Williams Lake Assessment and Business Expansion, and Attraction Strategy

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Executive Summary

Introduction

Purpose

The Williams Lake Assessment and Business Attraction Strategy will result in the development of a targeted work plan that will allow the City of Williams Lake to facilitate the expansion of existing businesses and proactively attract new investment and businesses to the community.

Project Study Area

For the purposes of this project, the local economic area is considered the City of Williams Lake and the surrounding Cariboo Regional District Electoral Areas D, E, and F and neighbouring First Nation communities. The market trade area for the City of Williams Lake is slightly different and is based on travel times and knowledge of consumer behaviour in the local area.

Community Overview

Demographics

In 1996, the population in Williams Lake and Area was 24,135 and declined over the next ten year period to approximately 23,290 by 2006.

For Williams Lake and Area in 2006 there was a larger share of population in the 0 to 19 year age group when compared to the province, and a similar share of residents in the working age categories of 20 years to 64 years old.

Personal Income

In 2008, a total of 17,750 taxfilers earned income of $657.5 million in Williams Lake and Area. Between 2003 and 2006, Williams Lake and Area closely tracked the growth in personal income observed at the provincial level and then only lagged in the most recent two years. This is noteworthy given that over this same period the province noticeably outpaced Williams Lake and Area in population growth and job creation.

Retail Expenditures

According to the Financial Post, retail purchases in Williams Lake amounted to an estimated $393.4 million in 2009. The Financial Post estimate would be higher but does not include the retail sales in Williams Lake associated with the Cariboo Regional District Electoral Area F.

Economic Base Analysis

Labour Force by Industry

Williams Lake and Area and the Cariboo RD have a considerably larger share of their labour force in agriculture, logging, wood manufacturing, and mining than British Columbia does. Overall, Williams Lake and Area has more than one third of its labour force engaged in goods production, versus 21.1% at the provincial level.

Economic Dependencies

Williams Lake and Area has an income base that is still heavily dependent on forestry activity and the public sector. Transfer payments and "other" non-employment income sources were the third and fourth leading contributors of community income, respectively.

Labour Force Concentration

When Williams Lake's 2006 industry labour force concentrations are compared to British Columbia's, it indicates that the advantages for Williams Lake occur within the goods-producing sectors, while the community is under-represented in many key service industries, including construction, retail trade, information and culture, professional services and accommodation. The dominance of goods employment is not just a reflection of the key resource industries that are providing this employment, but it is also a symptom of low population growth.

SWOT Analysis

In economic development, Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is useful for helping communities find the best fit between local capital and mobile capital that when combined leads to the creation of productive economic activity and wealth.

The greatest strengths of the Central Cariboo are its natural resources, primarily timber, minerals, agricultural land and outdoor recreation features; and good basic infrastructure, including a location on the province's major north-south highway corridor, scheduled air services, equal access to northern and southern ports, reasonable business costs and an attractive quality of life that includes reasonably priced housing and real estate.

Key weaknesses fall into two general areas: a lack of population growth over the last decade and a lack of industrial diversification and job-creating investments. In turn, the labour pool is declining and may present challenges to new industrial projects in the future should the investment climate improve.

Economic development opportunities are mainly in the primary and manufacturing industries, especially mining, and even forestry.

The threats to the local economy derive primarily from external forces, particularly the province's declining share of goods production and how this might affect the rural economies that are still heavily resource dependent. The environmental assessment process, and particularly federal attitudes to proposed mining projects, is also a major concern.

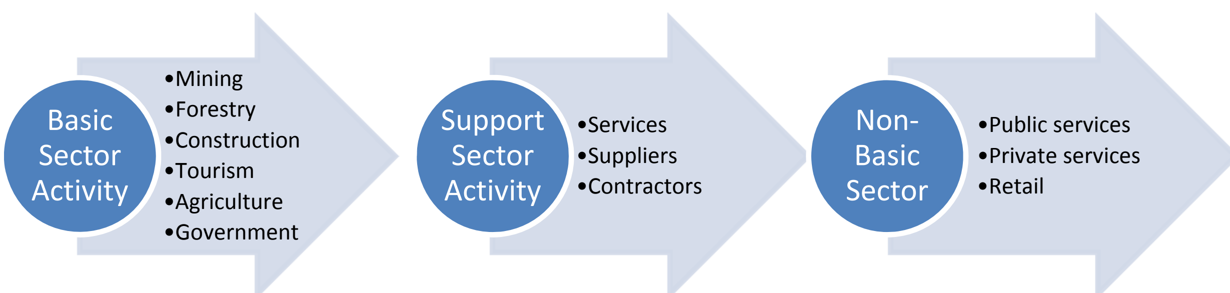
Development and Marketing Strategy

Approach to Opportunity Identification

Recognizing that the staples economy is still very much a reality in the Cariboo, we believe the dynamics of regional economic growth include three elements which provide a sense of direction for economic development policy. As illustrated in Figure ES-1, they are:

- The change in external demand for the products and commodities provided by key basic sectors (agriculture, forestry, mining, energy, construction), which will influence the local investment in these industries moving forward;
- The capacity and competitiveness of regional businesses that have traditionally served basic industry; and
- Anticipated growth in the local population, which will increase the amount of disposable income in the local area, drive demand for goods and services, and stimulate more local business activity in response to that demand.

Figure ES-1 Simplified Economic Opportunity Model



The following discussion addresses each of these elements in turn and then outlines industries that would be appropriate targets for economic development programming in Williams Lake.

Sector Opportunities

Table ES-1, summarizes the anticipated directional changes in the key basic sectors of forestry, mining, agriculture, tourism and public sector over the next ten years.

Table ES- 1 Basic Sector Outlook to 2020

		Short Term Trend	Long Term Trend	Evaluation
Basic Sector	Forestry	↑	↓	Locally industry will prosper as long as access to markets continues and wood supply is elevated. However, local harvest will decline at some point in the future.
Basic Sector	Mining	↑	↑	Excellent potential for new mine investment, through expansion of existing operations and development of new projects. Major risk factor is the environmental assessment process.
Basic Sector	Agriculture	→	↑	Stabilizing after a period of extreme challenges, but minimal value-added and growth prospects marginal.
Basic Sector	Tourism	→	→	In a holding pattern - poor market awareness, low visitation and no real catalyst to encourage growth.
Basic Sector	Government	↑	↑	Has been stable but showing signs of new investment and growth in both the shorter term and longer term locally.

The outlook for support sectors is mixed in the short term but generally positive in the long term because these businesses rely on the basic sectors for their revenues. If mining increases as expected and if logging and wood manufacturing can be stabilized with perhaps new investments in value-added production to meet growing demand in Asia, then these are the sectors most likely to benefit.

The population thresholds analysis focuses on the average population needed to support a single business in BC in 2010, with a comparison of the actual number of businesses in the Williams Lake census agglomeration area. The data shows that Williams Lake supports more businesses per capita than BC in several key sectors, including retail trade, wholesale trade, accommodation and food services and other services. It is in construction and “white collar” services where more local business activity could be supported.

The overall outlook for the non-basic sector is shown in Table ES-2. There is a clear connection between the local population and trading area and the overall outlook for the non-basic sector. The expansion of the non-basic sector is tied to population growth and vice versa; where there is a declining population, the non-basic sector will likely shrink. Expenditures are also a factor as higher average household incomes will invariably produce greater per capita expenditures, and therefore more opportunities for local firms to capture that spending.

Table ES-2 Non-Basic Sector Outlook to 2020

		Short Term Trend	Long Term Trend	Evaluation
Non-Basic Sector	Retail	→	→	BC Stats is forecasting growth locally, and new mine investment will further foster local growth over short to mid-term. The prospects for forestry and tourism are more cautious so population growth is expected to be less than the provincial average.
	Personal Services	↑	→	
	"White Collar" Services	→	↑	Professional, technical, real estate, finance and cultural services could all be stimulated by major project developments but long term growth is likely to be supported by greater investments in value-added activities and knowledge-led industries where these services are in demand. Any increase in the retirement population would also increase demand for these services.

Source: BC Stats (2009)

Even with modest population growth, we believe "white collar" services could be expanded because the local population appears under-serviced at this time, and because economic growth in general may favour these sectors going forward.

Summary of Targets

Based on the analyses of economic and industry data, feedback received during interviews with industry stakeholders, a long list of sectors that represent targets for retention, expansion and attraction initiatives, was formed. In the framework shown in Table ES-3, the sectors were then matched against a range of criteria covering internal capacity and resources, external industry and market forces, and potential for positive economic growth. A one to five rating scale was employed. Each opportunity is rated for each criteria. A mean rating is then calculated. The higher the score, the more preferred the opportunity.

Table ES-3 Opportunity Filter

Opportunity	MB	SGP	LC	LI	EC	JP	IP	Average Score
Construction	5	4	1	4	4	4	3	3.6
Cement and Concrete Manufacturing	3	4	2	4	3	4	4	3.4
Trucking, Warehousing and Storage	4	4	3	3	2	4	4	3.4
Professional and Technical. Consulting Services	4	5	1	2	4	4	4	3.4
Metal Fabrication and Machining	3	3	2	4	3	4	4	3.3
Equipment Supplies	3	4	4	3	3	3	3	3.3
Automotive Supplies	4	4	3	3	3	3	3	3.3
Machinery and Equipment Rental and Leasing	3	3	3	3	3	4	4	3.3
Personal Services	3	4	3	4	3	4	2	3.3
Hardware	4	3	3	3	3	3	3	3.1
Hospitality Services	5	3	2	3	3	3	2	3.0
Retail	3	3	1	4	2	4	1	2.6

MB	Market Base: how diverse and extensive is this sector's local consumer and business market base?
SGP	Sector Growth Potential: is this sector mature or declining, or growing and diversifying?
LC	Local Competitiveness: what is the sector's local performance as measured by the shift-share analysis?
LI	Local Inputs: are local inputs such as skilled labour available to support this sector?
EC	Existing Competition: do business establishment counts suggest a business opportunity?
JP	Job Potential: what is the job potential in terms of security and sustainability?
IP	Income Potential: is this a well-paying sector and how does its payroll compare to the average wage?

Rating Scale: 1= lowest to 5=highest

While Table ES-3 outlines the most promising opportunities, based on the ranking criteria, the following strategy section devotes several strategies to positioning the community to capitalize on these opportunities.

Strategy Recommendations

Based on the research and the key informant interview program, a strategy was developed that focused on moving the City of Williams Lake towards its strategic objective of a larger and more diversified business sector. To achieve this objective, six key strategy areas have been developed focusing on the basic sectors, support to the basic sector, and the non-basic sector. These strategy areas include:

5.4.1 Improvement in the Industrial Business Climate;

5.4.2 Growing the Economic Importance of the Government Sector;

5.4.3 Supporting the Development of Business Related Assets and Participating in Regional Marketing Initiatives;

5.4.4 Fostering Growth within Businesses Supporting the Basic Sector;

5.4.5 Organizing Information to Support Investment in the Non-basic Sector; and,

5.4.6 Supporting Revitalization and Investment in the Downtown.

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Abbreviations

ALR	Agriculture Land Reserve
BIA	Business Improvement Area
BRE	Business Retention and Expansion
CEDI	Community Economic Diversification Initiative
CRD	Cariboo Regional District
CMEA	Canadian Exporters and Manufacturers Association
CCBAC	Cariboo-Chilcotin Beetle Action Coalition
COTA	Council of Tourism Associations
DCC	Developer Cost Charge
DMO	Destination Marketing Association
EA	Environmental Assessment
EDAC	Economic Development Advisory Committee
EDC	Export Development Canada
EDO	Economic Development Officer
EDS	Economic Development Strategy
GDP	Gross Domestic Product
IEDC	International Economic Development Council
MAL	Ministry of Agriculture and Lands
MEMPR	Ministry of Energy, Mines and Petroleum Resources
MRESD	Ministry of Regional Economic and Skills Development
MOL	Ministry of Labour
MOTI	Ministry of Transportation and Infrastructure
MTCA	Ministry of Tourism, Culture and the Arts
MSBTED	Ministry of Small Business, Technology and Economic Development
NAIOP	National Association of Industrial and Office Properties
NGO	Non-government Organization
OCP	Official Community Plan
RFP	Request for Proposal
SD	School District
TBC	Tourism British Columbia
TSA	Timber Supply Area

1 Introduction

1.1 Background

The City of Williams Lake, with assistance from the Federal Government's Community Economic Diversification Initiative (CEDI) (administered through Western Economic Diversification) has initiated an Industry and Business Attraction Strategy for the City of Willliams Lake. The goal of the strategy will be to position the City of Williams Lake to further support the diversification and growth of the City's business sectors through the expansion of existing industry and service activities and the attraction of new business entities and investment to the community.

This initiative is an extension of the City's participation in regional economic diversification strategies completed over the past few years by the Cariboo-Chilcotin Beetle Action Coalition (CCBAC). The initial CCBAC work included investigation of best practices and input from business sectors and consulting experts on various industry sectors and their potential opportunity. The data and recommendations are presented from a *regional* perspective but provide some insight to local development opportunities. Therefore, to assist the City of Williams Lake in moving forward on specific actions to capitalize on the business opportunities, the completion of the Business Attraction Strategy focused on Williams Lake was identified by the economic development department as an important local task.

1.2 Purpose

The Williams Lake Assessment and Business Attraction Strategy will result in the development of a targeted work plan that will allow the City of Williams Lake to facilitate the expansion of existing local businesses and proactively attract new investment and businesses to the community.

Key outcomes associated with the Strategy will include:

- Undertaking research and analysis that builds on the previous CCBAC work and other City research to better understand the Williams Lake market area and the linkages the City's businesses have to the regional economy;
- Specifically identify business targets that would provide a means to expand the local tax base and sustainability of the City economy;
- Identifying, a shortlist of industry and business that match to the services available or that could reasonably be developed in the City; and,
- Outline strategic initiatives that will focus on business development and retention within the basic sector, support industries to the basic sector, non-basic sector, and service industries.

1.3 Project Study Area

For the purposes of this project, the key geographies are the City of Williams Lake and the surrounding Cariboo Regional District Electoral Areas D, E, and F and neighbouring First Nation communities. This area is seen as the local economic area in which the City of Williams Lake is the largest community and is surrounded by several small unincorporated communities, subdivisions, rural residential properties and First Nation communities.

The market trade area for the City of Williams Lake is defined in Chapter 2 and is based on travel times and local knowledge of consumer behaviour in the local area. It is defined as primary market area and secondary market area (See Section 2.4).

1.4 Report Structure

This report has five chapters including: community overview, economic base analysis, future outlook for the Williams Lake area, and development and market strategies. This is followed by detailed appendices. The content of each section is illustrated below.

Table 1 Study Reporting Schedule

	Project Component	Sections	Community Consultation
Feb	• Demographic analysis • Retail Trade Profile	Community Overview	
Mar	• Labour Force Analysis • Business profile • SWOT Analysis	Economic Base Analysis and Market Baseline	
	• Sector Outlook • Business selection	Future Outlook	Key Informant Interviews with business leaders
	• Strategies and recommendations	Business and Industry Strategy – (Strategic plan)	

2 Community Overview

2.1 Demographics

2.1.1 Population

In 1996, the population in Williams Lake and Area was 24,135 and declined over the next ten year period to approximately 23,290 by 2006.[1] As illustrated in Table 2, between 1996 and 2006, the population in Williams Lake and Area declined by a total of 3.5% while the provincial population experienced overall growth of 9.5% over the same period.

Table 2 Historical Population Change in Williams Lake and Area, 1996 to 2006

	1996	2001	2006	%Change 1996 to 2006
City of Williams Lake	10,895	11,595	11,080	
Cariboo RD Electoral Area D	3,450	3,295	3,075	
Cariboo RD Electoral Area E	4,875	4,670	4,335	
Cariboo RD Electoral Area F	4,630	4,965	4,385	
Neighbouring FN communities	285	445	415	
Total Local Area	24,135	24,970	23,290	-3.5%
British Columbia	3,874,310	4,076,265	4,243,580	+9.5%

Source: BC Stats (2009c).

Note: There were boundary changes in the City of Williams Lake, Cariboo Electoral Areas D and F between 1996 and 2006.

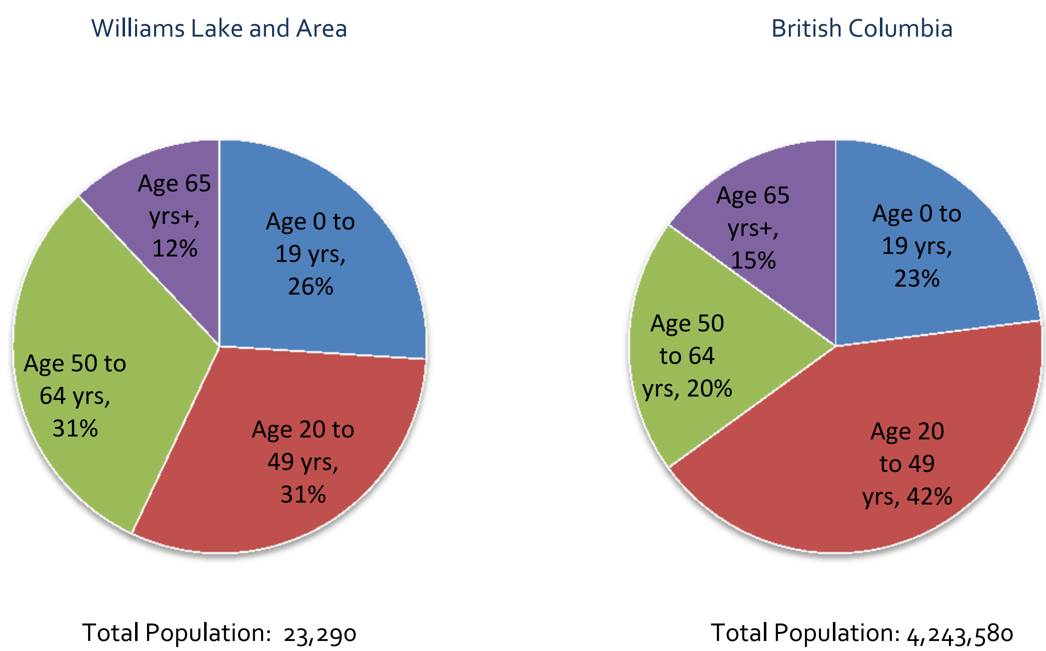
Since 2006 it is believed that the population for Williams Lake and Area has been relatively stable with the City of Williams Lake population estimated at 11,005 in 2010 while the population in the unincorporated areas of the Cariboo Regional District has increased by 4.8% between 2006 and 2010 (BC Stats 2011). Over the 2006 to 2010 period the population in the province has risen a further 6.7%.

[1] Williams Lake and Area includes the City of Williams Lake, Cariboo Regional District Electoral Areas D, E, and F and neighbouring First Nations communities.

2.1.2 Age Characteristics

Figure 1 presents the age characteristics for Williams Lake and Area and the province in 2006. As illustrated, Williams Lake and Area had a larger share of its population in the 0 to 19 year age group when compared to the province and a similar share of residents in the working age categories of 20 years to 64 years old. However, there is a noticeably smaller share of residence in the 20 to 49 years age group in the Williams Lake and Area when compared to the province.

Figure 1 Williams Lake and Area and British Columbia Age Characteristics, 2006

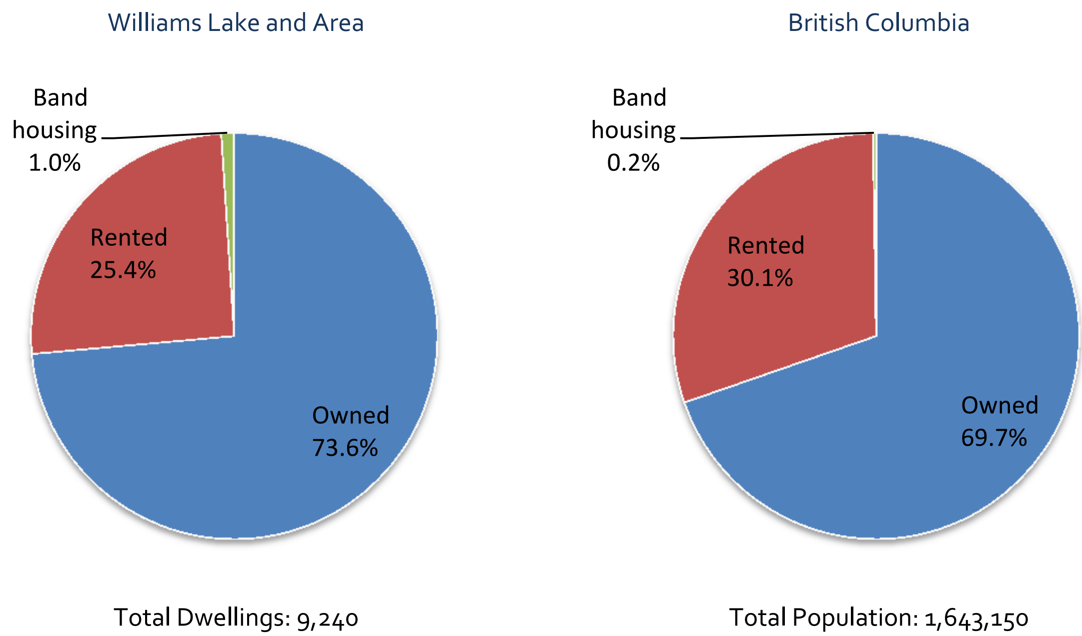


Source: BC Stats (2010a).

2.2 Households

Figure 2 outlines the percentage share of owned, rented, and Band Owned occupied dwellings in Williams Lake and Area and compares the ratios to those seen at the provincial level. As illustrated, in 2006 a higher percentage of local residents owned their own dwelling than was typically observed at the provincial level. Overall, between 2001 and 2006 the number of occupied dwellings in Williams Lake and Area remained relatively constant declining only slightly from 9,290 in 2001 to 9,240 in 2006. This is despite of a population decline of 1,680 residents over the same period.

Figure 2 Williams Lake and Area and British Columbia Occupied Dwellings, 2006



Source: BC Stats (2010a).

2.3 Personal Income

2.3.1 Total Personal Income and Average Income

Table 3 highlights the total number of taxfilers, total personal income and average income for women and men in 2008 for both Williams Lake and Area and the entire province.[2] In 2008, a total of 17,750 taxfilers earned income of $657.5 million in Williams Lake and Area. Average incomes in 2008 for men and women varied considerably with men earning on average $47,065 annually while women earned $26,875 on average in Williams Lake and Area. These average incomes for both men and women lagged the averages observed at the provincial level.

[2] Note: The Williams Lake and Area for personal income includes the City of Williams Lake and Cariboo Regional District Electoral Areas D, E, and F.

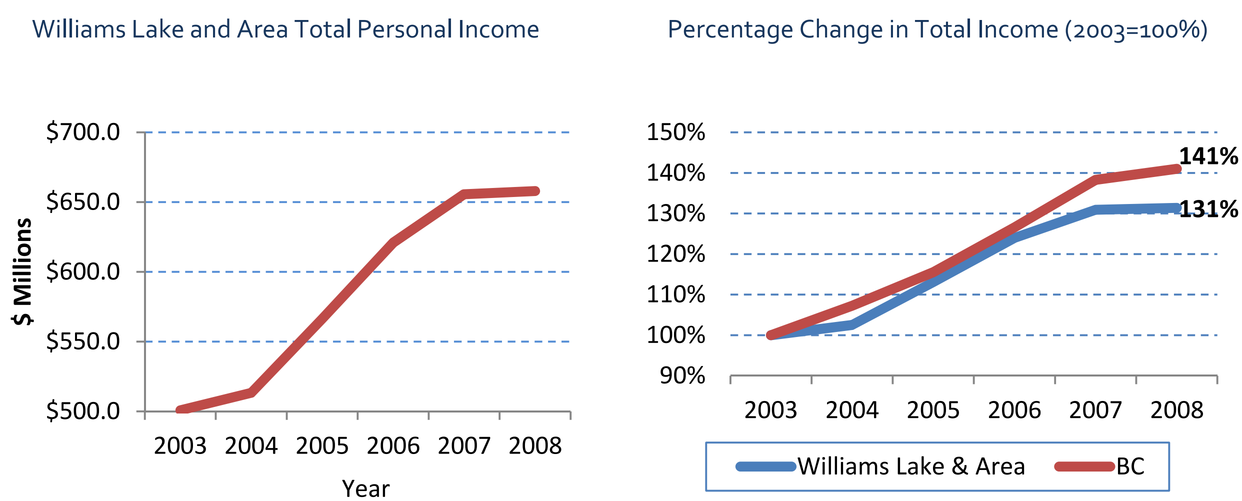
Table 3 Total Williams Lake and Area and BC Taxfilers, Total Income and Averages, 2008

	Williams Lake and Area	British Columbia
Number of Taxfilers (#)		
Male	8,940	1,580,010
Female	8,810	1,699,900
Total	17,750	3,279,910
Total Income ($'000s)		
Male	$420,783	$79,714,814
Female	$236,784	$54,300,446
Total	$657,567	$134,015,260
Average Taxfiler Income		
Male	$47,065	$50,450
Female	$26,875	$31,945
Total	$37,045	$40,860

Source: BC Stats (2010b).

Figure 3 outlines the change in the total personal income for Williams Lake and Area between 2003 and 2008. Total personal income is then compared to the percentage change in total personal income observed at the provincial level. Between 2003 and 2006, Williams Lake and Area has closely tracked the growth in personal income observed at the provincial level and then only lagged in the most recent two years. This is noteworthy given that over this same period the province has noticeably outpaced Williams Lake and Area in population growth and job creation.

Figure 3 Change in Total Personal Income for Williams Lake and Area and British Columbia, 2003 to 2008



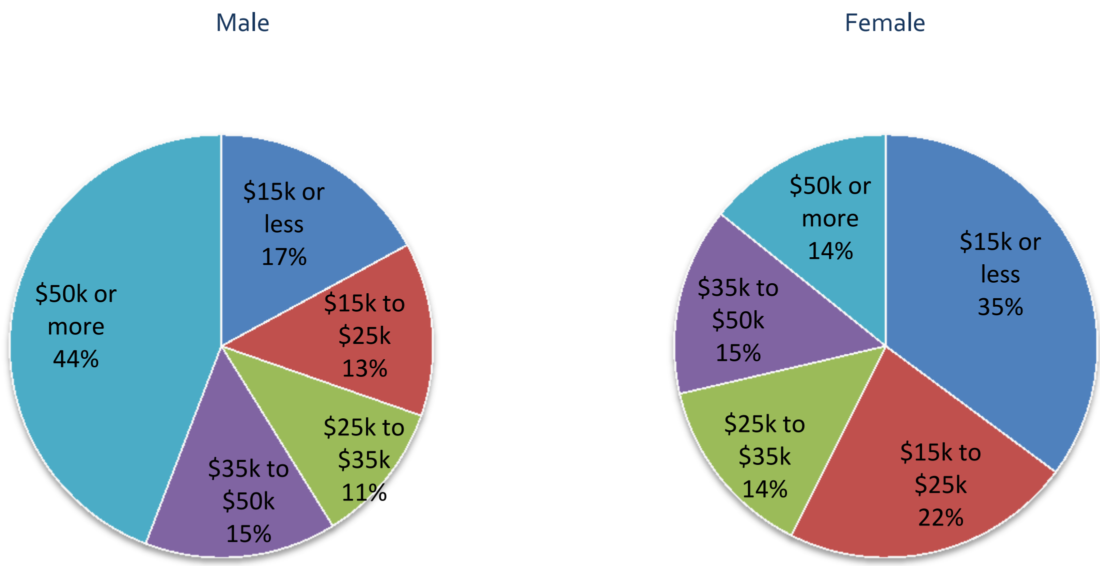
Source: BC Stats (2007a, 2007b, 2009d, 2009e, 2010b, 2010c).

A possible explanation could be that in 2004 Taseko Mines Ltd reopened its nearby Gibraltar mine and Imperial Metals Corporation resumed mining at their Mount Polley mine in 2005 collectively re-employing a large local mining workforce. In addition, an uplift in the local timber supply provided an opportunity for the local forest workforce to increase activity.

2.3.2 Range of Personal Income

As illustrated in Figure 4 in 2008, 44% of men and 14% of women earned more than $50,000 in Williams Lake and Area. In comparison, 37% of BC men and 19% of BC women earned more than $50,000 in 2008. At the end of the income scale, 17% of men and 35% of women earned $15,000 or less in 2008 in Williams Lake and Area compared to 21% of men and 32% of women at the provincial level.

Figure 4 Williams Lake and Area Personal Income Ranges, 2008



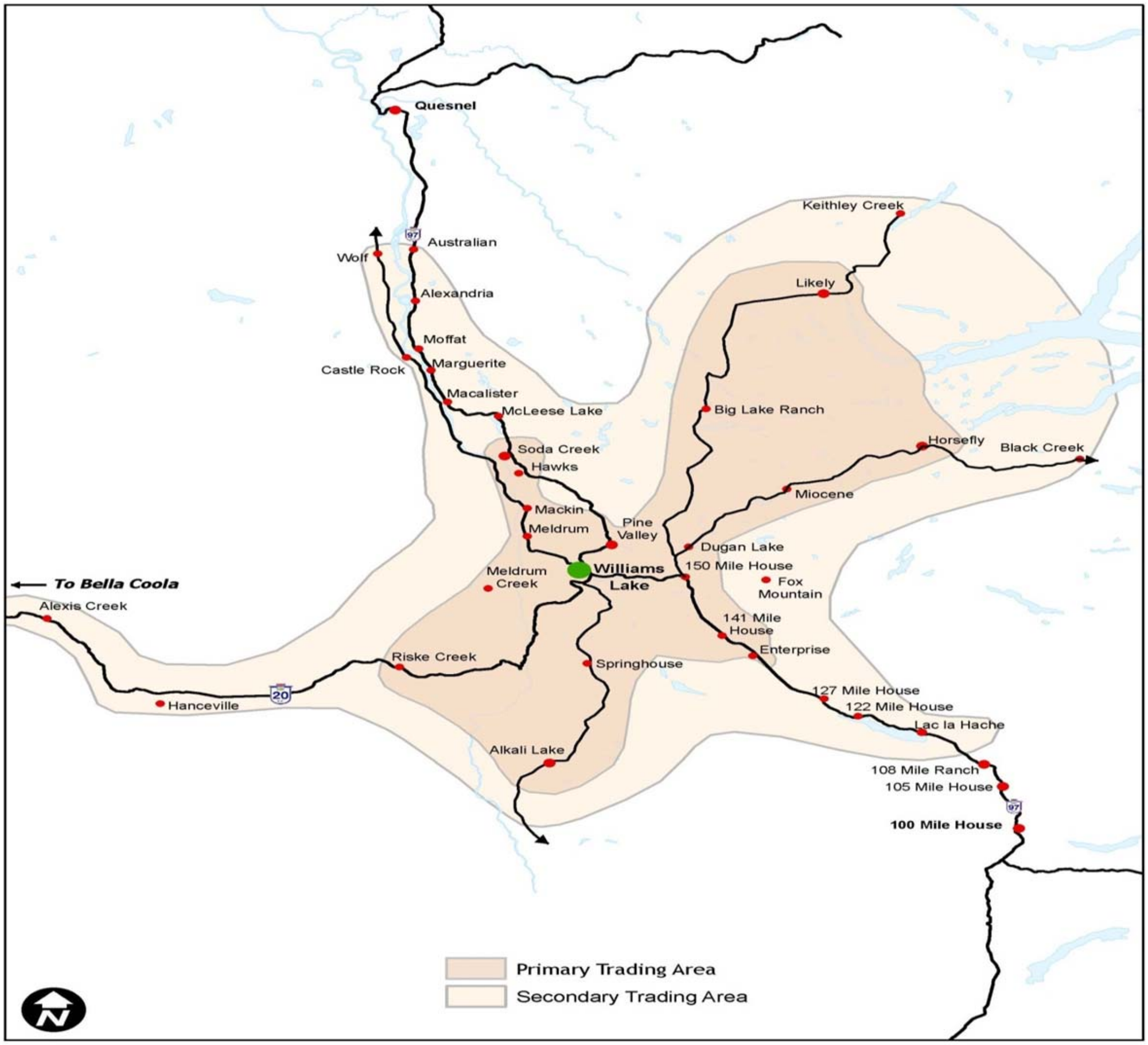
Source: BC Stats (2010b).

2.4 Retail Trade Profile

2.4.1 Description of Trade Area

The City of Williams Lake is the regional hub for retailing and services in the central portion of the Cariboo Regional District (Figure 5). The primary and secondary trade area were developed based on travel distances from Williams Lake and with local input and their understanding of current consumer patterns in the region.

Figure 5 Williams Lake Primary and Secondary Retail Service Area



Source: BC Stats.

Generally, the City of Williams Lake serves two main populations. The primary market area depends on Williams Lake services for daily needs, while the secondary area relies on Williams Lake for its services that are not available in the individual smaller town centres surrounding Williams Lake.

2.4.2 Primary Trading Area

The primary trading area includes the City of Williams Lake and encompasses most of the population in the surrounding Cariboo Regional District Electoral Areas of D, E, F and K and neighbouring First Nation communities. In total an estimated 22,660 people reside within the primary trading area in 2006 and will commute to the primary destination for shopping and services. Williams Lake is also a key area for employment for residents in the primary trading area.

2.4.3 Secondary Trading Area

The secondary trading area extends further and includes all population along Highway 20 to the Bella Coola Valley in the West. To the north, it is estimated the secondary trading area extends approximately half towards Quesnel and approximately half to 100 Mile House in the south. The secondary area includes the sparsely populated area extending north east towards Quesnel Lake. In 2006, it is estimated that this secondary trading area had a population of approximately 26,250 or 3,590 additional people than found in the primary trading area. The secondary area will rely on Williams Lake for speciality purchases, some employment and cultural products.

2.4.4 Retail Expenditures

The Financial Post prepares annual retail sales estimates for Canadian provinces, regions and communities of over 10,000 people. Estimates are spatially aggregated for varied types of business, including retail sales and services. Supply-side numbers are used to derive per capita and per household coefficients. As shown in Table 4, retail purchases in the Williams Lake area amounted to an estimated $393.4 million in 2009.[3] Interestingly, Williams Lake residents appear to spend a much greater proportion of their incomes than the average BC resident does. However, we believe the data may be reflecting the fact that Williams Lake has a larger trade area than thought. Local household income levels simply do not support the local retail sales estimates—the latter may be buoyed by sales to residents outside the immediate trading area and this has resulted in higher than expected per capita retail spending.

[3] Based on Williams Lake the Williams Lake Census Agglomeration which includes the City of Williams Lake and Electoral Areas D and E and neighbouring First Nation communities but does not include Electoral Area F.

Table 4 Financial Post Retail Sales Estimates, 2009

	Households 2009		Income 2009			Retail Sales 2009		
	Total No. (000's)	Total Pop. (000's)	Total $Mill.	Per Hhld. $	Per Capita $	Total $Mill.	Per Hhld. $	Per Capita $
BC	1,798	4,448	136,300.5	75,800	30,600	56,986.8	31,700	12,800
Williams Lk	7.7	18.7	515.7	66,419	27,309	393.4	50,700	20,800
Williams Lk as a % of BC	0.4%	0.4%	0.4%	87.6%	89.2%	0.7%	159.9%	162.5%

Source: FP Markets (nd).
Notes: Williams Lake includes City of Williams Lake and Areas D and E of the Cariboo Regional District.

Table 5 shows retail spending by major merchandise category for the Williams Lake area in 2009, with comparisons to the CRD and BC for the distribution of spending. The bulk of spending in all three jurisdictions is accounted for by automobile expenditures, otherwise there is great disparity in the allocation of spending by store type. In Williams Lake, the percent of total sales made at pharmacy and personal care store is approximately double that in the CRD and BC. Conversely, sales to supermarkets are well below those of the CRD and BC.

Table 5 Retail Sales Estimates by Merchandise Category, Williams Lake and CRD, 2009

	Williams Lake		CRD	BC
	$millions	% of total	% of total	% of total
Vehicles	$144.4	36.7%	30.3%	21.4%
Gas Stations	$52.2	13.3%	15.8%	11.5%
Furniture	$4.6	1.2%	1.1%	2.3%
Home Furnishings	$6.7	1.7%	1.6%	1.8%
Computers & Software	$0.3	0.1%	0.1%	0.5%
Home Electronics & Appliances	$14.7	3.7%	3.9%	3.8%
Home Centre & Hardware	$22.6	5.7%	8.4%	6.6%
Supermarkets	$29.2	7.4%	14.6%	17.0%
Convenience & Specialty Foods	$2.9	0.7%	1.0%	1.6%
Beer, Wine, Liquor	$14.2	3.6%	3.4%	5.0%
Pharmacies & Personal Care	$45.9	11.7%	6.6%	5.7%
Clothing	$8.4	2.1%	1.9%	4.3%
Shoes, Accessories & Jewellery	$2.9	0.7%	0.5%	1.3%
Department Store & General Merchandise	$24.1	6.1%	6.1%	10.8%
Sports, Music & Books	$12	3.1%	3.0%	3.5%
Misc.	$8.3	2.1%	1.5%	2.9%
Total	$393.4	100.0%	100.0%	100.0%

Source: FP Markets (nd).

It should be noted that if the population from Electoral Area F was included in the Financial Post retail sales data for the Williams Lake area, it would be higher than the $393 million reported here for the Williams Lake Census Agglomeration area.

3 Economic Base Analysis

3.1 Labour Force by Industry

Table 6 presents 2006 experienced labour force for Williams Lake and Area, Cariboo Regional District (CRD) and British Columbia. Williams Lake and Area and the CRD have a considerably larger share of their labour force in agriculture, logging, mining and wood manufacturing than British Columbia does.

Table 6 Experienced Labour Force, 2006

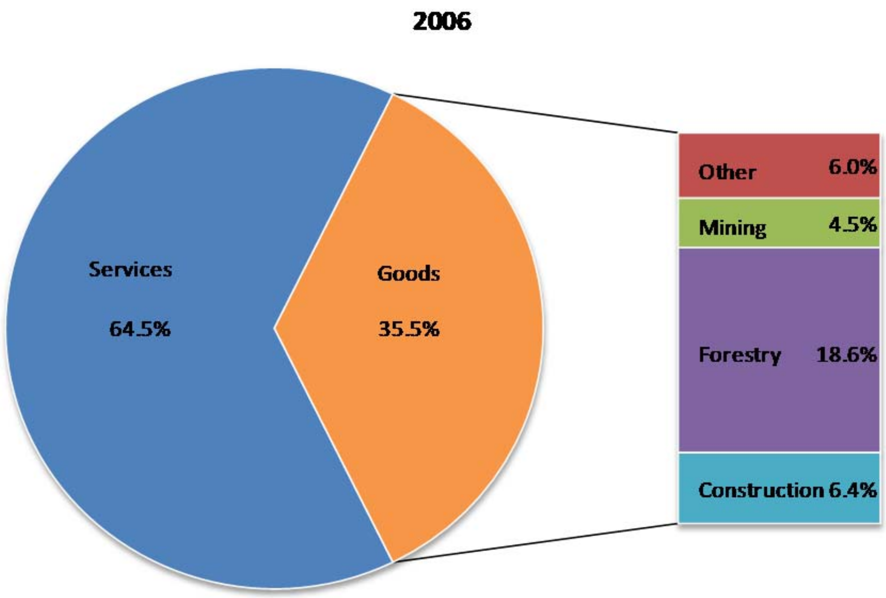
	Number		Percent		
	Williams Lake & Area	CRD	Williams Lake & Area	CRD	BC
Agriculture	535	1,600	4.0%	4.8%	1.9%
Logging and forestry	1085	2,705	8.2%	8.1%	1.3%
Mining	590	815	4.5%	2.4%	0.9%
Other Primary	10	15	0.1%	0.0%	0.2%
Utilities	40	60	0.3%	0.2%	0.5%
Construction	840	2,360	6.3%	7.1%	7.6%
Manufacturing, wood products	1345	3,630	10.1%	10.9%	1.8%
Manufacturing, metal fab.	40	120	0.3%	0.4%	0.6%
Manufacturing, other	195	1,135	1.5%	3.4%	6.2%
Total Goods Producing	**4,680**	**12,440**	**35.3%**	**37.4%**	**21.1%**
Wholesale trade	565	945	4.3%	2.8%	4.2%
Retail trade	1,305	3,470	9.8%	10.4%	11.4%
Transportation	640	1,590	4.8%	4.8%	5.2%
Information and culture	105	340	0.8%	1.0%	2.7%
Finance, insurance, real estate	400	980	3.0%	2.9%	6.2%
Professional, scientific and technical	490	1,100	3.7%	3.3%	7.4%
Management	0	30	0.0%	0.1%	0.1%
Administration and waste services	410	925	3.1%	2.8%	4.4%
Education	840	2,145	6.3%	6.4%	7.0%
Health	1,110	2,710	8.4%	8.1%	9.7%
Arts, entertainment, recreation	225	510	1.7%	1.5%	2.3%
Accommodation, food and beverage	890	2,495	6.7%	7.5%	8.2%
Other services	650	1,485	4.9%	4.5%	5.0%
Public administration	770	1,615	5.8%	4.9%	5.0%
Total Services Sector	**8,400**	**20,340**	**63.4%**	**61.1%**	**78.9%**
Unclassified	175	510	1.3%	1.5%	0.0%
Total Labour Force	**13,255**	**33,290**	**100%**	**100%**	**100%**

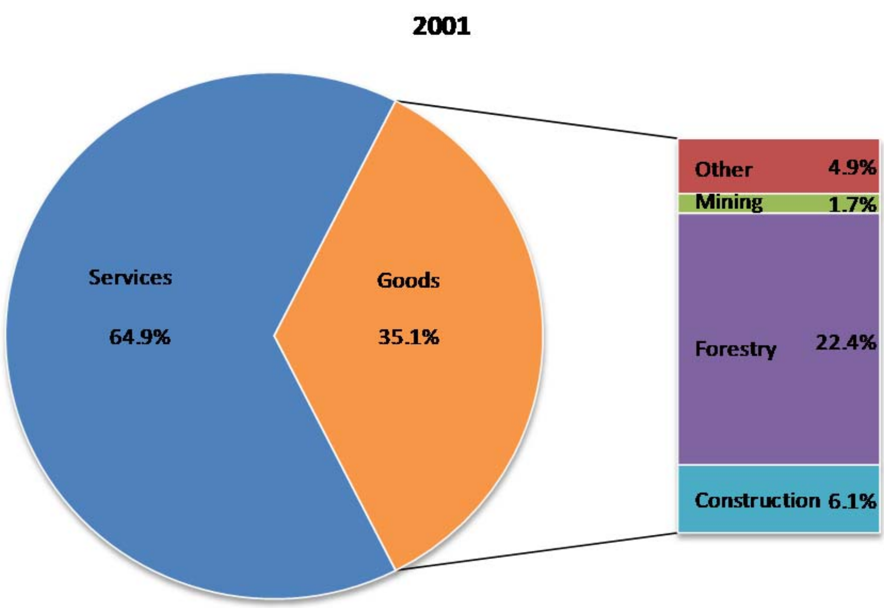
Source: Statistics Canada (2006).

Overall, Williams Lake and Area has more than one third of its labour force engaged in goods production versus 21.1% at the provincial level. Conversely its service labour force is proportionately smaller than British Columbia's, with only wholesale trade and public administration above the provincial average.

Figure 6 compares the proportion of goods-producing and service-producing jobs for 2001 and 2006. In Williams Lake, the proportions have not changed, although the distribution within the goods category has, with mining picking up the slack from a declining forestry sector.

Figure 6 Change in Williams Lake Labour Force Proportion, 2001 and 2006





Source: Statistics Canada. 2001 and 2006 Census.

The transformation of the provincial labour force from goods-producing to services is not being reflected locally or regionally, mainly due to the heavy reliance on forestry and on the lack of population growth which is a key factor in stimulating service activity.

3.1.1 Labour Force by Occupation

Table 7 shows the 2006 experienced labour force by major occupation in Williams Lake and Area and the CRD, as well as the percent distribution for British Columbia. The leading occupations, by number of jobs, are sales and service, trades, transport and equipment operation, business, finance and administration and occupations unique to primary industry. The lowest employment occupation was art, culture, recreation and sport.

Table 7 Experienced Labour Force By Occupation, 2006

	Williams Lake & Area	CRD	Williams Lake & Area	CRD	BC
	Number		Percent		
A. Management	995	2,375	7.5%	7.1%	10.3%
B. Business, Finance & Administration	1,635	3,915	12.3%	11.8%	16.9%
C. Natural & Applied Science, Related	675	1,530	5.1%	4.6%	6.2%
D. Health	565	1,410	4.3%	4.2%	5.4%
E. Social Science, Education, Government Services & Religion	930	2,360	7.0%	7.1%	8.0%
F. Art, Culture, Recreation and Sport	155	470	1.2%	1.4%	3.4%
G. Sales and Services	2,830	7,495	21.4%	22.5%	25.0%
H. Trades, Transport & Equipment Operators	2,735	7,110	20.6%	21.4%	15.2%
I. Unique to Primary Industry	1,255	3,590	9.5%	10.8%	3.9%
J. Unique to Processing, Manufacturing & Utilities	870	2,525	6.6%	7.6%	4.1%
Unclassified	610	510	4.6%	1.5%	1.5%
Total Labour Force	13,255	33,290	100.0%	100.0%	100.0%

Source: BC Stats (2010a).

3.1.2 Economic Dependencies

BC Stats produces income dependencies for 63 local areas in British Columbia. The income dependencies are based on the premise that the economy of a community can be represented by income flows that fall into basic or non-basic sectors, depending on the source of income. Basic income is defined as income that flows into the community from the outside, in the form of either employment income or non-employment income (BC Stats 2009). Non-basic income is the re-spending and circulation of basic income throughout the community (i.e. the multiplier effect).

A preliminary step in determining the source of community income is to take employment in the basic sectors and then allocate indirect and non-basic shares. The breakdown of employment for the Williams Lake and Area is shown to Table 8. So, for example, while the direct forestry labour force in 2006 was 2,647, the total labour force linked to forestry was actually 4,311. These additional 1,664 jobs, created through the spending of forest companies, contractors and their employees, would not exist if the direct jobs themselves did not exist. These additional jobs are therefore the result of what is commonly referred to as the multiplier or spin-off effect.

Table 8 Direct, Indirect and Non-basic Components of the Employed Labour Force, 2006

	Direct	Indirect	Non-basic	Total
Logging	1,206	221	455	1,883
Pulp and paper	20	12	3	35
Other wood mfg	1,421	406	566	2,393
Mining (& proc.)	607	210	245	1,062
Oil & gas(& proc)	10	32	6	48
High tech	3	0	1	4
Fishing & trapping	0	0	0	0
Agriculture & food	510	69	52	631
Tourism	831	54	101	985
Public sector	2,919	409	768	4,096
Construction	709	201	224	1,134
Film & sound prod.	12	3	1	16
Other (unallocated)	278	67	60	404
Non-employment	0	0	818	818
Total	8,524	1,685	3,299	13,508

Source: Horne (2009b).
Note: Based on the Williams Lake Forest District which includes the City of Williams Lake, Cariboo Regional District Electoral Areas, D, E, and F and surrounding First Nation communities.

Table 9 highlights the percentage of income by basic sector dependencies for the Williams Lake local area between 1991 and 2006. The income dependencies are calculated using after-tax income in the local area.

Williams Lake and Area[4] has an income base that is still heavily dependent on forestry activity and the public sector. Transfer payments and “other” non-employment income sources were the third and fourth leading contributors of community income, respectively. This means that approximately half of all income flowing to the local area is either from the public sector or non-employment sources of income.

The performance of the resource sectors other than forestry was mixed, with mining declining throughout the 1990s before recovering in 2006. Both tourism and agriculture have lost share since 1991. Williams Lake ranked 43rd out of 63 on the BC Stats’ diversity index reflecting a lower

[4] The local area the City of Williams Lake, and areas D, E and F of the Cariboo Regional District.

economic diversity than most local areas in British Columbia and highlights the high dependency in Williams Lake and Area on forestry and the public sector income.

Table 9 Williams Lake Local Area Economic Dependencies, 1991 to 2006

	FOR	MIN	AGR	TOU	PUB	OTHER	TRANS	ONEI
2006	27	5	2	4	22	10	16	12
2001	30	2	3	6	24	9	16	9
1996	31	3	4	7	22	11	14	8
1991	27	4	4	6	20	11	15	13

Source: BC Stats (1998,2009b).

Notes: 1. FOR-forestry, MIN-mining and oil and gas, AGR-agriculture, PUB-public sector, CONST-construction, Trans-transfer payments, ONEI-other non-employment income.
2. Transfer Payments (Trans) includes income from senior governments including: welfare payments, OAS, CPP, employment insurance, federal child tax credit, guaranteed income supplements and others.
3. Other Non-Employment Income (ONEI) includes investment income, such as dividends and interest; retirement pensions, superannuation, annuities, alimony, etc.

3.1.3 Labour Force Concentration

Location quotients are a tool for comparing a community's labour force distribution with a benchmark area (in our case the province of British Columbia) to identify comparative advantages and disadvantages. A location quotient of 1.0 for a basic sector indicates that the region employs the same proportion of its labour force in that sector as the province does, and that the region has no comparative advantages or disadvantages. A location quotient of greater than 1.0 indicates that relatively more people are employed in that sector, and that there are comparative advantages at work[5]. Conversely, a location quotient of less than 1.0 indicates that there are relatively fewer people employed in that sector, and that there are likely comparative disadvantages affecting activity.

Figure 7, which compares Williams Lake's 2006 industry and occupational employment to British Columbia's, indicates that the advantages occur within the goods-producing sectors, while the community is under-represented in many key service industries, including construction, retail trade, information and culture, professional services and accommodation. The occupational data mirrors the industry data. The dominance of goods employment is not just a reflection of the key resource industries that are providing this employment, it is also a symptom of low population growth. Without population growth, local demand for services and small business activity tend to lag the province, which will contribute to low levels of job creation in many personal and business services.

[5] The comparative advantages are not identified. The location quotient analysis assumes the if a region has proportionally more employment than what it is being compared against (in this case, the province of BC), the region possesses comparative advantages vis-à-vis the benchmark (BC).

Figure 7 Williams Lake and Area Location Quotient Analysis, 2006

	Advantage-LQ>1	Level-LQ≅1	Disadvantage-LQ<1
Industry	• Agriculture • Logging • Mining • Wood Products Manufacturing	• Wholesale trade • Transportation • Education • Health • Public Admin	• Utilities • Construction • Retail trade • Information and culture • Finance and real estate • Professional, technical • Arts, entertainment, recreation • Accommodation
Occupation	• Occupations unique to processing, manufacturing and utilities • Trades, transport and equipment operators • Occupations unique to primary industry	• Sales & service occupations • Occupations in social science, education, public service and religion • Natural and applied sciences occupations • Health occupations	• Management occupations • Business, finance & administration occupations • Occupations in art, culture, recreation and sport •

3.2 Labour Force Shift and Share

In order to understand the nature of employment growth or decline in Williams Lake and Area, it is useful to compare that change to the broader economy. Shift-share analysis is a technique for disaggregating employment change into three components, again using the province as a reference area:

- The region's share of provincial growth (provincial effect);
- The change in industry mix (industry effect); and,
- The shift of activities to, or away from, the region (local effect).

As noted in Table 10, the provincial effects are positive for all industries because overall provincial employment increased between 2001 and 2006.

The industry effects were mixed with some large gainers, equally large losers and a cluster occupying the margin of change. Unfortunately for Williams Lake, the biggest industry declines by far were in logging and wood products manufacturing. This poor performance at the provincial level suggests that the decline in the local forest sector is a provincial and not just a regional phenomenon. The better performing industries during this period were construction, mining and professional and technical services.

The local effects for each industry are meant to account for the residual change in regional employment. The negative local effect in other logging and wood manufacturing suggests that local performance in these industries was even worse than the overall provincial performance.

Table 10 Employment Shift-Share in Williams Lake, 2001 to 2006

	Labour Force 2001	Provincial Effect 2001-2006	Industry Effect 2001-2006	Local Effect 2001-2006	Total Change	Labour Force 2006
Agriculture	430	38	-14	81	105	535
Logging	1,295	115	-287	-38	-210	1,085
Mining	235	21	79	255	355	590
Other primary	0	0	0	10	10	10
Utilities	35	3	-4	6	5	40
Construction	820	73	255	-307	20	840
Wood manufacture	1,715	152	-428	-94	-370	1,345
Metal fabrication	50	4	1	-15	-10	40
Other manufacture	175	16	-14	19	20	195
Wholesale trade	340	30	9	186	225	565
Retail trade	1,610	143	-32	-416	-305	1,305
Transportation	670	59	-55	-34	-30	640
Information, culture	210	19	-30	-94	-105	105
Finance, insurance, real estate	450	40	7	-97	-50	400
Professional, technical	585	52	57	-204	-95	490
Management	0	0	0	0	0	0
Administration, waste	350	31	40	-11	60	410
Education	895	79	3	-138	-55	840
Health	1,205	107	-28	-173	-95	1,110
Arts, entertainment, recreation	85	8	2	130	140	225
Accommodation, food, beverage	1,015	90	-11	-203	-125	890
Other services	590	52	17	-10	60	650
Public administration	700	62	-76	84	70	770

Source: Statistics Canada (2006).

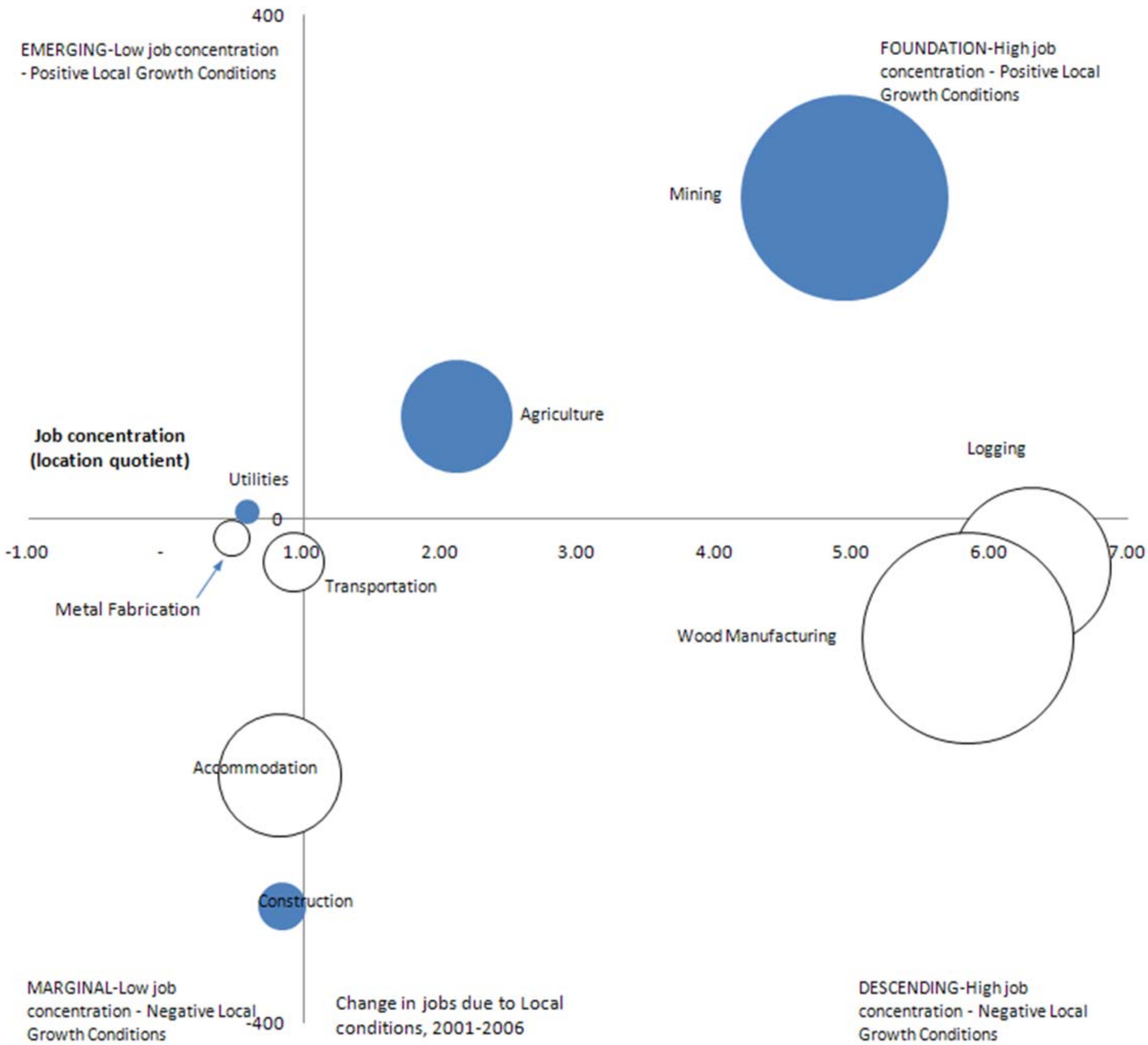
Other poor performers were construction, retail trade, information and culture, finance, insurance and real estate, professional and scientific services, health, education and accommodation. As noted previously, the lack of growth in these service fields is likely due to the lack of regional population growth. The drop-off in education and health services, in particular, is directly linked to population.

The clear growth leader in terms of employment change between 2001 and 2006 was mining, which grew well above the provincial norm. This is attributable almost entirely to the re-start of operations at the Gibraltor Mine. However, exploration and development activity related to other projects also grew rapidly during this period and contributed to industry employment levels.

Wholesale trade also grew strongly in marked contrast to the decline of retail employment. The rise in wholesale activity may be signalling a growing role for Williams Lake as a regional distribution centre.

A graphic representation of job concentration (i.e. location quotients discussed in Figure 8) plotted against the locally induced change in jobs (i.e. the "Local Effect" in Table 10) between 2001 and 2006 can be seen in Figure 8.

Figure 8 Williams Lake and Area Labour Force Concentration and Change, 2001-2006



Employment concentration and change for the study period are characterized by their placement within the four quadrants of the chart. The size of each bubble represents the total change in the labour force, with empty bubbles representing job loss and shaded bubbles job gain.

Two key industries in which Williams Lake and Area has relatively high job concentration (i.e. a high location quotient), namely wood manufacturing and logging, lost jobs during the 2001 to 2006 period and are in the process of slipping into the descending quadrant. Any future falldown in the crown timber harvest and in mill production will likely exacerbate employment levels and prevent any turnaround in performance.

Three small economic base sectors (e.g. metal fabrication, utilities, transportation) are clustered around the margin and there are no clear signals as to where they might move in the future. In any case, their contributions to the total labour market are relatively small, and swings to the positive or negative are unlikely to generate significant change in the economic base.

Of more concern to the local economy is the performance of the accommodation and constructions industries. They are potentially major sources of employment but for the 2001-2006 period at least were lagging in activity and employment growth.

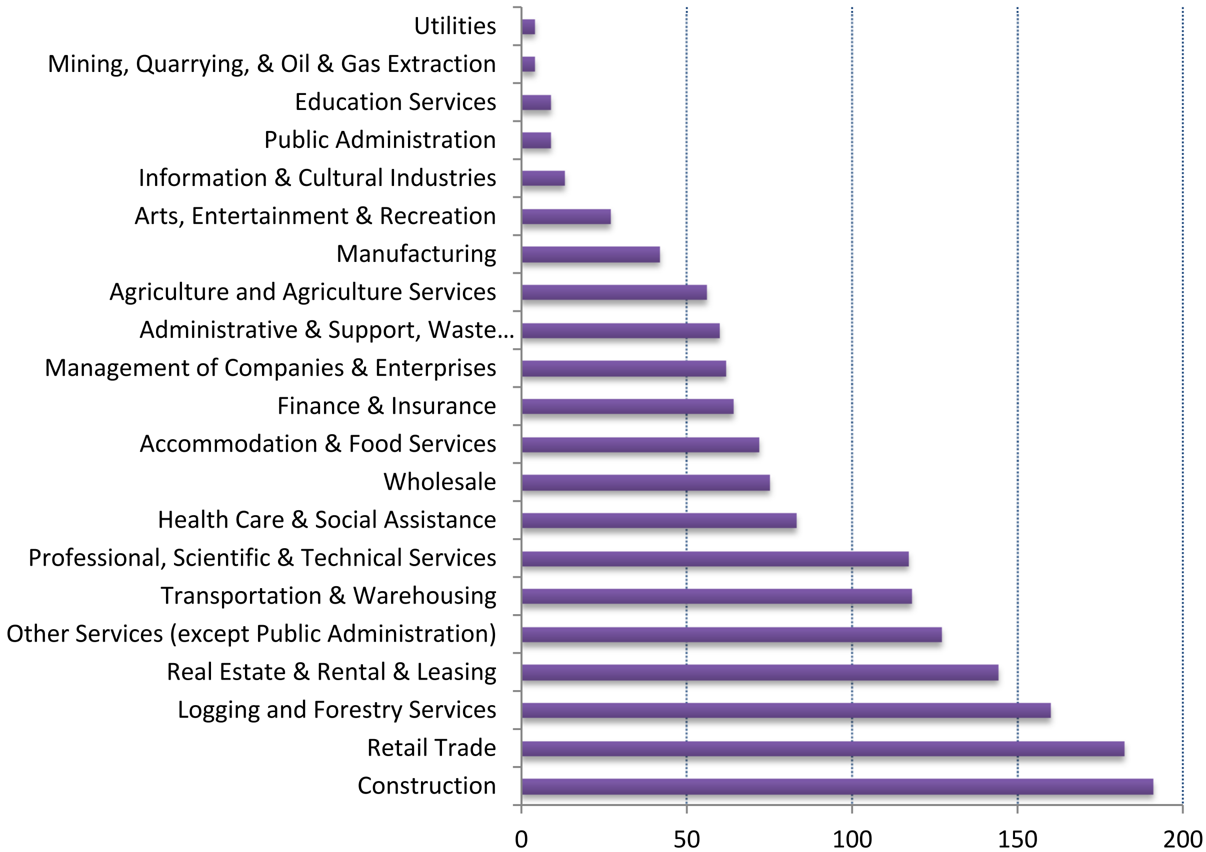
Finally, agriculture and especially mining are clearly positioned as foundation industries due to high job concentration and positive local growth conditions.

3.3 Number of Business Establishments

Statistics Canada regularly tracks the number of establishments by employment type and region through its *Business Register*. There are a total of 1,619 business establishments active in the Williams Lake census agglomeration (CA) as of December 2010 (Figure 9).[6] Leading industries include construction, retail trade, logging, real estate, personal and business ("other") services and professional services. Industries such as manufacturing and mining have very few business establishments but they nevertheless contribute significantly to the job base because they have relatively large workforces.

[6] The Williams Lake Census Agglomeration includes the City of Williams Lake, Cariboo Regional District (CRD) Electoral Areas D and E and neigbouring First Nations Communities; however, it does not include CRD Electoral Area F which is included in data presented elsewhere in this report.

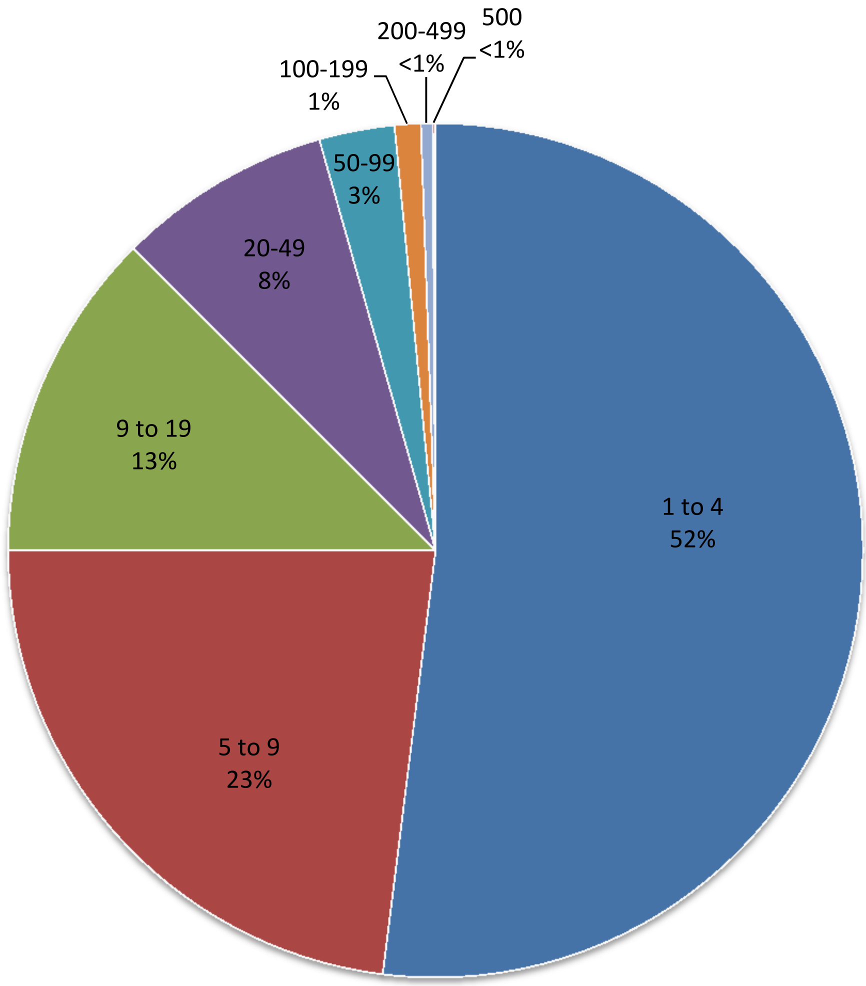
Figure 9 Number of Business Establishments in Williams Lake CA, 2010



Source: Statistics Canada (2010).
Note: Williams Lake CA includes the City of Williams Lake and Cariboo RD Electoral Areas D and E, and surrounding First Nation communities.

Figure 10 shows the distribution of establishments in Williams Lake according to the average number of employees. Over 50% had less than five employees, while three quarters had less than 10 and 96% had less than 50. While establishments of 50 or more employees constituted only five percent of the total number of operations in 2010, they contributed roughly 42% of all employment.

Figure 10 Distribution of Business Establishments By Number of Employees in Williams Lake CA, 2010



Source: Statistics Canada (2010).

3.4 SWOT Analysis

Finally, in economic development, Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis is useful for helping communities find the best fit between local capital and mobile capital that when combined leads to the creation of productive economic activity and wealth (Figure 11). SWOT is not meant to profile any and all attributes, just those that are strategically relevant and which are the source of some form of competitive advantage or disadvantage. These then become targets that the community can sustain or enhance (in the case of strengths and advantages), mitigate and convert (in the case of weaknesses or threats) or develop and diversify (in the case of opportunities).

Figure 11 Factors of Community Wealth

An overview of key strengths, weaknesses, opportunities and threats for Williams Lake is provided in Figure 12. The greatest strengths of the Central Cariboo are its natural resources, primarily timber, minerals, agriculture land and outdoor recreation features, and good basic infrastructure, including a location on the province's major north-south highway corridor, scheduled air services, equal access to northern and southern ports, reasonable business costs and an attractive quality of life that includes reasonably priced housing and real estate.

Key weaknesses fall into two general areas, a lack of population growth over the last decade and a lack of industrial diversification and job-creating investments. In turn, the labour pool is declining and may present challenges to new industrial projects in the future should the investment climate improve.

Economic development opportunities are mainly in the primary and manufacturing industries, especially mining, and even forestry, which, after many years of slumping productivity and uncertainty over the long-term effects of the mountain pine beetle epidemic, may be about to enter a new era of stability and growth. Emerging demand from Asian markets, especially China, is buoying the provincial industry and providing much-needed diversification to US-dependent wood markets. Agriculture, tourism and alternative energy projects also have potential, but as has been outlined in the past, greater efforts will have to be made to attract new capital into these sectors locally. A major opportunity in this area is greater involvement of First Nations communities and new partnerships in economic development consortia.

The threats to the local economy derive primarily from external forces, particularly the province's declining share of goods production and how this might affect the rural economies that are still heavily resource dependent. The environmental assessment process, and particularly federal attitudes to proposed mining projects, is also a major concern.

Figure 12 Williams Lake SWOT Overview

	Helpful	Harmful
Internal	**Strengths** • Highway, port, rail, air services • Productive farm and range lands • Established cattle sector • Favourable geology and mineral resources Skilled, educated labour market • Affordable real estate • Outdoor recreational resources • Competitive development costs • Attractive quality of life •	**Weaknesses** • Small home market/local demand • Low population growth • Spending leakages to other communities • Lack of value-added and cluster development in primary industries • Lack of destination tourist attractions • Lack of food processing capacity • Lack of serviced industrial land • Small labour pool
External	• Completion of the Cariboo Connector Program • Warehousing, storage and inland port potential related to improved highway • Small-scale food processing • Emerging Asian demand for key products (e.g. wood products) • Major mine projects and supply, procurement opportunities • Outdoor adventure development • New destination attraction • Bio-energy and alternative energy projects • First Nations economic development partnerships **Opportunities**	• Future fall down of the Allowable Annual Cut • Mountain pine beetle visuals • Continued decline in forest economy • Declining basic manufacturing base • Loss of industrial enterprises and tax base • Competition from other communities • Labour shortages in key sectors • Federal participation in the environmental assessment process • Effect of rising Canadian dollar on competitiveness • Rising electricity rates **Threats**

4 Future Outlook

4.1 Sector Outlook

The key basics sectors for Williams Lake and Area include forestry, government, mining, tourism, and agriculture. For British Columbia, 2010 marked an impressive rebound for the province's resource sector (Royal Bank. March 2011). Early indications in 2011 suggest the positive trend will continue with British Columbia experiencing a 21% increase in exports in January 2011 over January 2010. This could position several key sectors in Williams Lake and Area for a growth cycle over the next several years.

4.1.1 Forestry

Overview and Forecast

In recent years, the British Columbia forest sector has made important in-roads into Asian markets, particularly China. In 2010, British Columbia's timber exports to China totalled $687 million, a tenfold increase from 2003. Over the past two years an estimated 24 mills have reopened across the province just to fill orders for the Chinese market (Vancouver Sun. 2011). Finally, in the first three months of 2011, sales to Japan and China exceeded those to the United States highlighting a fundamental shift in the industry that will noticeably diversify the industries growth opportunities in the future.

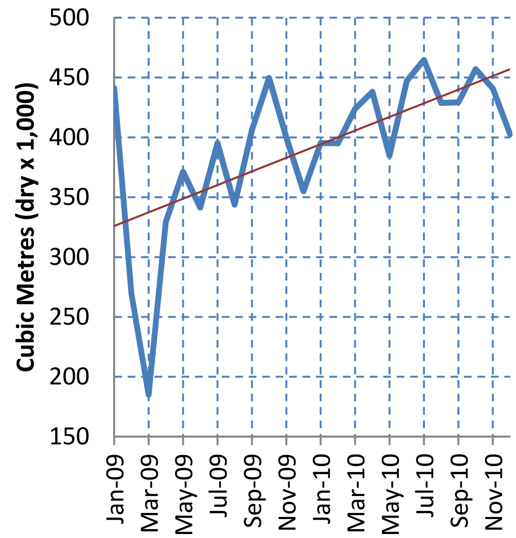
Looking ahead, the British Columbia forest sector capital expenditures in 2011 are forecast to increase by almost 60% over 2010 to $93.6 million in forestry and logging, 53% to $310 million in paper manufacturing and decline by 2% in wood product manufacturing to $154 million (Statistics Canada. 2011). Overall, if the British Columbia forest sector continues to capitalize on its exposure to demand in Asia for its products the industry should move off its recent depressed activity levels. In addition, reduced dependency on the US market could mitigate the harsh cyclic downturns that have been experienced with periods of weakness in the US housing sector and also allow the British Columbian industry to move beyond the constraints that the Softwood Lumber Agreement has created for their sales of forest product in the US.

Local Situation

As illustrated in Figure 13 lumber production in the Central Interior of British Columbia, which includes Williams Lake, has been trending upwards over the past two years with the area participating, along with the rest of British Columbia, in capturing new market share in Asia, allowing production growth at local sawmills.

Locally, Williams Lake and Area is centred in the Williams Lake Timber Supply Areas, one of the largest TSA in the province with a current annual allowable cut (ACC) of over 5.7 million cubic metres. The current ACC reflects an increase of 2 million cubic metre uplift (increase of 53%) that was allocated in 2007 to harvest wood killed by the mountain pine beetle epidemic (Ministry of Forests. 2007).

Figure 13 Central Interior Sawn Lumber Production, Monthly 2009 & 2010



Source: CANISM Table 303-009.

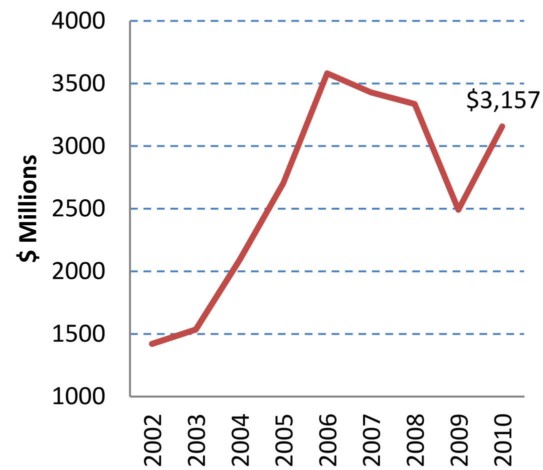
The uplift has created expanded logging and milling opportunities for those mills able to expand their sales during this period. In addition, the mountain pine beetle has created local investment opportunities in the associated biofuel sector using wood products that would not have been available previously. However, at some point it is anticipated the AAC will decline once the pine beetle killed wood is harvested. This will create challenges for local wood processors and the logging sector as the local harvest declines. Currently, local forest industry representatives believe there is enough local fibre to continue to operate local milling facilitates for the next four to eight years. Each operator is hopeful to continue operating their local processing facilities after the uplift period; however, it remains unclear which facilities will continue once fibre supply declines.

4.1.2 Mining

Overview and Forecast

The Cariboo Region has high quality, bulk mineable, porphyry-style deposits with copper-gold projects remaining the most significant of these (BC Ministry of Forests, Mines and Lands. 2011). As illustrated in Figure 14, the value of metallic mineral (which includes copper-gold-molybdenum concentrates) exports in British Columbia have risen significantly since 2002; and after a brief set back in 2008 and 2009 have again begun moving upwards.

Figure 14 BC Exports of Metallic Mineral Products, 2002 to 2010



Source: BC Stats.

Moving forward, demand for copper, gold, and other metals are anticipated to remain strong with continued growing demand from emerging markets led by China. This in turn will continue to support metal prices and should foster new investment in the BC mining sector. Already, several existing metal mines in British Columbia have announced expansion plans.

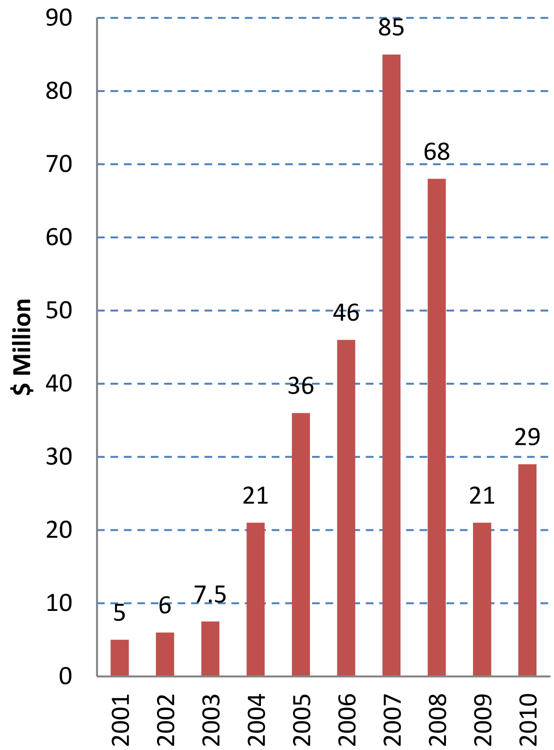
Currently, capital expenditures in the mining sector in British Columbia are anticipated to rise by 45% in 2011 over 2010 to $ 1,997.8 million. In addition, capital expenditures in supporting activities for mining and oil and gas (NAICS 213) are also forecast to increase from $354.9 million in 2010 to $428.4 million in 2011, a rise of 21% (Statistics Canada. 2011). However, a recent survey of mining companies scores British Columbia at the bottom among Canadian jurisdictions when it comes to mining friendly policies and creates uncertainty for mining companies attempting to bring on new mine projects in the province (Fraser Institute. 2011).

Local Situation

Metal prices are driving exploration trends with gold and copper attracting most of the exploration budgets locally. As illustrated in Figure 17 , the South-Central Mining Region (which includes Williams Lake and Area) mineral exploration expenditures rose steadily from 2001 until 2007, before the world financial crisis impacted spending; however, 2010 marked the beginning of a recovery of local exploration spending.

Already mining is showing positive local investment with Taseko Mines Ltd. announcing a $325 million expansion at their Gibraltar mine site. This mine draws much of its labour force from Williams Lake and will create an additional 140 mining jobs with the new investment (City of Williams Lake. 2011). In addition, Imperial Metals Corporation’s copper, gold, silver Mount Polley mine, located 56 kilometres northeast of Williams Lake, is actively exploring their mine site in an effort to extend mine life. Employment and business activity from these two active mines makes an important contribution to the Williams Lake economy.

Figure 15 South-Central Mining Region Exploration Expenditures, 2001 – 2010



Source: BC Forests, Mines and Lands. (2011).

New mine investment could come from development of exploration activity locally. Of specific interest to Williams Lake and Area are the major exploration programs being undertaken by Gold Fields Horsefly Exploration Corporation who is currently undertaking the largest exploration program in the Cariboo at their Woodjam North and Woodjam south projects (BC Ministry of Forests, Mines and Lands. 2010). These exploration projects are located 45 kilometres east of Williams Lake and are copper-gold mineralizations. In addition, near Likely exploration is underway at Acrex's Spanish Mountain property where low-grade gold is hosted in near-surface sedimentary rocks.

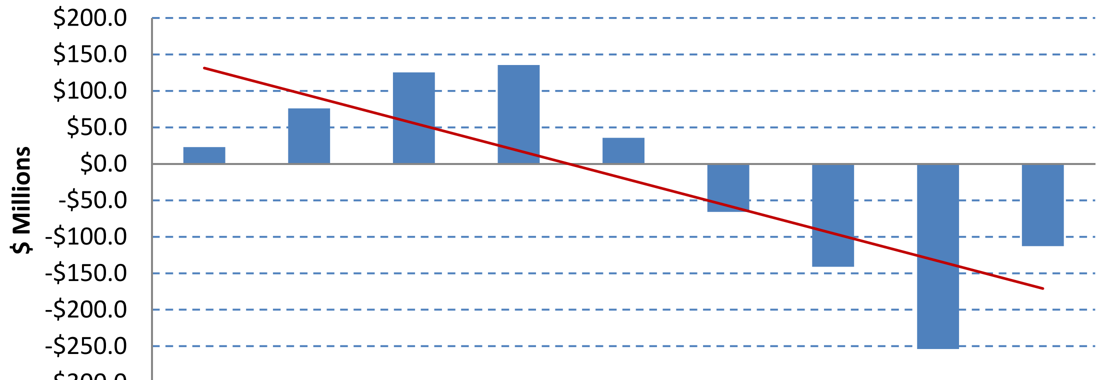
However, the project with the highest likelihood of attracting new mine investment to Williams Lake and area over the next few years is the work at Taseko Mine Ltd.'s Prosperity project (copper-gold). This project received provincial government environmental assessment certificate and was granted a 25 year mining lease; however the federal government did not grant federal authorization to the project. Taskeo is currently working to address the issues raised in the federal decision that prevented the project to proceed as proposed. Any new mine development in Williams Lake and Area would serve as a significant catalyst to a range of business opportunities locally.

4.1.3 Agriculture

Overview and Forecast

The past few years have been particularly challenging for agriculture in British Columbia. As illustrated in Figure 16, net farm income for British Columbia farms has been negative since 2006. This is clearly the poorest performance among all the provinces in Canada over this period.

Figure 16 Net Farm Income for British Columbia Farms, 2001 to 2009



	2001	2002	2003	2004	2005	2006	2007	2008	2009
Net Income	$22.9	$76.1	$125.4	$135.6	$35.8	-$65.9	-$141.2	-$253.8	-$112.8

Source: Statistics Canada. (2010).

Particularly hard hit in the British Columbia agriculture sector has been the cattle industry. While the industry is characterized as a cyclic, seasonal and commodity-based industry the last several years have been particularly hard on ranchers with droughts, bovine spongiform encephalopathy (BSE), rising input costs, closure of US border, depressed cattle prices, and rising Canadian dollar all combining to impact viability in this key agriculture sector. In response to these challenges, British Columbia has seen the cow herd in the province decline by almost 35% between 2005 and 2009. (BC Ranching Task Force. 2009)

However, it is felt that cattle prices may begin to recover in 2012, particularly if the industry is successful in making further in-roads in international markets (particularly Russia, China and European Union) opportunity to re-establish cattle numbers may exist (BC Ranching Task Force. 2009). For the entire agriculture sector capital and repair expenditures are forecast to begin reversing their recent negative trends and begin seeing modest increases in capital expenditures. Specifically, crop production (NAIC 111) capital expenditures in British Columbia are forecast to increase from $91.3 million in 2010 to $$96.0 million in 2011, while animal production (NAIC 112) expenditures will increase from $142.0 million to $149.1 million

Local Situation

In 2006, there were 337 farms in Williams Lake and Area with a total farm area of 142,340 hectares of which 13,783 hectares of this was in crops. Almost all of the crop lands were either in Alfalfa and alfalfa mixtures or tame hay and fodder crops. Cattle ranching was the predominate agriculture activity in the area with a total of 40,380 cattle and calves reported, representing 5% of the entire cattle herd in British Columbia in 2006. Total farm capital for Williams Lake and Area was estimated at $292.3 million and generated total gross farm receipts of $19.4 million in 2006 (Statistics Canada. 2006).

While the cattle industry in the Williams Lake and Area has suffered the same hardships experienced by the rest of the province it appears the worst is behind the local industry. Looking ahead, there may be new opportunities to increase production as markets expand and diversify and prices eventually recover. In addition, in the Williams and Area there is potential for new grazing lands with the implications of the mountain pine beetle epidemic creating new range opportunities. For other farm products opportunities may be emerging as there is a growing trend towards sourcing food from more local sources.

4.1.4 Tourism

Overview and Forecast

The sudden onset of the global economic recession in September 2008 has had a significant dampening impact on domestic and international visitor demand throughout British Columbia although a recovery is in progress, led by a strong bounce back in world travel indicators in 2010. This is anticipated to continue to recover further throughout 2011. International tourism is predicted to have hit a new all-time high in 2010 and is heading for further growth in the 3-5% range in 2011 (IPK International 2010). This growth includes a 4% increase in domestic tourism across the globe.

While improving economic conditions are now expected to generate an increase in leisure travel demand, other factors such as the appreciation of the Canadian dollar against the US and European currencies and lower package prices in competitor destinations are creating a growth in outbound travel from British Columbia, while economic conditions in major western markets such as the UK are continuing to constrain inbound tourism (Conference Board of Canada 2010b).

Emerging markets for British Columbia include China, India, and Brazil, countries that are spending and travelling more as their economies grow. To benefit from these trends, BC will need to look at ways of adapting product and services to meet the cultural expectations of these new travellers. Meanwhile, a rising Canadian dollar and new passport requirements for the US market have curbed the likelihood of an imminent rebound in this key market.

The 2010 Winter Olympic and Paralympic Games provided a short-term boost in BC travel and continued growth of 3.4% in overnight travel is forecast for 2011. Domestic pleasure travel is expected to rise by 3.5% and international travel by 8.1% (Conference Board of Canada 2010b).

The nature of the tourism experience and the characteristics of the visitor continue to evolve. This is evidenced in a heightened demand for authenticity, quality and memorable experiences, and the growing sophistication of the well-travelled visitor.

Local Situation

The Cariboo accounts for a very small proportion of the entire BC tourism market, in the range of 3% to 4% according to the last comprehensive visitor exit survey in the late 1990s. Travel indicators since that time (see Table 9) would suggest that this proportion may in fact have declined rather than increased. Attendance at visitation centres throughout the Cariboo have been declining in recent years in part because the region has been unable to overcome several fundamental weaknesses, namely poor market awareness, the predominance of mainly drive-by touring travellers, lack of market-ready product, short tourism season and limited transportation options. There have been few investments in new destination attractions and products that appeal to the changing marketplace, especially the baby boomer appetite for more learning and educative experiences and the evolving needs of younger families and children.

We believe the tourism industry will grow more slowly than the BC benchmark in the years ahead, mainly because the lack of product will discourage significant change in the number of in-bound visitors. The declining US market is especially problematic for the Cariboo, while there have been few signs that the emerging markets such as China and Brazil have the awareness or inclination to visit the region as a travel option. However, it is also clear that unless new private and public investments in tourism product and destination infrastructure are made, the tourism deficit will likely continue for the region.

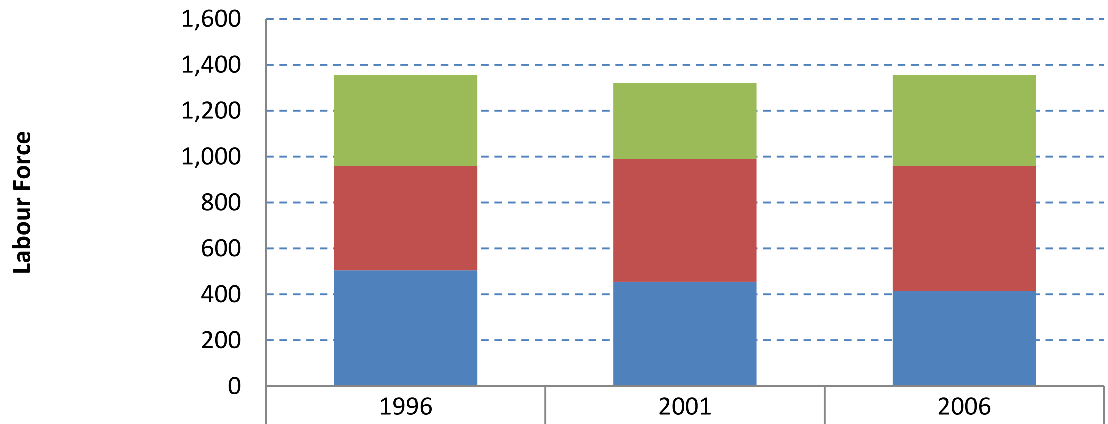
4.1.5 Government

Overview and Forecast

The public sector consists of three general components including public administration (local, regional, senior government administration), health and social services, and educational services. As a regional centre, Williams Lake benefits from the location of regional offices and services in the community, most noticeably the regional offices of the provincial government, First Nation tribal governments, and the Cariboo Regional District. In the educational sector, Thompson Rivers University maintains their northern campus in Williams Lake and Cariboo-Chilcotin School District (SD 27) and maintains administrative offices in the community. There is a range of health services locally, including the Cariboo Memorial Hospital which provides regional inpatient care to residents from the Bella Coola Valley, north to Quesnel and south to 100 Mile House.

Overall, the government sector plays an important role in the Williams Lake economy. As a basic sector, the public sector makes up the second largest share of personal income by the Williams Lake area and is only exceeded by the total income generated in the forest sector. As illustrated in Figure 17, over the past three census periods, employment in the government sector has remained relatively stable. While employment has declined within education, it has increased within the health and social services sector. This makes the sector an important stabilizing force in the local economy, which has been characterized by extreme commodity cycle swings associated within the local agriculture, mining, and forestry sectors.

Figure 17 Williams Lake Experienced Labour Force in Government Services, 1996 to 2006



	1996	2001	2006
Public Admin.	395	330	395
Health & Social Ser.	455	535	545
Education	505	455	415

Source: Statistics Canada. Census 1996, 2001, and 2006.

Local Situation

While recent years have been challenging for components of the government services sector in Williams Lake, with provincial office and school closures and staff reductions, moving forward there appears to be several positive events that will ensure that the government services sector remains strong locally. Among these is Interior Health's work on a new master plan for the Cariboo Memorial Hospital. This plan will lead to renovations and additions to the hospital and support growth and expansion of services over the next fifteen years. In addition, it was recently announced that Interior Health will spend $1.9 million to reopen Deni House. Deni House closed in April 2007 and had provided residential care beds in Williams Lake. Following upgrades, Deni House will provide 28 new beds and expand on the 44 beds provided at the new Williams Lake Seniors village which opened in 2007.

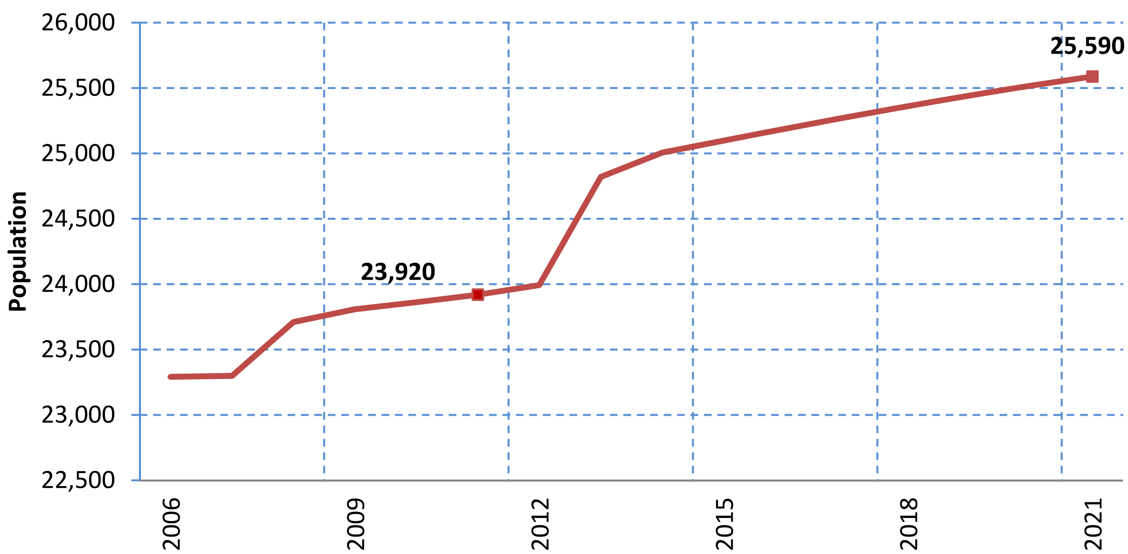
Thompson Rivers University (TRU) has recently made several investments in Williams Lake including purchasing the Anne Stevenson high school in 2004 and undertaking $8 million in retrofits to the site, consolidating their northern campus at the site. TRU began operating from the new location in the fall of 2005. More recently Thompson Rivers University completed construction on the $800,000 Gathering Place designed to increase the visibility of Interior Salish culture on the campus. Moving forward the University plans to aggressively expand their program offerings and begin hosting international students, offering specialized training that will bring visiting students to study in Williams Lake.

4.2 Population Base Scenario

The population for Williams Lake and Area is anticipated to increase over the next 10 years.[7] BC Stats produces population projections by Local Health Area (LHA). The Williams Lake area falls within Thompson Cariboo Shuswap LHA 27 and BC Stats has forecast modest growth between 2010 and 2021 for the LHA. For this report, the population growth is adjusted upward with the additional growth anticipated from the recently announced expansion at Taseko Mine Ltd.'s Gibraltar mine site as this investment and job create can now be considered part of the Base Case.[8] In other words, the investment is now anticipated to take place and influence the community in the future. Discussions with BC Stats have highlighted that this increase in population has not yet been considered in current LHA projections (Natilie Work, pers. comm.).

Figure 18 highlights the anticipated increase in the population for Williams Lake and Area over the next decade. As illustrated, the new mining activity is anticipated to create an influx of people around 2013 associated with the new mining jobs coming on stream. Given Williams Lake and Areas modest population size, this one event will create a noticeable jump in population over the 2012 to 2014 period. Over the next ten period Williams Lake and Area is estimated that upwards of 1,700 new residents may be added to the local area.

Figure 18 Population Change for Williams Lake and Area, 2006 to 2021



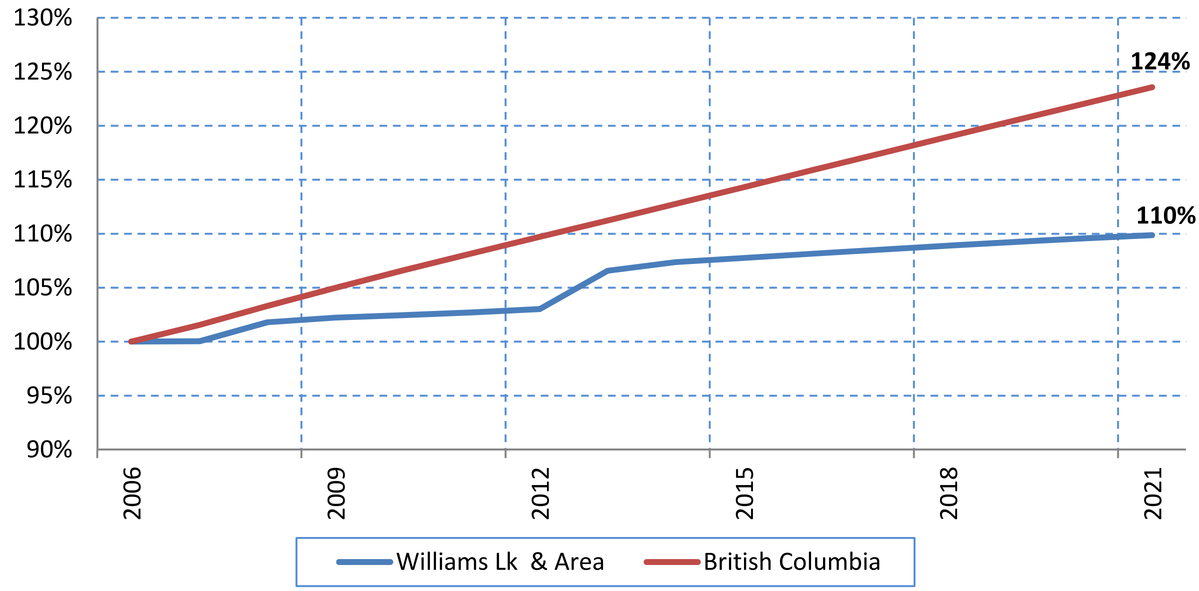
Source: BC Stats and Peak Solutions Consulting Inc. (2011).

As illustrated in Figure 19, despite the growth, it is anticipated that Williams Lake and Area will continue to lag the population growth anticipated for the entire province over the next ten years. However, the key change in the future for Williams Lake and Area is that historical population

[7] Williams Lake and Area includes the City of Williams Lake; Cariboo Regional District Electoral Areas D, E, and F; and Neighbouring First Nation communities.
[8] City of Williams Lake. February 18. 2011. Media Release – Mayor Applauds Gilbraltar Mine Expansion.

declines will be reversed and the local area will re-establish positive growth, although not at the same rate as the province. Specifically, between 2006 and 2021 the total British Columbian population is projected to increase by 24% while Williams Lake and Area is anticipated to grow by 10%.

Figure 19 Population Change for Williams Lake and Area and BC, 2006 to 2021



Source: BC Stats and Peak Solutions Consulting Inc. (2011).

5 Development and Marketing Strategy

5.1 Approach to Opportunity Identification

In his 2008 report to the Cariboo-Chilcotin Beetle Action Coalition, Hutton (2008) claimed that Interior communities still exhibit the characteristics of a "staples" economy in which economic growth and prosperity is based on the exportation of raw materials or minimally processed commodities such as lumber. This basic development cycle has the extra disadvantage of being susceptible to the commodity trap where the economy is confined to extracting rent from local resources without creating new rents through investment and innovation. When those commodities experience secular price decline (as happened with lumber over the last 20 years and with metal prices before) the economy will see investment outflows, declining competitiveness, plant closures and industry decline. It is also true that during periods of high commodity prices, such as the current run up in metal prices, these same industries can come back into production and generate periods of strong growth. The problem from a community perspective is that this boom-bust cycle makes it very difficult to diversify the economy into sectors that entail more value-added services and goods production.

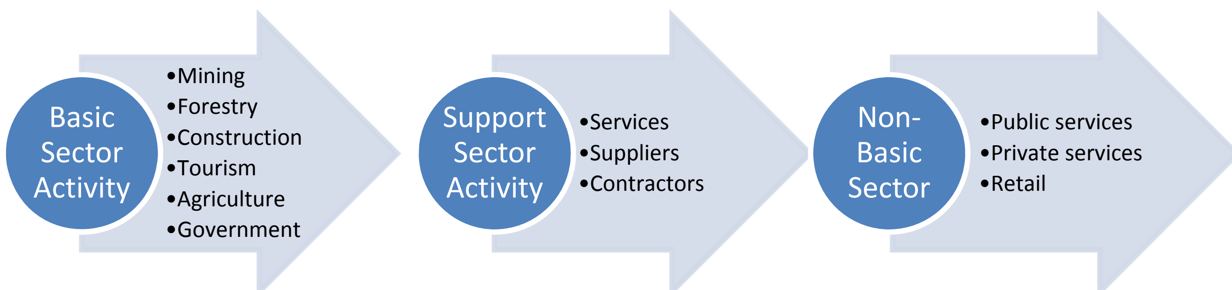
The Cariboo continues to rely on dwindling goods production because it has been unable to participate in the rapid growth in the service sectors experienced by the province's urban centres. The low levels of regional employment growth in many service industries and advanced manufacturing is in contrast to a consistent improvement in overall provincial performance. In fact, what has filled in for declining goods activity is an expanded public sector, but this is unlikely to be a reliable source of employment long term if the population does not increase.

In the last 20 years, public and private investment flows have clearly favoured the urban regions of the province, which is where the population and employment growth is now concentrated. The poor business climate outside of southwest BC has consequently impeded economic development of rural regions and communities, to the detriment of the well-being of residents in Cariboo communities like Williams Lake. In order to reverse the stalled investment cycle Hutton suggests that it is important to invest in infrastructure and other community assets that will create new sources of business activity and investment. He calls these elements "platforms" and "catalysts". It is our view that the current resurgence in metal and mineral prices, and a cautious recovery in forestry products, would be an opportunity to leverage strategic public and private investments so that the regional economy is better able to respond to future downturns and participate more fully in areas of future expected provincial economic growth.

Recognizing that the staples economy is still very much a reality in the Cariboo, we believe the dynamics of regional economic growth include three elements which provide a sense of direction for economic development policy. As illustrated in Figure 20, they are:

- The change in external demand for the products and commodities provided by key basic sectors (agriculture, forestry, mining, energy, construction), which will influence the local investment in these industries moving forward;
- The capacity and competitiveness of regional businesses that have traditionally served basic industry; and
- Anticipated growth in the local population, which will increase the amount of disposable income in the local area, drive demand for goods and services and stimulate more local business activity in response to that demand.

Figure 20 Simplified Economic Opportunity Model



The following discussion addresses each of these elements in turn and then outlines industries that would be appropriate targets for economic development programming in Williams Lake.

5.2 Sector Opportunities

Table 11 summarizes the anticipated directional changes in the key basic sectors of forestry, mining, agriculture, tourism and public sector over the next ten years. As previously shown in Table 9, these five sectors collectively account for 60 percent of total community income in Williams Lake and Area in 2006. For these four resource dependent sectors there are some key commonalities that link their future growth prospects, including:

- Demand from Asia, particularly China, is expected to stimulate production, especially in mining and forestry, but also, potentially, tourism;
- As our closet trading partner, the US will remain an important source of future demand and the eventual return of their housing market is expected to buoy the demand for lumber products;

- There are significant constraints on future wood manufacturing due to the pending downfall in the Allowable Annual Cut as a result of the Mountain Pine Beetle epidemic, while new mines may be delayed or cancelled because of the federal environmental assessment process;
- Tourism is a small but important part of the economy, but its growth prospects are limited due to a short operating season and the lack of major destination attractions; and,
- All key industries are sensitive to land use policies and land use certainty or lack thereof, moving forward land use access and certainty will play a key role in future investments, particularly in mining, forestry and ranching.

Table 11 Basic Sector Outlook to 2020

		Short Term Trend	Long Term Trend	Evaluation
Basic Sector	Forestry	↑	↓	Locally industry will prosper as long as access to markets continues and wood supply is elevated. However, local harvest will decline at some point in the future.
Basic Sector	Mining	↑	↑	Excellent potential for new mine investment, through expansion of existing operations and development of new projects. Major risk factor is the environmental assessment process.
Basic Sector	Agriculture	→	↑	Stabilizing after a period of extreme challenges, but minimal value-added and growth prospects marginal.
Basic Sector	Tourism	→	→	In a holding pattern - poor market awareness, low visitation and no real catalyst to encourage growth.
Basic Sector	Government	↑	↑	Has been stable but showing signs of new investment and growth in both the shorter term and longer term locally.

The outlook for support sectors outlined in Table 12 is mixed in the short term but generally positive in the long term because these businesses rely on the basic sectors for their revenues. If mining increases as expected and if logging and wood manufacturing can be stabilized with perhaps new investments in value-added production to meet growing demand in Asia, then these are the sectors most likely to benefit. They include various forms of construction, manufacturing of construction inputs such as cement and metal products, wholesale trade (automotive, equipment, hardware), equipment rental and leasing, trucking, professional services and hospitality services. Combined, these support sectors will account for approximately 80% of local spending made by the mining, forest and agriculture industries. Any development of the energy sector will create similar effects.

Table 12 Support Sector Outlook to 2020

		Short Term Trend	Long Term Trend	Evaluation
Support Sector	Construction	↑	↑	Major mines projects will eventually develop and stimulate building, infrastructure and specialty trade contracting.
	Cement and Concrete Manufacturing	↑	↑	Major input into building and infrastructure construction activities.
	Metal Fabrication and Machining	↑	↑	Key service for most industrial operations and major construction projects, including mine development or expansion, logging, wood products manufacture and most forms of construction.
	Equipment Supplies	→	↑	Downturn in forestry will dampen demand in the long term, but this will be offset by mining, logging and any development of the energy sector, which will increase industrial equipment and machinery sales and servicing.
	Automotive Supplies	→	↑	Includes parts, accessories and tires. Should be stimulated by return of population growth as well as industrial activities where mobile equipment is essential for the movement of materials, goods and people.
	Hardware	↑	↑	Construction materials, electrical supplies, plumbing and piping supplies, coatings, cables and miscellaneous hardware must be supplied to any major project development.
	Trucking, Warehousing and Storage	→	↑	Freight trucking, storage and warehousing will be stimulating by construction activities on major projects, but are more likely to benefit from the commencement of operations of these enterprises.
	Machinery and Equipment Rental and Leasing	→	↑	Similar to equipment supplies - automotive, commercial and industrial machinery rental and leasing is linked to mining, logging, wood manufacture and energy production, which have good prospects in the long term.
	Professional and Technical. Consulting Services	→	↑	Engineering, architecture and computer services are needed to support development projects.
	Hospitality Services	↑	→	Increases in temporary work force related to construction will stimulate business travel in the short term, while long term demand will hold steady.

As seen in Table 12, some of these sectors are already well served, while others are not. The potential for expansion and new business development will depend on the scale of growth in the basic sector. The competitiveness of these firms will also determine if they can diversify their customer base by providing their services to markets outside the region. This will help alleviate dependence on local projects and contribute to a more stable operating regime.

The non-basic sector is composed of firms that depend largely upon local business conditions. Whereas the basic and support sectors rely on export activities, the non-basic sector is driven by the spending of the employees of the other two. Establishments such as grocery stores, service stations, department stores and almost all personal services have local clientele.

In order to refine our understanding of non-basic sector opportunities, we prepared a market threshold analysis (MTA) the results of which are shown in Table 13. MTA is a tool for determining the population needed to support a business enterprise. The number of businesses in a benchmark area, in our case British Columbia, is divided by the study area population to determine the population required to support an average business establishment. That theoretical factor can then be compared to the actual number of business establishments of a local area to see if there might be surplus demand that could support the establishment of more businesses in that sector.

Generally speaking, MTA is not useful in analysing economic base sectors such as forestry, mining and manufacturing that serve external markets—it is only relevant to non-basic industries that depend on local demand and household spending. This covers trade, personal and household services and to a lesser extent, business services.

Table 13 shows the average population needed to support a single business in BC in 2010, with a comparison of the actual number of businesses in the Williams Lake census agglomeration area. The data shows that Williams Lake supports more businesses per capita than BC in several key sectors, including retail trade, wholesale trade, accommodation and food services and other services. It is in construction and “white collar” services where more local business activity could be supported.

Table 13 Population Thresholds Analysis, 2010

Industry	BC Business Count	BC Population Per Business	Williams Lake CA Potential Businesses	Williams Lake CA Existing Business Count	Williams Lake CA Business Opportunity
Construction	51,926	87	215	191	24
Wholesale Trade	16,471	275	68	75	-7
Retail Trade	30,041	151	124	182	-58
Transportation and Warehousing	18,964	239	78	118	-40
Information and Culture	5,509	822	23	13	10
Finance and Insurance	19,946	227	82	64	18
Real Estate, Rental and Leasing	41,389	109	171	144	27
Professional, Scientific& Technical Serv.	48,449	94	200	117	83
Arts, Entertainment and Recreation	6,187	732	26	27	-1
Accommodation and Food Services	15,964	284	66	72	-6
Other Services	28,939	157	120	127	-7

Source: Statistics Canada (2011).

The overall outlook for the non-basic sector is shown in Table 14. There is a clear connection between the local population and trading area and the overall outlook for the non-basic sector. The expansion of the non-basic sector is tied to population growth and vice versa, where there is a declining population, the non-basic sector will likely shrink. Expenditures are also a factor as higher average household incomes will invariably produce greater per capita expenditures, and therefore more opportunities for local firms to capture that spending.

However, not all expenditures will be captured locally and some will leak to neighbouring jurisdictions and major urban centres where there is greater consumer choice and shopping alternatives. The population, expenditure and trade area data previously presented in Chapter 2 suggest that the opportunities for non-basic sector businesses will be limited unless the local population can be grown. We believe this could occur in the short term as long as major project developments (i.e. mines) or new investments in the public sector can be made, but over the long term, the expected falldown in the regional timber harvest and possible mill closures remain a major economic risk.

Even with modest population growth we believe "white collar" services could be expanded because the local population appears under-serviced at this time, and because economic growth in general may favour these sectors going forward.

Table 14 Non-Basic Sector Outlook to 2020

		Short Term Trend	Long Term Trend	Evaluation
Non-Basic Sector	Retail	→	→	BC Stats is forecasting growth locally, and new mine investment will further foster local growth over short to mid-term. The prospects for forestry and tourism are more cautious so population growth is expected to be less than the provincial average.
	Personal Services	↑	→	
	"White Collar" Services	→	↑	Professional, technical, real estate, finance and cultural services could all be stimulated by major project developments but long term growth is likely to be supported by greater investments in value-added activities and knowledge-led industries where these services are in demand. Any increase in the retirement population would also increase demand for these services.

Source: BC Stats (2009).

5.3 Summary of Targets

Based on the analyses of economic and industry data, feedback received during interviews with industry stakeholders, a long list of sectors that represent targets for retention, expansion and attraction programs was formed. In the framework shown in Table 15, the sectors were then matched against a range of criteria covering internal capacity and resources, external industry and market forces and potential for positive economic growth. A one to five rating scale was employed. Each opportunity is rated for each criteria. A mean rating is then calculated. The higher the score, the more preferred the opportunity. The rankings are meant to assist decision-making by prioritizing sectors according to conditions today and in the reasonably foreseeable future. Any changes in these underlying conditions could change the rankings. It is therefore important to understand that business development opportunities exist within each of these sectors but that as of today the most promising are those achieving the highest score.

Table 15 Opportunity Filter

Opportunity	MB	SGP	LC	LI	EC	JP	IP	Average Score
Construction	5	4	1	4	4	4	3	3.6
Cement and Concrete Manufacturing	3	4	2	4	3	4	4	3.4
Trucking, Warehousing and Storage	4	4	3	3	2	4	4	3.4
Professional and Technical. Consulting Services	4	5	1	2	4	4	4	3.4
Metal Fabrication and Machining	3	3	2	4	3	4	4	3.3
Equipment Supplies	3	4	4	3	3	3	3	3.3
Automotive Supplies	4	4	3	3	3	3	3	3.3
Machinery and Equipment Rental and Leasing	3	3	3	3	3	4	4	3.3
Personal Services	3	4	3	4	3	4	2	3.3
Hardware	4	3	3	3	3	3	3	3.1
Hospitality Services	5	3	2	3	3	3	2	3.0
Retail	3	3	1	4	2	4	1	2.6

MB	Market Base: how diverse and extensive is this sector's local consumer and business market base?
SGP	Sector Growth Potential: is this sector mature or declining, or growing and diversifying?
LC	Local Competitiveness: what is the sector's local performance as measured by the shift-share analysis?
LI	Local Inputs: are local inputs such as skilled labour available to support this sector?
EC	Existing Competition: do business establishment counts suggest a business opportunity?
JP	Job Potential: what is the job potential in terms of security and sustainability?
IP	Income Potential: is this a well-paying sector and how does its payroll compare to the average wage?

Rating Scale: 1= lowest to 5=highest

While Table 15 outlines the most promising opportunities, based on the ranking criteria, the following strategy section devotes several strategies to positioning the community to capitalize on these opportunities.

5.4 Strategy Recommendations

Based on the research and the key informant interview program, a strategy was developed that focused on moving the City of Williams Lake towards its strategic objective of a larger and more diversified business sector. To achieve this objective six key strategy areas have been developed focusing on the basic sectors, support to the basic sector, and the non-basic sector. These strategy areas include:

5.4.1 Improving the Industrial Business Climate;

5.4.2 Growing the Economic Importance of the Government Sector;

5.4.3 Supporting the Development of Business Related Assets and Participating in Regional Marketing Initiatives;

5.4.4 Fostering Growth within Businesses Supporting the Basic Sector;

5.4.5 Organizing Information to Support Investment in the Non-basic Sector; and,

5.4.6 Supporting Revitalization and Investment in the Downtown.

5.4.1 Improving the Industrial Business Climate (Key Basic Sector Firms)

The business climate consists of economic and administrative conditions, such as taxation and trade policy, as well as the attitude of government and institutions toward businesses and business activity. Business climate is affected by major cost factors (e.g. land, labour, taxes, regulations) and non-costs factors (e.g., quality of life, attitudes towards business). There are national, provincial and local components associated with the business climate.

At the local level, business climate is influenced by flexibility and timeliness of the development approval process, construction costs, operating costs, access to infrastructure, availability of capital and the quality of the local labour force. If these attributes allow investors to find fewer risks and higher returns in a community when compared to other places, then business and financial risk is reduced and presumably investment flows and job-creating activities enhanced.

Key informant interviews with business leaders in Williams Lake suggest that there is general satisfaction with the City of Williams Lake when it comes to undertaking business development in the community. As a smaller community, it is generally felt that the opportunity to work closely with municipal staff was greater and the bureaucratic processes and costs generally experienced in larger communities were generally avoided in Williams Lake. However, businesses expressed concerns at the high business property taxation in the City, particularly for major industry. In fact, major industry taxation rates in Williams Lake are the highest in the Central interior and among the top three in the province (See Appendix D).

The major industrial property class in Williams Lake is dominated by the forest industry, and over the next four to eight years the local forest industry will be making strategic decisions on which processing facilities that they will continue to operate once the regional fibre supply begins to decline. This provides Williams Lake with a "window" to work with the industry to explore long-term partnerships and foster a close industry relationship to position Williams Lake to remain a regional centre for the wood process manufacturing.

Strategic Initiatives

A.1 Implement a business visitation program to better monitor industrial business issues and explore how the City can work on improving business conditions for major industrial clients in the City.

A.2 Review the mill rates for major industry and consider capping the rates at 2011 levels and explore foregoing any increase in property taxes paid by major industry clients on new capital investment that they make that may increase property assessments. Particularly if these investments are associated with emission control technology or create new employment.

5.4.2 Growing the Economic Importance of the Government Sector (Key Basic Sector)

Williams Lake is well situated as a regional centre for government services and already benefits from considerable employment and income from this sector locally. The diversity within the government services is also noticeable locally with public administration (provincial government, First Nation governments, Cariboo Regional District); education (Thompson Rivers University and School District 27 administration offices); and health care and social services (Cariboo Memorial Hospital, doctor and dental offices and seniors care facilities) all being present in Williams Lake.

Within the overall economy, government employment and income plays an important diversification factor in the local economy and is an important stabilizing factor during the economic down cycles that the Williams Lake economy periodically experiences. Also, as mentioned above, Thompson Rivers University and Interior Health are exploring new activities in Williams Lake. In addition, health care and education play an important role in the overall quality of life in the community.

An important part of the business attraction for Williams Lake can be achieved by ensuring that the strategies and goals for the government sector are connected to objectives and that government sector strategies are integrated to the economic development goals of the City of Williams Lake.

Strategic Initiatives

B.1 Support Thompson River University in developing its northern campus and local program expansion, particularly as it pertains to attracting investment from outside. Already the Williams Lake campus of TRU is working on:

- Hosting international students;
- Expanding the facilities at the campus including developing student accommodation; and,
- Expanding niche training programs such as log home building training and practical nursing program.

B.2 Participate in the attraction of health care professionals to the Williams Lake area by:

- Working regionally and with Interior Health to channel resources to attract key professionals to the Cariboo;
- Explore approaches being implemented by other regions of the province to attract health professionals;
- Pursue external resources from regional and senior government to support Williams Lake efforts; and,
- Explore a local role in Interior Health's Red Carpet program.

5.4.3 Supporting the Development of Business Related Assets and Participating in Regional Marketing Initiatives (Basic Sector Assets)

There are several activities underway that would result in new community assets in the Williams Lake area. As part of these initiatives move forward, it will be important that business opportunities remain at the forefront. Currently, key asset development being discussed or pursued include:

- Development of a Community Forest for the City of Williams Lake. In addition, Williams Lake First Nations is exploring a forest license while Williams Lake TSA wood lot operators (50,000 m^3), the Likely-Xat'sull Community Forest (12,500 m^3), Wells Community Forest (5,000 m^3), Esketem'c First Nation Community Forest (40,000m^3), Eniyud Community Forest (20,000 m^3), and 100 Mile House Community Forest (20,000 m^3) could collectively provide a fibre basket of well over 150,000 cubic metres.

- Capital Power Income L.P. operates a 66 MW biomass-fuelled power plant in Williams Lake which generates electricity for sale to BC Hydro. It is currently the largest biomass power plant in North America and the most efficient (Community Energy. Nd). With communities more aware of their carbon footprint, recent discussions have shifted to a more local, decentralized energy systems and exploring how to extract more benefit out of the waste heat from the plant.

- Rail service and access is an important component for several of the industrial clients in the City of Williams Lake. Currently, there is some industry interest in ensuring spur line access to key industrial properties and access to adequate numbers of rail cars to meet their business needs.

Marketing is an important component in attracting new basic sector activity to the Williams Lake area. In addition, there are already regional marketing efforts that are underway and on-going such as the Mountain Biking efforts and tourism in general in the Cariboo that the City of Williams Lake could leverage to support the growth of their own basic sector business activity.

Strategic Initiatives

C.1 Explore business development opportunities associated with the development of the Williams Lake Community Forest and wood lot fibre basket in the local area.

C.2 Support the Community Futures of Cariboo-Chilcotin in developing their on-line fibre trading database. The objective of this initiative is to foster trade between wood lots, community forests and small wood processors and has the participation of the BC Community Forest Association.

C.3 Explore with Capital Power Income L.P. the possible incremental possibilities that they may be interested in adding value to their business and support the City's energy utilization goals. Possibly link to business plan development that Beetle Action Coalitions are undertaking to support the implementation of new Green Energy projects in the interior of British Columbia.

C.4 Working with local partners, prepare an expression of interest targeting the private sector to see what the investment interests in developing district energy might be.

C.5 Explore support that the City of Williams Lake can provide in addressing local rail issues for industrial clients.

C.6 Consider a branding initiative for the City that would see a brand develop that could be used to support the promotion of several of the basic sectors in the community.

C.7 Ensure linkages to efforts to grow Mountain Bike Tourism activities in the Cariboo-Chilcotin region. Focus on supporting expansion of support business associated with mountain biking in Williams Lake.

C.8 Work with Williams Lake area log and timber frame builders to capitalize on marketing initiatives for log and timber frame builders being undertaken by CCBAC.

5.4.4 Fostering Growth within Businesses Supporting the Basic Sector

Chapter 3 presented an economic base profile showing where the wealth in the Williams Lake area was originating—forestry, mining, tourism, agriculture, construction, public sector and non-employment sources. However, the productive capacity, and wealth creation, does not exist solely within these major industries, because there is an extensive indirect or support sector without which these primary producers could not exist. Suppliers, contractors, distributors and other service providers provide inputs into exporting activities that constitute an essential building block of the economic base. In some industries, the indirect component can represent a significant spinoff (or add on) to direct impacts, as much as 40% over and above what a major industry would generate.

The spinoff or multiplier effect for a community is determined, in part, on the capacity and competitiveness of its support sector businesses—an undeveloped or shallow support sector will mean that purchasing by major industry will leak to businesses outside the area, while a strong sector cluster will supply as much of that demand as possible and keep it circulating within the community. For example, Gibraltar Mines sourced approximately 11% of its materials from Williams Lake in 2010 making a significant contribution to the local economy; however, capturing a larger share of this spending local would directly increase the importance of the basic sector to Williams Lake. A thriving economic base, therefore, is as much about a supportive network of supply industries as it is about major industries and major projects.

In this context, facilitating, building and promoting local business relationships and linkages within major industry supply chains should be a fundamental focus of economic development programming. Through more effective local hiring practices, procurement policies, bidding procedures and industry networking it should be possible to create more added value within the existing supply relationships. That is, there could be more trade activity among major industry and the local support sector that would effectively increase spinoff effects and keep more dollars circulating within the local economy.

One of the distinctive advantages of the regional economy continues to be access to and utilization of natural resources within the Cariboo. With the pending future down turn in forestry activity and the inevitable commodity down-cycle in metals, Williams Lake cannot evade the underlying effects fluctuating production levels within its key industries. However, there is no reason why it should not be encouraging investment throughout the commodity cycle including new investments during peak periods and resisting disinvestment during slowdowns.

Senior government and major industry should be encouraged to develop policies and explore local supply chain development as a good business practice not just because it would potentially strengthen the economic base. Moreover, for major projects subject to the Environmental Assessment process, the community has a built-in pathway to communicating and negotiating with companies for policy measures that increase regional production and strengthening community stability.

For its part, local government can build infrastructure, streamline services and improve the business climate as risk management options that encourage more investment and cluster development from the support sector.

Strategic Initiatives

D.1 Work with local mining companies to identify material suppliers that they currently use who are based outside of the Cariboo and engage these suppliers to see if there is the potential to locate offices or provide services from Williams Lake.

D.2 Create an *investwilliamslake.com* website as a stand-alone economic development portal (website) to effectively promote Williams Lake to key target markets and sectors. Websites and Internet communication tools have surpassed traditional channels such as trade shows and advertising in economic development.

D.3 Prepare and publish a directory of local suppliers, contractors and support sector businesses and distribute it to major industry.

D.4 Explore opportunities for a Reverse Trade Show which would have major industry display and promote raw materials, commodities, goods, supplies and services that they regularly purchase as part of their construction projects or operating activities.

D.5 Identify and market support sector opportunities related to resource projects.

- Monitor all local development projects subject to the Environmental Assessment (EA) process.
- Obtain construction and operating pro formas from proponents involved in the EA process through its engineering and design studies that can be used to identify local potential for goods, equipment and services.
- Using the business directory, offer proponents access to a local business and contractor database.
- In cooperation with proponents, promote opportunities to local suppliers and contractors and provide brokering assistance to further business relations through the distribution of opportunity lists and brokering services.
- Develop a City guidebook and policy for participating in all Environmental Assessment (EA) hearings that would include recommendations on the preferred approach to negotiating economic and other community benefits. Mitigation and other benefit measures that are written into the EA certificate are subject to monitoring and follow-up and therefore bind project proponents to those commitments.

D.6 Host a Cariboo or Interior Economic Forum. Special events can be challenging to organize and selecting an appropriate niche or theme is essential, but they can also generate significant returns in the form of awareness, communications, networking and brand identity of the City. The highly successful Surrey Regional Economic Summit, which has been operating only since 2008, is an example of the benefits of this concept.

D.7 Participate in the Asia Pacific Initiative . Although the local and regional markets are the primary target for investment attraction to Williams Lake, the potential for attracting offshore investors in the longer term should not be ignored.

5.4.5 Organizing Information to Support Investment in the Non-Basic Sector

In order to generate more local jobs, increase the availability of services to residents and expand the tax base, it is necessary to attract new businesses, entrepreneurs and sources of capital from both the private and public sectors into Williams Lake. In the context of the non-basic sector, which includes retail and most personal services, growth usually derives from three distinct pathways:

- An increase in the local area population which will lead to greater local demand for and expenditures on retail goods and services;
- A decrease in spending by the local population that is currently leaking to outside jurisdictions; and
- An increase in spending in the local area by non-residents—this could include an increase in the number of tourists or temporary workers as well as more expenditures locally by residents of other jurisdictions.

If none of these conditions are present, then an expansion of retail or service activity is probably being offset by an equivalent loss somewhere else in the local economy, for example through the downsizing or closing of businesses. There can be no net gain to the community in terms of employment, income or tax base without growing local spending. In fact, this is what has happened over the last 40 years as highway mall and big box store development expands at the expense of traditional downtown cores. Jobs and development are transferred from one area to another but no new wealth is being created. In other words, there must be existing, unmet retail market demand to support all of the businesses in the sector otherwise it will not expand. Otherwise, new commercial space for retail use would likely deflect sales from existing retail businesses and put them at risk.

Economic development efforts therefore should focus on stimulating one or more of these pathways. Population growth is either attributable to an expanding job base (which will draw in new in-migrants to take up these employment opportunities) or a growing retirement community. In the past, natural increase (i.e. a local birth to death ratio of greater than one) could be counted on to spur population growth but with a rising average age the prevailing trend is natural decrease where deaths exceed births. Thus, increased in-migration is really the only reasonable source of new residents. As far as employment goes, it is the basic sector that has to be the driving force so unless primary industry, manufacturing and export-related activity increases the growth in the employment base (and local population) will be modest at best.

The remaining sources of growth in the non-basic sector fall into two broad categories:

- Increases in the size of the retirement and tourism industries; and
- More competitive local businesses that are able to plug spending leakages and expand their trade area.

It is in these two areas where opportunities for the expansion of non-basic sector are most likely to be found.

Strategic Initiatives

E.1 Document spending leakages from local trading area to gain a better understanding of new trade and service opportunities. The analytical model would basically compare an estimate of total household and business expenditures with total retail and service sales in the study area. This would generate an estimate of per capita taxable sales estimates of Williams Lake area residents with both internal and external expenditure components.

E.2 Develop a retail and commercial inventory that will quantify available, under-utilized properties and facilitate marketing and attraction efforts by focusing efforts on shopping nodes.

E.3 Prepare a forecast of commercial and retail inventories and annual absorption to assist with planning for more concentrated, viable shopping clusters.

E.4 In cooperation with the Planning Department, promote new retail development in high traffic areas with transit services by encouraging developers to give preference to under-served retail niches.

E.5 Encourage and assist local businesses to fill in gaps in the local trading areas, through the addition of new product and service lines, offering deliveries, and selling products from mobile vending units, and an overall broader range of merchandise to community.

E.6 Encourage and assist local businesses to develop new sales channels beyond the local trading area by offering unique merchandise, or by renting pop-up stores in outlying communities that promote close-in commercial areas and downtown.

E.7 Examine the feasibility of assisting local businesses to purchase commercial property, so that their financial planning becomes more stable, predictable and manageable.

E.8 Create and distribute a list of in-demand retail and commercial enterprises and regularly promote these opportunities through the website. This report contains several analytic sections that indicate the most promising types of business opportunities.

E.9 Create an updateable demographic, household expenditure and traffic volume data for key shopping nodes that can be used to promote the uptake of retail opportunities in these areas.

E.10 Build awareness and interest in Williams Lake to attract more development capital and create more opportunities for retail and commercial by promoting the community to real estate associations, turn-key developers and site location professionals.

E.11 Develop a community retail promotion calendar that all retailers and commercial businesses can participate in.

E.12 Launch a "tourist in your own town", local shopping or similar loyalty program that will educate local consumers and encourage more local spending.

5.4.6 Supporting Revitalization and Investment of the Downtown

Williams Lake's central shopping area has been undergoing change for decades in response to changing consumer tastes, competition from the development of malls and big box stores and the challenges of dealing with a de-populated core. This has resulted in sales leakage to neighbouring communities, building vacancies, property neglect, growing instances of anti-social behaviour and a growing disconnect between municipal planning and the root causes of downtown decline.

For Williams Lake and many other communities, downtown issues and the stakeholders are multi-dimensional, and do not lend themselves easily to simplistic, one-off solutions. Programming and leadership has to emerge at many different levels to combat the causes of decline and overall sense of helplessness shared by merchants and business owners. In some cases, stakeholders may be motivated by different interests, making cooperative efforts especially difficult. Yet it is clear from those downtowns that have repositioned themselves and remained competitive that partnerships among local government, downtown merchants, landowners, the chamber of commerce and First Nations are critical. The experience of communities like Leavenworth in Washington State and Chemainus has shown that channelling a diversity of opinions and interests is only possible through strong leadership and vision about what is best for the community.

The community has not been idle and has made efforts to address downtown issues. Beautification and enhancement efforts have been implemented since the 1970's, when the western theme frontage guidelines were introduced. Initiatives such as Communities in Bloom and efforts by the Central BIA are also noteworthy. Yet the community survey conducted as part of the 2002 Economic Development Strategy, and more recently, the ICSP process indicate that residents see a much greater role for the downtown in the City's future.

The solution to attracting visitors and residents to the downtown core is better market awareness, competitive and innovative services, quality infrastructure and a sense of safety. This entails engaging in a range of activities, including marketing for both business and tourist attraction, building or improving infrastructure, clean-up initiatives, property redevelopment and reuse, and retention programs. An increasing number of downtowns are trying to replicate the conditions of a century ago when downtowns throughout North America were at their liveliest, characterized by intensive mixed-use developments and density. Subsequent zoning and land use policies separated land uses and created the balkanization of industrial, commercial, retail and residential areas but revitalized downtowns are defining a new sense of place through innovative mixed use planning. Thus, it is not just the visitors who need to be encouraged to use downtown it is residents who are going to be integral to revitalization efforts.

Strategic Initiatives

F.1 Generate more strategic information about downtown properties and opportunities by working with real estate companies to track vacancies, identify opportunity sites for new retail occupancies, encourage renovation and development of the sites, and assist the efforts to attract tenants to these sites.

F.2 Support the City's current OCP policy directions for downtown revitalization, specifically:

- Directing enquiries for multi-use office and retail space to the downtown area.
- Attracting more visitors downtown.
- Downtown enhancement programs, including beautification and the programming of events.
- Creation of a central cultural district.
- Location of all new civic buildings not neighbourhood-oriented downtown.

F.3 Support the Downtown Central BIA and its committees, specifically on marketing and arts and culture initiatives. Addressing service issues such as coordinated hours of operation, signage, and cooperative promotions would also be complementary.

F.4 Develop, distribute, and post marketing materials in areas convenient to visitors and to ensure that they have ready access to downtown information, services, lodging, meeting and conference space that will contribute to the enjoyment of their visit to Williams Lake.

F.5 In conjunction with other service providers such as TRU and Community Futures, consider a suite of technical services that could be offered and promoted to downtown business owners. This could include:

- Hiring a professional retail consultant (e.g., a Business Development Bank CASE counsellor) to perform local retail "walk-throughs", recommend product and service upgrades, and advise local retailers on themes such as merchandising and customer and staff relations.
- Investigating training opportunities for retail managers and owners.
- Developing a local business coaching/facilitation program for new and expanding businesses.

F.6 Collaborate with merchants and land owners to enhance and strengthen the ongoing growth and attraction of retailers and commercial enterprises in the downtown.

F.7 Identify and promote appropriate shopping niches by reviewing best practices from other similar downtowns. Niche development is the best way to create a cluster effect and increased traffic flow that mimics shopping malls.

F.8 Investigate the feasibility of investing in local telecommunications infrastructure, to ensure affordable high speed and high bandwidth Internet access for businesses and residents.

F.9 Develop at least one signature promotional event that is unique, creative and draws on historical and cultural traditions. This would be targeted not just at residents but to visitors as well. Special events and festivals have a number of benefits for the community and for those who choose to participate, including businesses.

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Appendix B Establishment Counts In Williams Lake, 2008

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
Total	1619	707	912	474	210	114	74	26	9	4	1
1111 - Oilseed and Grain Farming	1	0	1	1	0	0	0	0	0	0	0
1112 - Vegetable and Melon Farming	0	0	0	0	0	0	0	0	0	0	0
1113 - Fruit and Tree Nut Farming	0	0	0	0	0	0	0	0	0	0	0
1114 - Greenhouse, Nursery and Floriculture Production	2	2	0	0	0	0	0	0	0	0	0
1119 - Other Crop Farming	3	2	1	1	0	0	0	0	0	0	0
1121 - Cattle Ranching and Farming	37	20	17	13	4	0	0	0	0	0	0
1122 - Hog and Pig Farming	1	0	1	0	0	0	1	0	0	0	0
1123 - Poultry and Egg Production	0	0	0	0	0	0	0	0	0	0	0
1124 - Sheep and Goat Farming	1	1	0	0	0	0	0	0	0	0	0
1125 - Aquaculture	0	0	0	0	0	0	0	0	0	0	0
1129 - Other Animal Production	6	4	2	2	0	0	0	0	0	0	0
1131 - Timber Tract Operations	1	1	0	0	0	0	0	0	0	0	0
1132 - Forest Nurseries and Gathering of Forest Products	2	0	2	2	0	0	0	0	0	0	0
1133 - Logging	119	53	66	36	9	12	8	1	0	0	0
1141 - Fishing	0	0	0	0	0	0	0	0	0	0	0
1142 - Hunting and Trapping	0	0	0	0	0	0	0	0	0	0	0
1151 - Support Activities for Crop Production	1	1	0	0	0	0	0	0	0	0	0
1152 - Support Activities for Animal Production	4	4	0	0	0	0	0	0	0	0	0
1153 - Support Activities for Forestry	38	22	16	8	4	0	2	1	1	0	0
2111 - Oil and Gas Extraction	0	0	0	0	0	0	0	0	0	0	0
2121 - Coal Mining	0	0	0	0	0	0	0	0	0	0	0
2122 - Metal Ore Mining	1	0	1	0	0	0	0	0	0	1	0
2123 - Non-Metallic Mineral Mining and Quarrying	0	0	0	0	0	0	0	0	0	0	0
2131 - Support Activities for Mining and Oil and Gas Extraction	3	2	1	1	0	0	0	0	0	0	0
2211 - Electric Power Generation, Transmission and Distribution	3	2	1	0	0	0	1	0	0	0	0
2212 - Natural Gas Distribution	1	0	1	0	1	0	0	0	0	0	0
2213 - Water, Sewage and Other Systems	0	0	0	0	0	0	0	0	0	0	0
2361 - Residential Construction	46	27	19	13	5	1	0	0	0	0	0
2362 - Non-residential Building Construction	10	3	7	6	1	0	0	0	0	0	0
2371 - Utility Systems Construction	5	2	3	1	2	0	0	0	0	0	0
2372 - Land Subdivision	9	9	0	0	0	0	0	0	0	0	0
2373 - Highway, Street and Bridge Construction	12	6	6	4	0	0	1	1	0	0	0
2379 - Other Heavy and Civil Engineering Construction	0	0	0	0	0	0	0	0	0	0	0
2381 - Foundation, Structure and Building Exterior Contractors	17	7	10	5	1	2	2	0	0	0	0
2382 - Building Equipment Contractors	35	10	25	14	5	3	3	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
2383 - Building Finishing Contractors	24	17	7	5	1	1	0	0	0	0	0
2389 - Other Specialty Trade Contractors	33	14	19	13	4	1	0	1	0	0	0
3111 - Animal Food Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3112 - Grain and Oilseed Milling	0	0	0	0	0	0	0	0	0	0	0
3113 - Sugar and Confectionery Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3114 - Fruit and Vegetable Preserving and Specialty Food Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3115 - Dairy Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3116 - Meat Product Manufacturing	1	0	1	1	0	0	0	0	0	0	0
3117 - Seafood Product Preparation and Packaging	0	0	0	0	0	0	0	0	0	0	0
3118 - Bakeries and Tortilla Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3119 - Other Food Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3121 - Beverage Manufacturing	3	0	3	1	2	0	0	0	0	0	0
3122 - Tobacco Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3131 - Fibre, Yarn and Thread Mills	0	0	0	0	0	0	0	0	0	0	0
3132 - Fabric Mills	0	0	0	0	0	0	0	0	0	0	0
3133 - Textile and Fabric Finishing and Fabric Coating	1	0	1	1	0	0	0	0	0	0	0
3141 - Textile Furnishings Mills	0	0	0	0	0	0	0	0	0	0	0
3149 - Other Textile Product Mills	1	0	1	0	1	0	0	0	0	0	0
3151 - Clothing Knitting Mills	0	0	0	0	0	0	0	0	0	0	0
3152 - Cut and Sew Clothing Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3159 - Clothing Accessories and Other Clothing Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3161 - Leather and Hide Tanning and Finishing	0	0	0	0	0	0	0	0	0	0	0
3162 - Footwear Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3169 - Other Leather and Allied Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3211 - Sawmills and Wood Preservation	7	1	6	0	1	0	1	0	3	1	0
3212 - Veneer, Plywood and Engineered Wood Product Manufacturing	1	0	1	0	0	0	0	0	0	1	0
3219 - Other Wood Product Manufacturing	7	4	3	0	0	0	2	1	0	0	0
3221 - Pulp, Paper and Paperboard Mills	0	0	0	0	0	0	0	0	0	0	0
3222 - Converted Paper Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3231 - Printing and Related Support Activities	2	0	2	1	1	0	0	0	0	0	0
3241 - Petroleum and Coal Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3251 - Basic Chemical Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3252 - Resin, Synthetic Rubber, and Artificial and Synthetic Fibres and Filaments Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3253 - Pesticide, Fertilizer and Other Agricultural Chemical Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3254 - Pharmaceutical and Medicine Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3255 - Paint, Coating and Adhesive Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3256 - Soap, Cleaning Compound and Toilet Preparation Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3259 - Other Chemical Product Manufacturing	1	0	1	1	0	0	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
3261 - Plastic Product Manufacturing	1	0	1	1	0	0	0	0	0	0	0
3262 - Rubber Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3271 - Clay Product and Refractory Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3272 - Glass and Glass Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3273 - Cement and Concrete Product Manufacturing	2	0	2	1	0	1	0	0	0	0	0
3274 - Lime and Gypsum Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3279 - Other Non-Metallic Mineral Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3311 - Iron and Steel Mills and Ferro-Alloy Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3312 - Steel Product Manufacturing from Purchased Steel	0	0	0	0	0	0	0	0	0	0	0
3313 - Alumina and Aluminum Production and Processing	0	0	0	0	0	0	0	0	0	0	0
3314 - Non-Ferrous Metal (except Aluminum) Production and Processing	0	0	0	0	0	0	0	0	0	0	0
3315 - Foundries	0	0	0	0	0	0	0	0	0	0	0
3321 - Forging and Stamping	0	0	0	0	0	0	0	0	0	0	0
3322 - Cutlery and Hand Tool Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3323 - Architectural and Structural Metals Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3324 - Boiler, Tank and Shipping Container Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3325 - Hardware Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3326 - Spring and Wire Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3327 - Machine Shops, Turned Product, and Screw, Nut and Bolt Manufacturing	1	0	1	0	1	0	0	0	0	0	0
3328 - Coating, Engraving, Heat Treating and Allied Activities	0	0	0	0	0	0	0	0	0	0	0
3329 - Other Fabricated Metal Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3331 - Agricultural, Construction and Mining Machinery Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3332 - Industrial Machinery Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3333 - Commercial and Service Industry Machinery Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3334 - Ventilation, Heating, Air-Conditioning and Commercial Refrigeration Equipment Manufacturing	1	0	1	0	0	1	0	0	0	0	0
3335 - Metalworking Machinery Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3336 - Engine, Turbine and Power Transmission Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3339 - Other General-Purpose Machinery Manufacturing	1	0	1	1	0	0	0	0	0	0	0
3341 - Computer and Peripheral Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3342 - Communications Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3343 - Audio and Video Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3344 - Semiconductor and Other Electronic Component Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3345 - Navigational, Measuring, Medical and Control Instruments Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3346 - Manufacturing and Reproducing Magnetic and Optical Media	0	0	0	0	0	0	0	0	0	0	0
3351 - Electric Lighting Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3352 - Household Appliance Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3353 - Electrical Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
3359 - Other Electrical Equipment and Component Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3361 - Motor Vehicle Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3362 - Motor Vehicle Body and Trailer Manufacturing	1	1	0	0	0	0	0	0	0	0	0
3363 - Motor Vehicle Parts Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3364 - Aerospace Product and Parts Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3365 - Railroad Rolling Stock Manufacturing	1	0	1	1	0	0	0	0	0	0	0
3366 - Ship and Boat Building	0	0	0	0	0	0	0	0	0	0	0
3369 - Other Transportation Equipment Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3371 - Household and Institutional Furniture and Kitchen Cabinet Manufacturing	2	0	2	1	0	1	0	0	0	0	0
3372 - Office Furniture (including Fixtures) Manufacturing	1	0	1	1	0	0	0	0	0	0	0
3379 - Other Furniture-Related Product Manufacturing	0	0	0	0	0	0	0	0	0	0	0
3391 - Medical Equipment and Supplies Manufacturing	2	1	1	1	0	0	0	0	0	0	0
3399 - Other Miscellaneous Manufacturing	5	3	2	2	0	0	0	0	0	0	0
4111 - Farm Product Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4121 - Petroleum Product Wholesaler-Distributors	7	2	5	3	2	0	0	0	0	0	0
4131 - Food Wholesaler-Distributors	6	2	4	3	0	0	0	1	0	0	0
4132 - Beverage Wholesaler-Distributors	2	0	2	2	0	0	0	0	0	0	0
4133 - Cigarette and Tobacco Product Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4141 - Textile, Clothing and Footwear Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4142 - Home Entertainment Equipment and Household Appliance Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4143 - Home Furnishings Wholesaler-Distributors	1	0	1	1	0	0	0	0	0	0	0
4144 - Personal Goods Wholesaler-Distributors	1	1	0	0	0	0	0	0	0	0	0
4145 - Pharmaceuticals, Toiletries, Cosmetics and Sundries Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4151 - Motor Vehicle Wholesaler-Distributors	4	1	3	0	0	1	2	0	0	0	0
4152 - New Motor Vehicle Parts and Accessories Wholesaler-Distributors	3	2	1	0	0	0	1	0	0	0	0
4153 - Used Motor Vehicle Parts and Accessories Wholesaler-Distributors	1	0	1	1	0	0	0	0	0	0	0
4161 - Electrical, Plumbing, Heating and Air-Conditioning Equipment and Supplies Wholesaler-Distributors	3	0	3	2	1	0	0	0	0	0	0
4162 - Metal Service Centres	1	1	0	0	0	0	0	0	0	0	0
4163 - Lumber, Millwork, Hardware and Other Building Supplies Wholesaler-Distributors	7	4	3	1	0	2	0	0	0	0	0
4171 - Farm, Lawn and Garden Machinery and Equipment Wholesaler-Distributors	3	0	3	0	2	1	0	0	0	0	0
4172 - Construction, Forestry, Mining, and Industrial Machinery, Equipment and Supplies Wholesaler-Distributors	17	4	13	7	1	4	1	0	0	0	0
4173 - Computer and Communications Equipment and Supplies Wholesaler-Distributors	1	0	1	0	0	1	0	0	0	0	0
4179 - Other Machinery, Equipment and Supplies Wholesaler-Distributors	3	0	3	1	1	1	0	0	0	0	0
4181 - Recyclable Material Wholesaler-Distributors	2	0	2	1	0	1	0	0	0	0	0
4182 - Paper, Paper Product and Disposable Plastic Product Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4183 - Agricultural Supplies Wholesaler-Distributors	2	0	2	0	1	1	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
4184 - Chemical (except Agricultural) and Allied Product Wholesaler-Distributors	0	0	0	0	0	0	0	0	0	0	0
4189 - Other Miscellaneous Wholesaler-Distributors	6	4	2	2	0	0	0	0	0	0	0
4191 - Wholesale Electronic Markets and Agents and Brokers	5	2	3	2	0	0	1	0	0	0	0
4411 - Automobile Dealers	6	0	6	0	0	2	3	1	0	0	0
4412 - Other Motor Vehicle Dealers	9	1	8	4	1	3	0	0	0	0	0
4413 - Automotive Parts, Accessories and Tire Stores	11	1	10	0	6	4	0	0	0	0	0
4421 - Furniture Stores	7	1	6	3	3	0	0	0	0	0	0
4422 - Home Furnishings Stores	5	4	1	0	0	1	0	0	0	0	0
4431 - Electronics and Appliance Stores	8	1	7	3	3	1	0	0	0	0	0
4441 - Building Material and Supplies Dealers	7	1	6	2	2	0	2	0	0	0	0
4442 - Lawn and Garden Equipment and Supplies Stores	1	0	1	0	0	1	0	0	0	0	0
4451 - Grocery Stores	12	4	8	0	5	1	0	1	1	0	0
4452 - Specialty Food Stores	7	2	5	5	0	0	0	0	0	0	0
4453 - Beer, Wine and Liquor Stores	4	1	3	1	1	0	1	0	0	0	0
4461 - Health and Personal Care Stores	6	2	4	2	0	1	1	0	0	0	0
4471 - Gasoline Stations	22	11	11	2	5	2	2	0	0	0	0
4481 - Clothing Stores	13	0	13	5	6	2	0	0	0	0	0
4482 - Shoe Stores	4	1	3	1	1	1	0	0	0	0	0
4483 - Jewellery, Luggage and Leather Goods Stores	4	1	3	0	3	0	0	0	0	0	0
4511 - Sporting Goods, Hobby and Musical Instrument Stores	13	2	11	7	2	2	0	0	0	0	0
4512 - Book, Periodical and Music Stores	3	0	3	2	1	0	0	0	0	0	0
4521 - Department Stores	2	0	2	0	1	0	0	1	0	0	0
4529 - Other General Merchandise Stores	9	2	7	4	1	1	0	0	1	0	0
4531 - Florists	2	1	1	0	1	0	0	0	0	0	0
4532 - Office Supplies, Stationery and Gift Stores	8	2	6	4	1	0	1	0	0	0	0
4533 - Used Merchandise Stores	6	3	3	2	1	0	0	0	0	0	0
4539 - Other Miscellaneous Store Retailers	8	3	5	1	3	1	0	0	0	0	0
4541 - Electronic Shopping and Mail-Order Houses	1	0	1	0	1	0	0	0	0	0	0
4542 - Vending Machine Operators	0	0	0	0	0	0	0	0	0	0	0
4543 - Direct Selling Establishments	4	1	3	1	2	0	0	0	0	0	0
4811 - Scheduled Air Transportation	1	0	1	0	1	0	0	0	0	0	0
4812 - Non-Scheduled Air Transportation	6	2	4	4	0	0	0	0	0	0	0
4821 - Rail Transportation	0	0	0	0	0	0	0	0	0	0	0
4831 - Deep Sea, Coastal and Great Lakes Water Transportation	0	0	0	0	0	0	0	0	0	0	0
4832 - Inland Water Transportation	0	0	0	0	0	0	0	0	0	0	0
4841 - General Freight Trucking	21	12	9	4	3	2	0	0	0	0	0
4842 - Specialized Freight Trucking	69	31	38	29	4	2	2	1	0	0	0
4851 - Urban Transit Systems	0	0	0	0	0	0	0	0	0	0	0
4852 - Interurban and Rural Bus Transportation	0	0	0	0	0	0	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
4853 - Taxi and Limousine Service	2	0	2	1	0	1	0	0	0	0	0
4854 - School and Employee Bus Transportation	0	0	0	0	0	0	0	0	0	0	0
4855 - Charter Bus Industry	0	0	0	0	0	0	0	0	0	0	0
4859 - Other Transit and Ground Passenger Transportation	1	0	1	0	1	0	0	0	0	0	0
4861 - Pipeline Transportation of Crude Oil	0	0	0	0	0	0	0	0	0	0	0
4862 - Pipeline Transportation of Natural Gas	0	0	0	0	0	0	0	0	0	0	0
4869 - Other Pipeline Transportation	0	0	0	0	0	0	0	0	0	0	0
4871 - Scenic and Sightseeing Transportation, Land	0	0	0	0	0	0	0	0	0	0	0
4872 - Scenic and Sightseeing Transportation, Water	2	1	1	1	0	0	0	0	0	0	0
4879 - Scenic and Sightseeing Transportation, Other	1	1	0	0	0	0	0	0	0	0	0
4881 - Support Activities for Air Transportation	6	3	3	1	0	2	0	0	0	0	0
4882 - Support Activities for Rail Transportation	0	0	0	0	0	0	0	0	0	0	0
4883 - Support Activities for Water Transportation	0	0	0	0	0	0	0	0	0	0	0
4884 - Support Activities for Road Transportation	3	0	3	1	1	0	1	0	0	0	0
4885 - Freight Transportation Arrangement	0	0	0	0	0	0	0	0	0	0	0
4889 - Other Support Activities for Transportation	0	0	0	0	0	0	0	0	0	0	0
4911 - Postal Service	0	0	0	0	0	0	0	0	0	0	0
4921 – Couriers	3	1	2	1	1	0	0	0	0	0	0
4922 - Local Messengers and Local Delivery	1	1	0	0	0	0	0	0	0	0	0
4931 - Warehousing and Storage	2	2	0	0	0	0	0	0	0	0	0
5111 - Newspaper, Periodical, Book and Database Publishers	4	3	1	0	0	0	0	1	0	0	0
5112 - Software Publishers	1	1	0	0	0	0	0	0	0	0	0
5121 - Motion Picture and Video Industries	0	0	0	0	0	0	0	0	0	0	0
5122 - Sound Recording Industries	0	0	0	0	0	0	0	0	0	0	0
5151 - Radio and Television Broadcasting	3	0	3	1	2	0	0	0	0	0	0
5152 - Pay and Specialty Television	0	0	0	0	0	0	0	0	0	0	0
5171 - Wired Telecommunications Carriers	3	0	3	3	0	0	0	0	0	0	0
5172 - Wireless Telecommunications Carriers (exept Satellite)	0	0	0	0	0	0	0	0	0	0	0
5174 - Satellite Telecommunications	0	0	0	0	0	0	0	0	0	0	0
5179 - Other Telecommunications	0	0	0	0	0	0	0	0	0	0	0
5182 - Data Processing, Hosting and Related Services	0	0	0	0	0	0	0	0	0	0	0
5191 - Other Information Services	2	1	1	0	0	0	0	1	0	0	0
5211 - Monetary Authorities - Central Bank	0	0	0	0	0	0	0	0	0	0	0
5221 - Depository Credit Intermediation	6	0	6	0	1	0	5	0	0	0	0
5222 - Non-Depository Credit Intermediation	3	1	2	1	0	0	0	1	0	0	0
5223 - Activities Related to Credit Intermediation	3	0	3	3	0	0	0	0	0	0	0
5231 - Securities and Commodity Contracts Intermediation and Brokerage	5	1	4	3	0	1	0	0	0	0	0
5232 - Securities and Commodity Exchanges	0	0	0	0	0	0	0	0	0	0	0
5239 - Other Financial Investment Activities	33	25	8	5	1	1	1	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
5241 - Insurance Carriers	2	0	2	1	0	0	0	1	0	0	0
5242 - Agencies, Brokerages and Other Insurance Related Activities	11	0	11	7	2	0	1	0	1	0	0
5261 - Pension Funds	0	0	0	0	0	0	0	0	0	0	0
5269 - Other Funds and Financial Vehicles	1	1	0	0	0	0	0	0	0	0	0
5311 - Lessors of Real Estate	93	66	27	19	3	4	1	0	0	0	0
5312 - Offices of Real Estate Agents and Brokers	23	21	2	1	1	0	0	0	0	0	0
5313 - Activities Related to Real Estate	12	10	2	1	1	0	0	0	0	0	0
5321 - Automotive Equipment Rental and Leasing	2	1	1	0	0	1	0	0	0	0	0
5322 - Consumer Goods Rental	2	0	2	0	2	0	0	0	0	0	0
5323 - General Rental Centres	0	0	0	0	0	0	0	0	0	0	0
5324 - Commercial and Industrial Machinery and Equipment Rental and Leasing	11	8	3	2	1	0	0	0	0	0	0
5331 - Lessors of Non-Financial Intangible Assets (Except Copyrighted Works)	1	1	0	0	0	0	0	0	0	0	0
5411 - Legal Services	22	9	13	10	1	2	0	0	0	0	0
5412 - Accounting, Tax Preparation, Bookkeeping and Payroll Services	28	10	18	16	1	0	1	0	0	0	0
5413 - Architectural, Engineering and Related Services	11	4	7	5	2	0	0	0	0	0	0
5414 - Specialized Design Services	2	1	1	0	1	0	0	0	0	0	0
5415 - Computer Systems Design and Related Services	4	3	1	1	0	0	0	0	0	0	0
5416 - Management, Scientific and Technical Consulting Services	28	22	6	5	1	0	0	0	0	0	0
5417 - Scientific Research and Development Services	2	1	1	0	0	0	1	0	0	0	0
5418 - Advertising, Public Relations, and Related Services	2	2	0	0	0	0	0	0	0	0	0
5419 - Other Professional, Scientific and Technical Services	18	8	10	6	1	2	1	0	0	0	0
5511 - Management of Companies and Enterprises	62	49	13	5	4	3	1	0	0	0	0
5611 - Office Administrative Services	7	4	3	1	0	2	0	0	0	0	0
5612 - Facilities Support Services	0	0	0	0	0	0	0	0	0	0	0
5613 - Employment Services	0	0	0	0	0	0	0	0	0	0	0
5614 - Business Support Services	2	1	1	1	0	0	0	0	0	0	0
5615 - Travel Arrangement and Reservation Services	6	1	5	2	2	1	0	0	0	0	0
5616 - Investigation and Security Services	5	2	3	2	0	0	1	0	0	0	0
5617 - Services to Buildings and Dwellings	27	8	19	11	7	1	0	0	0	0	0
5619 - Other Support Services	7	2	5	3	1	0	0	1	0	0	0
5621 - Waste Collection	1	0	1	1	0	0	0	0	0	0	0
5622 - Waste Treatment and Disposal	2	0	2	1	0	0	1	0	0	0	0
5629 - Remediation and Other Waste Management Services	3	0	3	1	2	0	0	0	0	0	0
6111 - Elementary and Secondary Schools	1	0	1	0	0	0	0	0	0	0	1
6112 - Community Colleges and C.E.G.E.P.s	0	0	0	0	0	0	0	0	0	0	0
6113 - Universities	0	0	0	0	0	0	0	0	0	0	0
6114 - Business Schools and Computer and Management Training	1	0	1	0	0	0	0	1	0	0	0
6115 - Technical and Trade Schools	2	0	2	1	0	1	0	0	0	0	0
6116 - Other Schools and Instruction	4	1	3	2	1	0	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees 0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
6117 - Educational Support Services	1	1	0	0	0	0	0	0	0	0	0
6211 - Offices of Physicians	21	3	18	12	5	1	0	0	0	0	0
6212 - Offices of Dentists	9	1	8	1	3	3	1	0	0	0	0
6213 - Offices of Other Health Practitioners	11	3	8	4	3	1	0	0	0	0	0
6214 - Out-Patient Care Centres	11	8	3	1	1	0	0	1	0	0	0
6215 - Medical and Diagnostic Laboratories	1	0	1	0	1	0	0	0	0	0	0
6216 - Home Health Care Services	0	0	0	0	0	0	0	0	0	0	0
6219 - Other Ambulatory Health Care Services	0	0	0	0	0	0	0	0	0	0	0
6221 - General Medical and Surgical Hospitals	2	0	2	0	1	0	0	0	0	1	0
6222 - Psychiatric and Substance Abuse Hospitals	0	0	0	0	0	0	0	0	0	0	0
6223 - Specialty (except Psychiatric and Substance Abuse) Hospitals	0	0	0	0	0	0	0	0	0	0	0
6231 - Nursing Care Facilities	2	0	2	0	0	0	1	1	0	0	0
6232 - Residential Developmental Handicap, Mental Health and Substance Abuse Facilities	5	0	5	0	1	3	0	1	0	0	0
6233 - Community Care Facilities for the Elderly	1	0	1	1	0	0	0	0	0	0	0
6239 - Other Residential Care Facilities	1	0	1	0	0	1	0	0	0	0	0
6241 - Individual and Family Services	11	0	11	3	2	2	4	0	0	0	0
6242 - Community Food and Housing, and Emergency and Other Relief Services	0	0	0	0	0	0	0	0	0	0	0
6243 - Vocational Rehabilitation Services	5	0	5	1	3	1	0	0	0	0	0
6244 - Child Day-Care Services	3	0	3	1	1	1	0	0	0	0	0
7111 - Performing Arts Companies	1	0	1	1	0	0	0	0	0	0	0
7112 - Spectator Sports	0	0	0	0	0	0	0	0	0	0	0
7113 - Promoters (Presenters) of Performing Arts, Sports and Similar Events	1	1	0	0	0	0	0	0	0	0	0
7114 - Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures	0	0	0	0	0	0	0	0	0	0	0
7115 - Independent Artists, Writers and Performers	1	1	0	0	0	0	0	0	0	0	0
7121 - Heritage Institutions	3	0	3	1	2	0	0	0	0	0	0
7131 - Amusement Parks and Arcades	1	0	1	1	0	0	0	0	0	0	0
7132 - Gambling Industries	1	0	1	0	0	0	1	0	0	0	0
7139 - Other Amusement and Recreation Industries	19	10	9	4	2	2	1	0	0	0	0
7211 - Traveller Accommodation	11	3	8	2	2	0	3	1	0	0	0
7212 - RV (Recreational Vehicle) Parks and Recreational Camps	10	5	5	2	3	0	0	0	0	0	0
7213 - Rooming and Boarding Houses	2	2	0	0	0	0	0	0	0	0	0
7221 - Full-Service Restaurants	22	2	20	7	4	7	0	2	0	0	0
7222 - Limited-Service Eating Places	20	3	17	5	3	4	3	2	0	0	0
7223 - Special Food Services	3	1	2	0	0	2	0	0	0	0	0
7224 - Drinking Places (Alcoholic Beverages)	4	2	2	1	1	0	0	0	0	0	0
8111 - Automotive Repair and Maintenance	25	10	15	8	6	1	0	0	0	0	0
8112 - Electronic and Precision Equipment Repair and Maintenance	3	3	0	0	0	0	0	0	0	0	0
8113 - Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	25	17	8	7	1	0	0	0	0	0	0

	Total (A)	Ind. (B)	Sub (A - B)	Number of Employees							
				0-4	4-9	9-19	20-49	50-99	100-199	200-499	500 +
8114 - Personal and Household Goods Repair and Maintenance	9	3	6	5	1	0	0	0	0	0	0
8121 - Personal Care Services	21	7	14	9	4	1	0	0	0	0	0
8122 - Funeral Services	1	1	0	0	0	0	0	0	0	0	0
8123 - Dry Cleaning and Laundry Services	2	1	1	0	1	0	0	0	0	0	0
8129 - Other Personal Services	1	0	1	1	0	0	0	0	0	0	0
8131 - Religious Organizations	12	0	12	7	4	0	1	0	0	0	0
8132 - Grant-Making and Giving Services	2	0	2	2	0	0	0	0	0	0	0
8133 - Social Advocacy Organizations	3	2	1	0	0	0	1	0	0	0	0
8134 - Civic and Social Organizations	7	1	6	3	2	0	1	0	0	0	0
8139 - Business, Professional, Labour and Other Membership Organizations	11	7	4	2	2	0	0	0	0	0	0
8141 - Private Households	5	0	5	5	0	0	0	0	0	0	0
9111 - Defence Services	0	0	0	0	0	0	0	0	0	0	0
9112 - Federal Protective Services	0	0	0	0	0	0	0	0	0	0	0
9113 - Federal Labour, Employment and Immigration Services	0	0	0	0	0	0	0	0	0	0	0
9114 - Foreign Affairs and International Assistance	0	0	0	0	0	0	0	0	0	0	0
9119 - Other Federal Government Public Administration	0	0	0	0	0	0	0	0	0	0	0
9121 - Provincial Protective Services	0	0	0	0	0	0	0	0	0	0	0
9122 - Provincial Labour and Employment Services	0	0	0	0	0	0	0	0	0	0	0
9129 - Other Provincial and Territorial Public Administration	0	0	0	0	0	0	0	0	0	0	0
9131 - Municipal Protective Services	0	0	0	0	0	0	0	0	0	0	0
9139 - Other Local, Municipal and Regional Public Administration	3	0	3	0	1	0	0	0	2	0	0
9141 - Aboriginal Public Administration	6	0	6	0	0	0	4	2	0	0	0
9191 - International and Other Extra-Territorial Public Administration	0	0	0	0	0	0	0	0	0	0	0

Source: Statistics Canada (June 2008).
Note: Ind. – Indeterminate

Appendix C Williams Lake Household Expenditures, 2009

		Average expenditure per household	Percentage reporting	Percentage of total expenditure	Median expenditure per household reporting (5)
		$	%	%	$
10000-52300	**Total expenditure (2)**	73571	1	1	60559
10000-48400	**Total current consumption (2)**	55010	1	0.748	46403
10000-15600	**Food**	7570	1	0.103	6540
10000-15200	Food purchased from stores	5,731	100.0%	7.8%	4,930
15300-15400	Board paid to private households	21	4.8%	0.0%	240
15600	Food purchased from restaurants	1818	0.945	0.025	1200
20000-20520	**Shelter (2)**	16336	0.997	0.222	11343
20000-20340	Principal accommodation (2)	15,198	99.5%	20.7%	10,500
20000-20020	Rented living quarters	3,687	39.0%	5.0%	8,625
20100-20280	Owned living quarters (2)	9,714	64.4%	13.2%	10,090
20200-20280	Other expenditures for owned living quarters	950	22.0%	1.3%	900
20300-20330	Water, fuel and electricity	1797	0.915	0.024	1800
20400-20520	Other accommodation (2)	1,138	56.0%	1.5%	970
20400-20480	Owned vacation home (2)	335	7.8%	0.5%	3,389
20500-20520	Traveller accommodation	803	0.539	0.011	800
22000-23800	**Household operation**	3483	1	0.047	2530
22000-22300	Communications	1,667	99.5%	2.3%	1,375
22000-22020	Telephone	500	85.8%	0.7%	524
22400-22440	Child care expenses	327	8.0%	0.4%	2,000
22400-22420	Child care outside the home	204	5.4%	0.3%	2,000
22700-23000	Pet expenses	489	45.6%	0.7%	610
23110-23120	Household cleaning supplies	224	98.9%	0.3%	160
23200-23320	Paper, plastic and foil household supplies	268	98.4%	0.4%	200
23310-23320	Other paper and plastic supplies	209	98.0%	0.3%	150
23400-23700	Garden supplies and services	252	60.3%	0.3%	200
25000-27310	**Household furnishings and equipment**	2017	0.916	0.027	1000
25000-25340	Household furnishings	1,093	65.7%	1.5%	600
25300-25340	Art, antiques and decorative ware	140	33.4%	0.2%	130
25400-26800	Household equipment	820	88.2%	1.1%	420
25400-25900	Household appliances	400	69.4%	0.5%	150
26000-26020	Home and workshop tools and equipment	125	35.9%	0.2%	160
26100-26300	Lawn, garden and snow-removal tools and equipment	67	24.0%	0.1%	150
26900-27100	Maintenance and repairs of furniture and equipment	55	23.2%	0.1%	150
27200-27310	Services related to furnishings and equipment	49	0.222	0.001	150

		Average expenditure per household	Percentage reporting	Percentage of total expenditure	Median expenditure per household reporting (5)
		$	%	%	$
28000-29750	**Clothing**	**2878**	**0.985**	**0.039**	**1800**
28000-28400	Women's and Girls' wear (4 years and over)	1,621	88.2%	2.2%	1,000
28110-28120	Footwear	278	71.2%	0.4%	231
28310-28320	Jewellery and watches	202	38.5%	0.3%	120
28500-28900	Men's and Boys' wear (4 years and over)	989	86.4%	1.3%	670
28610-28620	Footwear	211	63.9%	0.3%	220
28810-28820	Jewellery and watches	68	14.9%	0.1%	125
28900	Clothing gifts to non-household members	116	0.436	0.002	200
29000-29200	Children's wear (under 4 years)	101	40.0%	0.1%	120
29500-29750	Clothing material, notions and services	167	63.3%	0.2%	150
29720-29750	Services	131	54.3%	0.2%	150
30000-32600	**Transportation**	**9318**	**0.984**	**0.127**	**5805**
30000-31300	Private transportation	8,074	88.3%	11.0%	5,300
30000-30040	Purchase of automobiles and trucks	2,758	19.7%	3.7%	10,000
30105-30110	Purchase of automotive accessories	44	0.15	0.001	160
30200-30420	Rented and leased automobiles and trucks	455	18.5%	0.6%	500
30200-30240	Rented automobiles and trucks	80	14.9%	0.1%	350
30410-30420	Leasing fees for automobiles and trucks	375	4.7%	0.5%	6,000
30500-31300	Operation of owned and leased automobiles and trucks	4,817	86.3%	6.5%	4,676
30800-30820	Garage rent and parking	64	0.307	0.001	85
32000-32600	Public transportation	1,244	80.9%	1.7%	985
32510 - 32520	Other passenger transportation	131	31.0%	0.2%	212
33000-33840	**Health care**	**2,455**	**98.4%**	**3.3%**	**1,672**
33100-33120	Medicinal and pharmaceutical products	584	92.8%	0.8%	316
33220-33221	Health care practitioners	185	0.273	0.003	300
33300-33340	Eye-care goods and services	253	55.6%	0.3%	250
33700-33840	Health insurance premiums	863	63.4%	1.2%	1,000
33800-33840	Private health insurance plans	362	35.5%	0.5%	660
35000-35800	**Personal care**	**1,160**	**99.6%**	**1.6%**	**840**
35300-35600	Personal care supplies and equipment	651	99.5%	0.9%	450
35700-35800	Personal care services	509	90.8%	0.7%	360
37000-41900	**Recreation**	**4,561**	**97.9%**	**6.2%**	**2,467**
37000-38200	Recreation equipment and associated services	995	82.4%	1.4%	700
37500-37600	Computer equipment and supplies	386	61.6%	0.5%	300
37700-37720	Photographic goods and services	112	37.3%	0.2%	200
39000-39570	Recreation vehicles and associated services	1,385	31.2%	1.9%	500
39000-39190	Purchase of recreation vehicles	1,031	15.9%	1.4%	300
39100-39190	Other recreational vehicles and outboard motors	983	0.046	0.013	4600
39500-39570	Operation of recreational vehicles	354	24.0%	0.5%	440
40000-40700	Home entertainment equipment and services	636	75.8%	0.9%	410
41000-41420	Entertainment	787	90.4%	1.1%	765

		Average expenditure per household	Percentage reporting	Percentage of total expenditure	Median expenditure per household reporting (5)
		$	%	%	$
41410-41420	Rental of cablevision and satellite services	514	78.7%	0.7%	655
41500-41700	Use of recreation facilities	332	46.1%	0.5%	392
43000-43400	Reading materials and other printed matter	214	66.5%	0.3%	225
44000-44700	Education	1,760	34.8%	2.4%	2,100
44400-44500	Tuition fees	1,424	25.3%	1.9%	3,000
45000-45400	Tobacco products and alcoholic beverages	1,630	78.7%	2.2%	1,100
48000-48400	Games of chance (net)	200	63.1%	0.3%	100
48000	Government-run lotteries	131	0.544	0.002	100
46000-47500	Miscellaneous expenditures (2)	1,426	90.6%	1.9%	552
46000	Expenses on other property owned	87	4.9%	0.1%	1,000
46200	Legal services not related to dwellings	174	6.7%	0.2%	500
46300-46600	Financial services	370	79.3%	0.5%	202
47100-47500	Other miscellaneous goods and services	163	0.512	0.002	100
	End of total current consumption detailed items				
49000-49300	Personal taxes	13,157	90.9%	17.9%	7,699
50000-50840	Personal insurance payments and pension contributions	3,482	81.9%	4.7%	3,088
50800-50840	Retirement and pension fund payments	2485	0.71	0.034	2302
52000-52300	Gifts of money and contributions	1,922	69.8%	2.6%	800
52000-52100	Money and support payments	1239	0.378	0.017	800
52200-52300	Contributions to charity	683	60.9%	0.9%	300
	End of total expenditures detail items				
	Selected items in asset money flows				
55000	Registered retirement savings plans	1615	0.426		2600
	Investments in the home:				
55100	Improvements and alterations	3125	0.39		3000

Source: Statistics Canada prepared by BC Stats (December 2010).
Note (2): Prior to 1997, mortgage interest and interest on loans were reported in the "Shelter" and "Miscellaneous" category.

Appendix D Tax Rate Assessment

Table 16 outlines the tax rate by property class for municipalities surrounding Williams Lake.

Table 16 Municipal Tax Rates for Selected Municipalities, 2010

Municipalities	Purpose of Tax Rate	Residential	Utilities	Supportive Housing	Major Industry	Light Industry	Business	Managed Forest Land	Rec. Non-Profit	Farm
Williams Lake	Municipal	5.3294	40.0000	5.3294	84.1429	33.7100	11.0201	5.3294	14.7895	18.3029
	Reg'l District	1.5025	5.2588	1.5025	5.1086	5.1086	3.6812	1.5025	1.5025	1.5025
	Hospital	0.6700	2.3451	0.6700	2.2781	2.2781	1.6416	2.0101	0.6700	0.6700
	School	3.0451	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.1840	0.9167	0.1840	0.9049	0.5985	0.4868	0.6126	0.1840	0.1840
	Total	10.7310	62.9206	7.7859	99.2345	48.4952	23.6296	11.2546	20.6461	27.4594
Quesnel	Municipal	3.8681	39.9997	0.0000	59.9976	23.5186	11.2588	0.0000	14.4357	5.9257
	Reg'l District	1.8092	6.3323	0.0000	6.1514	6.1514	4.4326	0.0000	1.8092	1.8092
	Hospital	0.6723	2.3532	0.0000	2.2860	2.2860	1.6472	0.0000	0.6723	0.6723
	School	3.9266	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.0666	0.5058	0.0666	0.5058	0.1994	0.1992	0.2604	0.0666	0.0666
	Total	10.3429	63.5910	0.1666	75.7407	38.9553	24.3379	2.0604	20.4838	15.2738
Prince George	Municipal	7.7103	40.0000	7.7103	47.8980	26.6172	15.8437	7.7103	7.7103	5.2000
	Reg'l District	0.7368	2.5787	0.7368	2.5050	2.5050	1.8051	2.2103	0.7368	0.7368
	Hospital	0.3907	1.3674	0.3907	1.3283	1.3283	0.9572	1.1720	0.3907	0.3907
	School	3.2964	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.0666	0.5058	0.0666	0.5058	0.1994	0.1992	0.2604	0.0666	0.0666
	Total	12.2007	58.8518	9.0043	59.0370	37.4498	25.6052	13.1530	12.4043	13.1941
Kamloops	Municipal	4.8300	37.6400	4.8300	69.0200	24.0100	15.0500	14.4900	10.6600	12.1400
	Reg'l District	0.3593	1.2576	0.3593	1.2216	1.2216	0.8803	1.0779	0.3593	0.3593
	Hospital	0.2141	0.7494	0.2141	0.7279	0.7279	0.5245	0.6423	0.2141	0.2141
	School	2.4385	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.0666	0.5058	0.0666	0.5058	0.1994	0.1992	0.2604	0.0666	0.0666
	Total	7.9085	54.5528	5.5700	78.2753	32.9589	23.4540	18.2706	14.8000	19.5800
Clinton	Municipal	7.3347	32.7670	0.0000	10.7728	6.4400	19.1559	0.0000	6.9604	5.1902
	Reg'l District	1.3989	4.8962	0.0000	4.7563	4.7563	3.4273	0.0000	1.3989	1.3989
	Hospital	0.2140	0.7490	0.0000	0.7276	0.7276	0.5243	0.0000	0.2140	0.2140
	School	3.3388	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.3764	1.5899	0.1666	1.5590	1.2526	0.9581	1.1897	0.3764	0.3764
	Total	12.6628	54.4021	0.2666	24.6157	19.9765	30.8656	2.9897	12.4497	13.9795
100 Mile Hse	Municipal	4.1723	40.0000	4.1723	54.1465	10.6210	9.5738	12.5170	3.4986	3.5056
	Reg'l District	1.4321	5.0122	1.4321	4.8690	4.8690	3.5085	4.2962	1.4321	1.4321
	Hospital	0.6751	2.3628	0.6751	2.2953	2.2953	1.6540	2.0253	0.6751	0.6751
	School	3.0451	14.4000	0.1000	6.8000	6.8000	6.8000	1.8000	3.5000	6.8000
	Other	0.4188	1.4939	0.1666	1.4656	1.1592	0.8908	1.1073	0.3489	0.3489
	Total	9.7434	63.2689	6.5461	69.5763	25.7445	22.4271	21.7457	9.4546	12.7617

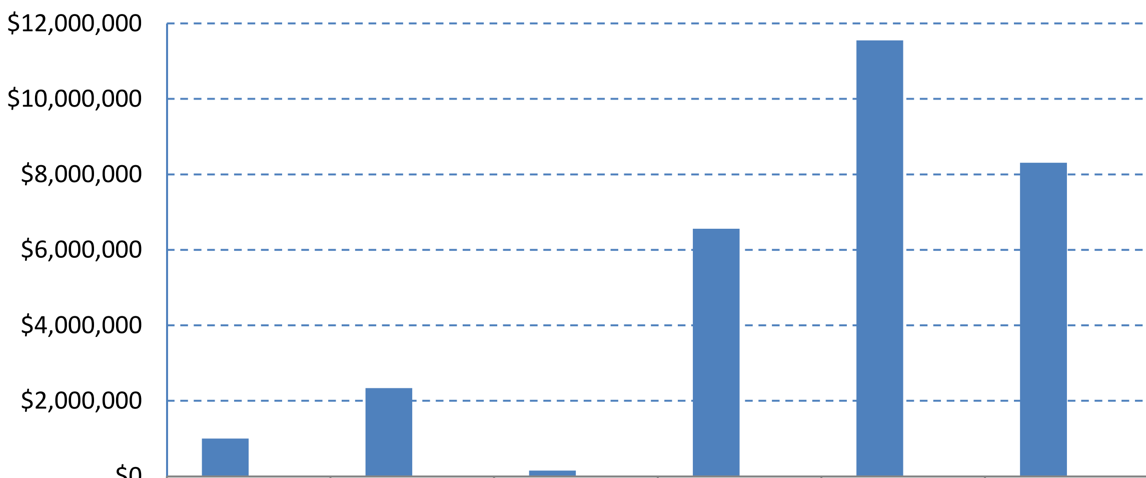
Source: BC Ministry of Community, Sport and Cultural Development.

As illustrated, the municipal portion of the property tax for major industry accruing to the municipal government is the largest portion of the property tax for major industry property class, while the tax share for regional district, hospital, and other makes up the remainder. Overall, Williams Lake has the highest major tax rate for municipalities in the Central Interior. In addition, only two communities, the Town of Lake Cowichan and the Town of Ladysmith have higher major industry tax rates than Williams Lake in British Columbia. At the current tax rate for major industry, Williams Lake has a property class multiple for major industry which is 15.79 that of the local residential tax rates, again the highest ratio among Central Interior municipalities.

In Figure 21, the total taxes paid by major industrial customers and the percentage share of total taxes paid in communities surrounding Williams Lake is highlighted. Of the communities, Prince George with an authenticated property roll value of $241.1 million in major industrial class collected $11.55 million in 2010 representing making up 16% of total property tax collected. Conversely, Clinton with authenticated property roll value of $14.0 million in major industrial class collected $0.15 million.

In 2010, Williams Lake had an authenticated property roll value of $27.8 million in major industrial class which was closest in value to 100 Mile House with a value of $18.4 million or 66% the value of Williams Lake. However, in 2010, Williams Lake collected $2.3 million in property taxes from major industry while 100 Mile House collected just under $1.0 million or only 43% of the property tax from major industry as Williams Lake.

Figure 21 Major Industrial Tax Payment For Select Municipalities, 2010



	100 Mile Hse	Williams Lk	Clinton	Kamloops	Prince George	Quesnel
Municipal Tax	$998,585	$2,336,111	$151,148	$6,559,675	$11,550,289	$8,306,176
% Total Taxes	37%	23%	26%	8%	16%	65%

Source: BC Ministry of Community, Sport and Cultural Development.

E Attributes of Successful Downtowns

Sense of Place – Most downtowns were built around a combination of social, economic and cultural forces embedded in the history of the community, that no suburban mall could replicate. This sense of place and its interpretation and use in creating a modern urban downtown is a hallmark of successful downtowns continent wide.

Walkability – Most successful downtowns are relatively small in size (less than ½ square kilometre) because most people have a limited tolerance for walking. However, an interesting and active streetscape, depending on the time of year, day or week, can lead to a constantly changing sensory experience and draw pedestrians beyond their normal walking zone. Wlkability is about encouraging pedestrian traffic and alternative transportation options and creating a bustling downtown environment. It is achieved through many elements including street improvements, streetscape design, and public interest in the surroundings.

Mixed Use – Successful downtowns are not just about serving local retail needs, they are increasingly about leveraging public and community infrastructure such as museums, arenas, performing arts centres, historic sites and buildings, and others cultural facilities that complement the shopping experience and reinforce sense of place. Office development is another example of mixed use that brings more traffic to downtowns, even smaller or rural ones. Office developments bring a ready market for downtown retail and services and is an important element of street level diversity.

Green Space - Parks, open space, public spaces, greenways and trails can significantly increase the connectedness of downtown areas by facilitating the movement of pedestrians and alternative forms of transportation. They also complement and contrast with the built features of the typical urban landscape.

Critical Mass – A sense of place and good urban design will not by themselves create a strong downtown. Downtowns are really about the shopping experience, which entails a critical mass of stores, services and attractions that encourage pedestrian or transit use rather than vehicle use.

Innovative Businesses - The traditional department stores that once anchored downtowns no longer exist while most retail chains continue to ignore downtown in their site selection process. But newly successful downtowns are building around a few innovative businesses or niches that are drawing traffic back to the central shopping area. These businesses not only offer products and services that cannot be found in major chains and big box stores, they build on the community's sense of place and history.

Tourism – Functional downtowns inevitably have a tourism component built either on the availability and development of destination attractions, cultural facilities, accommodation clusters, attractive shopping experiences, or all of the above. When business and leisure travel are considered together, one of the best ways to supplement traffic and pedestrian volumes is to cluster visitor services such as visitor centres, cultural venues and other visitor services downtown.

Real Estate Demand – Downtowns should have reasonable rents and sales prices that continue to justify new construction or renovation and discourage disinvestment, neglect and vacant properties. One of the biggest problems faced by decaying downtowns is falling property prices and falling rents which discourages tenancy by reputable and innovate business owners and leads to various forms of anti-social behaviour and street problems.

Employment – Successful downtowns generally serve as sources of employment, not just retail and services, but basic and support sector businesses as well.

Housing – The greater the diversity of moderate to high density housing options the more likely the community will succeed in generating the traffic and vibrancy local businesses require to invest in downtown. This requires a flexible and adaptable planning environment as well as expertise and understanding of the development community for multi-residential developments.

Transportation – Competitive downtowns almost always provide residents and visitors with transportation options that are convenient, flexible and affordable. Public transit into and out of downtown is essential, but even taxi services, structured parking and pedestrian-friendly street design will make a difference in attracting traffic and businesses to the core.

Community Involvement – Community residents, those living and working downtown, as well as those in adjacent neighbourhoods should be actively involved and engaged in planning and decision-making.