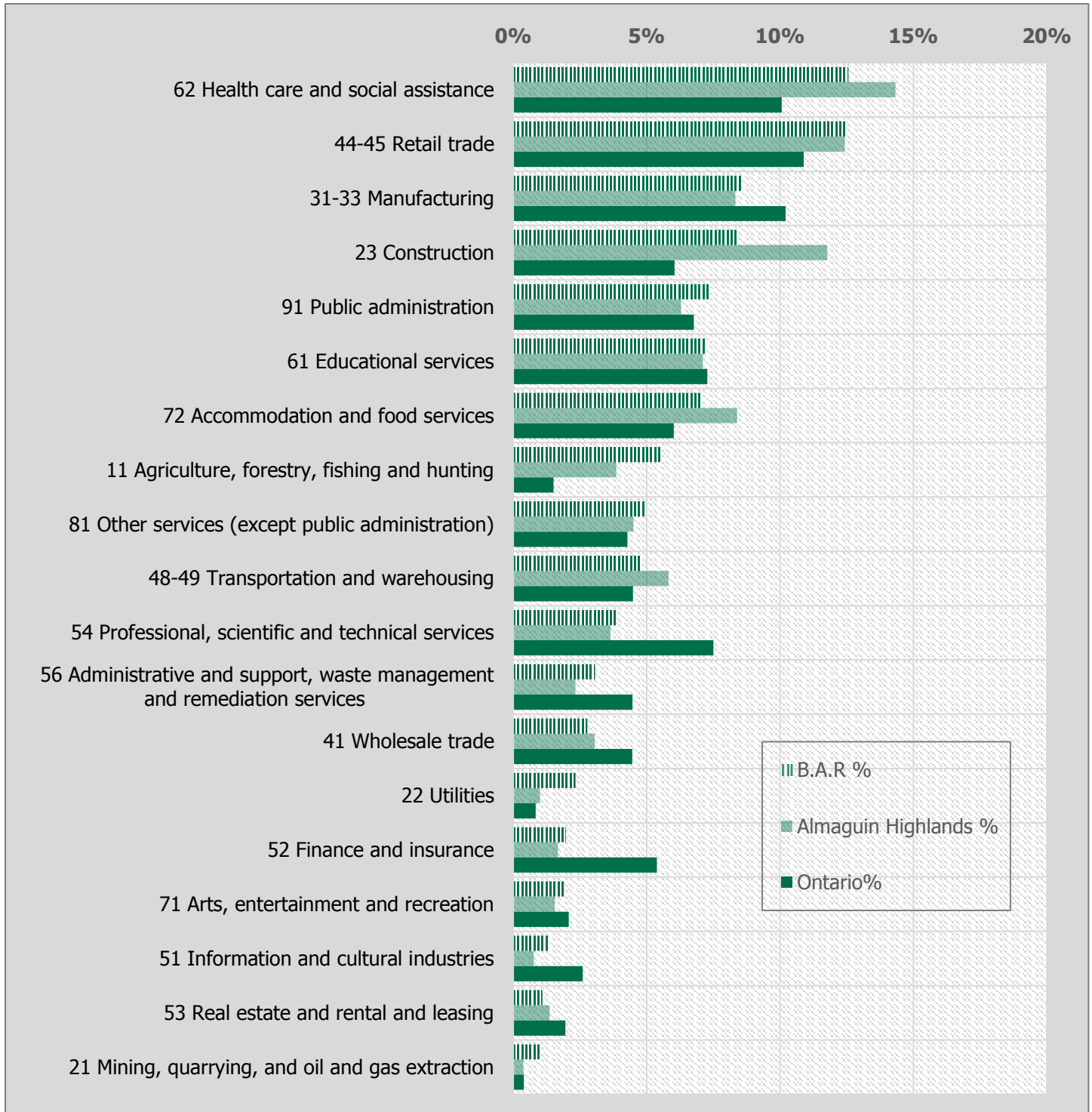
Figure 11 (following page) and Table 20 (Appendix A) compare the regional workforces. The chart shows which are the top employment sectors for the residents (regardless of job location).

Based on figure 11, in 2017, top employment sectors (ordered from largest to smallest) for the compared regions of interest are as follows:

B.A.R	Alamguin Highlands	Ontario
Healthcare	Healthcare	Retail trade
Retail trade	Retail trade	Manufacturing
Manufacturing	Construction	Healthcare
Construction	Manufacturing	Professional, scientific and technical services
Public Administration	Accommodation and Food Services	Educational services

Figure 11 shows the percentage of the population employed by each sector (displayed are sector code and name) in the three regions of study: Burk's Falls & Area, Almaguin Highlands, and Ontario.

Figure 11: Regional Labour Force by (NAICS #) Sector, 2017



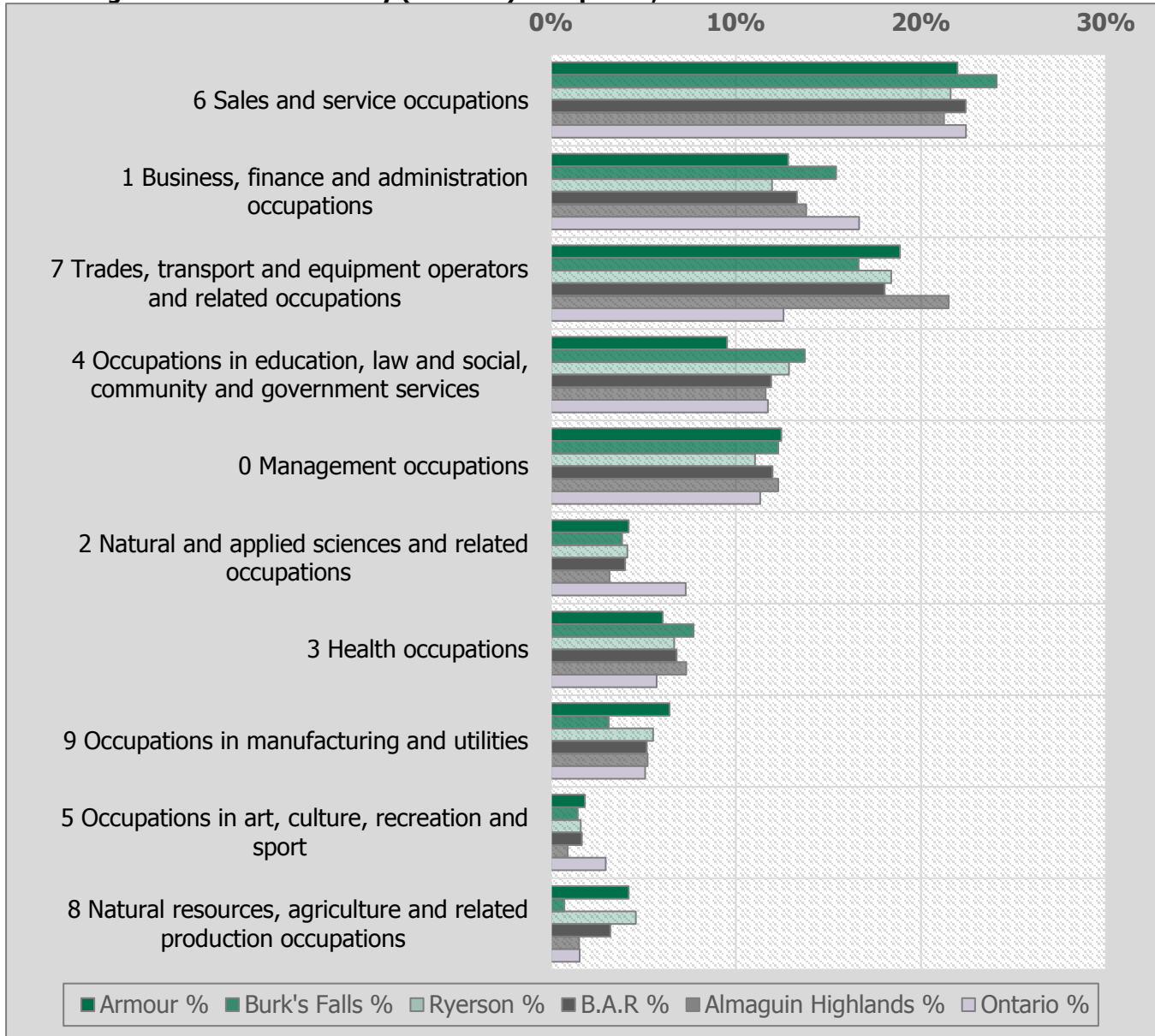
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

4.3 Labour Force by Occupation

Figure 12 and Table 21 (in the Appendix) compare 2017 estimates of percentage of labour force (15 years and over) by employment occupation for Burk's Falls & Area and Ontario. In comparison to the province, the area has larger percentages of its labour force working in:

- Sales and services Occupations
- Trades, transport, and equipment operators and related occupations
- Natural resources, agriculture and related production occupations.

Figure 12: Labour Force by (NOC #¹⁰) Occupation, 2017



Source: McSweeney & Associates Manifold Data Mining Inc. SuperDemographics 2017.

¹⁰ For more information please see: <http://noc.esdc.gc.ca/English/noc/welcome.aspx?ver=16>

4.4 Labour Flows

The following two tables provide information on the inflow and outflow of labour into Burk's Falls & Area, and Almaguin Highlands. These are estimates produced by the Emsi Analyst, and are based on 2011 data, as such, the purpose of this data is to illustrate directionality, and not to be interpreted as exact numbers.

Table 5 shows only those industries where there are flows of 5 jobs or more. The following can be said about the labour flows in the regions of interest:

- The majority of the workforce employed in education within Burk's Falls & Area commutes from outside of Armour, Burk's Falls and Ryerson to work.
- All of those employed by non-ferrous metal (except aluminum) production and processing in Burk's Falls & Area are residing outside the region.
- Everyone living in Burk's Falls & Area that works in residential building construction, commutes to work outside of the region

Table 5: Labour Flows in Burk's Falls & Area, (based on NHS 2011)

Industry Description	Employed in Region	Resident in Region	Net Import
Elementary and secondary schools	150	60	90
Non-ferrous metal (except aluminum) production and processing	70	0	70
Provincial and territorial public administration (9121 to 9129)	35	0	35
Highway, street and bridge construction	30	0	30
Household and institutional furniture and kitchen cabinet manufacturing	25	0	25
Architectural, engineering and related services	20	0	20
Grocery stores	15	0	15
Forging and stamping	20	15	5
Residential building construction	0	55	(55)
Local, municipal and regional public administration (9131 and 9139)	0	25	(25)

Source: EMSI analyst Note that the data does not add up to 100% due to rounding in order to preserve anonymity.

Table 6 shows only those industries where 5 or more people commuted to a place of employment. The following can be said about the labour flows in the regions of interest:

- The largest number of external workers commuting into the Almaguin Highlands economy are employed at Nursing and residential care facilities.
- Everyone who works locally in Accounting, tax preparation, bookkeeping and payroll services, Other motor vehicle dealers, Veneer, plywood and engineered wood product manufacturing, Architectural, engineering and related services, or Out-patients care centres in Burk's Falls & Area, lives outside the region.

Table 6: Labour Flows in Almaguin Highlands, (based on NHS 2011)

Industry Description (NAICS)	Employed in Region	Resident in Region	Net Import
Nursing and residential care facilities (6231 to 6239)	505	315	190
Non-ferrous metal (except aluminum) production and processing	70	0	70
Automobile dealers	90	30	60
Full-service restaurants	100	50	50
Household and institutional furniture and kitchen cabinet manufacturing	65	15	50
Ship and boat building	45	0	45
Highway, street and bridge construction	60	20	40
Farms (except aquaculture) (1111 to 1124 and 1129)	75	45	30
Child day-care services	40	15	25
Accounting, tax preparation, bookkeeping and payroll services	25	0	25
Other motor vehicle dealers	20	0	20
Veneer, plywood and engineered wood product manufacturing	20	0	20
Architectural, engineering and related services	20	0	20
Out-patients care centres	15	0	15
Elementary and secondary schools	545	535	10
Building equipment contractors	80	225	(145)
Grocery stores	65	170	(105)
Residential building construction	0	100	(100)
Limited-service restaurants	50	120	(70)
Traveller accommodations	40	110	(70)
Local, municipal and regional public administration (9131 and 9139)	120	180	(60)
General freight trucking	0	45	(45)

Source: EMSI analyst



5 Economic Base Analysis

The economic base analysis utilizes labour market data from Emsi Analyst to draw conclusions about the economic strengths of the region of study. In the previous labour force analysis (Section 4), jobs by occupation and industry sector were used to identify demographic trends about the resident population, and thus, the data (i.e. jobs) were reported by place of residence. Moving forward, jobs data will be studied by the place of work rather than where the worker's place of residence is, as we are primarily interested in the local economy (local jobs).

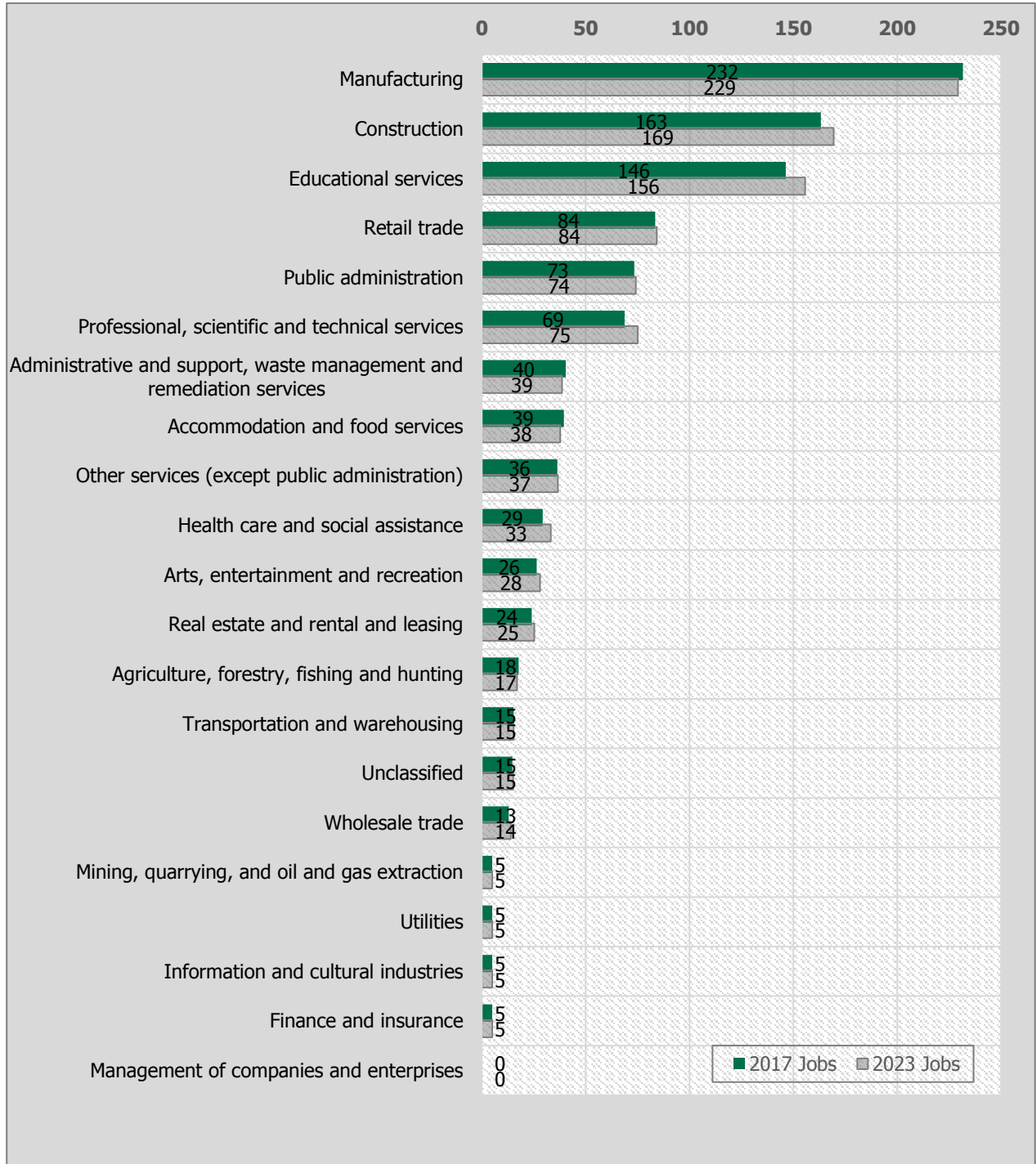
5.1 Employment Profile

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



The following figure illustrates the estimated 1,044 jobs in Burk's Falls & Area. With 232 jobs, the manufacturing sector was the largest employer, followed by construction (163 jobs) and educational services (146 jobs).

Figure 13: Number of Jobs by Sector, 2017-2023



Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data 2011-2016. Estimates include total businesses with employees plus businesses with indeterminate number of employees

5.2 Location Quotient Analysis

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

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

“Benchmarking” employment in Burk’s Falls & Area to Almaguin Highlands and Ontario provides information on:

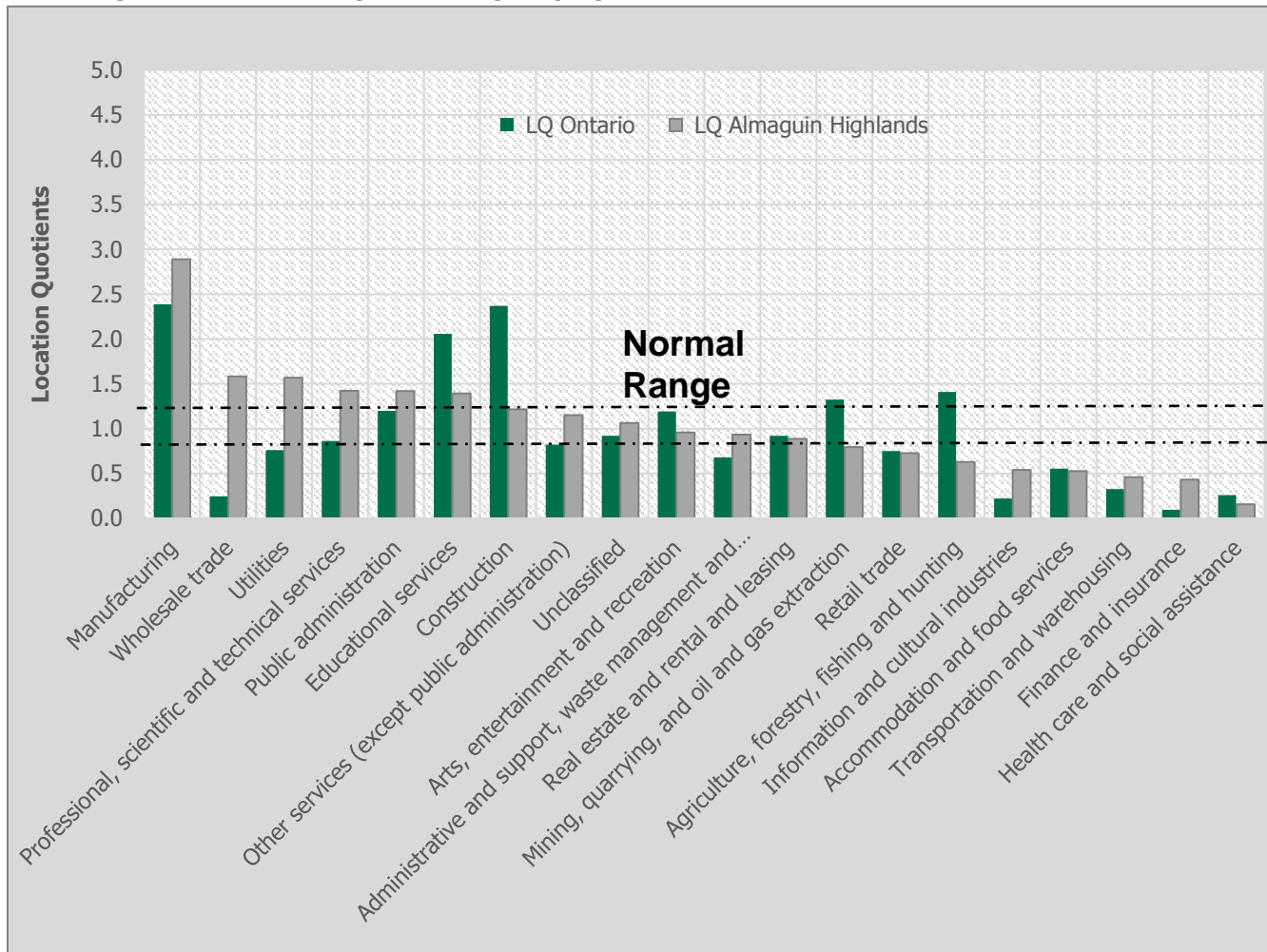
- The extent to which Burk’s Falls & Area is producing all of the goods or services required for consumption locally (this potentially identifies opportunities to replace the imports with locally provided goods and services).
- Whether the Burk’s Falls & Area economy is producing goods or services in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

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

5.2.1 Dominant Sectors by LQ

This section illustrates location quotients for sectors classified at the 2-digit NAICS. Figure 14 illustrates the sectors concentrations in Burk's Falls & Area, as measured by the location quotient, compared to Ontario and Almaguin Highlands as benchmarks.

Figure 14: Location Quotients by Employment Sectors, 2017



Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data 2011-2016. Estimates include total businesses with employees, plus businesses with indeterminate number of employees.

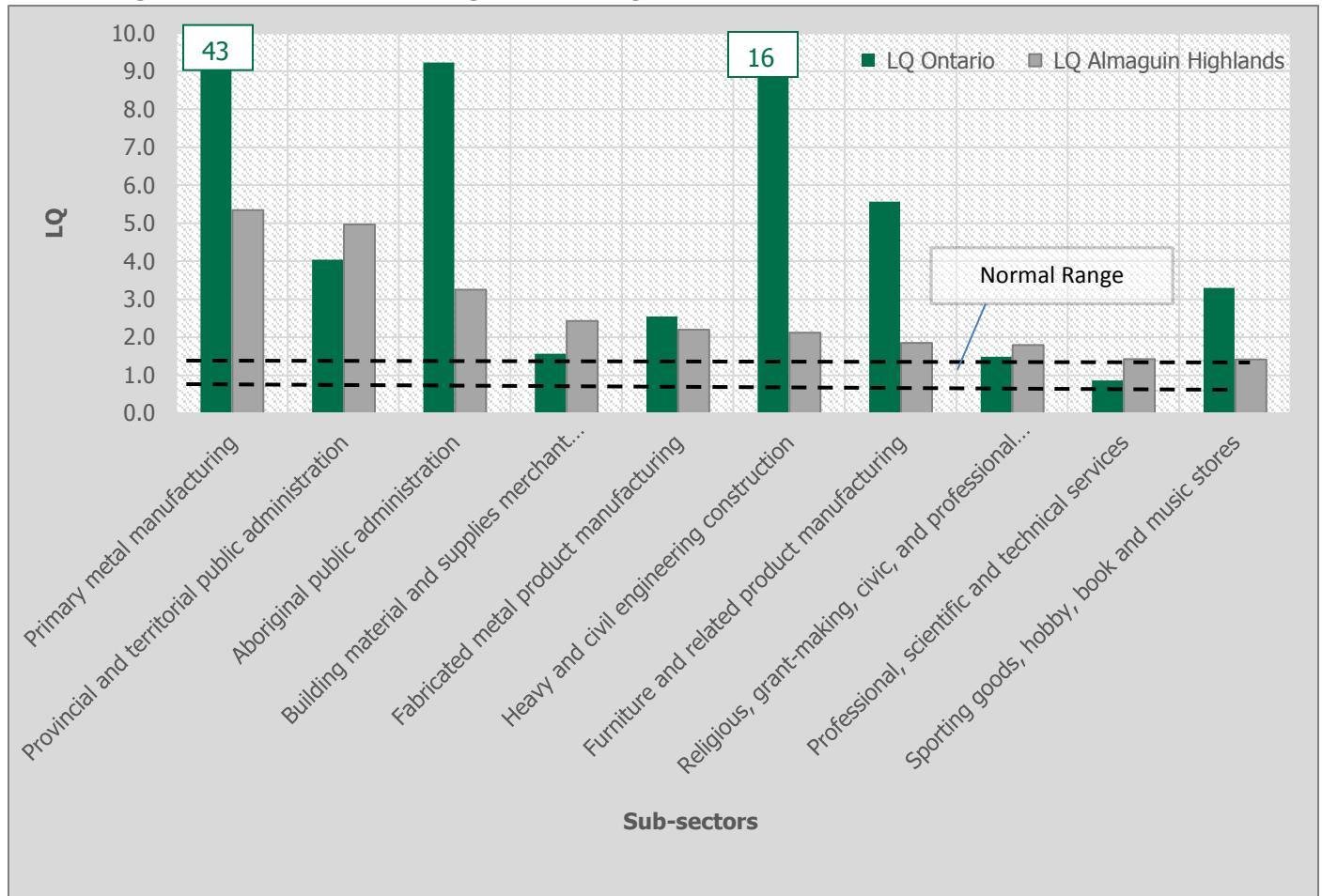
Compared to Almaguin Highlands and Ontario, sectors in Burk's Falls & Area with a higher than normal concentration were:

Relative to Almaguin Highlands	Relative to Ontario
1. Manufacturing	1. Manufacturing
2. Wholesale trade	2. Construction
3. Utilities	3. Educational services
4. Professional, scientific and technical services	4. Agriculture, forestry, fishing and hunting
5. Public administration	5. Mining, quarrying, and oil and gas extraction

5.2.2 Dominant Sub-Sectors by LQ

This section illustrates the sub-sectors (3-digit NAICS) that have a significant concentration in Burk's Falls & Area based on the location quotient scored. Figure 15 shows the top 2017 location quotient for sub sectors with at least 1% percentage of local jobs.

Figure 15: Sub-sectors w/High Location Quotients, 2017



Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data 2011- 2016. Estimates include total businesses with employees, plus businesses with indeterminate number of employees

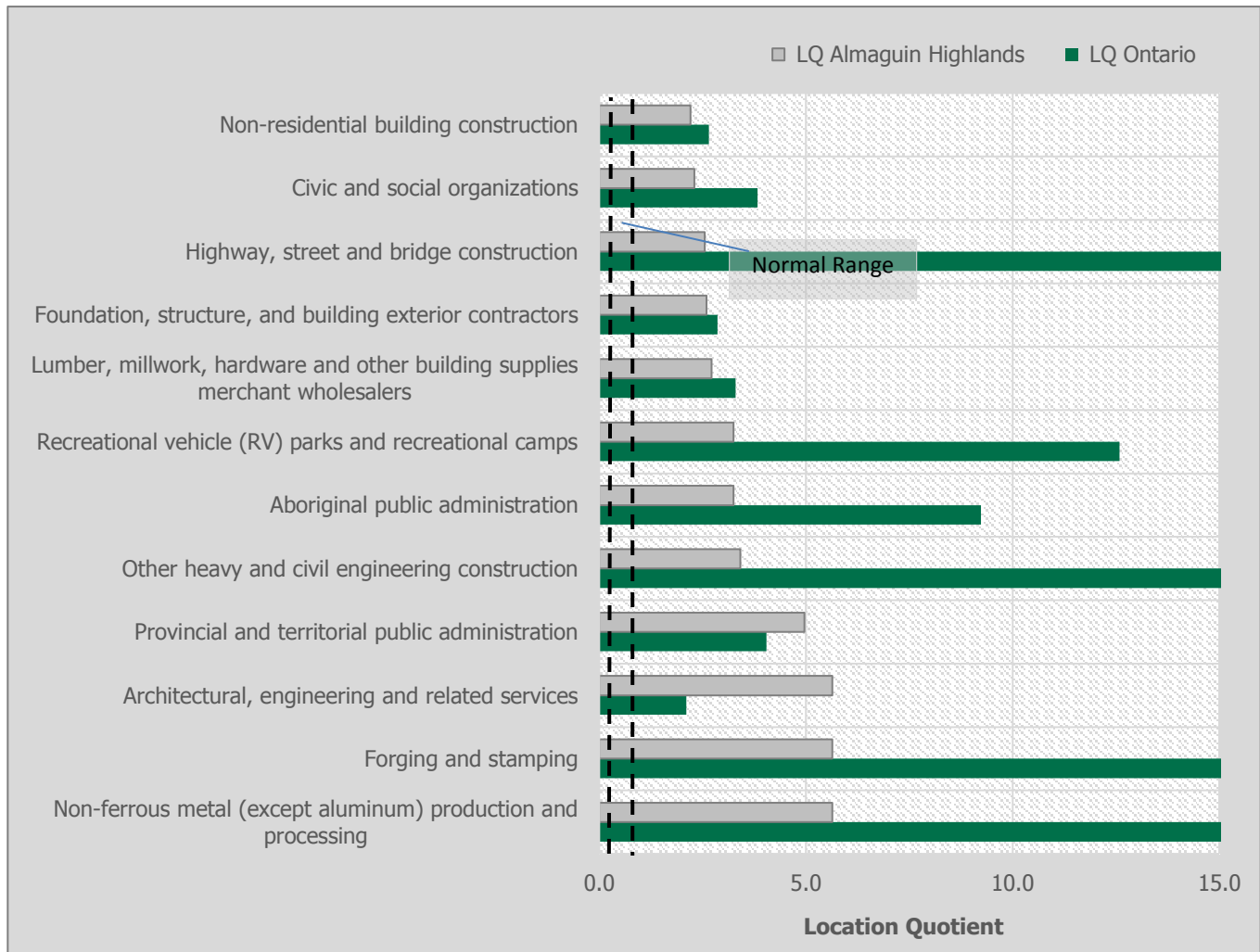
Compared to Almaguin Highlands and Ontario, top sub-sectors in Burk's Falls & Area with a higher than normal concentration were:

Relative to Almaguin Highlands	Relative to Ontario
1. Primary metal manufacturing (160 jobs)	1. Primary metal manufacturing (160 jobs)
2. Provincial and territorial public administration (43 jobs)	2. Heavy and civil engineering construction (101 jobs)
3. Building material & supplies merchant wholesalers (13 jobs)	3. Aboriginal public administration (13 jobs)
4. Fabricated metal product manufacturing (25 jobs)	4. Furniture & related manufacturing (24 jobs)
5. Heavy and civil engineering construction (101 jobs)	5. Provincial and territorial public administration (43 jobs)

5.2.3 Dominant Industries by LQ

This section identifies the industries (4-digit NAICS) that have a significant concentration in Burk's Falls & Area based on the location quotient scored. Figure 16 shows the top 2017 location quotient for industries with at least 1% percentage of local jobs

Figure 16: Industries with High Location Quotients, 2017



Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data 2011- 2016. Estimates include total businesses with employees, plus businesses with indeterminate number of employees

Compared to Almaguin Highlands and Ontario, the top employment industries in Burk's Falls & Area with a higher than normal concentration as listed below. Note that the LQ is not specified (they are all concentrated $LQ > 1.25$), but the number of jobs is listed alongside each industry.

Relative to Almaguin Highlands and Ontario:

1. Non-ferrous metal (except aluminum) production and processing (jobs 153)
2. Forging and stamping (jobs 19)
3. Architectural, engineering and related services (jobs 24)
4. Provincial and territorial public administration (jobs 42)
5. Other heavy and civil engineering construction (jobs 33)
6. Aboriginal public administration (jobs 14)
7. Recreational vehicle (RV) parks and recreational camps (jobs 13)
8. Lumber, millwork, hardware and other building supplies merchant wholesalers (jobs 12)
9. Foundation, structure, and building exterior contractors (jobs 26)
10. Highway, street and bridge construction (jobs 68)
11. Civic and social organizations (jobs 13)
12. Non-residential building construction (jobs 12)
13. Household and institutional furniture and kitchen cabinet manufacturing (jobs 24)

5.3 Shift-Share Analysis

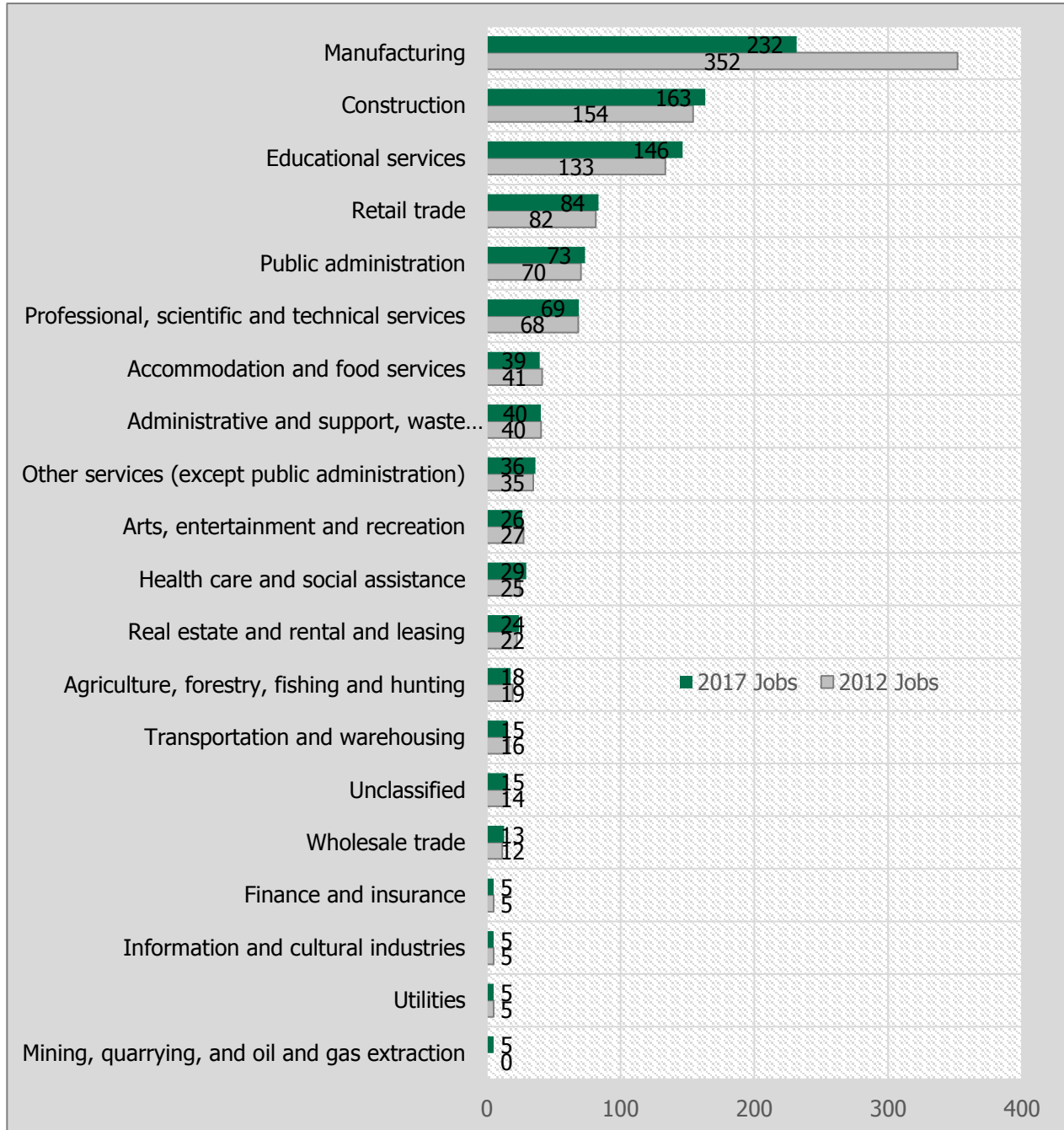
Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry within Canada, as well as the job growth overall for Canada. More specifically, this analytical tool examines the job growth/decline by attributing growth,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

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

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method. It has been applied to all NAICS Industries using place of work statistics. Shift-share analysis allows the examination of changes through time (trends) versus the static snapshot of location quotients. To begin, the absolute change in job numbers between 2012 and 2017 by sector will be examined.

Figure 17 shows the largest absolute increases in jobs between 2012 and 2017 were in education services and construction, which increased by 13 and 9 jobs, respectively. The largest decline in absolute number of jobs was in the manufacturing sector, which decreased by 120 jobs. Because these numbers are rather small, we proceed to the shift share analysis using Almaguin Highlands plus Huntsville census subdivision to identify industry growth driven by local/regional factors.

Figure 17: Job Change by Sector, 2012-2017

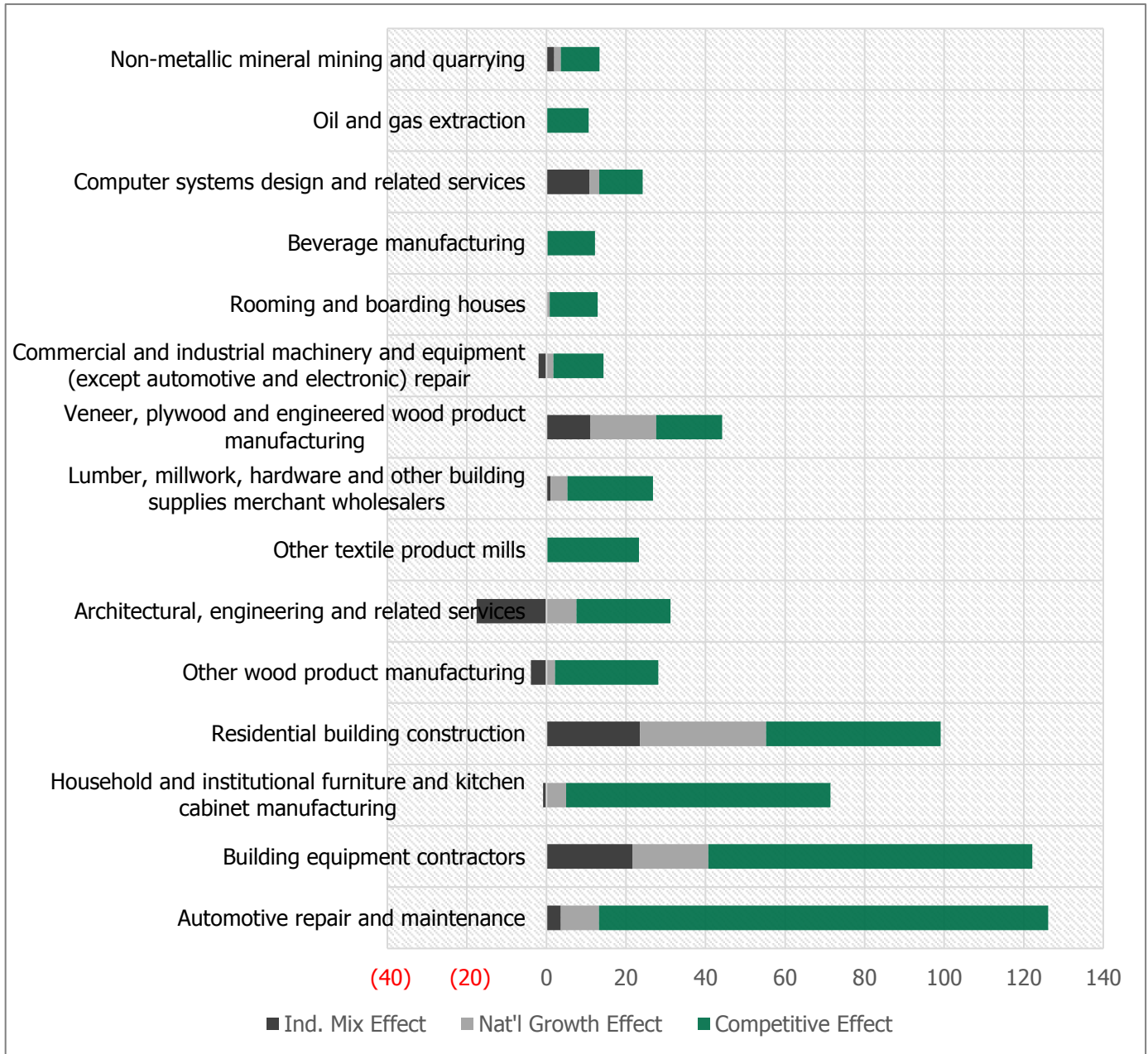


Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data June 2011-2016. Estimates include total businesses with employees, plus businesses with indeterminate number of employees

5.3.1 Industry Shift Share Analysis

This section examines industries (4-digit NAICS) with the largest employment shifts associated to local effects. Figure 18 allocates employment changes of these industries to national, industry and regional/local effects. The analysis reveals that the following industries saw the largest competitive effects on employment associated to local/regional factors:

Figure 18: Employment Shift-Share Analysis of Major Industries, 2012-2016



Source: Total number of jobs estimated using Canadian Business Patterns from Statistics Canada Data 2011 & 2016. Estimates include total businesses with employees, plus businesses with indeterminate number of employees. The region of study for the shift share analysis includes Almaguin Highlands, plus Huntsville.



6 Business Pattern Data

The total number of businesses in Burk's Falls & Area increased from 220 in December 2012 to 353 in December 2016, for an increase of 60%. During the same period, the number of business establishments in Ontario and Almaguin Highlands increased by 60% and 49%, respectively. (Note: the rest of this page references Tables 22 and 23 in the Appendix).

In December 2016, the Construction sector had the largest number of businesses (64 businesses, which is 18% of total businesses) in Burk's Falls & Area. In addition, the area also had a larger percentage of businesses in the following sectors:

- Real estate and rental and leasing (60 businesses, 17 % of all businesses)
- Other services (except public administration) (28 businesses, 8% of all businesses)
- Retail trade (23, 7% of all businesses)
- Accommodation and food services (21 businesses, 6% of all businesses)
- Transportation and warehousing (21 businesses, 6% of all businesses)

Between 2012 and 2016, the Burk's Falls & Area economy had a large percentage increase of businesses establishments in the following sectors:

- Agriculture, forestry, fishing and hunting (233 %, vs. 22.2% in Ontario, 41% in Almaguin Highlands)
- Real estate and rental and leasing (172%, vs 121% in Ontario, 110% in Almaguin Highlands)
- Professional, scientific and technical services (90%, vs 35% in Ontario, 86% in Almaguin Highlands)

Five sub-sectors with high percentage of businesses establishments in Burk's Falls & Area in December 2016 were:

- Real estate (58 businesses, 16 % of all businesses)
- Specialty trade contractors (43 businesses, 12 % of all businesses)
- Unclassified (35 businesses, 9 % of all businesses)
- Professional, scientific and technical services (19 businesses, 5 % of all businesses)
- Construction of buildings (18 businesses, 5 % of all businesses)

Between 2012 and 2016, Burk's Falls & Area had a large percent increase of businesses in the following sub-sectors (considering only those that account for at least 5% of total economy):

- Real estate (190% vs, 127% in Ontario and 114% in Almaguin Highlands)
- Professional, scientific and technical services (90%, vs 35% in Ontario, 86% in Almaguin Highlands)
- Specialty trade contractors (43%, vs 33% in Ontario, and 30% in Almaguin Highlands)
- Construction of buildings (13 % vs, 31% in Ontario, and 32% in Almaguin Highlands)
- Truck transportation (13 % vs, 67% in Ontario, and 19% in Almaguin Highlands)



7 Economic Development Trends Analysis

7.1 Site Selection Factors

In 2016, Annual Corporate Survey and the Consultants Survey were conducted to rate site selection factors and the impact these factors have on planning decisions.¹¹ Highlighted points of the survey are as follows:

- *Available skilled labour and Highway access* are the most important factors in both surveys.
- *Labour costs* rose to 3rd from 6th.
- *Waterway or ocean port accessibility* remained at the bottom of the list.
- *Quality of life* fell from 3rd to 10th in the corporate survey, and remains low (24th) in the consultant's survey.

The following two tables provide more detailed results of the 2016 Corporate Survey and Consultants Survey 2016 reported on Q1/2017.

¹¹ For more information about the survey please go to: <http://www.areadevelopment.com/Corporate-Consultants-Survey-Results/Q1-2016/corporate-executive-site-selection-facility-plans-441729.shtml>

Table 7: Site Selection Factors - Corporate Survey 2016

Area Development Combined Ratings*		
<i>Ranking - Site Selection Factors</i>	2016	2015
1. Highway accessibility	94.4	88.0 (2) **
2. Availability of skilled labour	89.8	92.9 (1)
3. Labour costs	89.6	80.8 (6)
4. Occupancy or construction costs	86.0	85.4 (4)
5. State and local incentives	84.0	75.8 (9)
6. Corporate tax rate	82.3	78.8 (7)
7. Tax exemptions	79.7	74.7 (11)
8. Energy availability and costs	78.5	75.3 (10)
9. Proximity to major markets	78.1	76.3 (8)
10. Quality of life	76.4	87.6 (3)
11. Available buildings	75.5	83.7 (5)
12. Available land	75.3	73.9 (13)
13. Expedited of "fast track" permitting	71.7	74.2 (12)
14. Environmental regulations	70.8	69.8 (14)
15. Low union profile	70.8	66.3 (18)
16. Right-to-work state	70.1	67.7 (16)
17. Inbound/outbound shipping costs	69.1	64.6 (19)
18. Training programs/technical colleges	66.7	68.7 (15)
19. Availability of long term financing	66.7	67.7 (16T)
20. Proximity to suppliers	66.0	64.3 (20)
21. Raw materials availability	53.7	52.6 (24)
22. Accessibility to major airports	52.4	58.6 (21)
23. Availability of unskilled labour	51.9	47.8 (26)
24. Water availability	46.3	54.6 (22)
25. Availability of advanced ICT services	40.9	53.6 (23)
26. Proximity to innovation/commercialization R&D centers	39.2	48.4 (25)
27. Railroad services	33.7	32.4 (27)
28. Waterway or Oceanport accessibility	18.1	24.0 (28)
*All figures are percentages and are the total of "very important" and "important" ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent.		
**(2015 ranking)		

Source: Area Development Magazine (Q1 2017)

Table 8: Consultants Survey 2016

Area Development Combined Ratings*		
<i>Ranking – Site Selection Factors</i>	2016	2015
1. Availability of skilled labour	100.0	100.0 (1) **
2. Highway accessibility	98.7	93.5 (6)
3. Labour costs	95.8	96.1 (2)
3T. Proximity to major markets	95.8	96.1 (2T)
3T. State and local incentives	95.8	94.9 (4)
3T. Available land	95.8	97.0 (7)
3T. Tax Exemptions	95.8	91.0 (7T)
8. Energy availability and costs	93.0	85.8 (13)
8T. Proximity to suppliers	93.0	84.2 (14)
10. Training programs/technical colleges	91.7	86.9 (12)
11. Available buildings	88.9	94.8 (5)
12. Accessibility to major airports	88.8	88.4 (9)
13. Expedited or “fast-track” permitting	87.3	88.4 (9T)
14. Occupancy or construction costs	86.0	84.0 (15)
15. Inbound/outbound shipping costs	84.6	88.4 (9T)
16. Low union profile	82.0	83.1 (16)
17. Environmental regulations	80.3	82.9 (17)
18. Corporate tax rate	78.9	74.1 (20)
19. Right-to-work state	76.4	76.7 (18)
20. Water availability	72.2	75.3 (19)
21. Availability of advanced ICT services	69.5	57.2 (25)
22. availability of unskilled workers	69.0	65.0 (21)
23. Raw material availability	64.8	64.9 (22)
24. Quality of life	63.3	64.5 (23)
25. Proximity to innovation/commercialization/R&D centers	62.0	61.9 (24)
26. Railroad services	45.1	52.0 (26)
27. availability of long term financing	40.8	39.0 (28)
28. Waterway or Oceanport access	29.6	42.9 (27)
*All figures are percentages and are the total of “very important” and “important” ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent.		
**(2015 ranking)		

Source: Area Development Magazine (Q1 2017)



8 Economic Forecast

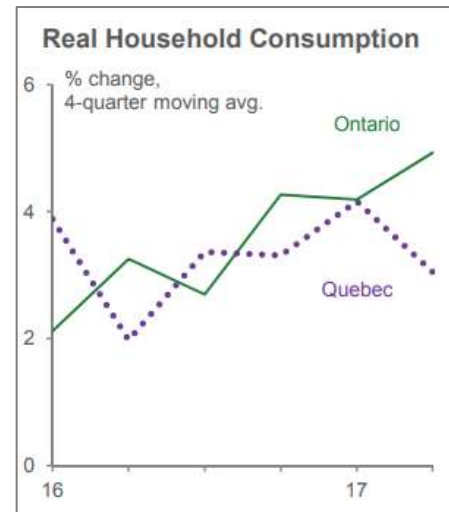
Tables 24 – 27 in Appendix A provide the economic outlook for Canada and Ontario. A summary of the forecasts is below:

Canada

- In 2017, Gross domestic product (GDP) grew by 3.7% (annualized) in the first quarter, then 4.5% in the second quarter. GDP is expected to grow by an annual average of 3.1% in 2017, leading to economic cooldown by 2018 with moderate growth of 2.1%.
- Sustained growth has incited the Bank of Canada to slowly increase interest rates; policy interest rate is expected to reach 1.50% by early next year before taking a long pause to evaluate effects.
- The rather unexpected rate of change in interest rate has intrigued financial markets, giving the Canadian a boost.
- With increased interest rates, a more expensive dollar, and growing unease about excessive borrowing in the economy by households and policy maker, consumers will need to slow down consumption to avoid overheating the economy; future unemployment as inflation rises.
- In the meantime, net exports are expected to slowdown as the dollar has valued by nearly 7% due to fast increases to interest rates.

Ontario

- Ontario indicates two consecutive quarters of real household expenditure increases exceeding 4%
- For Ontario, merchandise imports through August are 5% higher over last year, while export shipments have slipped by 1.2%.
- The gradual investment recovery emerging in Alberta's energy sector should assist Ontario's interprovincial export volumes that have slipped 2.25% since the oil price correction in 2014.
- Growth in retail & wholesale trade and tourism-related industries was supplemented by a solid increase in transportation and warehousing, which is expected to continue.
- Ontario has demonstrated considerable job creation in technology-oriented occupations in natural and applied sciences (e.g., engineers, information systems and computer software specialists)



Source: Scotiabank, Provincial Pulse October 2017



Appendix A: Data Tables

Table 9: List of municipalities include in the Almaguin Highlands region

PRCDCSD - Name of Municipality
3549018 – Kearney
3549014 – Perry
3549012 - McMurrich/Monteith
3549043 – Magnetawan
3549019 – Armour
3549022 – Burk’s Falls
3549024 – Ryerson
3549046 – Strong
3549048 – Sundridge
3549054 – Machar
3549056 – South River
3549051 – Joly
3549060 – Powassan
3549071 – Nipissing
3548031 – Chisholm

Table 10: Changes in Percentage Population by Age, Burk's Falls & Area, 2017

Age Structure	Armour	Armour %	Burk's Falls	Burk's Falls %	Ryerson	Ryerson %
Total population	1,479	100.0%	1,023	100.0%	676	100.0%
0 to 4 years	51	3.4%	47	4.6%	21	3.1%
5 to 9 years	54	3.7%	48	4.7%	20	3.0%
10 to 14 years	50	3.4%	52	5.1%	26	3.8%
15 to 19 years	49	3.3%	65	6.4%	23	3.4%
20 to 24 years	72	4.9%	77	7.5%	43	6.4%
25 to 29 years	61	4.1%	55	5.4%	40	5.9%
30 to 34 years	69	4.7%	56	5.5%	29	4.3%
35 to 39 years	59	4.0%	50	4.9%	27	4.0%
40 to 44 years	64	4.3%	64	6.3%	23	3.4%
45 to 49 years	66	4.5%	65	6.4%	34	5.0%
50 to 54 years	102	6.9%	71	6.9%	46	6.8%
55 to 59 years	138	9.3%	53	5.2%	61	9.0%
60 to 64 years	164	11.1%	67	6.5%	67	9.9%
65 to 69 years	163	11.0%	77	7.5%	77	11.4%
70 to 74 years	130	8.8%	62	6.1%	68	10.1%
75 to 79 years	94	6.4%	44	4.3%	37	5.5%
80 to 84 years	50	3.4%	33	3.2%	18	2.7%
85 years and over	42	2.8%	39	3.8%	19	2.8%
Age Structure	B.A.R	B.A.R %	AH	AH %	Ontario	Ontario %
Total population	3,180	100.0%	20,632	100.0%	14,125,924	100.0%
0 to 4 years	118	3.7%	778	3.8%	751,103	5.3%
5 to 9 years	122	3.8%	890	4.3%	766,665	5.4%
10 to 14 years	128	4.0%	874	4.2%	768,357	5.4%
15 to 19 years	136	4.3%	985	4.8%	797,934	5.6%
20 to 24 years	192	6.0%	1,183	5.7%	898,947	6.4%
25 to 29 years	156	4.9%	984	4.8%	917,223	6.5%
30 to 34 years	153	4.8%	849	4.1%	880,091	6.2%
35 to 39 years	136	4.3%	934	4.5%	879,688	6.2%
40 to 44 years	150	4.7%	1,022	5.0%	905,871	6.4%
45 to 49 years	164	5.2%	1,222	5.9%	980,611	6.9%
50 to 54 years	219	6.9%	1,553	7.5%	1,094,314	7.7%
55 to 59 years	251	7.9%	1,714	8.3%	1,078,235	7.6%
60 to 64 years	298	9.4%	1,855	9.0%	932,073	6.6%
65 to 69 years	318	10.0%	1,861	9.0%	789,957	5.6%
70 to 74 years	260	8.2%	1,535	7.4%	608,067	4.3%
75 to 79 years	174	5.5%	1,070	5.2%	432,900	3.1%
80 to 84 years	103	3.2%	695	3.4%	313,741	2.2%
85 years and over	101	3.2%	629	3.0%	330,148	2.3%

Source: Total population by sex and age groups, McSweeney & Associates Manifold Data Mining Inc. SuperDemographics 2017.

Table 11: Personal Income Levels as Percent of the Population 15 Years and Over, 2016

Personal Income	Armour	Burk's Falls	Ryerson	B.A.R	Almaguin Highlands	Ontario
Total population 15 years and over	1,325	877	610	2,811	18,090	11,839,798
Without income	3.9%	2.5%	3.8%	3.5%	3.7%	5.3%
With income	96.1%	97.5%	96.2%	96.5%	96.3%	94.7%
Under \$5,000	8.9%	6.4%	7.4%	7.8%	7.6%	9.5%
\$5,000 to \$9,999	10.3%	11.5%	15.2%	11.7%	8.2%	7.0%
\$10,000 to \$14,999	8.5%	10.4%	13.3%	10.1%	9.2%	8.1%
\$15,000 to \$19,999	13.3%	10.9%	11.8%	12.2%	11.0%	8.4%
\$20,000 to \$29,999	16.5%	12.3%	10.5%	13.9%	14.2%	12.4%
\$30,000 to \$39,999	12.4%	10.9%	9.3%	11.3%	12.7%	10.9%
\$40,000 to \$49,999	6.6%	9.8%	8.0%	7.9%	10.3%	9.4%
\$50,000 to \$59,999	8.7%	7.8%	6.6%	7.9%	7.9%	7.5%
\$60,000 to \$79,999	6.1%	7.4%	5.1%	6.3%	7.6%	9.0%
\$80,000 to \$99,999	2.6%	5.9%	3.9%	3.9%	4.4%	5.8%
\$100,000 to \$124,999	1.7%	2.6%	3.0%	2.2%	1.9%	3.2%
\$125,000 and over	0.5%	1.4%	2.3%	1.2%	1.2%	3.4%
Median income (\$) of total population 15 years and over	\$27,596	\$20,890	\$31,220	\$27,596	\$30,454	\$34,243
Average income (\$) of total population 15 years and over	\$34,462	\$38,427	\$40,861	\$37,094	\$41,592	\$49,938

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017 (2016 incomes).

Table 12: Economic Family and Household Income Levels, 2016

Family income of economic families:	Armour	Burk's Falls	Ryerson	BFA	AH	Ontario
Median family income	\$57,544	\$73,797	\$ 58,297	\$58,297	\$72,850	\$97,218
Average family income	\$72,461	\$74,325	\$77,760	\$74,105	\$91,099	\$121,508
Median household total income	\$60,068	\$36,332	\$46,194	\$46,194	\$58,909	\$74,648
Average household total income	\$64,755	\$61,907	\$70,924	\$65,155	\$78,222	\$99,778

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017 (2016 incomes).

Table 13: Highest Certificate, Diploma or Degree, B.A.R.¹², 2017

	Armour %	Burk's Falls %	Ryerson %
Population 25 to 64 years	724	479	325
No certificate, diploma or degree	16.6%	12.1%	18.2%
Certificate, diploma or degree	83.4%	87.9%	81.8%
High school certificate or equivalent	28.7%	29.2%	25.5%
Postsecondary certificate, diploma or degree	54.7%	58.7%	56.3%
Apprenticeship or trades certificate or diploma	11.3%	9.4%	12.6%
College, CEGEP or other non-university certificate or diploma	27.2%	27.8%	28.3%
University certificate, diploma or degree	16.2%	21.5%	15.4%
University certificate or diploma below bachelor level	1.5%	1.3%	2.5%
University certificate or degree	14.6%	20.3%	12.9%
Bachelor's degree	10.1%	12.7%	8.6%
University certificate or diploma above bachelor level	4.6%	7.5%	4.3%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

¹² 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a postsecondary certificate diploma or degree.

'Postsecondary certificate diploma or degree' includes 'apprenticeship or trades certificates or diplomas' 'college CEGEP or other non-university certificates or diplomas' and university certificates diplomas and degrees.

'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates (including Certificate of Qualification Journeyperson's designation) and other trades certificates or diplomas such as pre-employment or vocational certificates and diplomas from brief trade programs completed at community colleges institutes of technology vocational centres and similar institutions.

Comparisons with other data sources suggest that the category 'University certificate or diploma below the bachelor's level' was over-reported in the NHS. This category likely includes some responses that are actually college certificates or diplomas bachelor's degrees or other types of education (e.g. university transfer programs bachelor's programs completed in other countries incomplete bachelor's programs non-university professional designations). We recommend users interpret the results for the 'University certificate or diploma below the bachelor's level' category with caution.

'University certificate diploma or degree above bachelor level' includes the categories 'University certificate or diploma above bachelor level' 'Degree in medicine dentistry veterinary medicine or optometry' 'Master's degree' and 'Earned doctorate.'

Table 14: Highest Certificate, Diploma or Degree, Region vs. Ontario, 2017

	B.A.R %	Almaguin Highlands %	Ontario%
Population 25 to 64 years	1,528	10,131	7,668,104
No certificate, diploma or degree	15.5%	15.8%	11.5%
Certificate, diploma or degree	84.5%	84.3%	88.5%
High school certificate or equivalent	28.2%	29.2%	24.1%
Postsecondary certificate, diploma or degree	56.3%	55.0%	64.4%
Apprenticeship or trades certificate or diploma	11.0%	11.5%	7.5%
College, CEGEP or other non-university certificate or diploma	27.6%	28.8%	23.7%
University certificate, diploma or degree	17.7%	14.8%	33.1%
University certificate or diploma below bachelor level	1.6%	1.8%	4.4%
University certificate or degree	16.1%	13.0%	28.7%
Bachelor's degree	10.6%	8.6%	17.7%
University certificate or diploma above bachelor level	5.5%	4.4%	11.1%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 15: Post-secondary Qualifications by Major Field of Study, 2017

Description	Armour %	Burk's Falls %	Ryerson %	B.A.R %	AH %	Ontario%
Total population aged 15 +	1,325	877	610	2,811	18,090	11,839,798
Education	4.0%	8.0%	4.1%	5.3%	5.0%	3.6%
Visual and performing arts, and communications technologies	1.1%	1.9%	0.8%	1.3%	0.9%	2.0%
Humanities	1.9%	1.5%	1.8%	1.7%	1.2%	3.2%
Social and behavioural sciences and law	3.7%	5.0%	3.9%	4.2%	4.1%	6.5%
Business, management and public administration	7.6%	9.2%	7.9%	8.2%	8.2%	11.8%
Physical and life sciences and technologies	1.1%	0.8%	1.0%	1.0%	0.9%	2.1%
Mathematics, computer and information sciences	1.0%	1.4%	0.7%	1.0%	0.7%	2.5%
Architecture, engineering, and related technologies	11.5%	9.9%	12.3%	11.2%	11.7%	11.2%
Agriculture, natural resources and conservation	2.1%	0.3%	2.1%	1.6%	2.1%	0.9%
Health and related fields	8.2%	8.6%	8.2%	8.3%	9.1%	7.6%
Personal, protective and transportation services	3.6%	3.3%	4.1%	3.6%	3.0%	2.9%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 16: Mobility Status, 2017

Mobility status 1 year ago	Armour %	Burk's Falls %	Ryerson %	B.A.R %	AH %	Ontario %
Population	1,479	1,023	677	3,180	20,632	14 mil
Non-movers	89.5%	84.5%	89.8%	87.9%	89.4%	87.9%
Movers	10.6%	15.6%	10.2%	12.1%	10.6%	12.1%
Non-migrants	5.1%	4.6%	5.5%	5.0%	3.3%	7.1%
Migrants	5.5%	10.9%	4.7%	7.1%	7.3%	5.0%
Internal migrants	5.3%	10.9%	4.6%	7.0%	7.2%	4.0%
Intraprovincial migrants	5.0%	8.5%	4.3%	6.0%	6.7%	3.6%
Interprovincial migrants	0.3%	2.4%	0.4%	1.0%	0.5%	0.5%
External migrants	0.1%	0.0%	0.1%	0.1%	0.0%	1.0%
Mobility status 5 years ago	Armour %	Burk's Falls %	Ryerson %	B.A.R %	AH %	Ontario %
Population	1,479	1,023	677	3,180	20,632	14 mil
Non-movers	68.2%	59.1%	68.2%	65.3%	67.2%	61.1%
Movers	31.8%	40.9%	31.8%	34.7%	32.8%	38.9%
Non-migrants	14.5%	16.0%	16.4%	15.4%	11.7%	21.5%
Migrants	17.2%	24.8%	15.4%	19.3%	21.1%	17.4%
Internal migrants	16.6%	24.8%	14.8%	18.8%	20.6%	13.4%
Intraprovincial migrants	15.2%	20.9%	13.3%	16.6%	19.5%	11.8%
Interprovincial migrants	1.4%	3.9%	1.3%	2.2%	1.1%	1.5%
External migrants	0.7%	0.0%	0.6%	0.4%	0.5%	4.1%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 17: Knowledge of Official Languages, 2017

Knowledge of First official language	Armour %	Burk's Falls %	Ryerson %	B.A.R %	Almaguin Highlands %	Ontario %
Total population	1,479	1,023	677	3,180	20,632	14 mil
English	95.7%	96.4%	96.0%	96.0%	93.3%	86.4%
French	0.3%	0.0%	0.0%	0.2%	0.1%	0.3%
English and French	3.6%	3.6%	4.0%	3.7%	6.5%	11.0%
Neither English nor French	0.3%	0.0%	0.0%	0.2%	0.1%	2.3%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 18: Key Labour Force Indicators, 2017

Characteristics	Armour	Burk's Falls	Ryerson	B.A.R	Almaguin Highlands	Ontario
Population 15 years and over	1,325	877	610	2,811	18,090	11,839,798
In the labour force	546	415	435	1,369	10,201	7,801,243
Employed	510	388	403	1,277	9,273	7,263,691
Unemployed	37	27	32	91	927	537,552
Not in the labour force	779	462	175	1,443	7,889	4,038,555
Participation rate (%)	41.24	47.36	71.32	48.68	56.39	65.89
Employment rate (%)	38.47	44.27	66.07	45.43	51.26	61.35
Unemployment rate (%)	6.72	6.53	7.36	6.68	9.09	6.89

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 19: Local/Resident Labour Force by Industry, 2017

Labour force by industry:	Armour %	Burk's Falls %	Ryerson %
Total labour force 15 years and over	546	415	435
Industry - not applicable	1.6%	1.0%	1.6%
All industries	98.5%	99.0%	98.2%
62 Health care and social assistance	11.4%	13.0%	13.8%
44-45 Retail trade	11.5%	14.2%	11.7%
31-33 Manufacturing	11.2%	6.5%	7.1%
23 Construction	9.0%	7.5%	8.5%
91 Public administration	5.7%	8.9%	8.0%
61 Educational services	5.5%	9.6%	7.1%
72 Accommodation and food services	6.0%	8.2%	7.4%
11 Agriculture, forestry, fishing and hunting	8.6%	1.4%	5.7%
81 Other services (except public administration)	4.9%	6.3%	3.9%
48-49 Transportation and warehousing	4.6%	5.1%	4.8%
54 Professional, scientific and technical services	4.0%	4.1%	3.4%
56 Administrative and support, waste management and remediation services	3.3%	3.6%	2.5%
41 Wholesale trade	3.5%	2.7%	2.1%
22 Utilities	1.8%	1.4%	3.7%
52 Finance and insurance	2.2%	1.7%	2.1%
71 Arts, entertainment and recreation	1.8%	2.2%	1.6%
51 Information and cultural industries	1.1%	1.9%	1.1%
53 Real estate and rental and leasing	1.3%	0.7%	1.1%
21 Mining, quarrying, and oil and gas extraction	0.5%	0.0%	2.8%
55 Management of companies and enterprises	0.0%	0.0%	0.0%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 20: Regional Labour Force by Industry, 2017

Labour force by industry:	B.A.R	Almaguin Highlands	Ontario
Total labour force 15 years and over	100.0%	100.0%	100.0%
Industry - not applicable	1,443	7,889	4,038,555
All industries	98.5%	98.6%	97.3%
62 Health care and social assistance	12.6%	14.3%	10.1%
44-45 Retail trade	12.5%	12.4%	10.9%
31-33 Manufacturing	8.5%	8.3%	10.2%
23 Construction	8.4%	11.8%	6.0%
91 Public administration	7.4%	6.3%	6.8%
61 Educational services	7.2%	7.1%	7.3%
72 Accommodation and food services	7.1%	8.4%	6.0%
11 Agriculture, forestry, fishing and hunting	5.6%	3.9%	1.5%
81 Other services (except public administration)	5.0%	4.5%	4.3%
48-49 Transportation and warehousing	4.8%	5.8%	4.5%
54 Professional, scientific and technical services	3.9%	3.6%	7.5%
56 Administrative and support, waste management and remediation services	3.1%	2.3%	4.5%
41 Wholesale trade	2.8%	3.0%	4.5%
22 Utilities	2.3%	1.0%	0.8%
52 Finance and insurance	2.0%	1.7%	5.4%
71 Arts, entertainment and recreation	1.9%	1.6%	2.1%
51 Information and cultural industries	1.3%	0.8%	2.6%
53 Real estate and rental and leasing	1.1%	1.4%	2.0%
21 Mining, quarrying, and oil and gas extraction	1.0%	0.4%	0.4%
55 Management of companies and enterprises	0.0%	0.0%	0.1%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2017.

Table 21: Resident Labour Force by Occupation, 2017

Labour Force by Occupation:	Armour %	Burk's Falls %	Ryerson %	B.A.R %	AH %	Ontario %
Total labour force 15 years and over	546	415	435	1,369	10,201	7,801,243
Occupation - Not applicable	1.6%	1.0%	1.6%	1.5%	1.4%	2.7%
All occupations	98.5%	99.0%	98.2%	98.5%	98.6%	97.3%
0 Management occupations	12.5%	12.3%	11.0%	12.0%	12.3%	11.3%
1 Business, finance and administration occupations	12.8%	15.4%	12.0%	13.3%	13.8%	16.7%
2 Natural and applied sciences and related occupations	4.2%	3.9%	4.1%	4.0%	3.2%	7.3%
3 Health occupations	6.0%	7.7%	6.7%	6.8%	7.3%	5.7%
4 Occupations in education, law and social, community and government services	9.5%	13.7%	12.9%	11.9%	11.6%	11.7%
5 Occupations in art, culture, recreation and sport	1.8%	1.4%	1.6%	1.7%	0.9%	3.0%
6 Sales and service occupations	22.0%	24.1%	21.6%	22.4%	21.3%	22.4%
7 Trades, transport and equipment operators and related occupations	18.9%	16.6%	18.4%	18.0%	21.5%	12.6%
8 Natural resources, agriculture and related production occupations	4.2%	0.7%	4.6%	3.2%	1.5%	1.6%
9 Occupations in manufacturing and utilities	6.4%	3.1%	5.5%	5.2%	5.2%	5.1%

Source: McSweeney & Associates Manifold Data Mining Inc. SuperDemographics 2017.

Table 22: Business Establishments Counts, Sector Level

Sector	B.A.R 2012	B.A.R 2016	B.A.R. 2016% of Total	B.A.R % Change	AH Change	AH % Change	ON % Change
Total Number of Businesses	220	353	100%	60%	579	49%	60%
Unclassified	0	35	9.9	na	165	na	na
Agriculture, forestry, fishing and hunting	3	10	2.8	233.3	33	41.8	22.2
Real estate and rental and leasing	22	60	17.0	172.7	127	110.4	121.3
Arts, entertainment and recreation	2	4	1.1	100.0	11	57.9	46.7
Professional, scientific and technical services	10	19	5.4	90.0	48	85.7	35.9
Wholesale trade	5	9	2.5	80.0	4	12.5	8.4
Other services (except public administration)	17	28	7.9	64.7	30	32.3	25.0
Finance and insurance	7	11	3.1	57.1	12	33.3	54.7
Administrative and support, waste management and remediation services	12	18	5.1	50.0	11	19.6	34.6
Accommodation and food services	16	21	5.9	31.3	26	31.0	20.4
Construction	49	64	18.1	30.6	69	29.2	30.7
Health care and social assistance	11	14	4.0	27.3	20	43.5	78.9
Transportation and warehousing	20	21	5.9	5.0	17	18.9	58.5
Retail trade	22	23	6.5	4.5	6	4.9	13.9
Information and cultural industries	4	4	1.1	0.0	6	50.0	32.3
Mining, quarrying, and oil and gas extraction	1	1	0.3	0.0	1	20.0	25.6
Educational services	1	1	0.3	0.0	0	0.0	64.9
Utilities	0	0	0.0	0.0	2	50.0	170.9
Manufacturing	7	6	1.7	-14.3	2	4.4	16.9
Public administration	5	4	1.1	-20.0	(1)	-4.8	12.3
Management of companies and enterprises	6	0	0.0	-100.0	(10)	-58.8	-64.1

Source: McSweeney & Associates from Canadian Business Patterns December 2012 and December 2016.

Table 23: Business Establishments Counts, Select Sub-Sector Level, Largest Employers

Subsector	B.A.R 2012	B.A.R 2016	B.A.R. 2016% of Total	B.A.R % Change	AH Change	AH % Change	ON % Change
Total	220	353	100%	60%	579	49%	60%
Real estate	20	58	16.4	190.0	125	113.6	127.5
Specialty trade contractors	30	43	12.2	43.3	41	29.5	32.9
Professional, scientific and technical services	10	19	5.4	90.0	48	85.7	35.9
Construction of buildings	16	18	5.1	12.5	26	32.1	30.8
Truck transportation	16	18	5.1	12.5	13	18.8	66.6
Administrative and support services	9	15	4.2	66.7	8	15.7	34.9
Religious, grant-making, civic, and professional and similar organizations	7	13	3.7	85.7	11	31.4	36.2
Accommodation services	8	12	3.4	50.0	15	33.3	20.7
Repair and maintenance	8	12	3.4	50.0	10	22.2	21.1
Ambulatory health care services	8	10	2.8	25.0	12	42.9	81.0
Food services and drinking places	8	9	2.5	12.5	11	28.2	20.4
Farms	2	7	1.98	250.0	19	35.8	18.4
Securities, commodity contracts, and other financial investment and related activities	4	7	2.0	75.0	7	29.2	55.5
Food and beverage stores	6	5	1.4	-16.7	(3)	-9.4	8.9
Amusement, gambling and recreation industries	2	4	1.1	100.0	5	31.3	29.1
Local, municipal and regional public administration	5	4	1.1	-20.0	(1)	-4.8	14.6
Building material and supplies merchant wholesalers	1	3	0.8	200.0	(1)	-9.1	4.4
Personal and laundry services	1	3	0.8	200.0	9	90.0	50.9
Building material and garden equipment and supplies dealers	1	3	0.8	200.0	2	20.0	3.0
Social assistance	2	3	0.8	50.0	8	200.0	106.5
Heavy and civil engineering construction	3	3	0.8	0.0	2	12.5	17.0
Waste management and remediation services	3	3	0.8	0.0	3	60.0	25.2
Gasoline stations	3	3	0.8	0.0	0	0.0	-0.8
Support activities for agriculture and forestry	0	2	0.6	200.0	7	63.6	77.2

Source: McSweeney & Associates from Canadian Business Counts December 2011 and December 2016.

Table 24: Canada and Ontario Economic Indicators Outlook

Canada					
Annual Average Percent Change*	2014	2015	2016	2017f	2018f
Real GDP Growth	2.6	0.9	1.4E	2.3	1.9
Employment growth	0.6	0.9	0.7	1.2	0.5
Unemployment (annual per cent)	6.9	6.9	7.0	6.7	6.7
Consumer Price Index	1.9	1.1	1.4	2.1	2.1
Retail Trade	4.6	1.7	3.7	4.0	3.8
Housing Starts (per cent change)	0.6	2.3	2.5	1.3	-7.0
Ontario					
Annual Average Percent Change*	2014	2015	2016	2017f	2018f
Real GDP Growth	2.7	2.5	2.7E	2.6	1.9
Employment	0.8	0.7	1.1	1.3	0.7
Unemployment (annual per cent)	7.3	6.8	6.5	6.3	6.3
CPI	2.3	1.2	1.8	2.2	2.1
Retail Trade	5.0	4.2	4.7	4.7	3.6
Housing Starts	-3.8	17.7	9.1	6.9	-8.7

Source: McSweeney & Associates from TD Economics, *Provincial Economic Forecast*, March 27, 2017

*Unless otherwise stated. 'E' = estimate, 'f' = forecast

Table 25: Canadian Export Forecast by Sector (% Growth)

Main Sectors	CAD Billion 2016	% Share of Total Exports 2016	Export Outlook (% growth)		
			2016	2017 (f)	2018 (f)
Advanced Technology	17.4	3.7%	1.6%	1%	-2%
Aerospace	16.3	3.5%	-11.1%	4%	17%
Agri-food	61.9	13.2%	1.4%	2%	4%
Automotive	89.7	19.1%	8.7%	-1%	2%
Chemicals and Plastics	43.2	9.2%	-1.5%	7%	8%
Consumer Goods	24.0	5.1%	4.5%	3%	2%
Energy	76.7	16.4%	-17.1%	18%	7%
Fertilizers	6.6	1.4%	-25.8%	4%	4%
Forestry Products	31.8	6.8%	5.1%	7%	-2%
Industrial Machinery and Equipment	24.3	5.2%	-3.0%	5%	5%
Ores and Metals	71.3	15.2%	-2.7%	11%	5%
Special Transactions*	5.7	1.2%	1.4%	-3%	2%
Total Goods	469.0	81.4%	-2.6%	6%	4%
Total Services	107.2	18.6%	4.8%	5%	6%
Total Exports	576.2	100.0%	-1.3%	6%	5%

Source: Statistics Canada, EDC Economics, 2016 is actual data while 2017 and 2018 are forecast. *Special transactions are mainly low-valued transactions, value of repairs to equipment and goods returned to country of origin.

Table 26: Ontario Merchandise Export Outlook

Top Sectors	% Share of Exports (2015)	Export Outlook (% growth)		
		2015	2016(f)	2017(f)
Motor Vehicles and Parts	36.3	14.5	17	-4
Metals, Ores and Other Industrial Products	19.3	-0.3	-7	2
Chemical and Plastics	12.8	10.6	3	3
Industrial Machinery and Equip	9.2	17.4	6	4
All others	22.4	14.7	4	4
Total	100.0	11.1	7	0
Total excl. energy	98.4	11.6	7	0

Source: EDC *Global Export Forecast Fall 2016*, p. 39. Statistics Canada, EDC Economics.

Table 27: Employment Outlook by Industry – Q1/2017

Industry	Ontario
	Net Employment Outlook (%)
All Industries	7
Construction	-5
Education	6
Finance, Insurance & Real Estate	15
Manufacturing - Durables	11
Manufacturing – Non-Durables	15
Mining	-7
Public Administration	9
Services	9
Transportation & Public Utilities	3
Wholesale & Retail Trade	6

Source: Manpower Employment Outlook Survey – Q1/2017.