

**WOOD BUFFALO REGIONAL BUSINESS
INVENTORY AND GAP ANALYSIS 2010**

REGIONAL MUNICIPALITY OF WOOD BUFFALO

Jeff Penney
Manager, Economic Development
Regional Municipality of Wood Buffalo
9909 Franklin Avenue
Fort McMurray, AB T9H 2K4

Dear Mr. Penney:

Millier Dickinson Blais, in collaboration with YLM.ca, is pleased to present the Regional Municipality of Wood Buffalo's Business Inventory and Gap Analysis. The Business Inventory and Gap Analysis builds upon Wood Buffalo's previous strategies and reports to ensure the action plans presented promote the diverse and progressive nature of the region. The project has considered holistic infrastructure planning in developing a sustainable urban environment that incorporates physical, urban and social needs and environmental stewardship. This project continued the Municipality's tradition of stakeholder engagement and consultation to ensure the strategies developed are reflective of the community's needs.

We are a national economic development consulting firm with extensive experience working with communities in Alberta to develop successful economic development and business marketing strategies. The firm's partners and staff build upon their hands-on, local economic development experience (gained as practitioners in local environments) to deliver solid and far-reaching analysis and practical, focused strategy designed to position communities and businesses for growth in the 21st Century economy.

It has been a pleasure working with you and your team on this project. At any point in the future if you would like to discuss the content and actions contained within the document please do not hesitate to contact me.

Sincerely,



Paul Blais, MA, EcD.
Partner
Millier Dickinson Blais Inc.



A. Executive Summary

A.1 The Regional Municipality of Wood Buffalo in Context

The Province of Alberta and the Regional Municipality of Wood Buffalo (RMWB) are experiencing rapid and far-reaching structural changes. At the centre of the Alberta Oil Sands, the municipality has been experiencing phenomenal growth; far greater than that experienced by any other municipality in Canada. According to municipal census Wood Buffalo expanded by 141.2% from 1999 to 2008.

With a population now exceeding 100,000, the Municipality is making efforts to plan for an envisioned future. *Future Forward*, presented to council in 2007, is a vision for the Regional Municipality in 2030 imagines a population of 200,000 and a diverse economy with Wood Buffalo being the business and industrial centre of Canada's northwest. To achieve this, the Economic Development Strategy (2010-2014), sets out goals to diversify the economy and to reduce economic leakage by providing a greater portion of goods and services for industry and residents from within the regional economy. A greater balance in the supply of retail, commercial and professional services will attract people and lead them to call Wood Buffalo their home.

Business diversity is a strong theme in the strategy and, as such, the Municipality has chosen this time to proactively examine its current and future business inventory, and to develop an action-oriented approach to building a business attraction strategy to diversify the business base to meet consumers' needs while being complimentary, supportive and aligned with the Municipality's Land Use Planning strategies, Future Forward, the Municipal Development Plan and other reports produced by the Municipality.

A.2 Purpose of the Report

The primary objective of this project is the creation of a comprehensive business inventory, gap analysis and business climate readiness strategy. Typically, a region's economic base is developed through the expansion of export based industries, or through import substitution. Import substitution encourages people and businesses to buy their goods and services locally, rather than importing from another community, and attracts new businesses that recognize the leakage and provide a product or service to stop it. Import substitution strategies also contribute to quality of life and the social sustainability of a community bringing people together and reinforcing an inward, rather than outward, focus.

Important aspects of this project were to:

- Communicate with stakeholder groups in developing benchmark measurements to be used in the business inventory
- Engage with stakeholder groups in qualifying the gap analysis and targeting the types of businesses to be recruited
- Ensure compliance with the Municipality's Land Use Planning strategies in recommending land servicing requirements and business attraction activities
- Develop a complimentary strategy for business climate readiness and diversification with action plans for business recruitment that will include costs and potential resources.

A.3 Approach

The project was undertaken in seven phases, each of which comprises a section of this report, being:

- Background review¹ and economic base assessment
- Business Inventory development
- Market threshold quantitative analysis
- Identification of tertiary industry targets through a long-list/short-list approach
- Identification of secondary industry targets
- Exploring land and servicing requirements
- Developing of a three year business recruitment strategy

A.4 Economic Base Analysis

The economic base analysis presented here is to highlight those aspects of Wood Buffalo's population, labour statistics and industry and occupational composition most relevant to Wood Buffalo's business base. An understanding of the municipality's economic base is necessary in determining the strengths and weaknesses possessed by the municipality in business attraction efforts.

Throughout this report the basis of analysis is the 2006 Statistics Canada Census of Population. There are three reasons for basing the study in Statistics Canada data.

1. It gives a base that can be compared to other communities and the Province of Alberta.
2. The Statistics Canada census provides labour force information that is valuable for this study.
3. The Statistics Canada data set provides a more conservative estimate in which the Municipality can base its decisions.

This does not detract from the recognition and value of the municipal census. Where possible; municipal data will be used to draw comparisons with Statistics Canada data.

The following points summarize aspects of Wood Buffalo's economic base that have the potential to impact business retention, expansion and attraction efforts as well as the types of the businesses targeted for these activities.

- Wood Buffalo has a high percentage of the population of working age with the percentage of the population aged 20-49 much higher than the provincial average. This indicates business expansion and attraction efforts should focus on those aged 20-49
- Young children and pre-schoolers are also an important segment of the population offering opportunities for retailers targeting this age group
- The population is dominantly male with younger single men comprising large portions of the population
- Wood Buffalo has very high levels of household income with 63% of households earning more than \$100,000/year and a median household income of \$122,442/year almost double the provincial median of 63,988/year. While this indicates disposable income for personal goods and services it also indicates employers should anticipate paying higher wages than in other locations
- Low levels of unemployment in Wood Buffalo will make recruiting difficult for expanding and new businesses
- Wood Buffalo has a high proportion of workers with apprenticeships and college diplomas and working in the skilled trades and as transport and equipment operators suggesting businesses requiring these skills have a local labour pool to draw from. However, there is a smaller

¹ A list of documents referenced for this report is included in Appendix I

percentage of the population with a university degree. In addition 60% of those with a university degree, hold a degree in architecture, engineering and related studies. This lack of diversity in the local skill set will make it difficult to diversify the business base. As noted in the Worker Needs and Shortages Analysis of 2009, the shortage of clerical, skilled sales and service and intermediate sales and service occupations are of a particular concern in Wood Buffalo

- An assessment of migrant workers in Wood Buffalo suggests that industries outside of oil and gas extraction, construction and professional, scientific and technical services may have difficulties in attracting workers

A.5 Business Inventory

YLM™/The Breken Group, applied their patented data merging technology to this project to develop a comprehensive business inventory for the Regional Municipality of Wood Buffalo. DataMerge is a process and toolset developed by YLM that enables multiple separate databases to be combined, resulting in a comprehensive and accurate superset database for Wood Buffalo. The data sets merged for this project included:

- Sampling, Modeling and Research Technologies Inc.² - 2224 Records
- AlbertaFirst.com Data - 1559 Records
- Fort McMurray Business License Data - 3056 Records
- Fort McMurray Chamber of Commerce Membership - 447 Records
- Fort McMurray Advertisers Directory - 46 Records

The total combined Business Inventory for Wood Buffalo includes 5107 Records. The business inventory allows the Economic Development Branch to generate a number of reports including: NAICs Report Pie Charts, Employee Size Report Pie Charts, Revenue Report Pie Charts, Search Reports, Update Reports, Duplicate Address Reports, Duplicate Phone Reports & Stale Record Reports, History Search Analysis, Benchmark Analysis, Cluster and Industry Maps. Figure 1 below displays the percentage of businesses in each industry for all industries, while Figure 2 provides a more detailed look at the retail sector in Wood Buffalo.

² www.smres.com

Figure 1: Wood Buffalo Industry Pie Chart



Source: Wood Buffalo business inventory, 2010

Figure 2: Wood Buffalo Retail Mix Pie Chart



Source: Wood Buffalo business inventory, 2010

The business inventory results were compared to the City of Timmins and the District of Algoma in Ontario. These locations have been chosen as, of the possible choices, they most closely match Wood Buffalo’s population, mix of urban and rural, distance from major centres and resource or single industry representation. Wood Buffalo has only 16.04% of all businesses engaged in retail trade while Algoma records 19.27% and Timmins 18.70%. Most notable ‘gaps’ in Wood Buffalo’s profile are: accommodation and food services; arts, entertainment and recreation; health care and social assistance; educational services, finance and insurance and retail trade.

Within the retail trade sector this comparison reveals Wood Buffalo has a relatively lower mix of sporting goods, hobby, book and music; motor vehicle and parts dealers; general merchandise; furniture and

home furnishings; electronics and appliance and building material and garden equipment supplies. As we shall see, there are similarities between the gaps shown here and those evidenced by other means of assessment.

A.6 Tertiary Sector Targets

In discussing economic activities and industries, it is common to divide the economy in three sectors these bring the primary, activities related to agriculture and resource extraction; secondary, activities related to manufacturing; and tertiary, service related activities

The initial phase of the tertiary sector assessment included a detailed look into the location quotients and theoretical capacity for all industries. Location quotients (LQ) are used to inform a municipality of the relative degree of concentration of an industry in their area. Typically, employment by industry is used to calculate location quotients. In this study, however, the total number of business locations was used as the data available is more specific than employment by industry data.

- An LQ of 1.0 results if local sector business establishments are the same as provincial sector employment
- An LQ less than 1.0 indicates business establishment concentration that is less than Alberta
- An LQ over 1.0 indicates a concentration of economic activity that is greater than Alberta

Theoretical capacity was also calculated by using provincial data to develop a business to population benchmark ratio. This benchmark ratio was applied to Wood Buffalo's population to determine the theoretical capacity for the number of businesses in each industry for Wood Buffalo.

It is important to remember the following points in assessing these results:

- Using the Municipal Census data would result in shortages being more pronounced. (Note the appendix displays theoretical capacity using both the Statistics Canada Census of Population as well as the Municipal Census)
- When considering the theoretical capacity based on the Municipal Census, the large portion of temporary residents must also be considered. In 2006 the Municipal Census estimated 13.8% of the population to be living in project accommodation. While this population does draw on the goods and services available in Wood Buffalo the goods and services they do access are limited
- The data incorporates all businesses, large and small and has no sensitivity for size or service delivery of the businesses. Therefore, while there appears to be a need for 13 more flooring contractors in Wood Buffalo this may or may not be the case depending on the size of existing firms and their ability to meet local demand

This statistical overview was used to identify two 'long-lists' for public discussion, which formed the second phase of the tertiary assessment. Focus groups were held to create short lists of opportunities from the long lists developed in the statistical assessment. The focus groups were divided into 'general' opportunities and 'business and professional' opportunities. Focus groups were supplemented by additional 13 one on one and telephone interviews of community and business leaders.

A.6.1 Summary of Tertiary Targets

- Community engagement revealed the following general goods and services targets for business expansion and attraction efforts in Wood Buffalo:
 - Clothing and Shoe Stores
 - Personal Services

- Home Centres, Home Furnishings and Electronics
- Food Stores and Pharmacies
- Food and Accommodation Services
- Entertainment and Recreation
- Automotive Services
- Daycare facilities
- The priorities for business services identified included:
 - professional services
 - skilled trades professionals and HR support in attracting skilled trades
 - research and development
 - trucking and warehousing
 - equipment and machinery sales and leasing
 - other services to business
 - vehicle body shop and mechanical services
 - psychologists

There was a high level of agreement on challenges faced by new and expanding businesses which include the cost of leasing/purchasing space/land, the cost of labour, access to labour, zoning restrictions for home-based businesses, strained infrastructure and the negative perceptions of the oil sands.

A.7 Secondary Sector Targets

A value-chain analysis was used to determine opportunities in the secondary sector in Wood Buffalo. A value chain represents a continuum of economic activity where additional financial value is added at each point of activity in the chain. The value chain drives overall sector profitability, and effectively mapping the value chain of a locale is an essential component to assessing the potential for additional economic activities in a region. In the Provincial Energy Strategy, the Province of Alberta has made, “Extending our role along the value chain through upgrading and refining bitumen to transportation fuels and other products” a priority.

Examples of ways in which the value chain is already being extended in Wood Buffalo include:

- Williams, an integrated US natural gas company built a facility next to Suncor to recover natural gas liquids which can be used as petrochemical feedstock,
- Researching the use of petroleum coke, an upgrading by-product, to produce synthetic gas to generate power or hydrogen reducing their reliance on natural gas. Large scale synthetic gas production could transform the industry from a net consumer to a net provider of natural gas.

In order to identify potential investment opportunities related to Wood Buffalo’s oil sands sector, a methodology developed by Dr. Edward Feser, the head of the Department for Urban and Regional Planning at the University of Illinois at Urbana-Champaign, was used to study the supply chain of the target sector, oil and gas extraction

Dr. Feser’s framework has been applied to Wood Buffalo in generating Figure 3, which shows the 10 closest linked industries both upstream and downstream of the oil and gas extraction industry. The diagram shows the specific 4-digit NAIC as well as the relative strength of that industry in Wood Buffalo as defined by its business pattern location quotient. Upstream and downstream industries with LQ’s less than 1 theoretically offer the greatest potential for investment in Wood Buffalo.

Figure 3: Wood Buffalo Oil and Gas Extraction Upstream and Downstream Linked Industries

Supplier Industries			Customer Industries	
2131	Support activities for mining and oil and gas extraction (LQ 0.50)	Core Industry: Oil and Gas Extraction NAIC 2111	2212	Natural gas distribution (LQ 0)
2300	Construction		3241	Petroleum and coal products manufacturing (LQ 1.38) 1 firm
3329	Other fabricated metal product manufacturing (LQ 0.61)		2211	Electric power generation, transmission and distribution (LQ 1.10)
5324	Commercial and industrial machinery and equipment rental and leasing (LQ 1.47)		4861,4862,4869	Pipeline transportation (LQ 1.39, LQ 2.0, LQ 0)
3331	Agricultural, construction and mining machinery manufacturing (LQ 0)		5617	Services to buildings and dwellings (LQ 1.44)
3328	Coating, engraving, heat treating and allied activities (LQ 0.89)		3251	Basic chemical manufacturing (LQ 4.38)
3339	Other general-purpose machinery manufacturing (LQ 0.90)		3274	Lime and gypsum product manufacturing (LQ 0)
5413	Architectural, engineering and related services (LQ 0.82)		3253	Pesticide, fertilizer and other agricultural chemical manufacturing (LQ 0)
2212	Natural gas distribution (LQ 0)		3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing (LQ 0)

Source: Dr. Feser Linked Industry Model; Statistics Canada Business Patterns Data, 2009

The results shown in Figure 6 can be supplemented with the business inventory work, also completed as part of this study, to reveal not only the industries of focus and their relative strength, but also an inventory of the businesses active in Wood Buffalo in that industry. Those businesses are listed in the full report.

Capturing added value from the oil and gas sector may be difficult. Recent announcements by Oil Sands developers to send raw bitumen for upgrading in American facilities is an example of the Province's struggle to increase the amount of upgrading done in Alberta. Without the upgrading process, it would be difficult to capture further downstream value added activities from the oil sands sector in Wood Buffalo. Given this, work plans for the Economic Development Branch for downstream value added activities must be long term in nature and include close collaboration with the Ministry for Energy and the oil sands developers. In the medium term, there may be opportunities in focusing on the upstream activities and seeking to build regional capacity in the supply of goods and services to oil extraction industry.

Secondary sectors to be targeted in the medium term include:

- **Support activities for mining and oil and gas extraction**
- **Construction**
- **Fabricated metal product manufacturing**
- **Agricultural, construction and mining machinery manufacturing**
- **Coating, engraving, heat treating and allied activities**
- **General purpose machinery manufacturing**
- **Natural gas distribution**

A.8 Infrastructure Needs

The recently released Commercial and Industrial Land Use Study (CILUS) comes to a clear conclusion that the deficit of commercial and industrial space is resulting in larger problems with economic development potential and business sustainability.

- The current deficit of 230 gross hectares combined the anticipated need for a further 450 gross hectares to accommodate growth to 2031 require the Municipality to open and develop 680 gross hectares of industrial land;
- Lack of industrial land will seriously inhibit the Municipalities ability to expand value added activities surrounding the oil sands sector;
- In addition to the current deficit of approximately 189,000 square metres, it is estimated that between 400,000 and 710,000 square metres of new retail/service commercial space will be needed;
- Lack of commercial and retail space is already negatively impacting business expansion, which, by limiting the goods and services available to residents is impacting quality of life and the regions ability to attract skilled workers and new residents to the area.

In short, Wood Buffalo needs to address these deficits. Though the Lower Townsite Redevelopment Plan is expected to create significant revitalization in the urban core, the area will not specifically fulfil the role of large format or ‘big-box’ retail developments. The CILUS notes several candidate areas around Wood Buffalo, with an understanding that a significant level of coordination among different groups is also needed to accomplish this goal and eventually release lands for commercial and industrial development. However, moving forward with infrastructure upgrades and redevelopment of the urban core with mixed use commercial, retail and residential is also essential in attracting providers of the goods and services required by the residents of Wood Buffalo.

A.9 Strategic Objectives and Guiding Principles

An effective strategy is one that is fact-based and incorporates practical approaches that are likely to work. Based on the community engagement and research that went into this work, a common set of community needs and guiding principles that form the core of future business diversification and attraction efforts for Wood Buffalo’s Economic Development team was developed. In this portion of the work, the strategies articulated are broad, reflecting a series of “aspirational” goals and strategic objectives that formed the basis of a more detailed action plan (described below).

The goals and related strategies were based on information derived from:

- Municipal background documents (for a full list please see Appendix I)
- discussions with economic development staff
- a review of the existing economic development initiatives and best practices
- a look at what business diversification and attraction tactics other jurisdictions are employing
- identification of initiatives to increase competitiveness
- community profile and economic base analysis
- community and stakeholder input from the engagement process
- a review of available and needed resources to implement suggested components of the Strategy
- our professional experience with respect to findings related to other similar assignments

Consideration was also be given to the barriers and opportunities for attraction and how best to mobilize existing resources through the use of partnerships with other levels of government, business, academia and not-for-profit organizations.

B. Recommendations and Action Plan

The Action Plans look at a three year time horizon with achievable short-term goals to encourage the prospect of an ongoing commitment. With limited dollars and people to carry out the mandate it is very important to remain focused.

Economic development does not act in isolation – it impacts and is impacted by the community’s environmental, cultural and social objectives. As a result, the community’s Economic Development Branch must be open to partnerships: accepting them when approached by others and being proactive about establishing them. Sometimes the Branch will be the:

- Leader – initiating the partnership and taking primary responsibility for implementing it
- Facilitator – initiating the partnership and taking little to no role in implementation
- Supporter – reacting to a partnership invitation and contributing time and/or money towards implementation.

The Action Plan tables within this section show where and when this is the case.

There are a number of fundamentals that need to be addressed in order for Wood Buffalo to take the leap into a more aggressive sector attraction campaign. For the most part, these need to be taken care of in the first year. However, dealing with them does not have to happen (and should not happen) at the expense of all of outward marketing initiatives.

Strategic Objective #1

Improve investment readiness and fundamentals by regularly achieving the Gold Standard³ of services delivery and maintain top quality promotional presence in target markets and in social media

Annual Planning

- Adequate resources dedicated to investment retention and attraction.
- Incorporate training into the annual action plan. Most emphasis should be on training that provides staff with best practices, but also spend some dollars on sales/marketing training.
- Complete annual Business Expansion and Attraction Action Plans that will focus human and financial resources for all initiatives during the upcoming year. The plans will make an objective assessment of the previous year’s efforts, relating the outcomes to the targets that were set at the beginning of the year.
- Maintain a detailed and current source of community data including skills inventory, available property information and community profile and labour market statistics. Ongoing updates (minimum quarterly for all but Skills Inventory which is annual).

³ The Gold Standard of services delivery was developed by Millier Dickinson Blais for their municipal clients

Physical Infrastructure and Creating Dynamic Commercial Areas

- Continue collaborating with other Municipal departments to gain access to serviced commercial land. Verify the existence of “certified” shovel-ready development sites.
- Investigate best practices of creating dynamic main streets and commercial areas through the implementation of policies and legislation such as community improvement districts, facade improvement programs, enhanced building and architectural standards, encouraging retail and hospitality-only uses at street level and offices to above stories as well as civic square and park improvements.

Marketing and Promotion

- Create a web presence for the Economic Development Branch with dedicated references fulfilling the needs and priorities of site selectors and the retail and commercial sector.
- Develop commercial and retail promotion and information pieces in line with the marketing and branding strategy currently in development and consistent with municipal branding efforts.
- Print outs of research that further supports the credibility of the sector in Wood Buffalo (e.g. Province of Alberta brochures).
- Ensure all available commercial properties are identified and updated in online properties guide as a component of the recommended web presence.

Service Delivery – Department

- **Achieve the Gold Standard of service delivery**
 - All current and future promotional materials and tools must be available online.
 - Create an ability to provide immediate email responses with relevant attachments, including community profile, available properties, mapping and market analyses.
 - Encourage other departments to have land use planning information available electronically (e.g. Zoning By-law, building application).
 - Work with business licensing to transfer business licensing to NAIC standard
- **Contact information goes on EVERYTHING!** Ensure that the development officer’s contact details are very prominent on EVERYTHING that is published.

Public Relations

- Work with the Regional Municipality’s Communications Department to ensure that messages which support the outcomes of this strategy are a part of regular practice.

Contact Management

- Implementation of a robust and user friendly Contact Relationship Management system.
- Develop an “exit strategy” to track unsuccessful projects. This can be as simple as a survey with companies that leave Wood Buffalo or prospects that did not come to the community. Utilize the above mentioned CRM system to track unsuccessful projects.

Strategic Objective #2

Recruit retail and commercial investment from within the community through the implementation of a business retention and expansion program

Develop an ongoing business retention and expansion (BR+E) program focused on creating a diverse retail and commercial environment

- Every business owner should be contacted annually to evaluate their situation and determine the likelihood of their expansion or contraction. In the immediate future, Wood Buffalo needs to:
 - Prioritize the information needed from each firm such as number of employees, prospects for growth, challenges to growth, etc.
 - Prioritize those business segments highlighted from the long-list short-list process
 - ‘Clean’ the recently created business inventory. Contact each business listed in the newly created business inventory, we are suggesting the recruiting of summer interns to accelerate the process
 - Businesses that identify significant concerns or pending expansions should be visited by the Economic Development Branch or one of the Regional Municipality’s partner organizations as listed above.
- Use the BR+E program as a tool for ongoing annual evaluations of business gaps and measuring the success of retention and attraction strategies.

Implement a communications plan to reach out to important influencers in the community

- Work closely with the stakeholders to ensure they know the commercial opportunities being targeted.
- Develop and distribute a commercial and retail attraction brochure to be distributed to business association members and at community events.

Strategic Objective #3

Initiate a Rural Business Needs and Viability Assessment for Wood Buffalo

Initiate a rural business needs assessment for Wood Buffalo

- Utilize the business inventory to categorize businesses by postal code and highlight the business strengths and weaknesses of the rural areas.
- Engage with rural community and business leaders to recognize the unique business needs of each rural community.
- Utilize the BR+E program to target businesses in the urban area with the potential to expand or diversify services into the rural areas.
- Partner with First Nations, Metis and rural business associations as well as rural community leaders to promote retail and commercial opportunities to rural businesses and entrepreneurs.

Strategic Objective #4

Recruit retail and commercial investment from outside the community through a comprehensive business attraction and promotions campaign

Reach out to independent businesses and boutiques

- Independent businesses that are already operating in other communities can be an excellent source of opportunities.
- Distribute mail outs and brochures, using materials developed through the Marketing and Branding Strategy.

- Attend expositions and trade shows that feature independent businesses in Wood Buffalo's target markets. Examples include clothing exhibitions attending by purchasers from independent clothing retailers. Be sure to distribute commercial and retail attraction brochures at these events.

Reach out to regional and national chains, franchises and box stores

- Become a member of the International Council of Shopping Centres and attend the bi-annual Canadian conventions in Toronto (each year in October) and Whistler (each year in January).
- Develop a sophisticated marketing package consistent with the Marketing and Branding Strategy that responds to the specific demographic and community characteristics demanded by these retailers.
- Explore creating a reserve of designated commercial and industrial lands suitable for the needs of the big box priority retail outlets

Strategic Objective #5

Develop the value chain of the oil and gas sector through strategic industry, municipal and provincial partnerships

Outreach to attract upstream value added activities

- Partner with the province and other regions to leverage Wood Buffalo's time and money in attracting value added activities.
- Existing companies can be the most critical source of leads for upstream opportunities. It is important, to stay in touch with manufacturers and other end user service providers to identify what they are purchasing outside of Wood Buffalo. Understanding this will lead to picking up on opportunities.
- Target independent businesses that are already operating in other communities, especially those already supplying the oil sands industry.
- Attend expositions and trade shows that feature independent businesses supplying the oil sands industry

Market assessment and stakeholder engagement for downstream value added activities

- Initiate discussions with firms listed in the secondary value chain assessment of this report. Begin conversations about the opportunities in expanding the value chain in Wood Buffalo and develop a needs assessment to make the initiative a reality. Become involved in: Trade Team Alberta, Hydrocarbon Upgrader Task Force and Chemical Cluster Steering Committee.
- Continue the conversation with the Oil Sands Developers Group, key industry players and the provincial government. This initiative is a long term goal that will require the buy and support of these external parties.

Labour Market Development for Upstream Value Added Activities

- Ongoing relationship development with human resources managers of local companies in order to assess latest issues and how they may affect long term development
- Play a supporting role with stakeholders to develop labour attraction strategies that are intended to resolve issues as identified above

C. Conclusion

The Regional Municipality has been experiencing rapid and unparalleled growth. Wood Buffalo has been taking proactive steps to plan for growth and create a more economically and socially sustainable region. *Future Forward*, Fort McMurray's 20 year community vision identifies business diversification as a key goal for the future. The *Economic Development Strategy 2010-2014*, envisions a future with greater industrial sector balance, local provision of goods and services and supply of retail, commercial and professional services. The goal of this project was to assess the secondary and tertiary sector opportunities in Wood Buffalo and set out an action plan to realize those opportunities.

A statistical assessment which examined local industrial location quotients and theoretical capacity for business establishments was vetted and prioritized through a community engagement process. The result was a list of community priorities for the business expansion and attraction efforts of the Economic Development Branch. These priorities include personal and household needs such as clothing and shoe stores and options for entertainment and recreation, as well as business needs such as professional and technical services and equipment sales/leasing. Finally, recommendations for sectors to target in capturing greater value from the oil and gas supply chain are also provided.

The actions and targets to achieve increased diversity of business in Wood Buffalo include:

- Improving investment fundamentals
- Implementing a business retention and expansion program to recruit retail and commercial investment from within the community
- Implementing a marketing and promotions campaign to recruit retail and commercial investment from outside the community
- Developing the oil and gas value chain through strategic industry, municipal and provincial partnerships

The work will not be without its challenges. Past reports and community engagement revealed a shortage of industrial land and commercial and retail space, strained infrastructure, high cost of living and high wages. However, through provincial, municipal and industry collaboration the opportunities and targets set out in this report will be achieved.

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Appendix II North American Industrial Classifications (NAIC) Descriptions

Appendix III All Industries by Location Quotient (LQ) and Theoretical Capacity

Appendix IV High and Medium Priority Business Attraction Targets

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Appendix VI General Service Focus Group Results

Appendix VII Resident Businesses in Identified Secondary Sector Industries

1 Introduction

1.1 The Regional Municipality of Wood Buffalo in Context

The Province of Alberta and the Regional Municipality of Wood Buffalo (RMWB) are experiencing rapid and far-reaching structural changes. At the centre of the Alberta Oil Sands, the municipality has been experiencing phenomenal growth far greater than that experienced by any other municipality in Canada. According to municipal census Wood Buffalo expanded by 141.2% from 1999 to 2008.

With a population now exceeding 100,000, the Municipality is making efforts to plan for an envisioned future. *Future Forward*, presented to council in 2007, is a vision for the Regional Municipality in 2030 imagines a population of 200,000 and a diverse economy with Wood Buffalo being the business and industrial centre of Canada's northwest. One step towards achieving this vision is the development of an Economic Development Strategy (2010-2014), which summarizes its vision for the future in the following points. This strategy is anticipated to be reviewed by Municipal Council in 2010.

- While oil sands is its mainstay, the regional economy is more balanced and diversified with other sectors such as education, health services, research, tourism, etc. Playing larger roles.
- A greater proportion of goods and services for the oil sands industry and other sectors are provided from within the regional economy.
- Better balance between the supply of retail, commercial and professional services and consumers' diverse needs and demands.
- Partnerships between oil sands industry, education and municipal, provincial and federal levels of government are leading to the creation of a major oil sands and environmental research and innovation centre.
- Physical and social infrastructure development is leading to an increasingly appealing and desirable quality of life where individuals and families from various backgrounds are attracted to come, work and recreate and call home.

Business diversity is a strong theme in the strategy and, as such, the Municipality has chosen this time to proactively examine its current and future business inventory and to develop an action-oriented approach to building a business attraction strategy to diversify the business base to meet consumers' needs while being complimentary, supportive and aligned with the Municipality's Land Use Planning strategies and research studies. One such strategy is the *Lower Townsite Redevelopment Plan (2009) (LTRP)*, which recommends specific activities for economic development to promote the central business district as a location for corporate offices and street level retail. Another important document for this study is the recently completed *Commercial and Industrial Land Use Study*, which clearly sets out the infrastructure concerns and needs for expanding businesses in Wood Buffalo.

The region is experiencing some 'growing pains' as described in *Investing in our future: Responding to rapid growth of oil sands development (2006)*. Produced by the Government of Alberta, the report makes the following observations that will impact business and resident attraction strategies:

- The urban service area of Fort McMurray faces a serious shortage of affordable housing. As at November, 2006 there were 429 on the waiting list for affordable housing with only 200 additional units being developed by Wood Buffalo Housing and Development Corporation;

- Rental rates for a one bedroom apartment in 2006 were \$1,314/month compared to rates of \$760/month in 2000. A 73% increase in only 6 years. Vacancy rates in June, 2006 were considered to be near zero with 3% considered a balanced rental market;
- The Athabasca Northern Railroad cannot carry rail standard 286,000 lb railcars and needs \$250 million in upgrades to do so;
- The Fort McMurray area has no community health centres and only one continuing care centre located at the hospital. The 26 year old hospital in Fort McMurray is in need of some repair, it is too small to accommodate current demands, and it cannot accommodate any physical expansion. The area has fewer physicians per capita than other similarly sized centres in Alberta and has the lowest health satisfaction levels of the entire province;
- While there are high levels of satisfaction with schools they are also nearing capacity with few options to expand facilities. Given population growth predictions these expansions will be necessary in the future.

At the same time it should be noted that a recent residents survey of municipal services and facilities found that citizens ranked municipal services highly and felt they received value for their 'home' tax dollar. The Alberta Government's report also notes several infrastructure developments that will positively impact business attraction and expansion strategies such as:

- The Government of Alberta has committed to twinning highway 63 from Grassland to Fort McMurray
- Oil sands companies have been and continue to be engaged in funding and constructing infrastructure (highway and bridge construction) to ensure safe and ease of access to their facilities
- The municipality has planned the construction of seven truck staging areas throughout the municipality
- While water and waste water are over capacity there are plans and budgets allocated to rapidly expand capacity to meet current demand and exceed demand by 2011.

The points presented here have been considered in setting out the recommendations in this report. Infrastructure needs will be further explored in Section 6 of this report.

1.2 Purpose of the Report

The primary objective of this project is the creation of a comprehensive business inventory, gap analysis and attraction strategy for targeted businesses identified by the gap analysis. Typically, a region's economic base is developed through:

1. the expansion of export based industries, which focuses on bringing new money into the economy, or
2. through import substitution, which focuses on keeping money in the local economy. Import substitution encourages people and businesses to buy their goods and services locally, rather than importing from another community, and attracts new businesses that recognize the leakage and provide a product or service to stop it. Import substitution strategies, however, also contribute to quality of life and the social sustainability of a community bringing people together and reinforcing an inward, rather than outward, focus.

In keeping with *Future Forward: Fort McMurray 2030*, the business attraction strategy has taken a longer term perspective. Important aspects of this project were to:

- Communicate with stakeholder groups in developing benchmark measurements to be used in the business inventory
- Collaborate with stakeholder groups in qualifying the gap analysis and targeting the types of businesses to be recruited
- Ensure compliance with the Municipality's Land Use Planning strategies in recommending land servicing requirements and business attraction activities
- Develop a complimentary strategy for business attraction and diversification with action plans for business recruitment that will include costs and potential resources.

1.3 Approach

The project was undertaken in seven phases, each of which comprises a section of this report, being:

- Background review and economic base assessment
- Business Inventory development
- Market threshold quantitative analysis
- Identification of tertiary industry targets through a long-list/short-list approach
- Identification of secondary industry targets
- Exploring land and servicing requirements
- Developing of a three year business recruitment strategy

2 Economic Base Analysis

The economic base analysis presented here is to highlight those aspects of Wood Buffalo's population, labour statistics and industry and occupational composition most relevant to Wood Buffalo's business base. An understanding of the municipality's economic base is necessary in determining the strengths and weaknesses possessed by the municipality in business attraction efforts.

2.1 Location

Located in north-eastern Alberta, the Regional Municipality of Wood Buffalo is Canada's largest municipality covering an area over 68,000 km². The majority of the population and development is along Highways 63 and 881. The study conducted in preparing this report was meant to cover the entire municipality including the urban service area of Fort McMurray as well as the rural hamlets of Anzac, Conklin, Draper, Fort Chipewyan, Fort Fitzgerald, Fort McKay, Gregoire Lake, Janvier, Mariana Lake and Saprae Creek.

2.2 Demographic Assessment

2.2.1 Population Growth

To say that Wood Buffalo has been experiencing rapid population growth is an understatement. According to Statistics Canada 2006 Census of Population, the municipality grew by 24.2% from 2001 to 2006. At the same time, Alberta's population increased by 10.6%. It should be noted that in this time period Alberta was Canada's fastest growing Province. According to Wood Buffalo's Municipal Census, the population grew by 29.8% from 2002 to 2006. Wood Buffalo's Planning and Policy Division predicts the region will grow to 250,000¹.

It needs to be recognized that throughout this report the basis of analysis is the 2006 Statistics Canada Census of Population. There are three reasons for basing the study in Statistics Canada data.

1. It gives a base that can be compared to other communities and the Province of Alberta.
2. The Statistics Canada census provides labour force information that is valuable for this study.
3. The Statistics Canada data set provides a more conservative estimate in which the Municipality can base its decisions. This does not detract from the recognition and value of the municipal census. Where possible; municipal data will be used to draw comparisons with Statistics Canada data.

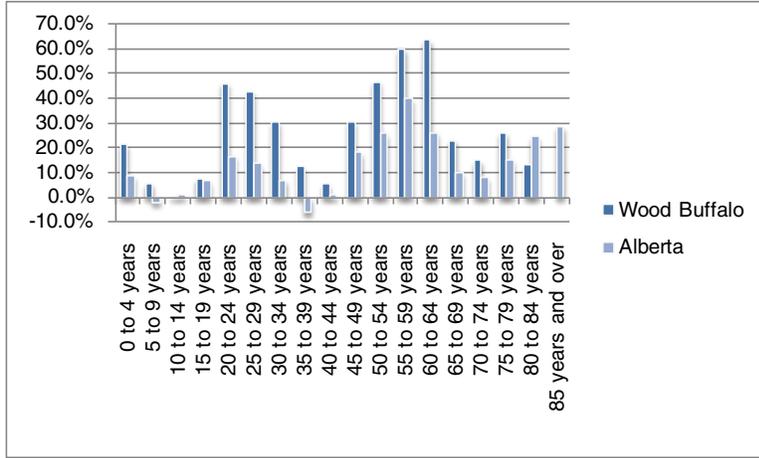
Of significant importance in this study is the non-resident population of Wood Buffalo. The 2006 Municipal Census estimated this population to be 10,442 or 13.8% of the total population. By 2008 this had grown to 26,284 or 36.3% of the total population. This non-resident population plays a significant role in assessing business and service needs in the municipality and will be considered throughout the recommendations.

¹ Regional Municipality of Wood Buffalo Census 2008

2.2.2 Population by Age Structure

Wood Buffalo is a young municipality with a very strong working age population. Figure 1 below shows the demographic breakdown of Wood Buffalo in 2006.

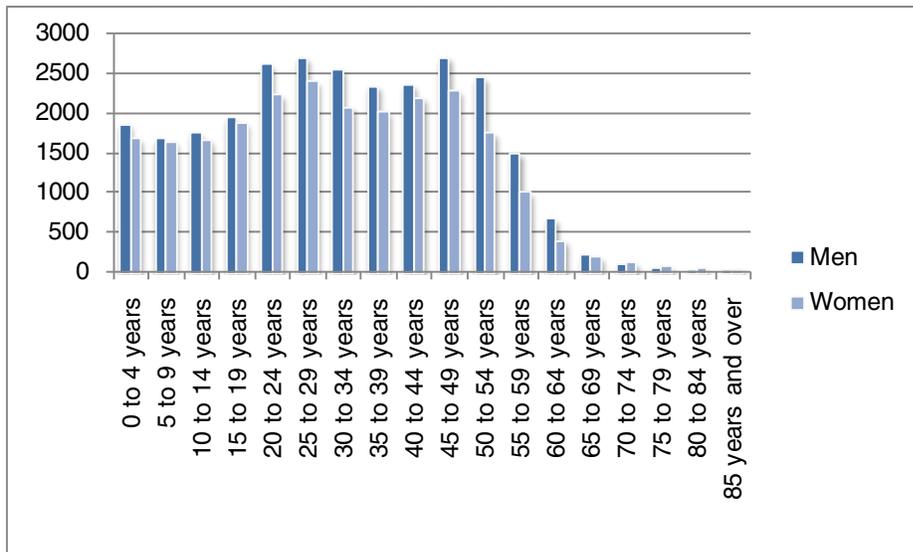
Figure 1: Demographic profile, Regional Municipality of Wood Buffalo 2006



Source: Statistics Canada Community Profiles, 2006

Business attraction efforts should consider both the working age population, which represents the available labour force, as well as the unique characteristics of other demographics age cohorts as they may impact on the nature of goods and services required by the municipality’s citizens. Here we can see that Wood Buffalo has, in comparison to Alberta, a relatively high population of those ages under 14 (most notably under the age of 4), 20-34 as well as those aged 35-54. On the other hand, Wood Buffalo has a very low population of those aged over 55. It appears that those reaching retirement age are choosing to leave Wood Buffalo for their retirement years. As such, businesses required by the citizens may be geared to younger families, young adults and children.

Figure 2: Population by age group and gender, Wood Buffalo 2006

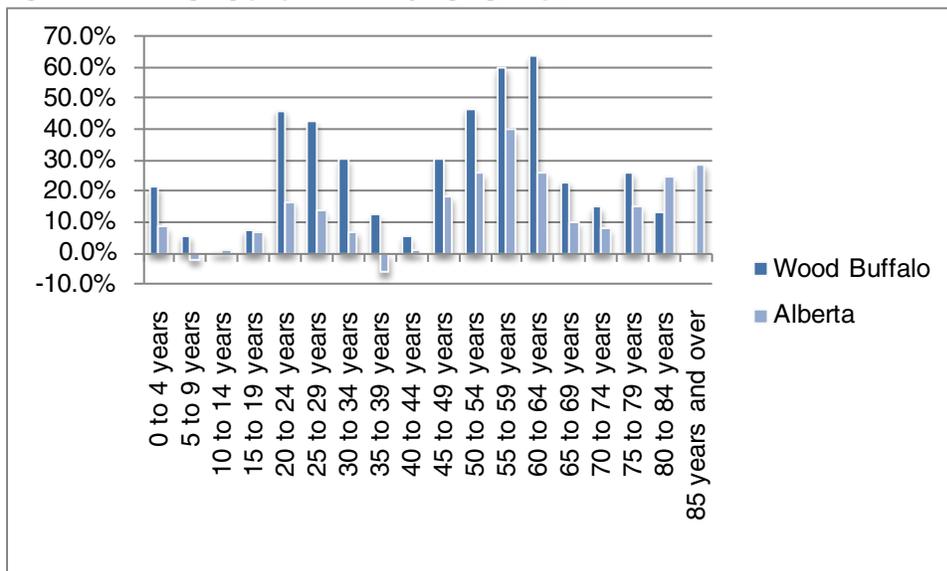


Source: Statistics Canada Community Profiles, 2006

Figure 2 above shows the population break down of men vs. women. This chart makes it clear that for all age groups, most notably the working age population aged 20-59, there are significantly more men than women. Young adults living in Wood Buffalo are predominantly men. Additionally, according to the 2006 Statistics Canada Census just over 40% of Wood Buffalo's population has never been legally married (measuring the population over 15 years of age). For the Province of Alberta, only 34% of the population has never been married. This may lead to the attraction of goods and services for not only young adults but more specifically young and single adult men.

Figure 3, representing data collected by Statistics Canada for the period 2001 to 2006, shows that the fastest growth rate is in the population aged 45-64 years with significant growth also being experienced by those aged 20-34. The less than 4 age cohort is also showing very strong growth. While the over 65 age cohort is posting strong growth, this age group still comprises a very small percentage of the overall population (less than 2%). Business providing goods and services targeting the age groups presented here should be considered as targets.

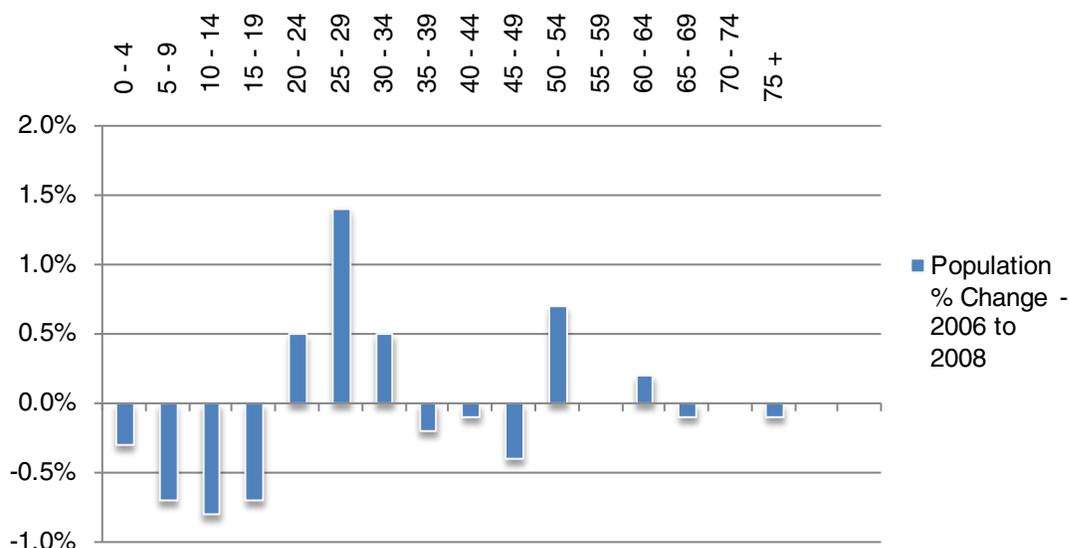
Figure 3: Changing population by age group, Wood Buffalo 2001 to 2006



Source: Statistics Canada Community Profiles, 2006

Figure 4 draws municipal census information to predict how the population has changed since 2006. While the young adult population, aged 20-34, has continued to grow, the population of children has declined.

Figure 4: Changing population by age group, Wood Buffalo 2006 to 2008



Source: Regional Municipality of Wood Buffalo Census 2008

2.2.3 Employment, Education and Income Profiles

Wood Buffalo has very high participation and employment rates. As seen in Figure 5 the participation and employment rates exceed the provincial average by 10%. With unemployment rates of only 2.8% in 2006, there is very little surplus labour available to new or expanding businesses in Wood Buffalo. This tight labour market may make it difficult for new businesses in Wood Buffalo to find employees.

Figure 5: Participation and employment rates, Wood Buffalo 2006

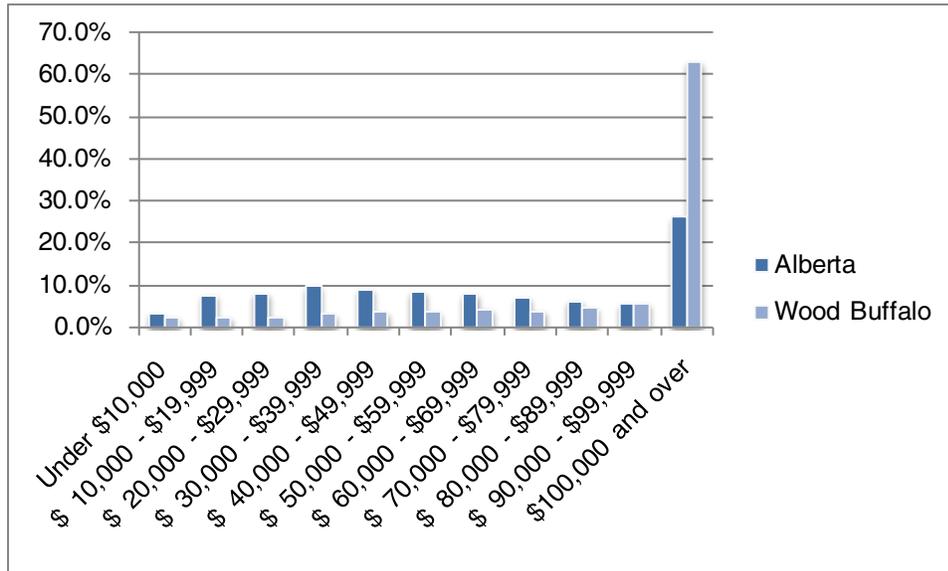
	Alberta	Wood Buffalo
Participation rate	74.2	84
Employment rate	71.7	81.7
Unemployment rate	3.4	2.8

Source: Statistics Canada Community Profiles 2006

As is evident in Figure 6 below, Wood Buffalo has very high levels of household income, with over 63% of private households² earning over \$100,000/year. The provincial average is only 26%. The median household income in Wood Buffalo is \$122,442 compared to \$63,988 for Alberta. This high level of household income could be considered a strength for Wood Buffalo in their business attraction efforts, especially in the attraction of retail and personal goods and services. However, this coupled with the low unemployment rates indicate businesses in Wood Buffalo are facing higher wage expenses than businesses elsewhere. These high wages will likely present a challenge to new and expanding businesses.

² A private household applies to a person or group of persons who occupy the same dwelling

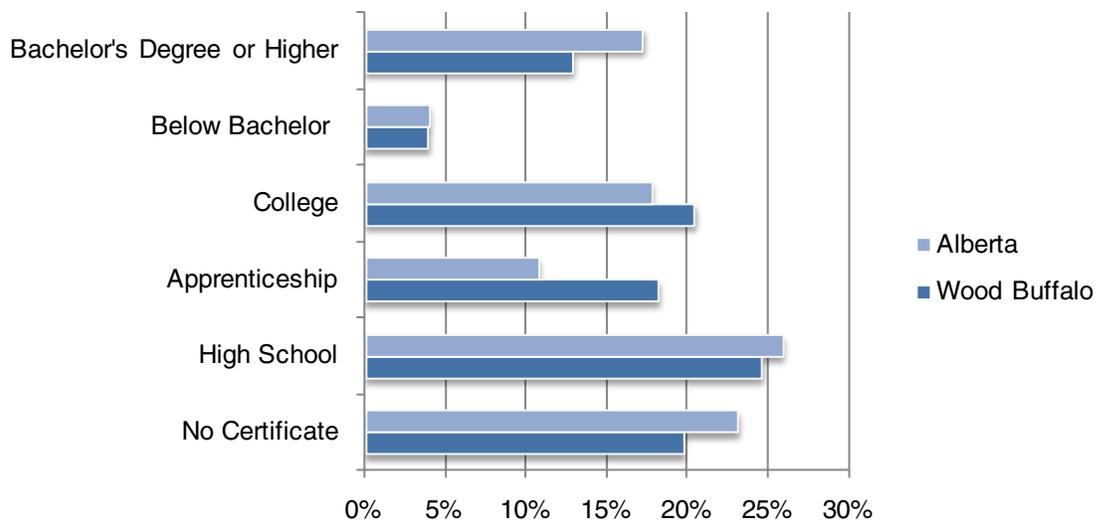
Figure 6: Household Income, Wood Buffalo 2005



Source: Statistics Canada Community Profiles, 2006

Education and field of study can also impact the attraction of new businesses. Potential investors will be concerned with the available skills in the area that they can choose from. In Figure 7 we can see that Wood Buffalo is comparatively high in apprenticeships and college education. The region, however, does rank lower than the provincial average in the attainment of bachelor’s degrees or higher. This might impact those businesses that require these levels of education and skills in their employees.

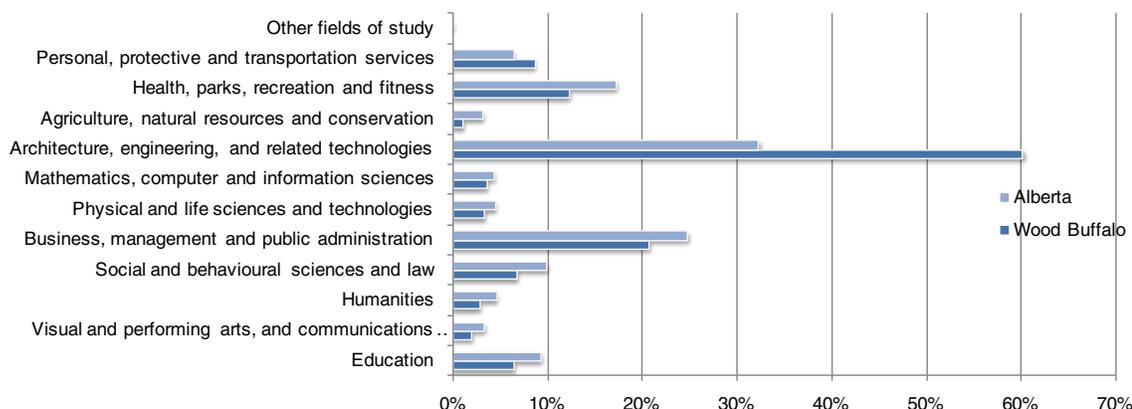
Figure 7: Educational Attainment, Wood Buffalo 2006



Source: Statistics Canada Community Profiles, 2006

Figure 8 below shows the area of study for those achieving diplomas or degrees. Over 60% of those holding a diploma or degree in Wood Buffalo hold their diploma in architecture, engineering and related technologies. This bodes well for businesses in professional and technical services. However, Wood Buffalo is lower in all other areas of study. As the Municipality looks to diversify its business base it may face challenges based on the educational skill set available. The Municipality may also look for ways to diversify the skills base of its residents as a way to attract a diverse set of businesses.

Figure 8: Education by major field of study, Wood Buffalo 2006



Source: Statistics Canada Community Profiles, 2006

2.3 Industry Assessment

2.3.1 Labour Force by Industry and Location Quotients

Location quotients (LQ) are used to inform a municipality of the relative degree of concentration of an industry in their area. In calculating industry location quotients the relative industry employment in a municipality is divided by the relative industry employment in a broader, benchmark area. In this case we have compared Wood Buffalo to the Province of Alberta. High LQ's indicate the economic base of a region and those industries that are exporting goods and services beyond the local area.

- An LQ of 1.0 results if local sector employment is the same as provincial sector employment.
- An LQ less than 1.0 indicates a concentration of economic activity that is less than Alberta.
- An LQ over 1.0 indicates a concentration of economic activity that is greater than Alberta.

The focus here is to identify those industries with lower location quotients. These industries likely represent 'leakage' in the local economy where local supply is insufficient to meet local demand and resident citizens and businesses are required to purchase goods and services outside of the local economy. It is these gaps that the Municipality seeks to close through business diversification. Section 5 will go into this in further detail using Canadian Business Patterns Data. Figure 9 displays the location quotients in for Wood Buffalo's major industry groups³.

³ Industry groups are by North American Industrial Classification (NAIC) a description of which is provided in Appendix II

Figure 9: Location Quotients for Industry Major Groups, Wood Buffalo 2006

Industry	Location Quotient
21 Mining and oil and gas extraction	4.3
23 Construction	1.3
53 Real estate and rental and leasing	1.2
22 Utilities	1.1
56 Administrative and support, waste management and remediation services	1.1
72 Accommodation and food services	1.0
<hr style="border-top: 1px dashed black;"/>	
48-49 Transportation and warehousing	0.9
44-45 Retail trade	0.9
81 Other services (except public administration)	0.8
61 Educational services	0.8
41 Wholesale trade	0.8
91 Public administration	0.6
62 Health care and social assistance	0.6
51 Information and cultural industries	0.5
71 Arts, entertainment and recreation	0.5
54 Professional, scientific and technical services	0.5
52 Finance and insurance	0.4
31-33 Manufacturing	0.4
55 Management of companies and enterprises	0.3
11 Agriculture, forestry, fishing and hunting	0.1

Source: Statistics Canada Community Profiles, 2006

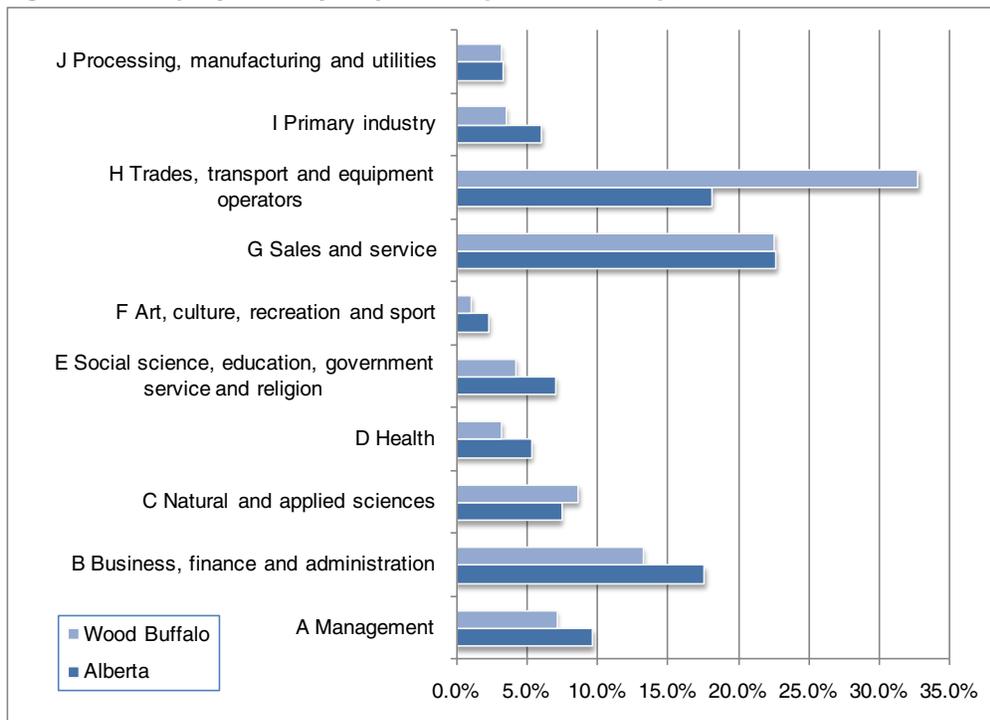
As shown in Figure 9, Wood Buffalo's export economic base is largely dependent on the mining and oil and gas extraction sector. Industries with LQ less than 1 will be investigated further using Canadian Business Patterns Data. This data allows for a much more detailed and specific assessment of sub-industry strengths and weaknesses.

2.3.2 Labour Force by Occupation

An occupational assessment of Wood Buffalo can supplement the educational assessment in understanding the skills available in the local labour force. As mentioned previously, the skills of the local labour force are a factor in business attraction efforts. Figure 10 breaks down the occupational composition of the local labour force by major occupational group using the National Occupation Classification (NOC) system.

In line with the educational assessment, which showed a high concentration of workers with apprenticeships in the trades, occupations in trades, transport and equipment operators and related occupations comprise 32.8% of the local labour force; A rate 14.6% higher than the provincial average. On a provincial comparison basis, the region is well represented in the trades. The region is also well represented in occupations related to natural and applied sciences.

Figure 10: Employment by Major Occupational Group, Wood Buffalo 2006



Source: Statistics Canada Community Profiles 2006

Conversely, the region is under-represented in occupations related to management; business, finance and administration; health; social science, education, government service and religion; art, culture, recreation and sport; and occupations unique to primary industry. Due to the geographic position of Wood Buffalo and its limitations in agriculture, forestry, fishing and hunting, this industry group and its occupational component will not be assessed further; however, the other under-represented occupations will impact business attraction efforts. This will be addressed later in the report. When looking at Major Occupational Group G in Figure 10 it appears the region is adequately represented in sales and service occupations. However further investigation shows there is an under-representation in retail sales persons and sales clerks (sub-group G2 in Figure 13), which is also a concern for the municipality.

These statistical findings in under-represented occupations are supported by the findings of the *Wood Buffalo Worker Needs and Shortages Analysis, 2009*. This report highlights that four occupations are of concern to employers due to difficulties in both recruiting and retaining employees. These four occupations are:

- Clerical occupations
- Skilled sales and service occupations
- Intermediate sales and service occupations
- Trades and skilled transport and equipment operators

Wood Buffalo's Worker Needs Analysis also stated 31% of businesses are impacted by difficulties in either recruitment or retention of workers. Further, 54% of new hires are due to turnover. While this is a decline from the 2008 survey, this is still an extremely high turnover rate. In retail, health care and social assistance, accommodation and food services and other services over 75% of new hires were due to turnover. The most commonly cited reasons for difficulties in hiring were lack of qualifications and wages not meeting expectations or the cost of living in Fort McMurray. In addition to these challenges to hiring

the high degree of competition for workers was listed as a primary challenge in retaining workers. While the competition for workers and cost of living in Fort McMurray has eased somewhat in the recent past, if oil sands activities once again accelerate the same pressures and challenges can be expected to reoccur. Indeed, the survey also found 56% of respondents expected their workforce to expand in the next 12 months.

Many regions are also now giving consideration to the creative industries in their business attraction and diversification efforts. These industries are often associated with higher levels of wealth and education as well as entrepreneurs and the self-employed. Figure 11 below shows that Wood Buffalo is well below the provincial average for those employed in creative industries.

Figure 11: Employment in Creative Industries, Wood Buffalo 2006

Creative Industry, as a % of total labour force 15 and over

	Alberta	Wood Buffalo
2001	32.09%	24.94%
2006	32.60%	24.45%

Source: Statistics Canada Community Profiles, 2006

Millier Dickinson Blais, in conjunction with researchers from the University of Toronto, have developed a model to further classify creative occupations by standardized NOC classification. Figure 12 below gives a more detailed breakdown of employment in the creative industries in Wood Buffalo using this classification model. The highest level of representation and growth in this group comes from professional and technical occupations related to natural and applied sciences. Reinforcing the lessons learned from employment by occupation, Wood Buffalo is comparatively low in its representation of those employed in management occupations as well as occupations related to health, law, psychology, social work, education, art and culture.

Figure 12: Employment by Creative Industry, Wood Buffalo 2001-2006

Wood Buffalo Creative Industries - Labour Force 15 and over			
	Field	2001	2006
A0 Senior management occupations		190	140
A1 Specialist managers		540	650
A2 Managers in retail trade, food and accommodation services		650	685
A3 Other managers, n.e.c.		710	930
B0 Professional occupations in business and finance		395	440
B1 Finance and insurance administration occupations		170	235
C0 Professional occupations in natural and applied sciences		1,005	1,400
C1 Technical occupations related to natural and applied sciences		1,065	1,525
D0 Professional occupations in health		130	160
D1 Nurse supervisors and registered nurses		260	385
D2 Technical and related occupations in health		190	295
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers		270	295
E1 Teachers and professors		710	740
F0 Professional occupations in art and culture		55	170
F1 Technical occupations in art, culture, recreation and sport		185	210

Source: Statistics Canada Community Profiles, 2006

Figure 13: Employment by Occupation, Wood Buffalo 2006

	Alberta	Wood Buffalo
A Management occupations	9.7%	7.1%
A0 Senior management occupations	1.0%	0.4%
A1 Specialist managers	2.5%	1.9%
A2 Managers in retail trade, food and accommodation services	2.8%	2.0%
A3 Other managers, n.e.c.	3.4%	2.8%
B Business, finance and administration occupations	17.7%	13.3%
B0 Professional occupations in business and finance	2.5%	1.3%
B1 Finance and insurance administration occupations	1.5%	0.7%
B2 Secretaries	1.5%	0.8%
B3 Administrative and regulatory occupations	2.3%	1.7%
B4 Clerical supervisors	0.5%	0.3%
B5 Clerical occupations	9.5%	8.4%
C Natural and applied sciences and related occupations	7.5%	8.7%
C0 Professional occupations in natural and applied sciences	4.0%	4.2%
C1 Technical occupations related to natural and applied sciences	3.5%	4.5%
D Health occupations	5.4%	3.3%
D0 Professional occupations in health	1.1%	0.5%
D1 Nurse supervisors and registered nurses	1.6%	1.1%
D2 Technical and related occupations in health	1.4%	0.9%
D3 Assisting occupations in support of health services	1.3%	0.8%
E Occupations in social science, education, government service and religion	7.1%	4.3%
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	1.9%	0.9%
E1 Teachers and professors	3.3%	2.2%
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	1.8%	1.2%
F Occupations in art, culture, recreation and sport	2.3%	1.1%
F0 Professional occupations in art and culture	0.9%	0.5%
F1 Technical occupations in art, culture, recreation and sport	1.4%	0.6%
G Sales and service occupations	22.7%	22.6%
G0 Sales and service supervisors	0.9%	1.2%
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	1.9%	0.8%
G2 Retail salespersons and sales clerks	4.1%	2.7%
G3 Cashiers	1.7%	2.0%
G4 Chefs and cooks	1.4%	1.3%
G5 Occupations in food and beverage service	1.6%	1.6%
G6 Occupations in protective services	1.4%	1.8%
G7 Occupations in travel and accommodation, including attendants in recreation and sport	0.9%	1.0%
G8 Child care and home support workers	1.6%	1.7%
G9 Sales and service occupations, n.e.c.	7.1%	8.5%
H Trades, transport and equipment operators and related occupations	18.2%	32.8%
H0 Contractors and supervisors in trades and transportation	1.1%	1.9%
H1 Construction trades	3.3%	3.6%
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	1.4%	4.0%
H3 Machinists, metal forming, shaping and erecting occupations	1.9%	3.4%
H4 Mechanics	2.4%	6.0%
H5 Other trades, n.e.c.	0.8%	1.0%
H6 Heavy equipment and crane operators, including drillers	1.2%	5.9%
H7 Transportation equipment operators and related workers, excluding labourers	3.6%	4.4%
H8 Trades helpers, construction and transportation labourers and related occupations	2.5%	2.6%
I Occupations unique to primary industry	6.1%	3.6%
I0 Occupations unique to agriculture, excluding labourers	3.4%	0.2%
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	1.4%	2.1%
I2 Primary production labourers	1.3%	1.3%
J Occupations unique to processing, manufacturing and utilities	3.4%	3.2%
J0 Supervisors in manufacturing	0.3%	0.5%
J1 Machine operators in manufacturing	1.6%	2.2%
J2 Assemblers in manufacturing	0.6%	0.1%
J3 Labourers in processing, manufacturing and utilities	0.8%	0.4%

Source: Statistics Canada Community Profiles 2006

2.3.3 Migration and Mobility

Understanding the tight labour and housing market, it is not surprising that workers commute from outside of Wood Buffalo to work in Wood Buffalo. What is surprising is the large number of them and the distances they commute from. The Wood Buffalo census showed that 10,442 workers lived in camps in 2006. Figure 14 shows that 9,445 workers (the sum of All Places and Alberta) commuted from outside the Municipality to work. This is similar to the number of camp workers described in the municipal census. What the figure also shows is the industry these migrant workers work in. While all industries are importing workers, some import more than others. It is interesting to note that those same industries that exhibit low LQ and low occupational employment; such as management, health, education, arts and entertainment, finance and insurance; also have fewer migrant workers. This may be an expression of the ability of these industries to attract workers.

Figure 14: Migrant Workers, Wood Buffalo 2006

	All Places (except Alberta)	Alberta
All Industries	3650	5795
11 Agriculture, forestry, fishing and hunting	30	15
21 Mining and oil and gas extraction	1030	2030
22 Utilities	50	75
23 Construction	1360	1900
31-33 Manufacturing	210	160
41 Wholesale trade	80	90
44-45 Retail trade	105	85
48-49 Transportation and warehousing	70	145
51 Information and cultural industries	10	15
52 Finance and insurance	0	5
53 Real estate and rental and leasing	90	115
54 Professional, scientific and technical services	145	375
55 Management of companies and enterprises	15	5
56 Administrative and support, waste management and remediation services	80	115
61 Educational services	10	60
62 Health care and social assistance	35	55
71 Arts, entertainment and recreation	0	15
72 Accommodation and food services	170	240
81 Other services (except public administration)	120	275
91 Public administration	35	20

Source: Statistics Canada Commuter Flow Patterns 2006

2.4 Summary of the Economic Base Analysis

The following points summarize aspects of Wood Buffalo's economic base that have the potential to impact business retention, expansion and attraction efforts as well as the types of the businesses targeted for these activities.

- Wood Buffalo has a high percentage of the population of working age with the percentage of the population aged 20-49 much higher than the provincial average. High rates of growth of those aged 20-34 and 45-64 indicates business expansion and attraction efforts should focus on those aged 20-49
- Young children and pre-schoolers are also an important segment of the population offering opportunities for retailers targeting this age group
- The population is dominantly male with younger single men comprising large portions of the population
- Wood Buffalo has very high levels of household income with 63% of households earning more than \$100,000/year and a median household income of \$122,442/year almost double the provincial median of 63,988/year. While this indicates disposable income for personal goods and services it also indicates employers should anticipate paying higher wages than in other locations
- Low levels of unemployment in Wood Buffalo will make recruiting difficult for expanding and new businesses
- Wood Buffalo has a high proportion of workers with apprenticeships and college diplomas and working in the skilled trades and as transport and equipment operators suggesting businesses requiring these skills have a local labour pool to draw from. However, there is a smaller percentage of the population with a university degree. In addition 60% of those holding a degree are educated in architecture, engineering and related studies. This lack of diversity in the local skill set will make it difficult to diversify the business base. Of particular concern are clerical, skilled sales and service and intermediate sales and service occupations
- An assessment of migrant workers in Wood Buffalo suggests that industries outside of oil and gas extraction, construction and professional, scientific and technical services may have difficulties in attracting workers

3 Business Inventory

YLM™/The Breken Group, applied their patented data merging technology to this project to develop a comprehensive business inventory of the Regional Municipality of Wood Buffalo. At the outset this business inventory is intended as an internal tool for use by the Economic Development Branch with future consideration as an external tool available to the community. DataMerge is a process and toolset developed by YLM that enables multiple separate databases to be combined, resulting in a comprehensive and accurate superset database for Wood Buffalo. All businesses and organizations from the multiple sources are included in the database (each as a single information record) with the attributes from each database combined for each individual record. The YLM DataMerge Process includes the following steps: formatting and grooming the data, matching and reconciling the data based via a set of “fill in the blanks” business rules, applying NAIC codes, importing the data for the Public Facing Directory Application (includes time stamping information for every update) and identifying gaps in the data set.

The data sets merged for this project included:

- Sampling, Modeling and Research Technologies Inc.⁴ – 2,224 Records
- AlbertaFirst.com Data – 1,559 Records
- Fort McMurray Business Licence Data – 3,056 Records
- Fort McMurray Chamber of Commerce Membership - 447 Records
- Fort McMurray Advertisers Directory - 46 Records

The combined set of records was then ‘scrubbed’ using sensitivity points as a probable match, to eliminate duplicates. The sensitivity points, which seeks matched pieces of data to identify possible duplicates includes business name, city, street address, phone number, contact name, etc. This process was continually repeated as updates for each of the multiple data sources become available. The merged and scrubbed dataset was then reviewed as a final stage in creating a clean merged database, which includes all businesses in the region.

The total combined Business Inventory for Wood Buffalo includes 4,806 Records. This is significantly more than the number of businesses stated in the recently produced Commercial and Industrial Land Use Study (CILUS); however, the process used for this study utilized multiple data source while the CILUS reported a single data source. Here are some important characteristics of the business inventory:

- There are 1,498 home based businesses based on the classification used in Wood Buffalo’s business licensing data set;
- There are 319 businesses included that are classified as non-resident but have a physical address in Wood Buffalo;
- There were only 46 non-resident businesses not imported from Wood Buffalo’s businesses licensing data. The majority of these businesses are located in the Edmonton Region and are classified as construction or other trades services.

Although the quality of the Directory data is dependent on the quality of the data sources used as input, the DataMerge process inherently improves the data quality on a continuous basis. The proposed business data system generates a number of reports to manage the data quality, including tools that assist in performing periodic audits. Each business actually has over 100 fields in the database, with the

⁴ www.smres.com

Wood Buffalo administrative staff has access to the data at any time, downloading it directly from the live directory into a spreadsheet. Each organization in the system has 100 fields associated with it. Should the RMWB choose, business associations, such as the chamber of commerce or the individual businesses themselves can have access to update aspects of their record.

Figure 16: Business Inventory Economic Development Tools

comp_id	name	last_upd	invmonth	naics	naics_1pry	size	sales	s_street	s_city	s_postal	r_region	phone	fax	email	add	ypr	business_year	export	head_office	expiry_2016	time_updat
110550	Danion Re	10/16/2004	2 23 29	21235	Nonmetallic 1 to 4	\$500 000	65	Maine Edwardoul	B2A 4T1	CapeBrato	(902) 564-5393										
111920	Kelly Rock	10/16/2004	5 14 43	21235	Nonmetallic 5 to 9			418 Portsv Edwardoul	B2A 4T8	CapeBrato	(902) 567-2474										
114108	Logan Gec	10/16/2004	1 56 36	21239	Nonmetallic 20 to 49			55 to 10137 Cenroc Swawacke	B09 2J8	Coichester	(902) 639-2043										
114487	Scitia Gel	4/22/2004	Oil & Gas	21311	Mining Act 1 to 4			Less than 46 Inglis P Truro	B2N 4B4	Coichester	(902) 895-2206										
116197	Martin Mar	4/21/2004	Sand & Gr	21232	Sand Grav 50 to 99			510 to 29 Adults Con-Melgren	B8E 2D8	Quysboro	(902) 747-1111			www.myp.com							
116443	Altmex Ca	10/17/2004	6 57 17	21311	Mining Act 1 to 4			Less than 17 Feogon Dartmouth	B2V 4H6	Halifax	(902) 461-1791										
116481	Pugliesew	10/17/2004	5 01 14	21311	Mining Act 1 to 4			Less than 30 Akerley Dartmouth	B3B 1N1	Halifax	(902) 423-2651										
116513	Rainbow RA	4/22/2004	Oil Offshor	21239	Nonmetallic 1 to 4			Less than 12 Charlou Dartmouth	B2W 2R4	Halifax	(902) 482-1111			www.rainbowresourcesltd.com							
117746	Rainbow RA	4/22/2004	Oil Offshor	21311	Mining Act 1 to 4			Less than 1 Cress Rt Dartmouth	B2W 2G8	Halifax	(902) 468-5691										
118835	Chemex C	4/21/2004	Oil & Gas	21311	Mining Act 1 to 4			Less than 1909 UpperHalifax	B3J 3F2	Halifax	(902) 496-3090										
118769	Marine Log	4/21/2004	Fishery Cc	21311	Mining Act 1 to 4			Less than 10 3045 RtHalifax	B3E 3P1	Halifax	(902) 492-2489										
119142	Cook's Off	10/17/2004	1 42 04	21311	Mining Act 1 to 4			Less than 14 Colpet Halifax	B3P 1H8	Halifax	(902) 497-0568										
119389	CMB Ener	4/21/2004	Oil & Gas	21311	Mining Act 1 to 4			Less than 820-1550 EBedford	B4A 1E6	Halifax	(902) 632-1137										
119704	Stable Faci	10/17/2004	2 50 06	21311	Mining Act 1 to 4			Less than 5251 DukeHalifax	B3J 1P3	Halifax	(902) 422-6761										
119710	Offshore R	4/21/2004	Oil Offshor	21311	Mining Act 1 to 4			Less than 1959 UpperHalifax	B9C 2K1	Halifax	(902) 422-8385										
120020	Aucion Min	10/17/2004	3 24 38	21239	Nonmetallic 1 to 4			\$500 000 96 Swants Dartmouth	B2W 2C4	Halifax	(902) 435-6616										
120203	Oel Nlwa	4/10/17/2004	3 42 42	21311	Mining Act 1 to 4			\$500 000 1741 BrynHalifax	B3J 2Q4	Halifax	(902) 490-0580										
120208	Oil Industr	10/17/2004	3 43 11	21311	Mining Act 1 to 4			\$500 000 1959 UpperHalifax	B3J 3J6	Halifax	(902) 422-5315										
120216	Sheil Canal	10/17/2004	3 43 57	21311	Mining Act 1 to 4			\$500 000 1718 ArgyHalifax	B3J 3F6	Halifax	(902) 474-2000										
120217	Agri Ltd	10/17/2004	3 44 03	21311	Mining Act 1 to 4			\$500 000 1496 LowerHalifax	B3J 3R5	Halifax	(902) 492-2118										
120320	Architectur	10/17/2004	3 55 02	21231	Stone Min 1 to 4			\$500 000 8 Mills Dr Goodwood	B3T 1P3	Halifax	(902) 490-0400										
120360	Stone Dep	4/22/2004	Concrete F	21231	Stone Min 1 to 4			\$500 000 23A Ebene-Beedford	B4B 1G8	Halifax	(902) 835-0711										
120366	Shawanate	10/17/2004	3 55 39	21311	Mining Act 1 to 4			\$500 000 405 Sackiv Lower Sac	B4C 2R9	Halifax	(902) 864-4416										
120967	Maverick E	10/17/2004	5 08 16	21311	Mining Act 1 to 4			\$500 000 147 Shore Bedford	B4A 2E4	Halifax	(902) 836-7004										
121063	Global Gec	4/23/2004	Geologists	21311	Mining Act 1 to 4			\$500 000 1657 BarnHalifax	B3J 2A1	Halifax	(902) 453-1111			www.global-geonergy.com							
121090	Frank Sim	10/17/2004	5 21 48	21311	Mining Act 1 to 4			\$500 000 5209 St N Upper Fael	B3Z 1E3	Halifax	(902) 821-3090										
123720	Offshore G	10/17/2004	10 09 3	21311	Mining Act 5 to 9			51 to 2 5 1718 ArgyHalifax	B3J 3H6	Halifax	(902) 425-4774										
123926	Canadiane	4/21/2004	Oil & Gas	21311	Mining Act 5 to 9			51 to 2 5 1409 1915 Halifax	B3J 3K2	Halifax	(902) 474-1111			www.canup.com							
123929	Kier-Me G	10/17/2004	10 31 5	21311	Mining Act 5 to 9			51 to 2 5 1989 UpperHalifax	B3J 3R7	Halifax	(902) 423-8857										
123930	Marathon	4/21/2004	Oil & Gas	21311	Mining Act 5 to 9			51 to 2 5 1949 UpperHalifax	B3J 3R3	Halifax	(902) 423-1111			www.marathon.com							

Various queries can be made to the system, including proximity and cluster queries, to direct economic development staff to the desired businesses.

Figure 17: Business Inventory Administrative Searches
 Example of Targeted Community Partner Administration Searches

Please enter your search criteria below then click Search.

Company Name: Search by entire or partial company name

Product/Service: Enter a keyword of a product or a service

City or Town:

Street Address:

Postal Code:

NAICS:

Number of Employees:

Last Updated: After

Organization Status: Approved Only

Note: All fields are required unless otherwise noted.
 All entered information will be used in the search.

General Company Email
 Mr. User129270 (Minister)

Y.L. Music Inc

Mr. Jerry Viel (owner)
 Management: jerryv@y.lmusic.com

Vaughn McIntyre Consulting

General Company Email
 Mr. Vaughn McIntyre (Principal)
 General: vmc@vaughnmcintyre.com
 Management: vmc@vaughnmcintyre.com

Village Of Blacks Harbour

General Company Email
 Ms. Deanna User128747 (CAO/Manager)
 General: dbh@vblh.nb.ca
 Management: dbh@vblh.nb.ca

William Garcelon

Wolfhead Smokers

General Company Email
 Mr. George W Wolf (President)
 General: sales@wolfheadsmokers.com
 Management: george@wolfheadsmokers.com

Working Stronger Together

General Company Email
 Mrs. Christina H Lindsay (Program Coordinator)
 Mrs. Kathy Smith (Vocational Support Worker)
 General: wst@rob.abn.com
 Management: wst@rob.abn.com
 Operations: wst@rob.abn.com

Select all contacts with role(s):

Send an EMail to all selected contact(s):

Send an internet survey to all selected contact(s) that have email addresses:

Generate printer friendly list of: ALL listed organizations

Download a data file containing: ALL listed organizations

Below is an example of just one of the reports the administrators have access to in the New Organization Report. The YLM staff checks and then approves new businesses daily, so the administration staff can use this report to welcome new businesses to their community directory.

Figure 18: Business Inventory New Organisations Report Example

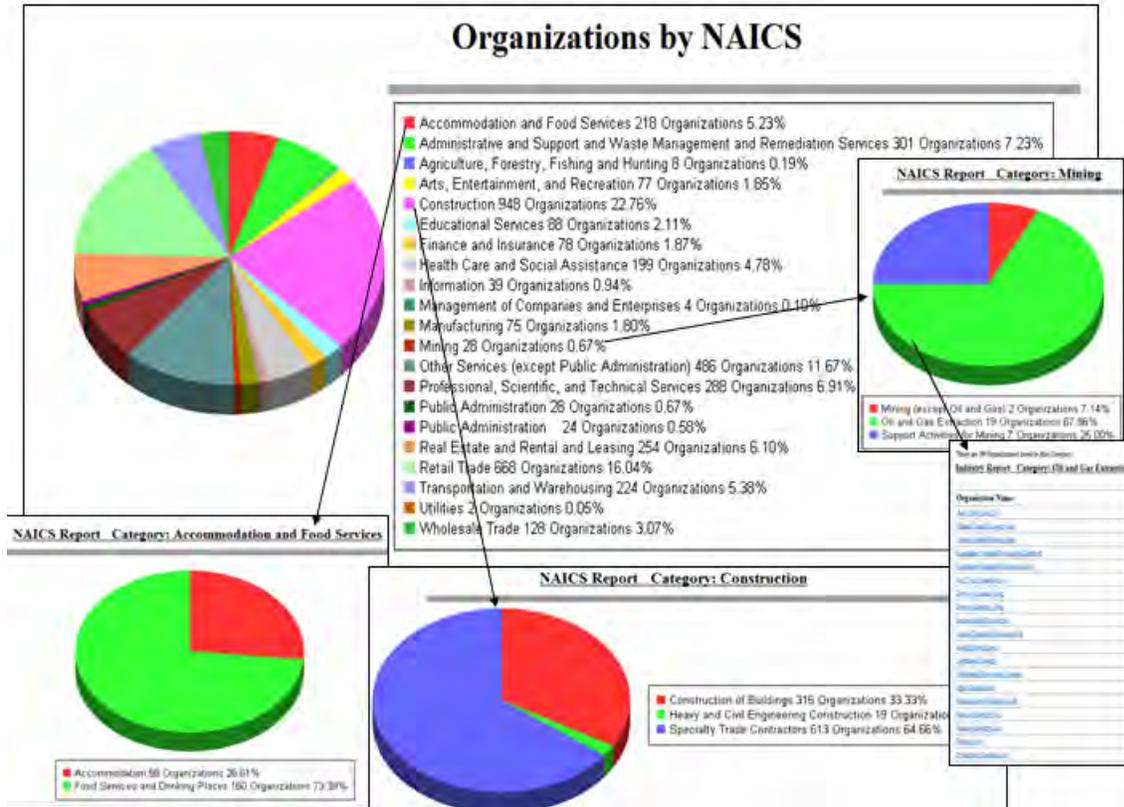
There are 3043 Organizations listed in this Report. **New Organizations as of 11/20/2009**

Date Registered: (mm/dd/yyyy) Default is last 90 days

Organization Name	View Details	Edit Org	Date Registered	Street	City	Province	Province	Phone Number
Environmental Affairs Liason	View	Edit	12/7/2009 10:50:09 AM	Box 6340 Stn Main	Anzac	AB	T0P1J0	(780) 334-2828
Wood Buffalo Pipe & Supply Ltd	View	Edit	12/7/2009 10:50:31 AM	Highway 881	Anzac	AB	T0P1J0	(780) 334-2008
The Burger Bar	View	Edit	1/6/2010 6:49:40 PM	240 Stony Mountain Road	Anzac	AB	T0P1J0	(780) 334-2227
Whitmoor Cookin & Catering	View	Edit	1/6/2010 7:13:29 PM	104 Hopegood Bay	Anzac	AB	T0P1J0	(780) 334-2196
Trowel Cement Ltd.	View	Edit	1/6/2010 7:43:17 PM	Lot 3 Oak Court	Anzac	AB	T0P1J0	(780) 334-9600
Anzac Superstation Ltd	View	Edit	1/6/2010 7:46:41 PM	102 Gilmore Drive	Anzac	AB	T0P1J0	(780) 334-2115
Midfield Supply Ulc	View	Edit	1/6/2010 8:49:09 PM	105 Oak Court	Anzac	AB	T0P1J0	(780) 334-0526
Aurora Tours	View	Edit	1/6/2010 8:58:56 PM	201 Townsend Dr	Anzac	AB	T0P1J0	(780) 334-2292
Seyer Construction	View	Edit	1/13/2010 9:38:04 AM		Anzac	AB		
Bold Industries Inc.	View	Edit	1/13/2010 9:50:55 AM		Anzac	AB		
Shotgun Welding Inc.	View	Edit	1/13/2010 9:52:13 AM		Anzac	AB		
Dbm Contracting O/A	View	Edit	1/13/2010 9:55:07 AM		Anzac	AB		
1441706 Alberta Ltd.	View	Edit	1/13/2010 10:03:50 AM	#106-236 Stony Mountain Road	Anzac	AB		(780) 792-4020
Conjoe's Trucking Ltd	View	Edit	1/13/2010 10:41:04 AM		Anzac	AB		
White Wolf Enterprises Ltd	View	Edit	1/13/2010 10:41:20 AM		Anzac	AB		
Willow Lake Cab	View	Edit	1/13/2010 10:43:57 AM	Lot 12	Anzac	AB		(780) 334-2260
Capital Ascent	View	Edit	1/13/2010 10:47:45 AM		Anzac	AB		
D. Slaght Office Services	View	Edit	1/13/2010 10:52:01 AM		Anzac	AB		
Jennifer Slaght, Rmt	View	Edit	1/13/2010 10:56:15 AM		Anzac	AB		
Willow Lake Cleaners	View	Edit	1/13/2010 11:13:47 AM		Anzac	AB		
Quick Vic's Cleaning	View	Edit	1/13/2010 11:16:08 AM		Anzac	AB		
Mz Mechanical	View	Edit	1/13/2010 11:18:23 AM		Anzac	AB		

Administrators also have access to various reports, including Organizations by NAICs, Employee Size and Sales Reports. These reports facilitate the creation of Power Point presentations for Council or Economic Development Advisory Board meetings. An example of the industry pie charts generated is shown in Figure 19. These pie charts show the percentage of businesses by industry using NAIC codes. As seen in the example here, the charts allow the user to 'drill down' to 5 digit NAIC specificity.

Figure 19: Business Inventory NAICs Charts Examples



New reports also include benchmarking, allowing Wood Buffalo to compare their industries with those of any other community using YLM’s services. This is done through aggregate or ‘rolled up’ reports as individual data and detailed industry breakdown cannot be shared. However, this information can still be useful in assessing industry or employment gaps. In the following example we have compared the total industry as well as retail breakdown in Wood Buffalo to the City of Timmins and the District of Algoma in Ontario. These locations have been chosen as, of the possible choices, they most closely match Wood Buffalo’s population, mix of urban and rural, distance from major centres and resource or single industry representation. Figure 20 below displays the percentage of businesses in each industry for all industries, while Figure 21 provides a more detailed look at the retail sector in Wood Buffalo.

Figure 20: Wood Buffalo Industry Pie Chart



Source: Wood Buffalo business inventory, 2010

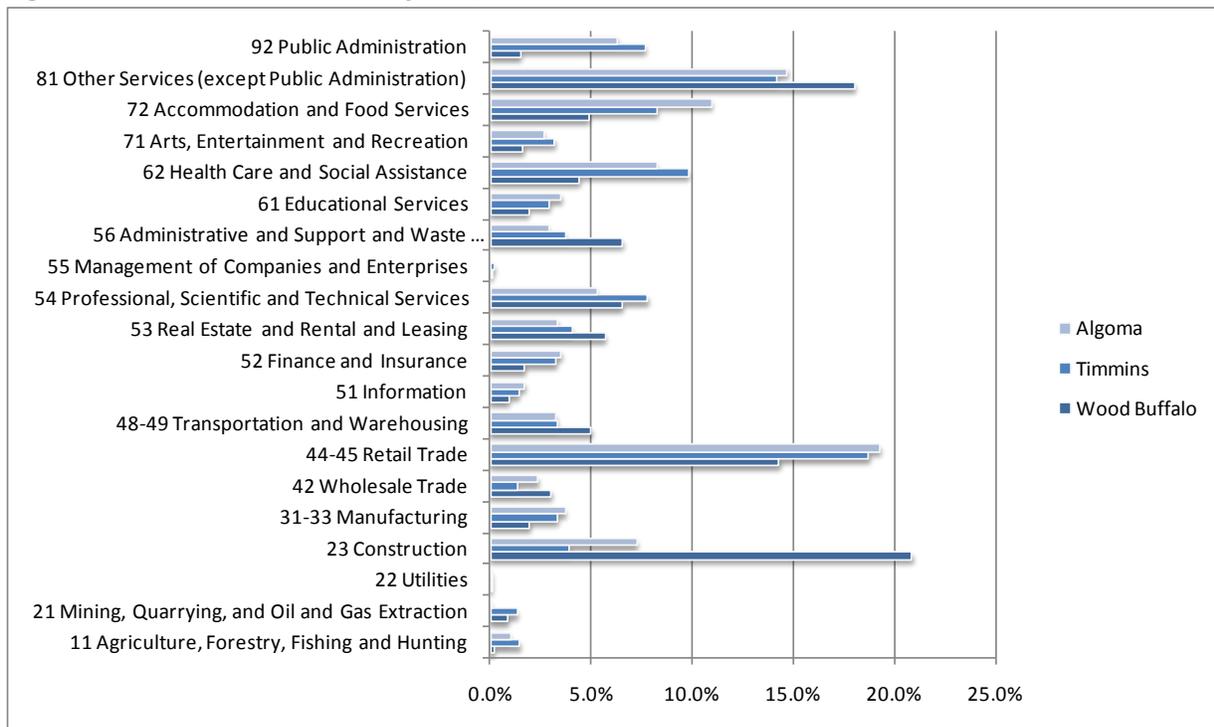
Figure 21: Wood Buffalo Retail Mix Pie Chart



Source: Wood Buffalo business inventory, 2010

Figure 22 compares the results of this inventory with similar inventories created for the City of Timmins and District of Algoma in Northern Ontario. According to this business inventory, Wood Buffalo has only 16.04% of all businesses engaged in retail trade while Algoma records 19.27% and Timmins 18.70%.

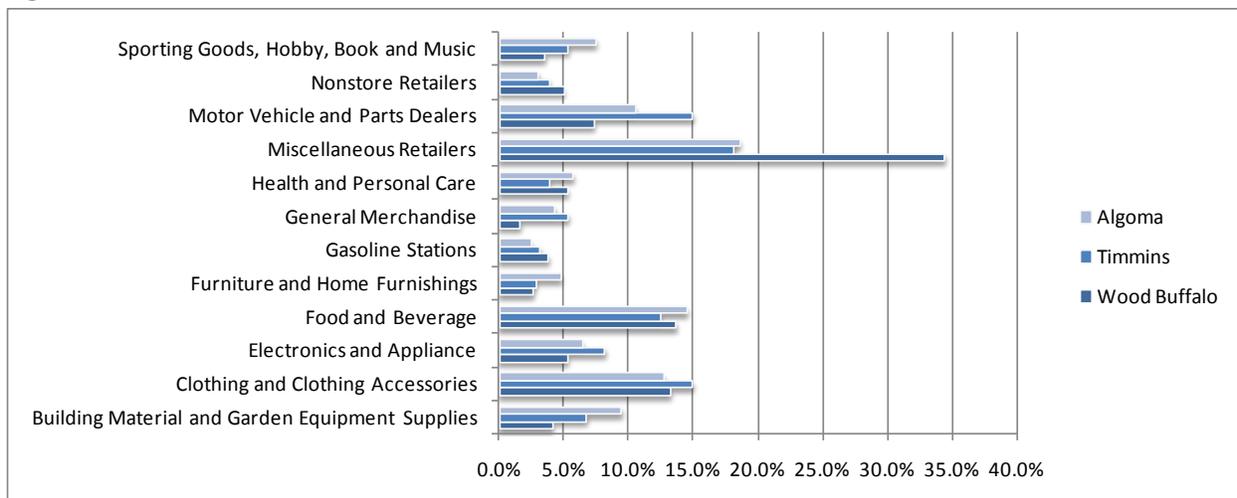
Figure 22: Wood Buffalo Industry Mix, 2010



Source: YLM.ca

Most notable 'gaps' in Wood Buffalo's profile are: accommodation and food services; arts, entertainment and recreation; health care and social assistance; educational services, finance and insurance and retail trade. Figure 23 compares the breakdown of the retail trade sector in Wood Buffalo, Timmins and Algoma.

Figure 23: Wood Buffalo Retail Mix, 2010



Source: YLM.ca

It is difficult to draw conclusions from this retail comparison given the disproportionate number of retail businesses that have been classified as miscellaneous. This is likely due to lack of information available to classify the business appropriately. However, it appears that the retail sector in Wood Buffalo has a relatively lower mix of sporting goods, hobby, book and music; motor vehicle and parts dealers; general merchandise; furniture and home furnishings; electronics and appliance and building material and garden equipment supplies. The following section will draw similarities between the gaps shown here and those evidenced by other means of assessment.

3.2 Summary of Business Inventory

- The business inventory created for Wood Buffalo provides several administrative support functions to support the work of the Economic Development Branch
- In observing non-resident business licences, it is evident Wood Buffalo ‘imports’ construction and professional trades services
- In comparing Wood Buffalo’s industry mix with the City of Timmins and Algoma District, findings are somewhat consistent with Wood Buffalo’s industry LQ’s. The business inventory comparison suggests Wood Buffalo has lower levels of:
 - Accommodation and food services
 - Arts, entertainment and recreation
 - Health care and social assistance
 - Educational services
 - Finance and insurance
 - Retail trade
 - Manufacturing
- In comparing Wood Buffalo’s retail mix to Timmins and Algoma it appears Wood Buffalo has a need for:
 - Sporting goods, hobby, books and music
 - Motor vehicle and parts dealers
 - General merchandise
 - Furniture and home furnishings
 - Electronics and appliances
 - Building material and garden equipment supplies

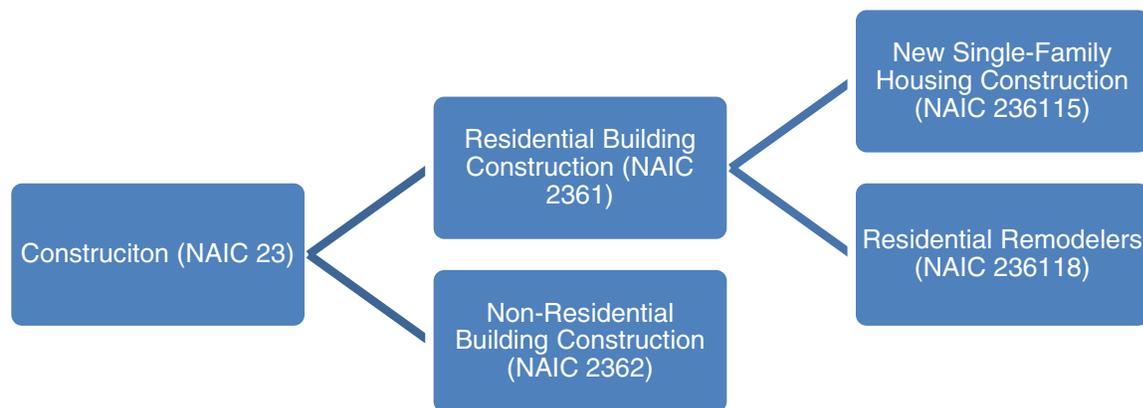
4 Tertiary Sector Targets

In discussing economic activities and industries, it is common to divide the economy in three sectors these bring the primary, activities related to agriculture and resource extraction; secondary, activities related to manufacturing; and tertiary, service related activities. At the outset of this report it was noted that a region's economy can expand either through export growth or through import substitution. Activities targeting the tertiary sector are primarily aimed at import substitution opportunities. Now may be the time to focus on this sector in Alberta. The Conference Board of Canada reports that while retail sales in Alberta declined by 9.3% in 2009, they are expected rise 1.3% in 2010 and a further 6.3% in 2011⁵.

This study incorporated a phased approach to generate an overview of the tertiary opportunities in Wood Buffalo. The first phase was to conduct a statistical assessment of industry representation in Wood Buffalo and generate a long-list of opportunities for business growth, while the second phase was to put this assessment to the reality test in asking local business and community leaders to discuss the appropriateness of the conclusions as well as to select priorities, or short-list, from the long-list generated in the initial phase.

In this statistical assessment Canadian Business Patterns data was used to calculate location quotients for all industries. For this study we used the highest level of specificity available. As an example the figure below describes how construction (NAIC 23) can be broken down into more specific descriptions of activity (note this not a complete breakdown of all sub-industries in the construction industry):

Figure 24: Example of Construction Industry Sub-Industries



Source: North American Industrial Classifications

Canadian Business Patterns draws on information from Revenue Canada to determine the total number of business locations in a region. It should be noted that this data doesn't tell us anything regarding the physical size or sales revenue of the business location, nor does it inform us as to any individual locations' capacity to meet customer needs.

Location quotients are used to inform a municipality of the relative degree of concentration of an industry in their area. Typically, employment by industry is used to calculate location quotients. In this study,

⁵ Alberta retail numbers go from loser to leader, Calgary Herald February 26, 2010

however, the total number of business locations was used as the data available is more specific than employment by industry data.

- An LQ of 1.0 results if local sector business establishments are the same as provincial sector employment
- An LQ less than 1.0 indicates business establishment concentration that is less than Alberta
- An LQ over 1.0 indicates a concentration of economic activity that is greater than Alberta

Business establishment location quotients less than the provincial average indicate these industries are likely 'importing' temporary or contract businesses and indicate a gap in business establishments in Wood Buffalo. It is these industries that Wood Buffalo should consider targeting in a business attraction strategy. As an additional layer of analysis the study also investigated the number of business locations per 1,000 residents using provincial averages to create a benchmark of 'theoretical capacity' for Wood Buffalo.

4.1 Location Quotients by Sector

In general we can say that in Wood Buffalo the relative total number of businesses is significantly lower than the provincial average. According to June 2009 Business Patterns data collected by Statistics Canada⁶, there are 2,775 business establishments in the region. Relative to the population base of the region this is about half the number of businesses we would expect for a similar sized municipality in Alberta. In Wood Buffalo, it is theorized that many smaller service oriented companies reside outside the region. This study will help to determine the nature of those businesses and develop a strategy to address attracting those businesses to the area.

As a starting point we have used those industries identified in Figure 9 (Section 3.3.1) which show LQ below 1 and fall into the tertiary sector. While educational services and health care and social assistance are a concern to the community and important for economic development to consider, given their dependence on provincial funding and decision making, they were not explored in this report. The secondary (manufacturing) sector will be considered further in the following section. While the LQ for the construction industry is greater than 1 it is being considered here as it was raised as a concern in the focus group discussions. This section will look more closely at:

- Transportation and Warehousing (NAIC 48-49)
- Retail Trade (NAIC 44-45)
- Other Services (NAIC 81)
- Wholesale Trade (NAIC 41)
- Arts, entertainment and recreation (NAIC 71)
- Professional, Scientific and Technical Services (NAIC 54)
- Finance and Insurance (NAIC 52)
- Accommodation and Food Services (NAIC 72)
- Construction (NAIC 23)

For further assessment by the Economic Development Branch and in determining those businesses to be brought forward for public engagement, each of the main industry sectors (e.g. Construction) and the sub-industries within it (e.g. heavy and civil engineering construction) were assessed for theoretical capacity

⁶ Data collected from the Canada Revenue agency including businesses that meet one of the following: have an employee, have a minimum of \$30,000 in sales revenue or filed a corporate tax return in the past 3 years.

and Location Quotient. For a complete list of all industry LQ and theoretical capacity refer to Appendix III. In the figures industries have been classified as:

- High Priority - $LQ < 1$ and below theoretical capacity
- Medium Priority - $LQ > 1$ and below theoretical capacity

As an example, there are 3 'other foundation, structure and building exterior' contractors in Wood Buffalo. Based on the number of framing contractor businesses in the Province of Alberta and using Wood Buffalo's 2006 population of 51, 496 residents there should be 13 framing contractor businesses in Wood Buffalo. At the same time, this group of contractors has an LQ of 0.4. Being below theoretical capacity and having an $LQ < 1$ has resulted in this group of contractors being categorized as high priority.

For a complete list of categorization of high priority and medium priority business types refer to Appendix IV. It is important to remember the following points in assessing these results:

- The 2006 Municipal Census measured a population of 75, 717, which would yield an even higher theoretical capacity than was used here. Therefore, the actual need may be more pronounced. (Note the appendix displays theoretical capacity using both the Statistics Canada Census of Population as well as the Municipal Census)
- When considering the theoretical capacity based on the Municipal Census, the large portion of temporary residents must also be considered. In 2006 the Municipal Census estimated 13.8% of the population to be living in project accommodation. While this population does draw on the goods and services available in Wood Buffalo the goods and services they do access are limited
- The data incorporates all businesses, large and small and has no sensitivity for size or service delivery of the businesses. Therefore, while there appears to be a need for 9 more framing contractors in Wood Buffalo this may or may not be the case depending on the size of existing firms and their ability to meet local demand
- The data draws from the entire Regional Municipality of Wood Buffalo and does not tell us the location of the business be it urban service area or rural hamlet.

This statistical overview was used to identify two 'long-lists' for public discussion, these being: general goods and services (retail and personal services) and professional and business services (services to businesses). The next section discusses the process by which these long lists were reduced to short lists for use by the Economic Development Branch to focus business retention, expansion and attraction efforts.

4.2 Long-List Short List Results

On Tuesday February 9th and Wednesday February 10th focus groups were held in the Regional Municipality of Wood Buffalo to assist in the determination of business 'gaps' in the municipality. These focus groups were the second phase in the business gap analysis being conducted by the Regional Municipality and followed a long list – short list methodology. In these sessions local residents and business owners were asked to review a long list of potential opportunities, derived from the statistical assessment of business thresholds discussed in the preceding section, for the business attraction efforts of the Municipality. The focus groups were divided into 'general' opportunities and 'business and professional' opportunities. Below is a summary of the general opportunities focus groups. Focus groups

were supplemented by additional 13 one on one and telephone interviews of community and business leaders.

4.2.1 General Goods and Services

There were two focus groups held where participants were given a list of 128 potential gaps (Figure 25) in personal goods and services in the region. The focus group participants were asked to review the entire list and chose their ‘top 20’ priority needs in the municipality. Each of the focus groups was asked to respond from two perspectives – as a business person who buys products/services and as a residential consumer. The top 20 priorities from all of the participants were then tabulated to arrive at a consensus of priorities. This prioritized list was then discussed to determine any missing needs, challenges to business attraction and potential solutions to these challenges.

Figure 25: Wood Buffalo Long-List of General Services

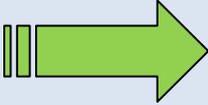
<ul style="list-style-type: none"> • Retail Bakeries • Quick Printing • Digital Printing • New Car Dealers • Used Car Dealers • Recreational Vehicle Dealers • Motorcycle, Boat and other Motor Vehicle Dealers • Automotive Parts and Accessories Stores • Tire Dealers • Furniture Stores • Floor Covering Stores • Window Treatment Stores • Print and Picture Frame Stores • All Other Home Furnishings Stores • Appliance Television and Other Electronics Stores • Computer and Software Stores • Camera and Photographic Supplies Stores • Home Centres • Paint and Wallpaper Stores • Hardware Stores • Other Building Material Dealers • Outdoor Power Equipment Stores • Nursery Stores and Garden Centres • Supermarkets and Other Grocery Stores • Convenience Stores • Meat Markets • Fish and Seafood Markets 	<ul style="list-style-type: none"> • Men’s Clothing Stores • Women’s Clothing Stores • Children’s and Infant’s Clothing Stores • Family Clothing Stores • Clothing Accessories Stores • Fur Stores • All Other Clothing Stores • Shoe Stores • Jewellery Stores • Luggage and Leather Goods Stores • Book Stores and News Dealers • Pre-Recorded Tape, Compact Disc and Record Stores • Department Stores • Warehouse Clubs and Superstores • Home and Auto Supplies Stores • All Other Miscellaneous General Merchandise Stores • Florists • Office Supplies and Stationery Stores • Gift, Novelty and Souvenir Stores • Used Merchandise Stores • Pet and Pet Supplies Stores • Art Dealers • Mobile Home Dealers • Beer and Wine-Making Supplies Stores • All Other Miscellaneous Store Retailers • Internet Shopping • Electronic Auctions 	<ul style="list-style-type: none"> • Hotels • Motels • Full-Service Restaurants • Limited Service Eating Places • General Automotive Repair • Automotive Exhaust System Repair • Other Automotive Mechanical and Electrical Repair and Maintenance • Automotive Body, Paint and Interior Repair and Maintenance • Automotive Glass and Replacement Shops • Car Washes • All Other Automotive Repair and Maintenance • Electronic and Precision Equipment Repair and Maintenance • Commercial and Industrial Machinery and Equipment Repair and Maintenance • Home and Garden Equipment Repair and Maintenance • Appliance Repair and Maintenance • Reupholstery and Furniture Repair • Footwear and Leather Goods Repair • Other Personal and Household Goods Repair and Maintenance • Barber Shops • Beauty and Hair Salons • Other Personal Care Services • Funeral Homes
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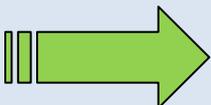
<ul style="list-style-type: none"> • Fruit and Vegetable Markets • Baked Goods Stores • Confectionery and Nut Stores • All Other Specialty Food Stores • Beer, Wine and Liquor Stores • Pharmacies and Drug Stores • Cosmetics, Beauty Supplies and Perfume Stores • Optical Goods Stores • Food (Health) Supplement Stores • All Other Health and Personal Care Stores • Gasoline Stations with Convenience Stores • Other Gasoline Stations • Sporting Goods Stores • Hobby, Toy and Game Stores • Sewing, Needlework and Piece Goods Stores • Musical Instrument and Supplies Stores 	<ul style="list-style-type: none"> • Mail-Order Houses • Vending Machine Operators • Heating Oil Dealers • Liquefied Petroleum Gas Dealers • Other Fuel Dealers • Other Direct Selling Establishments • Taxi Service • Limousine Service • Personal and Commercial Banking Industry • Portfolio Management • Investment Advice • Insurance Agencies and Brokerages • Veterinary Services • Landscaping Services • Golf Courses and Country Clubs • Fitness and Recreational Sports Centres 	<ul style="list-style-type: none"> • Cemeteries and Crematoria • Coin-Operated Laundries and Dry Cleaners • Dry Cleaning and Laundry Services • Linen and Uniform Supply • Pet Care Services • Photo Finishing Laboratories • One-Hour Photo Finishing • Parking Lots and Garages • All Other Personal Services • Religious Organizations • Grant-Making and Giving Services • Social Advocacy Organizations • Civic and Social Organizations • Business Associations • Professional Organizations • Labour Organizations • Political Organizations
---	--	--

In all, there were 18 participants in the groups that discussed and ranked their general goods and services priorities. The top 20 individual priorities of these groups are displayed in Figure 26 (a complete list of priorities can be viewed in Appendix VI). Included in this list are all those selected by at least 3 of the 18 participants. The selection process resulted in reducing the long list of 128 potential opportunities to a short list of 37. These 37 can be further aggregated into the following categories:

- Clothing and Shoe Stores
- Personal Services
- Home Centres, Home Furnishings and Electronics
- Food Stores and Pharmacies
- Food and Accommodation Services
- Entertainment and Recreation
- Automotive Services

Figure 26: Wood Buffalo, General Services Long-List Short-List Results

Focus Group Short Listed Priorities		Summary Category
Men's Clothing Stores (mall or street) Women's Clothing Stores (mall or street) Family Clothing Stores (mall or street) Children's and Infant's Clothing Stores (mall or street) Shoe Stores (mall or street) Footwear and Leather Goods Repair (mall or street)		Clothing and Shoe Stores
Dry Cleaning and Laundry Services (mall or street) Pet and Pet Supply Stores (mall or box store) Beauty Salons (street) Investment Advice (street)		Personal Services
Department Stores (mall or box store) Furniture Stores (mall or box store) Window Treatment Stores (mall or street) All Other Home Furnishing Stores (mall or box store) Appliance, Television and Other Electronics Stores (box store) Home Centres (box store) Hardware Stores (box store)		Home Centres, Home Furnishings and Electronics
Warehouse Clubs and Superstores (box store) Supermarkets and Other Grocery Stores (street) Fruit and Vegetable Markets (street) Fish and Seafood Markets (street) Meat Markets (street) All Other Specialty Food Stores (street) Pharmacies and Drug Stores (street)		Food Stores and Pharmacies
Full-Service Restaurants (mall or street) Limited-Service Eating Places Hotels		Food and Accommodation Services
Hobby, Toy and Game Stores (mall or street) Fitness and Recreational Sports Centres (street or box format) Sporting Goods Stores (box format) Cinema (box format)		Entertainment and Recreation

Computer and Software Stores (box format)		
Car Washes		Automotive Services
Automotive Body, Paint and Interior Repair and Maintenance		
General Automotive Repair		
Used Merchandise Stores		Other
Tourism Facilities and Outdoor Equipment Rentals		
Digital Printing		
Day Care Facilities		

The broad business categories presented here are by type of product or service offered but they could, and should also be, categorized by their spatial and locational needs. Retail establishments may be typified into three types of locations these being: a power centre or super centre with large stand alone 'box' stores, a mall with smaller format stores and mid-range product offerings and street, pedestrian oriented boutique shops with higher-range product offerings. Understanding the space and location needs of the various types of stores will allow the municipality to prepare the space in advance of the business attraction efforts. This improves the chance of success in attracting the retailers to Wood Buffalo.

It is clear from the needs identified here that Wood Buffalo requires space to be allocated in all three of the typical store formats. This is supported by other reports prepared for Wood Buffalo's Planning Department. The need for pedestrian oriented boutique retail has been highlighted in the Lower Townsite Redevelopment Plan, while the Commercial and Industrial Land Use Study clearly defines the need for the municipality to service land for both the development of both box store and mall retailing.

All of the groups also discussed the difference of access to goods and services between urban and rural areas of Wood Buffalo agreeing that most of the goods and services discussed are for the Fort McMurray urban area and that the rural needs may focus more on places to purchase staple goods and community gathering places such as coffee shops. In addition to the challenges to retail attraction listed below, the groups noted that not all rural areas have the high income levels present in the region decreasing the likelihood of retail investment in these areas. All groups agreed that the engagement process was insufficient to adequately assess and plan for the needs of the rural communities and recommended the municipality continue these efforts in the rural areas.

Challenges

The group felt that lack of retail space; high rental rates; competition with business seeking office space; high wages and by-laws and zoning restrictions for home business were all potential challenges to expanding retail trade in Wood Buffalo. The groups proposed zoning areas for specific kinds of businesses to encourage those businesses most needed. Participants would prefer to see more retail and commercial development in the areas with the highest residential population and growth rate rather than in the Lower Townsite, where most retail and commercial is presently located.

4.2.2 Business Goods and Services

There were 2 focus groups with a total of 7 participants held to discuss business goods and services. Each of the groups was asked to rank their top 10 priorities from a long list of 48 opportunities (Figure 27) for business goods and services expansion in Wood Buffalo. For a complete long list showing LQ and theoretical capacity refer to Appendix III.

Figure 27: Wood Buffalo Long-List of Business Suppliers and Services

<ul style="list-style-type: none"> • Geophysical Surveying and Mapping Services Testing Laboratories • All Other Machinery, Equipment and Supplies Wholesaler-Distributors • General Freight Trucking, Local • General Freight Trucking, Long Distance, Truck-Load • Bulk Liquids Trucking, Local • Dry Bulk Materials Trucking, Local • Other Specialized Freight (except Used Goods) Trucking, Local • Other Specialized Freight (except Used Goods) Trucking, Long Distance • Other Freight Transportation Arrangement • Couriers • General Warehousing and Storage • General Rental Centres • Other Commercial and Industrial Machinery and Equipment Rental and Leasing • Offices of Lawyers • Offices of Notaries • Other Legal Services • Offices of Accountants • Tax Preparation Services • Bookkeeping, Payroll and Related Services • Architectural Services • Engineering Services • Drafting Services • Building Inspection Services • Surveying and Mapping (except Geophysical) Services 	<ul style="list-style-type: none"> • Industrial Design Services • Graphic Design Services • Other Specialized Design Services • Computer Systems Design and Related Services • Administrative Management and General Management Consulting Services • Human Resources Consulting Services • Other Management Consulting Services • Environmental Consulting Services • Other Scientific and Technical Consulting Services • Research and Development in the Physical, Engineering and Life Sciences • Research and Development in the Social Sciences and Humanities • Advertising Agencies • Public Relations Services • Media Buying Agencies • Media Representatives • Display Advertising • Direct Mail Advertising • Advertising Material Distribution Services • Specialty Advertising Distributors • All Other Services Related to Advertising • Marketing Research and Public Opinion Polling • Photographic Services • Translation and Interpretation Services • All Other Professional, Scientific and Technical Services
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Figure 28 below displays those industries that were selected as a priority by at least one participant. The priorities selected have been aggregated into the following categories:

- professional services
- research and development
- trucking and warehousing
- equipment and machinery sales and leasing
- other services to business

Figure 28: Wood Buffalo Business Services Long-List Short-List Results

Focus Group Short Listed Priorities	Summary Category
Geophysical Surveying and Mapping Services Architectural Services Building Inspection Services Industrial Design Services Other Scientific and Technical Consulting Services	 Professional Services
Testing Laboratories Research and Development in Physical, Engineering and Life Sciences	 Research and Development
General Freight Trucking, Long Distance, Truck-Load General Warehousing and Storage Overhead Door Suppliers General Freight Trucking Full Service Truck Stop Bulk Liquids Trucking, Local	 Trucking and Warehousing
Other Commercial and Industrial Machinery and Equipment Rental and Leasing All Other Machinery, Equipment and Supplies Wholesaler Distributors General Rental Centres	 Equipment and Machinery Sales and Leasing
Couriers Advertising Agencies Psychologists and Family Support Services Vehicle Mechanical and Body Shop Repair Services Skilled Trades Professionals (plumbing and HVAC contractors)	 Other Services to Business

While not an immediate concern, if business begins to pick up again in the future there will be pressure on accommodation and food services, transportation as well as car rental agencies. The group believes there will always be a need for employment services to assist in filling the labour gap in skilled trades and specialized process operators.

In general, this group felt that the oil industry has no problems accessing goods and services as they can easily source from outside the region. In addition, participants felt that goods and services providers in Wood Buffalo focus on provisions to the larger firms rather than the smaller firms. While the larger oil companies do source goods and services locally, they realize that sourcing all of their needs locally could lead to capacity concerns for service delivery in Wood Buffalo as it can be challenging for smaller firms to gain access to business goods and services in the municipality.

Similar to the general goods and services focus groups, there was general consensus that the cost of land and leasing space, the availability of labour and the cost of living are deterrents to business investment in the region. As an example, one participant stated his company would build a warehouse in Wood Buffalo if it were cost effective to do so. While infrastructure is improving, strained infrastructure (water and waste water) also inhibits investment and business start-ups. In addition, it is believed that the negative perceptions of the oil sands also detract from attracting investment to the region.

Business representatives felt there needs to be a concerted focus on quality of life aspects of the region along with support to educational and college programming in order to attract and develop skilled workers. The group believes the Municipality should focus on these quality of life aspects and attracting providers of goods and services for the residents of Wood Buffalo and should take priority over attracting services for businesses.

4.2.3 Summary of Tertiary Targets

- After declining in 2009, retail sales in Alberta are expected to climb in 2010 and 2011.
- The Government of Alberta predicts employment in Professional, Scientific and Technical Services to grow by 2.6%/year from 2009 to 2013 accounting for 14.5% of new jobs⁷.
- Community engagement revealed the following general goods and services targets for business expansion and attraction efforts in Wood Buffalo:
 - Clothing and Shoe Stores
 - Personal Services
 - Home Centres, Home Furnishings and Electronics
 - Food Stores and Pharmacies
 - Food and Accommodation Services
 - Entertainment and Recreation
 - Automotive Services
 - Daycare facilities
- The results of the business inventory provide the Municipality with new and vital tools to proceed with a rural business needs and viability assessment. Before the development of the business inventory, the Municipality could not easily identify businesses located in the rural areas or distinguish between urban and rural based businesses. The business inventory allows sorting by postal code and hamlet thus facilitating a needs assessment.
- The priorities for business services identified included:
 - professional services
 - skilled trades professionals and HR support in attracting skilled trades
 - research and development
 - trucking and warehousing
 - equipment and machinery sales and leasing
 - other services to business
 - vehicle body shop and mechanical services
 - psychologists
- There was a high level of agreement on challenges faced by new and expanding businesses which include the cost of leasing/purchasing space/land, the cost of labour, access to labour, zoning restrictions for home-based businesses, strained infrastructure and the negative perceptions of the oil sands.

⁷ Alberta Employment and Immigration, industry profiles September 2009

- Focusing on the quality of life aspects such as increasing access to general goods and services and developing educational programming is important to attracting and retaining residents and skilled workers in the region and is in-line with *Future Forward*, Wood Buffalo's road map for future planning initiatives.

5 Secondary Sector Targets

The concept of value chain analysis was first described in the 1985 book *Competitive advantage: Creating and Sustaining Performance*, by Harvard University’s Michael Porter. Generally speaking, a value chain represents a continuum of economic activity where additional financial value is added at each point of activity in the chain. The value chain drives overall sector profitability and effectively mapping the value chain of a locale is an essential component to identifying one of Porter’s other economic development concepts, the ‘economic cluster.’

A value chain analysis is widely regarded in many industries as a primary tool in assessing the potential for additional economic activities in a region. In most cases the value chain assessment is used to investigate potential activities downstream of the core activities. The assumption being the closer the product/service is to the ultimate end user, the higher the value of the product/service. This theory has been used by the Province of Alberta in crafting the Provincial Energy Strategy, which states,

“to build a sustainable and prosperous future, the province must get the best possible economic return on the long-term development of its energy resources. Extending our role **along the value chain through upgrading and refining bitumen to transportation fuels and other products** will further expand our economy.”

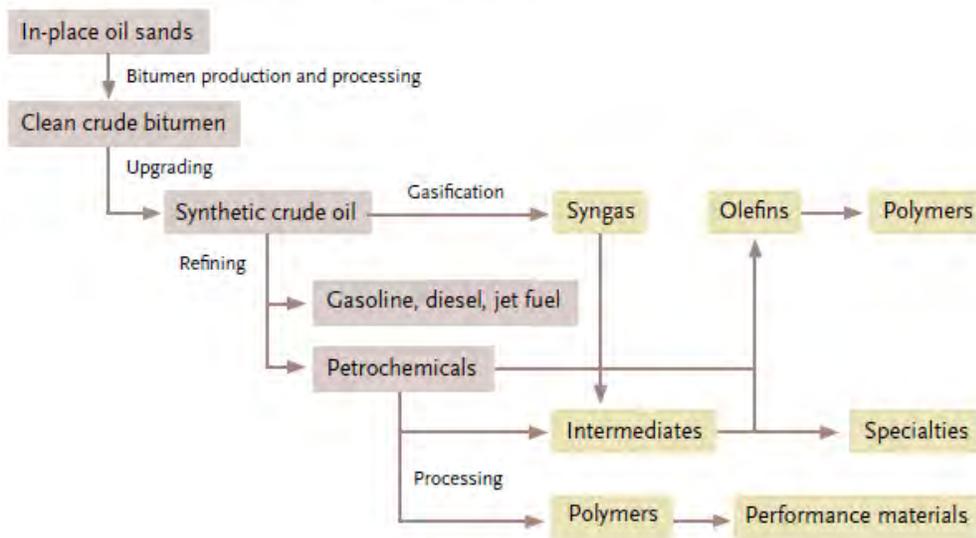
Clearly the Province has the goal to capture greater value from its oil and gas industry by moving the industry downstream and increasing the level of finished products and petrochemical production in Alberta. The Provincial Energy Strategy has created the following diagram to illustrate the entire value chain as an opportunity in building Alberta’s economy.

Figure 29: Hydrocarbon Value Chain

FIGURE 5

Hydrocarbon Value Chain

Source: *Launching Alberta’s Energy Future: Provincial Energy Strategy*



Source: Alberta Energy Provincial Energy Strategy

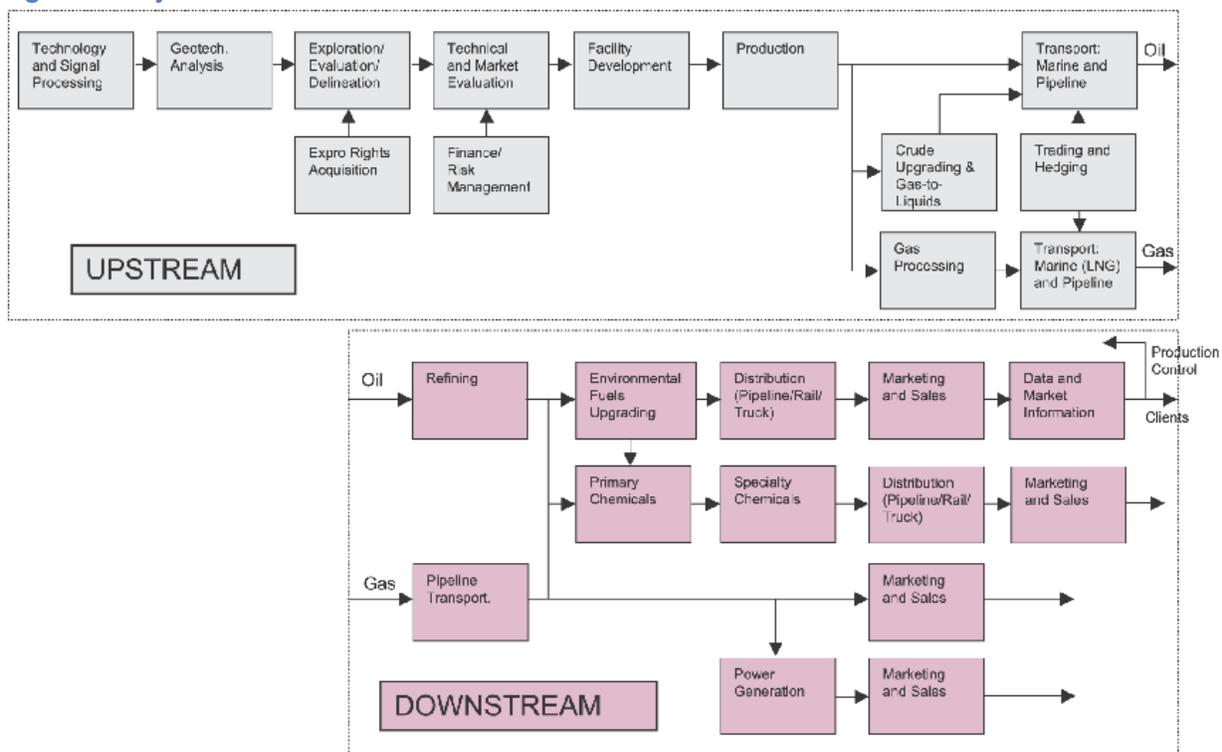
The potential in this area is also recognized by the oil and gas companies operating in the Athabasca Oil Sands. Rick George, the President and CEO of Suncor, in his presentation to the World Heavy Oil Congress in March, 2008, suggested further technological innovation, “to develop new ways of squeezing value-adding by-products out of every tonne of oil sands ore”. He provided several examples of ways in which Suncor is or could be capturing greater value. These included:

- Williams, an integrated US natural gas company built a facility next to Suncor to recover natural gas liquids which can be used as petrochemical feedstock,
- Researching the use of petroleum coke, an upgrading by-product, to produce synthetic gas to generate power or hydrogen reducing their reliance on natural gas. Large scale synthetic gas production could transform the industry from a net consumer to a net provider of natural gas.

Mr. George believes the potential use of other co-products and by-products is unlimited and issued a call to action for the industry to innovate in capturing greater value from oil sands mining activities.

The research into the oil and gas value chain is extensive. Dr. Abraham developed a value chain for the industry in his work assessing the value chain to discover customers’ needs⁸. In this work he included in his value chain the services needed to access the potential customer base of value added products.

Figure 30: Hydrocarbon Value Chain



Source: Using value-chain analysis to discover customers’ strategic needs (2008). Strategy and Leadership 36 (4).

⁸ Crain, D and Abraham, S. (2008). Using value chain analysis to discover customers’ strategic needs. Strategy and Leadership. 36 (4) pp.29-39

In order to identify potential investment opportunities related to Wood Buffalo’s oil sands sector, a methodology developed by Dr. Edward Feser, the head of the Department for Urban and Regional Planning at the University of Illinois at Urbana-Champaign, was used to study the supply chain of the target sector, oil and gas extraction. In the course of his work on regional economic analysis, Dr. Feser has done detailed analysis on national level US statistical data related to input/output of sales, in order to develop a measurement of the relative strength of inter-industry linkages. Feser’s work shows the connection between ‘Core’ and ‘Linked’ Industries. The average propagation length (APL) is used to note the strength of the industry connection, both forwards (linked industries that ‘purchase’ from the core industry) and backwards (linked industries that ‘supply’ the core industry). Generally speaking, the average propagation length is the average number of steps or time it takes a stimulus in one industry to propagate and affect another industry⁹. The lower the APL value, the tighter the linkage between a specific industry and the core industry. The relationship is noted by the figure below.

Figure 31: Dr. Feser’s Linked Industries Model



Related to the above, it is important to note that the analysis provides the strength of the industry linkage, but little information about how the industries are linked, or through what products. In some cases, a connecting product or service between the core and linked industries can be assumed based on their core activities; the relationship between pharmaceutical and medicine manufacturing as a core industry and basic chemical manufacturing as a supplier, for example. However, the exact relationship may be slightly less evident in other cases, like the presumably weak linkage between religious organizations as a supplier, and metalworking and machinery manufacturing core industries. What is missing is an explicit indication of what products or services link different industries, which could be useful when looking at industries with weak relationships.

Dr. Feser’s framework and calculation of APL values can be applied to Wood Buffalo to assess the extent to which the region is capturing value along the supply chain for NAIC 2111, Oil and Gas Extraction. The advantage to this model is the identification of opportunities both upstream and downstream to the core industry. Figure 32 shows the 10 closest linked industries both upstream and downstream of the extraction industry. The diagram shows the specific 4-digit NAIC as well as the relative strength of that industry in Wood Buffalo as defined by its business pattern location quotient. Upstream and downstream industries with LQ’s less than 1 theoretically offer the greatest potential for investment in Wood Buffalo.

⁹ Dietzenbacher, E. and Romero, I. Production Chains in an Interregional Framework: Identification by Means of Average Propagation Lengths. *International Regional Sciences Review*, 2007

Figure 32: Wood Buffalo Oil and Gas Extraction Upstream and Downstream Linked Industries

Supplier Industries			Customer Industries	
2131	Support activities for mining and oil and gas extraction (LQ 0.50)	Core Industry: Oil and Gas Extraction NAIC 2111	2212	Natural gas distribution (LQ 0)
2300	Construction		3241	Petroleum and coal products manufacturing (LQ 1.38) 1 firm
3329	Other fabricated metal product manufacturing (LQ 0.61)		2211	Electric power generation, transmission and distribution (LQ 1.10)
5324	Commercial and industrial machinery and equipment rental and leasing (LQ 1.47)		4861,4862,4869	Pipeline transportation (LQ 1.39, LQ 2.0, LQ 0)
3331	Agricultural, construction and mining machinery manufacturing (LQ 0)		5617	Services to buildings and dwellings (LQ 1.44)
3328	Coating, engraving, heat treating and allied activities (LQ 0.89)		3251	Basic chemical manufacturing (LQ 4.38)
3339	Other general-purpose machinery manufacturing (LQ 0.90)		3274	Lime and gypsum product manufacturing (LQ 0)
5413	Architectural, engineering and related services (LQ 0.82)		3253	Pesticide, fertilizer and other agricultural chemical manufacturing (LQ 0)
2212	Natural gas distribution (LQ 0)		3252	Resin, synthetic rubber, and artificial and synthetic fibres and filaments manufacturing (LQ 0)

Source: Dr. Feser Linked Industry Model; Statistics Canada Business Patterns Data, 2009

In Figure 32, there is no distinction, from the supplier side, between the provision of goods and services to the core industry. Section 5.2.2 identified and prioritized business service needs in Wood Buffalo. The chart presented here supports the finding from 5.2.2 suggesting there are opportunities to further develop the construction industry (including skilled trade contractors) and architectural, engineering and related services. Figure 32 suggests there are also opportunities to expand the manufacturing sector in Wood Buffalo by further developing the oil and gas extraction value chain.

In some of these industries, Wood Buffalo already has a competitive advantage to build on. The industries with a pre-existing competitive advantage are those with an LQ > 1 and include:

- Commercial and industrial machinery and equipment rental and leasing (NAIC 5324 – LQ 1.47)
- Petroleum and coal products manufacturing (NAIC 3241 – LQ 1.38)
- Electric power generation, transmission and distribution (NAIC 2211 – LQ 1.10)
- Pipeline transportation (NAIC 4861 – LQ 1.39 and NAIC 4862 – LQ 2.0)
- Service to buildings and dwellings (NAIC 5617 – LQ 1.44)
- Basic chemical manufacturing (NAIC 3251 – LQ 4.38)

The results shown in Figure 40 can be supplemented with the business inventory work, also completed as part of this study, to reveal not only the industries of focus and their relative strength, but also an inventory of the businesses active in Wood Buffalo in that industry. The businesses present in the industries identified in Figure 40 are listed in Appendix VI (Note industries not listed have no identified businesses in Wood Buffalo’s Business Inventory):

However, capturing added value from the oil and gas sector may be difficult. Despite Mr. George’s call to action in March of 2008, Suncor Energy Inc. will increase bitumen production without building new upgrading capacity. The most recent announcement by Syncrude Canada Ltd. to send raw bitumen for upgrading to the United States is an example of the Province’s struggle to increase the amount of

upgrading done in Alberta. Without the upgrading process, it would be difficult to capture further downstream value added activities from the oil sands sector in Wood Buffalo.

Given this, work plans for the Economic Development Branch for downstream value added activities must be long term in nature and include close collaboration with the appropriate stakeholder groups. In the short and medium term, efforts would be better placed toward focusing on upstream activities and seeking to build regional capacity in the supply of goods and services to the oil extraction industry.

5.1.1 Summary of Secondary Value Chain Opportunities

- Capturing greater value from the oil sands industry is in line with provincial strategies.
- Given the current pricing environment and considerable excess capacity in the United States, capturing downstream value in Wood Buffalo through upgrading and chemical processing will be very difficult with the potential exception of electric power generation.
- The Municipality will have greater influence over and higher levels of success in the short to medium term by focusing on upstream activities or those activities that supply the oil sands industry operators.

6 Infrastructure Needs

In order to determine the suitability of Wood Buffalo to meet the needs of existing and potential businesses, the project team undertook a review and assessment of general infrastructure concerns in the Regional Municipality, with a particular emphasis on understanding the commercial and industrial land markets.

6.1 Transportation Infrastructure

Highways and Roads

The Regional Municipality is strategically positioned along the Highway 63 corridor, offering quick access to the oil sands developments to the North and South. As well, Highway 63 represents an important transportation connection between Wood Buffalo and population centres to the South. However, population growth and growth of the oil sands developments in Wood Buffalo have stressed the corridor to the limit. Improvements are being made through Canada's Economic Action Plan to mitigate this stress, including the construction of interchanges at Thickwood Blvd. and Confederation Way, as well as the widening of the Highway from four to six lanes and improvements to the Athabasca Bridge. These capital investments will both improve the flow of traffic, especially to the quickly growing residential neighbourhoods in Fort McMurray, and improve safety.

Air Service

Fort McMurray Airport is serviced by commercial and charter air carriers, offering direct and connecting flights across the country. However, while the airport was originally designed to accommodate 70,000 passengers annually, volumes rose well above this to 500,000 by 2007. It is estimated that volumes rose further to 700,000 in 2009. While still functioning, the system is stressed beyond its limits. With projected population increases, as well as further oil sands developments that will come on stream, these volumes will likely increase in the future. Though there are plans to expand the airport facility to meet the increased and future demand, these plans have been delayed several times. In fact, due to rapid growth, the planned first phase of the expansion was deemed to not fully meet the needs of the airport before construction even began.

Further, funding concerns have delayed the project as well. However, with the Fort McMurray Regional Airport Commission making a full transition to Authority status, it is now possible to access funds beyond what has been committed to the expansion project already from the Alberta Capital Finance Authority. Construction of the expanded airport, namely a second runway and a new terminal, is scheduled to begin in 2011 and be completed by 2013. The airport expansion represents an important economic development priority for Wood Buffalo, primarily for the expansion of the oil sands development and attraction of workers across all sectors. However, expansions will have impacts on tourism as well, improving access to the area.

Public Transit and Worker Transportation

Wood Buffalo has access to an extensive public and intra-provincial bus transportation network, through services offered by Wood Buffalo Transit, Diversified Transportation Limited and Red Arrow Motorcoach. Wood Buffalo Transit operates ten separate routes that service the Fort McMurray Urban Service Area, with several specialized routes at peak times. Diversified Transportation is a privately owned

transportation company that operates over 500 units that connect the urban areas in Wood Buffalo with worksites in the rural areas, as well as providing complementary public transportation around the urban area and connections to other areas of Alberta. Lastly, Red Arrow Motorcoach connects Wood Buffalo with other areas of the province, operating an extensive intra-provincial network around Alberta.

In an economic development context, these services are important to the Regional Municipality in a variety of ways, but especially with regards to quality of life. Municipal transit provides the important service of moving people around the Urban Areas of Wood Buffalo, which is especially relevant given the level of in-migration to Wood Buffalo. These new residents may not necessarily have a means of independent transportation, so transit offers a viable alternative for new workers and their families of getting around Wood Buffalo. In addition, the extensive services connecting the urban Areas of Wood Buffalo with rural worksites provide an alternative to workers who may wish to choose urban areas of Wood Buffalo over the camps in the rural areas. This service becomes slightly more relevant as the quality of life in Wood Buffalo further develops and some migrant workers choose to settle more permanently in Wood Buffalo, by moving their residences and families which may be in a different part of the province, country, or world.

6.2 Commercial and Industrial Lands Assessment

The Regional Municipality of Wood Buffalo recently undertook a project to assess commercial and industrial land use (CILUS). This study was undertaken with the understanding that there was a critical land shortage in the Regional Municipality. Much of the efforts to date have been focused on the extensive residential growth that has occurred and opening new lands for residential development. However, the lack of commercial and industrial lands is creating a difficult situation for business expansion and attraction. This is especially troubling given the escalating costs on doing business in the Oil Sands Region and competition from other areas of Alberta. The Regional Municipality of Wood Buffalo's Population Projection Model predicts the population to increase between 162,900 and 233,300. To effectively accommodate this projected growth Wood Buffalo must expand its urban areas, while also establishing areas for industry, trade and commerce to service these new residents.

6.2.1 Commercial Space

The CILUS identified a strained present state for employment lands in Wood Buffalo. Generally speaking, the Study concluded that both commercial space and vacant industrial land levels in the Regional Municipality are well below "acceptable" levels, which is beginning to have a significant effect on economic growth in the area. Retail and commercial space levels are currently at approximately 2.44 square metres per resident, while a more balanced allocation for commercial and retail space is approximately 4.18 square metres per resident. The study concluded that to reach a "typical" level, Wood Buffalo would need an additional 188,517 square metres of commercial space, just to service the current population. As a result of this shortage, gaps exist in the commercial sector. While certain segments are well represented in the retail sector, such as food store retail (supermarkets, grocery stores and specialty food stores), other non-food retail like apparel, home furnishings, book stores, music stores, sporting goods are underrepresented. It is important to note that the results of the statistical assessment and focus groups that were conducted in the completion of this business inventory and gap analysis report are consistent with and support the findings from CILUS. This general segment accounts for 31% of the total space in the Regional Municipality, while it accounts for about 40% of the space in a typical market.

Further demonstrating the stress that the commercial market is under, there are only about 7,500 square metres of vacant commercial space, representing a vacancy rate of just 2.8% in Wood Buffalo. A more balanced vacancy rate, which would suggest a wide range of spaces that can support a variety of businesses, would be in the 7%-10% range. The situation is even more pronounced when the challenges to occupying vacant space are factored in.

This lack of space has resulted in rental and leasing rates that are disproportionate to the size of Wood Buffalo and in fact comparable with the rates of major urban centres like Vancouver, Calgary and Toronto. At a 2.8% vacancy rate, the resulting costs make Wood Buffalo an unsustainable business location and are considerably affecting the economic development prospects across the Regional Municipality, but especially with regards to retail services that would contribute to building a high quality of life in Wood Buffalo.

It's no surprise that this is the case in Wood Buffalo. Rapid economic growth associated with the oil sands developments and other regional infrastructure has produced a major upswing in commercial office demand, from professional and technical services supporting these projects. As noted above, this demand has now absorbed almost all of the commercial space in Wood Buffalo, while creating significant economic barriers to retailers looking to either enter commercial space or renew leases, based on higher costs. The effects go beyond just retailers though, considering that commercial office space also accommodates a range of other population-related uses that support quality of life, such as medical and dental offices. This highlights the need for purpose-built office developments in Wood Buffalo, particularly in the Urban Service Area, to accommodate these uses and leave room for the expansion of retail and population-related uses.

In short, the current and past conditions have left Wood Buffalo with a definite gap in the retail and population-related business sectors. This affects both the business attraction and retention prospects of the community, but also the quality of life that Wood Buffalo is capable of building, which influences the attraction of new workers to the area. While the oil sands developments attract workers from around the country or even the world, only a few decide to permanently settle in Wood Buffalo and move their families to the community. Building a more complete community that appeals to workers of all sectors and their families within Wood Buffalo can begin to address this. The CILUS indicates that achieving this will require a number of things.

- There needs to be more emphasis on developing purpose-built office spaces that can accommodate office uses without being a detriment to developments within the retail and population-related service sectors;
- The CILUS recommends preparing to accommodate large-format retail centre developments, characteristic to urban areas. These centres are able to accommodate national and sub-regional chain stores in a packaged environment, which can build on the quality of life in Wood Buffalo and offer the more regional or destination type shopping experiences; and
- These sites need excellent transportation access with frontage on major transportation routes, usually within an urban area. Given the present situation, opportunities within the current urban service area may be limited. The retail/commercial targets set out in this report and in CILUS (street front, mall and big box retail) should not require additional water and waste water treatment capacity beyond already in place residential/commercial infrastructure standards.

6.2.2 Industrial Land

In an industrial development context, the Regional Municipality has only 107 hectares of vacant industrial lands, which would presently be capable of accommodating 3,200 new jobs. This small supply becomes slightly more alarming when looking forwards, as the Municipality will likely need to accommodate an additional 10,000 new jobs by 2031. While a significant portion of these new jobs will be captured in oil sands projects, there is still a need for industrial space to accommodate businesses that service the oil sands developments, such as equipment sales, service and storage, transportation and warehousing, metal fabrication, and construction and engineering services. These uses typically require large contiguous parcels with large buildings, so a limited inventory of space significantly affects the ability to accommodate new investment.

The Regional Municipality currently has two industrial business parks. The MacKenzie Industrial Park, for all intents and purposes, should be considered fully occupied. The relatively new 45 hectare Eco-Industrial Park on the North side of the Urban Service Area is currently under development, but is also quickly reaching capacity and subject to intense price pressures due to lack of supply. As of February 8th, 2010 there were only 3.8 hectares of available industrial lands and approximately 2.8 hectares of commercial land. The CILUS indicates that this highlights the need for further industrial park lands to come on-stream. One suggestion was the lands surrounding the Fort McMurray Airport, particularly those on the south side of the Airport. The lands are well served by existing highway infrastructure and are buffered from existing and future residential areas. Through study of the area, the CILUS concluded that these lands are the “single greatest opportunity to expeditiously develop a new, comprehensively planned industrial business park.”

6.3 Summary of Infrastructure Needs

In summary, it is clear through a review of the CILUS and research for this gap analysis that the deficit of commercial and industrial space is resulting in larger problems with economic development potential and business sustainability.

- The current deficit of 230 gross hectares combined with the anticipated need for a further 450 gross hectares to accommodate growth to 2031 require the Municipality to open and develop 680 gross hectares of industrial land;
- Lack of industrial land will seriously inhibit the Municipality’s ability to expand downstream and upstream value added activities surrounding the oil sands sector;
- In addition to the current deficit of approximately 189,000 square metres, it is estimated that between 400,000 and 710,000 square metres of new retail/service commercial space will be needed;
- Lack of commercial and retail space is already negatively impacting business expansion, which, by limiting the goods and services available to residents is impacting quality of life and the Regional Municipality’s ability to attract skilled workers and new residents to the area.

In short, Wood Buffalo needs to address these deficits. Though the Lower Townsite Redevelopment Plan is expected to create significant revitalization in the urban core, the area will not specifically fulfil the role of large format or ‘big-box’ retail developments. The CILUS notes several candidate areas around Fort McMurray, with an understanding that a significant level of coordination among different groups is also needed to accomplish this goal and eventually release lands for commercial and industrial development.

Moving forward with infrastructure upgrades and redevelopment of the urban core with mixed use commercial, retail and residential is also essential in attracting providers of the goods and services required by local residents.

7 Strategic Objectives and Guiding Principles

An effective strategy is one that is fact-based and incorporates practical approaches that are likely to work. Based on the engagement and research that went into this work, a common set of community needs and guiding principles that form the core of future business diversification and attraction efforts for Wood Buffalo’s Economic Development team was developed. In this portion of the work, the strategies articulated are broad, reflecting a series of “aspirational” goals and strategic objectives that formed the basis of a more detailed action plan (described below).

The goals and related strategies were based on information derived from:

- Municipal background documents
- community and stakeholder input from the engagement processes
- discussions with economic development staff
- a review of the existing economic development initiatives and best practices
- a look at what business diversification and attraction tactics other jurisdictions are employing
- our professional experience with respect to findings related to other similar assignments

Consideration was also be given to the barriers and opportunities for attraction and how best to mobilize existing resources through the use of partnerships with other levels of government, business and not-for-profit organizations. This report is intended to be used in conjunction with the Commercial and Industrial Land Use Study, Lower Townsite Redevelopment Plan and the forthcoming Marketing and Branding Strategy.

7.1 Strategic Objectives

The following strategic objectives are recommended for Wood Buffalo:

1. Improve investment readiness and fundamentals by regularly achieving the **Gold Standard of services delivery** and maintain top quality promotional presence in target markets.
2. Recruit retail and commercial investment from within the community through the implementation of a **business retention and expansion program**.
3. **Initiate a rural business needs and viability assessment**
4. Recruit retail and commercial investment from outside the community through a **comprehensive marketing and promotions campaign**.
5. **Develop the value chain of the oil and gas sector** through strategic industry, municipal and provincial partnerships.

The following figure sets the local and broader context of the strategic objectives.

Figure 33 – Broader Context of Strategic Objectives

	Recruiting Retail and Commercial investment from Within the Community	Recruiting Retail and Commercial investment from Outside the Community	Developing the Oil and Gas Value Chain
Estimated near-term sector growth	Strong	Strong	Strong
Have a significant and sustaining impact on local economy	Strong	Strong	Very Strong
Municipal capital investment requirement to attract investment	Minimal	Moderate	Considerable
Current state of the sector?	Predictions are for a significant rebound in the retail sector on the Provincial level. Demand in Wood Buffalo is strong and rising. Financing is still difficult in some commercial sectors.	Predictions are for a significant rebound in the retail sector on the Provincial level. Demand in Wood Buffalo is strong and rising. Financing is still difficult in some commercial sectors.	Capturing downstream value added will be challenged by high prices for bitumen, excess refining capacity in the U.S. and distance to primary markets for chemical products. Upstream value added activities is showing stronger growth with renewed expansion of oil sands extraction activities.
How is this sector consistent with Council and the community's economic development values and goals?	Business diversification, retail expansion and quality of life are at the core of all Municipal strategies and plans.	Business diversification, retail expansion and quality of life are at the core of all Municipal strategies and plans.	Both the Province and Municipality have a stated goal of capturing greater value from the oil sands.
What is Wood Buffalo's current ability to capitalize on the sector?	Wood Buffalo can work with local business associations, Community Futures and provincial training organizations to build this initiative. However, departmental staffing will need to increase or priorities shifted to further realize the potential.	Wood Buffalo has a strong ability to capitalize on this sector offering 'hard data' to potential investors. However, departmental staffing will need to increase or priorities shifted to further realize the potential.	Wood Buffalo is best positioned to focus on the upstream activities supplying the oil sands industry. However, industrial land inventory is a limiting factor in the ability to capitalize on this opportunity.

	Recruiting Retail and Commercial investment from Within the Community	Recruiting Retail and Commercial investment from Outside the Community	Developing the Oil and Gas Value Chain
Desired future situation	In 5 years expanded local ownership by 10% with new businesses in each of the target sectors.	In 5 years expanded local retail from outside investors by 25% with at least 2 national chains attracted to the region	In 5 years, a 10% increase in number of businesses serving the oil sands residing in Wood Buffalo.
Capitalizes on competitive advantages	<ul style="list-style-type: none"> • Strong population growth • High proportion of children and young adults • High household income 	<ul style="list-style-type: none"> • Strong population growth • High proportion of children and young adults • High household income 	<ul style="list-style-type: none"> • Growth of oil sands • High wages and ability to attract migrant workers
Be aware of these competitive disadvantages	<ul style="list-style-type: none"> • cost of labour • availability and cost of space • infrastructure capacity 	<ul style="list-style-type: none"> • cost of labour • availability and cost of space • infrastructure capacity 	<ul style="list-style-type: none"> • lack of and cost of industrial land • infrastructure capacity • surplus capacity at US based facilities

7.2 Guiding Principles – Important Concepts for Action Planning

7.2.1 Implications of Technology on Service Delivery

Economic development is a service business and investment prospects require a high-degree of attention. To effectively determine the needs of the client (existing or prospective new business) and identify possible solutions takes strong selling skills and a broad knowledge of the local and regional economy, certain business sectors, building/land development and the local business community.

Interaction with the client may begin with a single staff person, but as the project develops it is normal for many different municipal departments and outside organizations to be involved. There needs to be a standard operating procedure and single interdepartmental point person who is capable of accessing information from many sources and being able to interact with the highest of corporate executives. To be consistently successful in retaining and attracting new business, the Regional Municipality and other organizations in the community must be recognized as one team who are working towards the common goal of doing whatever it can to attract desirable investments.

Figure 34 – Evolution of Economic Development Services

Year	The Gold Standard Response Time	The Gold Standard of Economic Development Service¹⁰
1996	48 hours	At the end of the call with the investment prospect the EDO says: “To help you better understand our community and the opportunities we have for you, I will put together a package that contains our Community Profile, Available Properties Guide and Lure Brochure. I will use Post-It Notes to highlight the pages that will be of most interest so you can quickly find the relevant information. I will courier that out to you tomorrow and you should have it in 48 hours.”
2001	Same day	At the end of the call with the investment prospect the EDO says “To help you better understand our community and the opportunities we have for you, I will send you an email before the end of the day that has several attachments including key excerpts from our Community Profile as well as hyperlinks to online listings of available property that closely meets your criteria.”
2007	While on the phone	<u>During</u> the call with the investment prospect, the EDO says “Do you have access to the Internet right now?” [YES] “Great, why don’t we go online and I’ll take you through our website so that you can download the relevant files. We’ll also go through our available properties directory and look at maps, photos and details of available properties which meet the criteria you’ve described to me.”

Any economic development and organization necessarily responds to a number of publics (or ‘target markets’) in the course of doing business. The chart below outlines the nature of these markets and our recommendation as to what “top notch” service provision would imply for each. A key philosophy running throughout this strategy is to enable the organization to provide this kind of service to each of these target markets.

Figure 35: Service Delivery to Target Markets

Target Market	How They Interact with the Economic Development Branch	Examples of ‘Top Notch’ Service Provision
Existing Businesses in Community	<ul style="list-style-type: none"> - enquiries related to business development and expansion - response to various initiatives aimed at retention, upgrading & expansion - participation with economic development organization in advocacy initiatives 	<ul style="list-style-type: none"> - regular visitation to ensure that Wood Buffalo is meeting their on-going needs - economic development involvement in various initiatives that improve the overall climate for doing business in Wood Buffalo - immediate response to specific enquiries or, at a maximum, within 24 hours

¹⁰ Developed by Millier Dickinson Blais Inc. for their municipal clients

Target Market	How They Interact with the Economic Development Branch	Examples of 'Top Notch' Service Provision
Potential New Businesses	<ul style="list-style-type: none"> - unsolicited enquiries into services and facilities available in Wood Buffalo - response to lead generation activities 	<ul style="list-style-type: none"> - maintenance of web site with all required information easily navigable and available - immediate response to enquiries or, at a maximum, within 24 hours - specific investigations into specific matters of particular interest / concern to the enterprise
Council, Community Groups and Organizations	<ul style="list-style-type: none"> - will refer economic development matters and questions to economic development for analysis and recommendations - expect to be updated periodically on economic development matters 	<ul style="list-style-type: none"> - regular reports to Council on economic development activities and successes - periodic meetings with community groups and organizations to discuss economic development issues - prompt response to any specific questions

Wood Buffalo has an opportunity to utilize the latest in Internet and web-based communications and technology to provide top-notch client service. If other municipalities are, then without it, it will be that much more difficult for Wood Buffalo to be successful. If they are not, then Wood Buffalo has a leg up in the first 10 minutes of the selling process.

Recently, the Economic Developers Council of Ontario held investment readiness seminars. Hosted by a U.S.-based firm that selects sites for international companies, the seminars were an effort to help communities identify what they need to do to be highly prepared for investment inquiries. The following findings are relevant to Alberta and this discussion:

- In the last 10 years decision cycles have been compressed. Operations run 365/7/24 and an economic development office that does not keep up is likely to miss or “turn-off” opportunities.
- Having an inventory of “Certified” available properties speeds up the process and heightens an investor’s interest. These certified properties have been independently verified to be ‘shovel-ready’. In other words, zoning is in place, there are no environmental/archaeological/geological problems and utilities are at the site.
- Competitive communities have an inventory of immediately available buildings and land, appropriate utility infrastructure, a labour force that is ready to work, shows widespread support for industry and can give a professional presentation to decision makers.

7.2.2 Where Does Lead Generation and Prospecting Fit In?

Meeting the “Gold Standard” is great, but if the phone is ringing only once a month, then the Municipality is not effectively leveraging its investment. Without a proactive effort of lead and visitor generation and prospecting this is exactly what will happen – Wood Buffalo will be waiting for people to call rather than generating interest in the product (Wood Buffalo) so that people will call.

The selection of target commercial and retail sectors that is contained in this report is an important component of being able to promote/sell effectively. Once there is an understanding and consensus on

the priority needs and where Wood Buffalo has the best chances of being successful, human and financial resources can be focused.

“Selling” is an important part of any economic development professional’s skill set. It should become an integral part of weekly activities. With targets selected, Wood Buffalo can become much more confident in being proactive to reach out to potential investors/visitors and “influencers”.

Investment in a quality Contact Relationship Management software package can be very helpful for lead prospecting and also delivering the Gold Standard of Service. This will be discussed further in the recommendations section.

7.2.3 Messaging

Although this strategy does not specifically identify any one particular brand that the community should employ, it should send a positive message.

To the prospective business investor, Wood Buffalo’s message needs to emphasize that the community will meet my employment needs. Its citizens are productive. The community cares about its citizens and will do what it can to keep them valuable contributors to my business. This is a place I want to invest.

7.2.4 Guiding Principle #2: Diversification by Attracting People, Not Businesses

For Wood Buffalo, the ability to continue to attract people to support business diversification and develop a sustainable community will be crucial. There were a number of concerns raised about the realities and perceptions of living and working in Wood Buffalo that the Regional Municipality must address in attracting residents and fostering business diversification. These concerns include:

- **Cost of living** – businesses have stated they cannot afford to pay the wages necessary to match the cost of living in Wood Buffalo
- **Access to health care** – surveys conducted by the Government of Alberta show that residents satisfaction of health facilities is the lowest in the province and that facilities are already strained and over capacity
- **Access to education** – while not yet a primary concern, educational facilities are reaching capacity with no plans or ability to expand
- **Access to child care** – child care facilities are limited in the region
- **Environmental reputation** – Wood Buffalo must address the negative perceptions of the region in its marketing efforts if it is going to successfully attract residents and new businesses

While not identified as an action strategy and not a core function of the Economic Development Branch, staff should work together with other departments to alleviate these concerns and positively promote the area to potential residents.

7.2.5 Linking to Senior Levels of Support

Throughout the engagement and the development of recommendations, it was identified that senior levels of government, most notably the Province of Alberta, is a significant partner in Wood Buffalo’s development and the need to identify ways in which Wood Buffalo’s economic development initiative can synergistically tie into efforts being made at the provincial level. The advantages are multiple:

- Funding assistance could be available
- Professional expertise in marketing plan development and organizing promotional events and company visits can be accessed

- Both the provincial and federal government have active investment recruitment attraction efforts that bring investment prospects and their agents to the community.

Interestingly, related that the latter point, both the provincial and federal governments are looking to its municipal partners to have developed a minimum level of investment readiness before they will bring investment prospects to the community. In the past, the approach was more compassionate and 'fair' where they would open an investment opportunity to nearly any community that fit within the geographic region. Through that experience they often received a very low level of service from communities, which in the eyes of the investment prospect reflected poorly on the government.

The provincial and federal governments are also striving for the "Gold Standard" of investment services. As such, they are starting to be far less lenient with unresponsive communities. Communities need to continue to strengthen (or initiate) relationships with government influencers.

8 Recommendations and Action Plan

The Action Plans look at a three year time horizon with achievable short-term goals to encourage the prospect of an ongoing commitment. With limited dollars and people to carry out the mandate it is very important to remain focused.

Economic development does not act in isolation – it impacts and is impacted by the community's environmental, cultural and social objectives. As a result, the community's Economic Development Branch must be open to partnerships: accepting them when approached by others and being proactive about establishing them. Sometimes the Branch will be the:

- **Leader** – initiating the partnership and taking primary responsibility for implementing it
- **Facilitator** – initiating the partnership and taking little to no role in implementation
- **Supporter** – reacting to a partnership invitation and contributing time and/or money towards implementation.

The Action Plan tables within this section show where and when this is the case.

Tertiary sectors to be targeted in business expansion and attraction efforts are:

- **Clothing and Shoe Stores** – men's, women's, family and children's clothing, shoe stores and footwear and leather goods repair stores
- **Personal Services** – dry cleaning and laundry services, pet and pet supply stores, beauty salons and investment advice
- **Home Centres, Home Furnishing and Electronics** – department stores, furniture stores, window treatment stores, appliance, television and other electronics stores, home centres and hardware stores
- **Food Stores and Pharmacies** – warehouse clubs and superstores, supermarkets and other grocery stores, fruit and vegetable markets, fish and seafood markets, meat markets, specialty food stores and pharmacies
- **Food and Accommodation Services** – full-service restaurants, limited-service eating places and hotels
- **Entertainment and Recreation** – hobby, toy and game stores, sporting goods stores, cinema and computer and software stores
- **Automotive Services** – car washes, automotive body, paint and interior repair and general automotive repair
- **Other Services** – used merchandise stores, tourism facilities, digital printing and day care facilities
- **Professional and Technical Services** – geophysical surveying and mapping, architectural, building inspection and industrial design services, scientific and technical consulting services
- **Research and Development** – testing laboratories, R&D in physical engineering and life sciences
- **Trucking and Warehousing** – general long distance and local freight trucking, general warehousing and storage, overhead door suppliers, full service truck stop and bulk liquids trucking

- **Equipment and Machinery Sales and Leasing** – commercial and industrial machinery and equipment rental and leasing, machinery, equipment and supplies wholesaler distributors, general rental centres
- **Other Services to Businesses** – couriers, advertising agencies, psychologists and family support services, skilled trades professionals (plumbing and HVAC contractors)

Secondary sectors to be targeted include upstream activities in the oil and gas value chain:

- **Support activities for mining and oil and gas extraction**
- **Construction**
- **Fabricated metal product manufacturing**
- **Agricultural, construction and mining machinery manufacturing**
- **Coating, engraving, heat treating and allied activities**
- **General purpose machinery manufacturing**
- **Natural gas distribution**

There are a number of fundamentals that need to be addressed in order for Wood Buffalo to take the leap into a more aggressive sector attraction campaign. For the most part, these need to be taken care of in the first year. However, dealing with them does not have to happen (and should not happen) at the expense of all of outward marketing initiatives.

Strategic Objective #1

Improve investment readiness and fundamentals by regularly achieving the Gold Standard of services delivery and maintain top quality promotional presence in target markets and in social media

1.1 Annual Planning		
Recommended Initiative	Priority and Role	Initiate By
<p>Adequate resources dedicated to investment retention and attraction. Review Economic Development’s budget for spending that is not associated with directly supporting the attraction and retention of investment. Reallocate appropriately. Similarly for human resources, to allow staff to focus time on investment readiness, marketing and selling activities, there is little time for other initiatives unless other resources are found. This would include responsibilities such as extensive committee meetings, etc.</p> <p>Resources: To be led by the Manager of Economic Development. Time Required: Approximately one week, including meetings with Economic Development staff. Cost: No additional costs are assumed from this activity.</p>	High; lead	2010
<p>Incorporate training into the annual action plan. Most emphasis should be on training that provides staff with best practices, but also spend some dollars on sales/marketing training.</p> <p>Resources: The focus of this strategy will be on business retention, expansion and attraction. All senior staff members from the Economic Development Branch are recommended to participate in training sessions in these activities. Time Required: Three working days for each staff member Cost: Webinars (\$1,000) and conferences (\$5,000) totalling \$6,000 in 2010/11 fiscal years</p>	High; lead	2010
<p>Complete annual Business Expansion and Attraction Action Plans that will focus human and financial resources for all initiatives during the upcoming year. The plans will make an objective assessment of the previous year’s efforts, relating the outcomes to the targets that were set at the beginning of the year.</p> <p>Resources: Economic Development Branch staff will consider outcomes from the Marketing and Branding Strategy in designing annual business attraction actions. Time Required: One week of Economic Development Branch senior staff members. Cost: No additional costs incurred for this activity.</p>	High; lead	2010

1.1 Annual Planning		
Recommended Initiative	Priority and Role	Initiate By
<p>Maintain a detailed and current source of community data including skills inventory, available property information and community profile and labour market statistics. Ongoing updates (minimum quarterly for all but Skills Inventory which is annual).</p> <p>Resources: Recruit an Economic Development Research Analyst (EDRA). This will be a primary task of the EDRA with guidance from a Senior Economic Development Officer (Senior EDO). To be conducted in partnership with municipal census, realtors associations, business associations, Oil Sands Developers Group and Alberta Employment and Immigration.</p> <p>Time Required: This will be a primary task for the Economic Development Research Analyst. It is recommended initial profiling to be contracted out with knowledge transfer as a key output.</p> <p>Cost: 50% time allocation of EDRA position. Expenses in addition to staffing costs include meeting, travel, data purchasing, software and contracting services. Total additional expenses \$10,000.</p>	<p>High; lead but in partnership with realtors, workforce orgs; StatsCan; municipal census</p>	<p>2011</p>

1.2 Physical Infrastructure and Creating Dynamic Commercial Areas		
Recommended Initiative	Priority and Role	Initiate By
<p>Continue collaborating with other Municipal departments to gain access to serviced commercial land. As was recommended in the CILUS, the deficit of industrial and commercial land must be rectified or the attraction strategies will prove less successful because there are few spots for new and expanding businesses to go.</p> <p>Resources: Economic Development Branch staff members participating at interdepartmental planning meetings.</p> <p>Time Required: Approximately 2 meetings each month.</p> <p>Cost: There are no additional costs associated with this activity.</p>	<p>High; support efforts of other municipal departments</p>	<p>2010</p>
<p>Verify the existence of “certified” shovel-ready development sites. Potential investors will have increased confidence in taking the next steps towards building if they know there will be few delays in getting to market.</p> <p>Resources: Senior EDO in partnership with Planning staff.</p> <p>Time Required: Several meetings over the span of 3 months.</p> <p>Cost: Contracting out to third party \$10,000.</p>	<p>Medium; lead</p>	<p>2011</p>

1.2 Physical Infrastructure and Creating Dynamic Commercial Areas		
Recommended Initiative	Priority and Role	Initiate By
<p>Investigate best practices of creating dynamic main streets and commercial areas through the implementation of policies and legislation such as community improvement districts, facade improvement programs, enhanced building and architectural standards, encouraging retail and hospitality-only uses at street level and offices to above stories as well as civic square and park improvements.</p> <p>Resources: Economic Development Branch staff to prepare best practices report to present to other Municipal Departments. This initiative is in line with strategies set out for the Economic Development Branch in the Lower Townsite Redevelopment Plan.</p> <p>Time Required: One week.</p> <p>Cost: No additional costs anticipated.</p>	Medium; leader and facilitator with other departments	2011

1.3 Marketing and Promotion		
Recommended Initiative	Priority and Role	Initiate By
<p>Create a web presence for the Economic Development Branch with dedicated references fulfilling the needs and priorities of site selectors and the retail and commercial sector.</p> <p>Resources: EDRA and Senior EDO advising web contractor</p> <p>Time Required: Website content to be gathered through the activities in Activity 1.1. This activity will require several meetings over the span of 2 months during website development. Ongoing requirements will be 2 days each month to conduct website content refresh.</p> <p>Cost: Initial website development \$25,000. Ongoing annual website maintenance fees \$5,000.</p>	High; lead	2010
<p>Develop commercial and retail promotion and information pieces in line with the marketing and branding strategy currently in development.</p> <ul style="list-style-type: none"> The internet takes precedence over all other media, but there is still a place for ready-to-print marketing material or short-run marketing material. The look should be consistent with Wood Buffalo's overall branding efforts. <p>Print outs of research that further supports the credibility of the sector in Wood Buffalo (e.g. Province of Alberta brochures)</p> <p>Resources/Time/Cost: The Marketing and Branding Strategy will advise on required resources and associated costs.</p>	High; lead	2011

1.3 Marketing and Promotion		
Recommended Initiative	Priority and Role	Initiate By
<p>Ensure all available commercial properties are identified and updated in online properties guide as a component of the recommended web presence. This could be as simple as an interactive link to local realtor property listings or as complex as a GIS enabled tool that displays properties and other, similar (by NAIC) resident businesses on a regional map.</p> <p>Resources: Senior EDO to lead an outside contractor in the development of this web based site selector tool.</p> <p>Time Required: Several meetings over the span of 2 months.</p> <p>Cost: Costs to develop this tool from \$2,000 for link to available commercial properties to \$20,000 for GIS enabled spatial assessment of available lands and local businesses.</p>	High; lead	2011

1.4 Service Delivery – Department		
Recommended Initiative	Priority and Role	Initiate By
<p>Achieve the Gold Standard of service delivery</p> <ul style="list-style-type: none"> • All current and future promotional materials and tools must be available online and readily available either as the user is browsing alone or on the phone with Economic Development staff. • Create an ability to provide immediate email responses with relevant attachments, including community profile, available properties, mapping and market analyses. • Encourage other departments to have land use planning information available electronically (e.g. Zoning By-law, building application). • Work with business licensing to transfer business licensing to NAIC standard <p>Resources: A primary task of the EDRA recruited from recommended initiative 1.1 will be to ensure access of updated information on a current website. Allocate Senior EDO to work with other departments in migrating data and providing online access to information.</p> <p>Time Required: One quarter part-time equivalent either internal or contract position to keep website current. Several meetings required of Economic Development Officer meeting with other departments to communicate Economic Development Branch needs.</p> <p>Cost: 25% annual salary of the EDRA position.</p>	High; lead with other departments	2011

1.4 Service Delivery – Department		
Recommended Initiative	Priority and Role	Initiate By
<p>Contact information goes on EVERYTHING! An investment decision is one of the most significant that any business person will ever make. This type of transaction will not happen without considerable involvement of the development officer. Ensure that the development officer’s contact details are very prominent on EVERYTHING that is published. Direct all prospects to a person, not an “info” or “inquiries” mailbox – they will expect personal service and want to know they will get it before picking up the phone or sending the email.</p> <p>Resources: Internal document control processes. Time Required: Minimal time is required to ensure all communication is personalized. Cost: No additional costs expected.</p>	High; lead	2010

1.5 Public Relations		
Recommended Initiative	Priority and Role	Initiate By
<p>Work with the Regional Municipality’s Communications Department to ensure that messages which support the outcomes of this strategy are a part of regular practice. This is an initiative that Economic Development needs to undertake in support of its investment attraction and retention efforts, but it is one that the Municipality (as a whole) should take the lead.</p> <p>Resources: This initiative will be complimented by the forth coming Economic Development Marketing and Branding Strategy. Time Required: Occasional meetings with other Municipal Departments to clearly communicate the needs and priorities of Economic Development Branch to other departments. Cost: No additional costs anticipated.</p>	High; facilitator	2010

1.6 Contact Management		
Recommended Initiative	Priority and Role	Initiate By

1.6 Contact Management		
Recommended Initiative	Priority and Role	Initiate By
<p>Implementation of a robust and user friendly Contact Relationship Management system. CRM systems vary in function and form including off-site web hosted systems to onsite server hosted systems. Economic Development must discuss their needs with information technology to determine the system best suited to them.</p> <p>Resources: Economic Development staff to scan and report on appropriate CRM software. Time Required: One week to scan potential software and prepare a summary report with recommendations. At the outset of implementing a CRM system, additional time should be anticipated as staff becomes familiar with the functionalities of the system. Cost: Purchase of CRM software from \$1,000 to \$12,000</p>	High; lead	2010
<p>Develop an “exit strategy” to track unsuccessful projects. This can be as simple as a survey with companies that leave Wood Buffalo or prospects that did not come to the community. Utilize the above mentioned CRM system to track unsuccessful projects.</p> <p>Resources: Contact relationship management (CRM) system. Time Required: To be conducted by Economic Development Branch staff. To be performed in conjunction with BR+E initiative (objective 2.1) and Business Attraction efforts. Cost: Refer to CRM cost in recommended initiative 1.6</p>	High; Lead	2010

Strategic Objective #2

Recruit retail and commercial investment from within the community through the implementation of a business retention and expansion program

2.1 Develop an ongoing business retention and expansion (BR+E) program focused on creating a diverse retail and commercial environment		
Recommended Initiative	Priority and Role	Initiate By
<p>Every business owner should be contacted annually evaluate their situation and determine the likelihood of their expansion or contraction. Community Futures, Chamber of Commerce, North-eastern Alberta Aboriginal Business Association, Keyano College and others would find value in being a partner in this initiative as it provides competitive intelligence. In the immediate future, Wood Buffalo needs to:</p> <ul style="list-style-type: none"> • Prioritize the information needed from each firm such as number of employees, prospects for growth, challenges to growth, etc. • Prioritize those business segments highlighted from the long-list short-list process • ‘Clean’ the recently created business inventory. Contact each business listed in the newly created business inventory, we are suggesting the recruiting of summer interns to accelerate the process • Businesses that identify significant concerns or pending expansions should be visited by the Economic Development Branch or one of the Regional Municipality’s partner organizations as listed above. <p>Resources: Considerable resources need to be dedicated to this task. Requirements are based entirely on how many businesses are targeted for the program. A goal of 30 meetings per month is realistic for a full-time individual considering preparation time and almost every visit will result in some type of follow-up. Contracting the work externally has positive factors (more meetings completed in same timeframe, all admin taken care of, etc.) but it does have negative factors (relationships with the business owners are ‘temporary’, follow-up work still needs to be done by staff, etc.). The municipality may consider a short-term pilot project using external resources and evaluate the usefulness of the initiative. If carried on, the longer term goal should be to recruit a dedicated staff (one or more) to manage the BR+E program and maintaining consistent contact with businesses in the region. A good first step would be to contact several municipalities who have completed BR+E projects.</p> <p>Time Required: six months to one year for initial inventory clean up and BR+E survey, however, the BR+E process is ongoing.</p> <p>Cost: Initial business inventory ‘cleansing’ six months contract Clerical Position or \$15,000 outside contractor (recommended YLM). Six month Pilot Project with a goal of meeting with 50 businesses and providing strategic recommendations: \$60,000 (contract services) plus internal admin resources to liaise with consultant and provide business contact information, etc. Ongoing investment is annual salary of Senior EDO (working as BR+E specialist).</p>	High; lead	2010

2.1 Develop an ongoing business retention and expansion (BR+E) program focused on creating a diverse retail and commercial environment		
Recommended Initiative	Priority and Role	Initiate By
<p>Use the BR+E program as a tool for ongoing annual evaluations of business gaps and measuring the success of retention and attraction strategies.</p> <p>Resources: Included in the BR+E recommendation above Time Required: To be performed by the BR+E specialist to be recruited in 2011. Cost: Annual salary of Senior EDO (note: these is the same cost suggested in the ongoing investment required in the previous recommended initiative)</p>	Medium; lead	2011
<p>Share information with public works and infrastructure planning to adequately meet and plan for ongoing business needs. Encourage business licensing to adopt a registry that gathers the same information as Economic Development and utilizes standard categories such as NAICs.</p> <p>Resources: Included as work allocated to EDRA and BR+E specialist – both new positions recommended in this report. Time Required: Ongoing regular meetings with planning and other departments. Cost: No additional costs anticipated for this initiative.</p>	High; facilitate	2010

2.2 Implement a communications plan to reach out to important influencers in the community		
Recommended Initiative	Priority and Role	Initiate By
<p>Work closely with stakeholder, including the CFDC and other organisations, to ensure they know the commercial opportunities being targeted.</p> <p>Resources: This work will be allocated to a Senior Economic Development Officer. Time Required: To be conducted in conjunction with regular outreach and networking meetings. Cost: No additional costs anticipated for this initiative.</p>	High; lead	2010

2.2 Implement a communications plan to reach out to important influencers in the community

Recommended Initiative	Priority and Role	Initiate By
<p>Educate other municipal staff and politicians on the commercial and retail attraction strategy and objectives and reiterate the importance of them speaking about the strategy with others.</p> <p>Resources: This initiative to be conducted by all members of the Economic Development Branch. Time Required: In conjunction with other regular interdepartmental meetings and meetings with council members. Cost: No additional costs associated with this initiative.</p>	Medium; support	2011
<p>Develop and distribute a commercial and retail attraction brochure to be distributed to business association members and at community events.</p> <p>Resources: Utilize the literature and materials developed in recommended initiative 1.3. Time Required: To be incorporated into regular outreach efforts of the Economic Development Branch. Cost: No additional costs associated with this initiative.</p>	Medium; lead	2011

Strategic Objective #3
Initiate a Rural Business Needs and Viability Assessment for Wood Buffalo

3.1 Initiate a rural business needs and viability assessment for Wood Buffalo		
Recommended Initiative	Priority and Role	Initiate By
<p>Utilize the business inventory to categorize businesses by postal code and highlight the business strengths and weaknesses of the rural areas.</p> <p>Resources: Economic Development Branch staff can initiate this project immediately using the business inventory tool recently created by this project.</p> <p>Time required: 1 week.</p> <p>Cost: No costs assumed.</p>	High; lead	2010
<p>Engage with rural community and business leaders to recognize the unique business needs of each rural community.</p> <p>Resources: Rural engagement, to facilitate full participation, can be outsourced to an external agency or completed internally. The advantage of outsourcing is a level of independence is ensured. Information acquired should be followed by a viability check to accelerate the process of recruiting appropriate business for the rural areas. This phase of the project should be complete by the end of July 2010.</p> <p>Time required: 2 months.</p> <p>Cost: \$15,000 plus travel expenses.</p>	High; lead	2010
<p>Utilize the BR+E program to target businesses in the urban area with the potential to expand or diversify services into the rural areas.</p> <p>Resources: Lessons learned from the engagement process are integrated into the BR+E process to identify those businesses with the potential to expand service delivery to rural areas.</p> <p>Time required: less than 1 week added to BR+E program.</p> <p>Cost: \$2,000 addition to BR+E program.</p>	High; lead	2011; in concert with main BR+E

3.1 Initiate a rural business needs and viability assessment for Wood Buffalo

Recommended Initiative	Recommended Initiative	Recommended Initiative
<p>Partner with First Nations, Metis and rural business associations as well as rural community leaders to promote retail and commercial opportunities to rural businesses and entrepreneurs.</p> <p>Resources: Economic Development Branch staff will conduct meetings and interviews to promote businesses opportunities.</p> <p>Time required: approximately 2 weeks spread over 3 months.</p> <p>Cost: \$5,000 in travel and meeting expenses.</p>	<p align="center">High; lead</p>	<p align="center">2011</p>

Strategic Objective #4

Recruit retail and commercial investment from outside the community through a comprehensive business attraction and promotions campaign

4.1 Reach out to independent businesses and boutiques		
Recommended Initiative	Priority and Role	Initiate By
<p>Independent businesses that are already operating in other communities can be an excellent source of opportunities. Economic Development should seek businesses that fit the target markets and meet the goals of the Lower Townsite Redevelopment Plan operating in a similar environment such as Grande Prairie, Red Deer, Lethbridge, Medicine Hat and Saskatoon.</p> <p>Resources: Research to be conducted by Senior Economic Development Officers Time Required: Two weeks to conduct and report on research of businesses in other communities. Cost: No additional financial costs anticipated.</p>	High; lead	2011
<p>Distribute mail outs and brochures, using materials developed through the Marketing and Branding Strategy.</p> <p>Resources: To be conducted internally. Distribute through trade magazine mailing lists and associations with memberships in Wood Buffalo's target markets. Time Required: six months. Cost: \$20,000.</p>	Medium; lead	2011
<p>Attend expositions and trade shows that feature independent businesses in Wood Buffalo's target markets. Examples include clothing exhibitions attending by purchasers from independent clothing retailers. Be sure to distribute commercial and retail attraction brochures at these events.</p> <p>Resources: Economic Development Branch staff to attend events. Time Required: Total of 12 person days each year allocated to trade show attendance. Cost: \$15,000 (3 trade shows at \$5,000/each).</p>	High; lead	2011

4.2 Reach out to regional and national chains, franchises and box stores

Recommended Initiative	Priority and Role	Initiate By
<p>This is a potential source of leads, but while leads for independent stores can be more personal, these leads will be more closely associated with cold calling.</p> <p>Resources: Initiative to be stored in-house or contracted out.</p> <p>Time Required: In house operation requires either a half-time Senior Economic Development Officer working as a retail attraction specialist or an external contractor. External contracts offer greater targeting of skills and experience as well as the flexibility to change or add contractors over time.</p> <p>Cost: External contractors may be \$60,000/year, however, fee structures can be variable and incorporate a bonus structure as well as be limited/targeted to individual store attraction efforts. Contracts to attract a single box store retail establishment can approach \$20,000.</p>	Low; lead	2011
<p>Become a member of the International Council of Shopping Centres and attend the bi-annual Canadian conventions in Toronto (each year in October) and Whistler (each year in January).</p> <p>Resources: To be attended by Economic Development Branch staff.</p> <p>Time Required: Two weeks each year. Planning for conference attendance is key – target individuals in advance and make appointments for meetings while in Toronto/Whistler.</p> <p>Cost: Canadian Convention (Toronto) \$1,100 plus travel. Whistler Convention \$800 plus travel.</p>	Medium; lead	2011
<p>Develop a sophisticated marketing package consistent with the Marketing and Branding Strategy that responds to the specific demographic and community characteristics demanded by these retailers. Recommended as a first step is to meet with franchisees or store managers who are already in Wood Buffalo to determine their market needs.</p> <p>Resources: Package design and content to be created by internal staff and external design contractor.</p> <p>Time Required: 3 months.</p> <p>Cost: \$2,000</p>	High; lead	2010

Strategic Objective #5

Develop the value chain of the oil and gas sector through strategic industry, municipal and provincial partnerships.

5.1 Outreach to Attract Upstream Value Added Activities		
Recommended Initiative	Priority and Role	Initiate By
<p>Partner with the province and other regions to leverage Wood Buffalo's time and money in attracting value added activities.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: \$1,000/year for travel.</p>	High; lead and facilitator	2011
<p>Existing companies can be the most critical source leads for upstream opportunities. It is important, through an initiative, such as the Business Retention and Expansion program described above, to stay in touch with manufacturers and other end user service providers to identify what they are purchasing outside of Wood Buffalo. Understanding this will lead to picking up on opportunities.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: No additional costs anticipated.</p>	High; lead	2011
<p>Develop a sophisticated marketing package that respond to the specific demographic and community characteristics demanded by these suppliers. We recommend as a first step to meet with franchisee or store manager to determine their market needs to assess Wood Buffalo's readiness.</p> <p>Resources: Package design and content to be created by internal staff and external design contractor. Time Required: 3 months. Cost: \$2,000</p>	Medium; lead	2011

5.1 Outreach to Attract Upstream Value Added Activities		
Recommended Initiative	Priority and Role	Initiate By
<p>Target independent businesses that are already operating in other communities, especially those already supplying the oil sands industry.</p> <p>Resources: Research to be conducted by Senior Economic Development Officers Time Required: Two weeks to conduct and report on research of businesses in other communities. Cost: Allocate \$2,000/year for mailing and distribution costs.</p>	Medium; lead	2012
<p>Attend expositions and trade shows that feature independent businesses supplying the oil sands industry.</p> <p>Resources: Expositions to be attended by Economic Development Branch staff. Time Required: One week each year. Cost: \$2,000 in convention fees and travel costs.</p>	Medium; lead	2012

5.2 Market Assessment and Stakeholder Engagement for Downstream Value Added Activities		
Recommended Initiative	Priority and Role	Initiate By
<p>Initiate discussions with firms listed in the secondary value chain assessment of this report. Begin conversations about the opportunities in expanding the value chain in Wood Buffalo and develop a needs assessment to make the initiative a reality. Become involved in: Trade Team Alberta, Hydrocarbon Upgrader Task Force and Chemical Cluster Steering Committee. Drive agendas towards supporting oil sands value chain development including trade missions, investment sales calls, website and printed promotions.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: No additional costs anticipated.</p>	Low; facilitate/ support	2012

5.2 Market Assessment and Stakeholder Engagement for Downstream Value Added Activities		
Recommended Initiative	Priority and Role	Initiate By
<p>Continue the conversation with the Oil Sands Developers Group, key industry players and the provincial government. This initiative is a long term goal that will require the buy and support of these external parties.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: No additional costs anticipated.</p>	Medium; facilitate	2012

5.3 Labour Market Development for Upstream Value Added Activities		
Recommended Initiative	Priority and Role	Initiate By
<p>Ongoing relationship development with human resources managers of local companies in order to assess latest issues and how they may affect long term development.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: No additional costs anticipated.</p>	Medium ; lead with Alberta Employment & Immigration; Chamber of Commerce; private sector	2011
<p>Play a supporting role with stakeholders to develop labour attraction strategies that are intended to resolve issues as identified above. Potential lead partners include Employment and Immigration and the Oil Sands Development Group.</p> <p>Resources: Conducted by Economic Development Branch staff. Time Required: Ongoing meetings throughout the year. Cost: No additional costs anticipated.</p>	Medium; support with Chamber of Commerce and Oil Sands Developers Group	2011

9 Conclusion

The Regional Municipality has been experiencing rapid and unparalleled growth. Wood Buffalo has been taking proactive steps to plan for growth and create a more economically and socially sustainable region. *Future Forward*, Fort McMurray's 20 year community vision identifies business diversification as a key goal for the future. The *Economic Development Strategy 2010-2014*, envisions a future with greater industrial sector balance, local provision of goods and services and supply of retail, commercial and professional services. The goal of this project was to assess the secondary and tertiary sector opportunities in Wood Buffalo and set out an action plan to realize those opportunities.

A statistical assessment which examined local industrial location quotients and theoretical capacity for business establishments was vetted and prioritized through a community engagement process. The result was a list of community priorities for the business expansion and attraction efforts of the Economic Development Branch. These priorities include personal and household needs such as clothing and shoe stores and options for entertainment and recreation, as well as business needs such as professional and technical services and equipment sales/leasing. Finally, recommendations for sectors to target in capturing greater value from the oil and gas supply chain are also provided.

The actions and targets to achieve increased diversity of business in Wood Buffalo include:

- Improving investment fundamentals
- Implementing a business retention and expansion program to recruit retail and commercial investment from within the community
- Implementing a marketing and promotions campaign to recruit retail and commercial investment from outside the community
- Developing the oil and gas value chain through strategic industry, municipal and provincial partnerships

The work will not be without its challenges. Past reports and community engagement revealed a shortage of industrial land and commercial and retail space, strained infrastructure, high cost of living and high wages. However, through provincial, municipal and industry collaboration the opportunities and targets set out in this report will be achieved.

Appendix I

Document Reference List

Documents Reviewed:

Investing in our future: Responding to rapid growth of Oil Sands development

Canadian Energy Research Institute: Economic impacts of the petroleum industry in Canada

Regional Municipality of Wood Buffalo: Regional Economic Development Strategy, 2010-2014

Regional Municipality of Wood Buffalo: Commercial and Industrial Land Use Study, 2010

Government of Alberta: Regional Economic Indicators, Wood Buffalo Region 2009

Regional Municipality of Wood Buffalo: 2009 Resident survey of Municipal Service and Facilities report

Regional Municipality of Wood Buffalo Census 2008

Oils Sands Developers Group: Report on mobile workers in the Wood Buffalo Region of Alberta 2007

Regional Municipality of Wood Buffalo: Lower Townsite Area Redevelopment Plan

Wood Buffalo Labour Market Information: Worker needs and shortages analysis 2009

Future Forward 2030: The Fort McMurray Vision

Regional Municipality of Wood Buffalo: Fringe area development assessment, Urban service area 2007

Appendix II

North American Industrial Classifications Descriptions

North American Industrial Classification System (NAICS)

Sector Definitions

Agriculture, Forestry (NAICS 11)

This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.

Establishments primarily engaged in agricultural research or that supply veterinary services are not included in this sector.

Mining and Oil and Gas Extraction (NAICS 21)

This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids, such as coal and ores; liquids, such as crude petroleum; and gases, such as natural gas.

The term *mining* is used in the broad sense to include quarrying, well operations, milling (for example, crushing, screening, washing, or flotation) and other preparation customarily done at the mine site, or as a part of mining activity.

Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included in this sector. Establishments performing similar activities, on a contract or fee basis, are also included.

Construction (NAICS 23)

This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

Manufacturing (NAICS 31-33)

This sector comprises establishments primarily engaged in the physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories or mills. Manufacturing establishments may own the materials which they transform or

they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools.

Wholesale Trade (NAICS 41)

This sector comprises establishments primarily engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are therefore organized to sell merchandise in large quantities to retailers, and business and institutional clients. However, some wholesalers, in particular those that supply non-consumer capital goods, sell merchandise in single units to final users.

This sector recognizes two main types of wholesalers, that is, wholesale merchants and wholesale agents and brokers.

Retail Trade (NAICS 44-45)

The retail trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are therefore organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, that is, store and non-store retailers.

Information and Cultural Industries (NAICS 51)

This sector comprises establishments primarily engaged in creating and disseminating (except by wholesale and retail methods) information and cultural products, such as written works, musical works or recorded performances, recorded dramatic performances, software and information databases, or providing the means to disseminate them. Establishments that provide access to equipment and expertise to process information are also included.

The main components of this sector are the publishing industries (except exclusively on Internet), including software publishing, the motion picture and sound recording industries, the broadcasting industries (except exclusively on Internet), the internet publishing and broadcasting industries, the telecommunications industries, the internet service providers, web search portals, data processing industries, and the other information services industries.

Finance and Insurance (NAICS 52)

This sector comprises establishments primarily engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions. Included are:

- Establishments that are primarily engaged in financial intermediation. They raise funds by taking deposits and/or issuing securities, and, in the process, incur liabilities, which they use to acquire financial assets by making loans and/or purchasing securities.

Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale and risk.

- Establishments that are primarily engaged in the pooling of risk by underwriting annuities and insurance. They collect fees (insurance premiums or annuity considerations), build up reserves, invest those reserves and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.
- Establishments that are primarily engaged in providing specialized services that facilitate or support financial intermediation, insurance and employee benefit programs.

In addition, establishments charged with monetary control - the monetary authorities - are included in this sector.

Real Estate and Rental Leasing (NAICS 53)

This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets.

Establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate, are also included

Professional, Scientific and Technical Services (NAICS 54)

This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

The main components of this sector are:

- legal services industries;
- accounting and related services industries;
- architectural, engineering and related services industries;
- surveying and mapping services industries;
- design services industries;
- management, scientific and technical consulting services industries;
- scientific research and development services industries;
- advertising services industries.

The distinguishing feature of this sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance. Thus, the establishments classified in this sector sell expertise.

Management of Companies and Enterprises (NAICS 55)

This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

They may undertake the function of management, or they may entrust the function of financial management to portfolio managers

Educational Services (NAICS 61)

This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Health Care and Social Assistance (NAICS 62)

This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

Arts, Entertainment and Recreation (NAICS 71)

This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce, promote or participate in live performances, events or exhibits intended for public viewing; provide the artistic, creative and technical skills necessary for the production of artistic products and live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and operate facilities or provide services that enable patrons to participate in sports or recreational activities of pursue amusement, hobbies and leisure-time interests.

Accommodation and Food Services (NAICS 72)

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps.

This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises

Public Administration (NAICS 91)

This sector comprises establishments primarily engaged in activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

Appendix III

All Industries (6 digit LQ) Sorted and Classified by Location Quotient and Theoretical Capacity

Blue: LQ<1 AND Theoretical Capacity <100% - High Priority

Green: LQ>1 AND Theoretical Capacity <100% - Medium Priority

Rose: LQ>1 AND Theoretical Capacity >100% - Low Priority

NAIC 11 Agriculture, Forestry, Fishing and Hunting

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
Total	332556	5205	7653	2775	-2430	53%	
111110 - Soybean Farming	16	0	0	0	0	0%	0.0
111120 - Oilseed (except Soybean) Farming	219	3	5	0	-3	0%	0.0
111130 - Dry Pea and Bean Farming	39	1	1	0	-1	0%	0.0
111140 - Wheat Farming	1952	31	45	0	-31	0%	0.0
111150 - Corn Farming	103	2	2	0	-2	0%	0.0
111211 - Potato Farming	87	1	2	0	-1	0%	0.0
111219 - Other Vegetable (except Potato) and Melon Farming	159	2	4	0	-2	0%	0.0
111411 - Mushroom Production	9	0	0	0	0	0%	0.0
111419 - Other Food Crops Grown Under Cover	36	1	1	0	-1	0%	0.0
111421 - Nursery and Tree Production	131	2	3	0	-2	0%	0.0
111422 - Floriculture Production	156	2	4	0	-2	0%	0.0
111910 - Tobacco Farming	2	0	0	0	0	0%	0.0
111940 - Hay Farming	338	5	8	0	-5	0%	0.0
111993 - Fruit and Vegetable Combination Farming	30	0	1	0	0	0%	0.0
111994 - Maple Syrup and Products Production	1	0	0	0	0	0%	0.0
112120 - Dairy Cattle and Milk Production	1607	25	37	0	-25	0%	0.0
112210 - Hog and Pig Farming	619	10	14	0	-10	0%	0.0
112310 - Chicken Egg Production	61	1	1	0	-1	0%	0.0
112320 - Broiler and Other Meat-Type Chicken Production	154	2	4	0	-2	0%	0.0
112330 - Turkey Production	17	0	0	0	0	0%	0.0
112340 - Poultry Hatcheries	23	0	1	0	0	0%	0.0
112391 - Combination Poultry and Egg Production	11	0	0	0	0	0%	0.0
112399 - All Other Poultry Production	7	0	0	0	0	0%	0.0
112410 - Sheep Farming	50	1	1	0	-1	0%	0.0
112420 - Goat Farming	7	0	0	0	0	0%	0.0
112510 - Aquaculture	9	0	0	0	0	0%	0.0
112910 - Apiculture	173	3	4	0	-3	0%	0.0
112920 - Horse and Other Equine Production	403	6	9	0	-6	0%	0.0
112930 - Fur-Bearing Animal and Rabbit Production	80	1	2	0	-1	0%	0.0
113110 - Timber Tract Operations	42	1	1	0	-1	0%	0.0
113210 - Forest Nurseries and Gathering of Forest Products	18	0	0	0	0	0%	0.0
113311 - Logging (except Contract)	269	4	6	0	-4	0%	0.0
114113 - Salt Water Fishing	14	0	0	0	0	0%	0.0
114210 - Hunting and Trapping	15	0	0	0	0	0%	0.0
115210 - Support Activities for Animal Production	484	8	11	0	-8	0%	0.0
115310 - Support Activities for Forestry	330	5	8	0	-5	0%	0.0
112110 - Beef Cattle Ranching and Farming, including Feedlots	6117	96	141	1	-95	1%	0.0
111190 - Other Grain Farming	4989	78	115	1	-77	1%	0.0
112991 - Animal Combination Farming	9704	152	223	2	-150	1%	0.0
111999 - All Other Miscellaneous Crop Farming	1749	27	40	1	-26	4%	0.1
115110 - Support Activities for Crop Production	621	10	14	1	-9	10%	0.2
112999 - All Other Miscellaneous Animal Production	223	3	5	1	-2	29%	0.5
113312 - Contract Logging	610	10	14	3	-7	31%	0.6
111330 - Non-Citrus Fruit and Tree Nut Farming	35	1	1	2	1	365%	6.8
114114 - Inland Fishing	7	0	0	1	1	913%	17.1
111160 - Rice Farming	0	0	0	0	0	#DIV/0!	#DIV/0!
111310 - Orange Groves	0	0	0	0	0	#DIV/0!	#DIV/0!
111320 - Citrus (except Orange) Groves	0	0	0	0	0	#DIV/0!	#DIV/0!
111920 - Cotton Farming	0	0	0	0	0	#DIV/0!	#DIV/0!
111930 - Sugar-Cane Farming	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 21 Mining, Quarrying, and Oil and Gas Extraction

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
212114 - Bituminous Coal Mining	11	0	0	0	0	0%	0.0
212115 - Subbituminous Coal Mining	8	0	0	0	0	0%	0.0
212116 - Lignite Coal Mining	1	0	0	0	0	0%	0.0
212220 - Gold and Silver Ore Mining	7	0	0	0	0	0%	0.0
212299 - All Other Metal Ore Mining	3	0	0	0	0	0%	0.0
212316 - Marble Mining and Quarrying	1	0	0	0	0	0%	0.0
212317 - Sandstone Mining and Quarrying	1	0	0	0	0	0%	0.0
212326 - Shale, Clay and Refractory Mineral Mining and Quarrying	2	0	0	0	0	0%	0.0
212393 - Salt Mining	1	0	0	0	0	0%	0.0
212397 - Peat Extraction	6	0	0	0	0	0%	0.0
212398 - All Other Non-Metallic Mineral Mining and Quarrying	6	0	0	0	0	0%	0.0
213117 - Contract Drilling (except Oil and Gas)	14	0	0	0	0	0%	0.0
213119 - Other Support Activities for Mining	275	4	6	0	-4	0%	0.0
211113 - Conventional Oil and Gas Extraction	3641	57	84	4	-53	7%	0.1
213111 - Oil and Gas Contract Drilling	1367	21	31	3	-18	14%	0.3
213118 - Services to Oil and Gas Extraction	6652	104	153	32	-72	31%	0.6
212323 - Sand and Gravel Mining and Quarrying	137	2	3	1	-1	47%	0.9
211114 - Non-Conventional Oil Extraction	56	1	1	7	6	799%	15.0
212315 - Limestone Mining and Quarrying	4	0	0	1	1	1597%	30.0
212210 - Iron Ore Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212231 - Lead-Zinc Ore Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212232 - Nickel-Copper Ore Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212233 - Copper-Zinc Ore Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212291 - Uranium Ore Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212314 - Granite Mining and Quarrying	0	0	0	0	0	#DIV/0!	#DIV/0!
212392 - Diamond Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212394 - Asbestos Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212395 - Gypsum Mining	0	0	0	0	0	#DIV/0!	#DIV/0!
212396 - Potash Mining	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 22 Utilities

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
221111 - Hydro-Electric Power Generation	24	0	1	0	0	0%	0.0
221113 - Nuclear Electric Power Generation	1	0	0	0	0	0%	0.0
221119 - Other Electric Power Generation	40	1	1	0	-1	0%	0.0
221121 - Electric Bulk Power Transmission and Control	18	0	0	0	0	0%	0.0
221122 - Electric Power Distribution	99	2	2	0	-2	0%	0.0
221210 - Natural Gas Distribution	165	3	4	0	-3	0%	0.0
221310 - Water Supply and Irrigation Systems	131	2	3	0	-2	0%	0.0
221320 - Sewage Treatment Facilities	17	0	0	0	0	0%	0.0
221330 - Steam and Air-Conditioning Supply	8	0	0	0	0	0%	0.0
221112 - Fossil-Fuel Electric Power Generation	35	1	1	2	1	365%	6.8

NAIC 23 Construction

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
237990 - Other Heavy and Civil Engineering Construction	175	3	4	0	-3	0%	0.0
238150 - Glass and Glazing Contractors	140	2	3	0	-2	0%	0.0
238190 - Other Foundation, Structure and Building Exterior Contractors	839	13	19	3	-10	23%	0.4
238299 - All Other Building Equipment Contractors	450	7	10	2	-5	28%	0.5
238330 - Flooring Contractors	1245	19	29	6	-13	31%	0.6
238320 - Painting and Wall Covering Contractors	2429	38	56	12	-26	32%	0.6
238120 - Structural Steel and Precast Concrete Contractors	186	3	4	1	-2	34%	0.6
237210 - Land Subdivision	3120	49	72	17	-32	35%	0.7
238140 - Masonry Contractors	698	11	16	4	-7	37%	0.7
237120 - Oil and Gas Pipeline and Related Structures Construction	1538	24	35	9	-15	37%	0.7
237110 - Water and Sewer Line and Related Structures Construction	315	5	7	2	-3	41%	0.8
236220 - Commercial and Institutional Building Construction	1789	28	41	12	-16	43%	0.8
238340 - Tile and Terrazzo Contractors	522	8	12	4	-4	49%	0.9
238170 - Siding Contractors	737	12	17	7	-5	61%	1.1
238130 - Framing Contractors	1570	25	36	16	-9	65%	1.2
238910 - Site Preparation Contractors	2912	46	67	30	-16	66%	1.2
238350 - Finish Carpentry Contractors	2958	46	68	32	-14	69%	1.3
238310 - Drywall and Insulation Contractors	2206	35	51	24	-11	70%	1.3
238110 - Poured Concrete Foundation and Structure Contractors	998	16	23	11	-5	70%	1.3
238390 - Other Building Finishing Contractors	527	8	12	6	-2	73%	1.4
238990 - All Other Specialty Trade Contractors	1300	20	30	15	-5	74%	1.4
237310 - Highway, Street and Bridge Construction	628	10	14	8	-2	81%	1.5
238160 - Roofing Contractors	700	11	16	9	-2	82%	1.5
236110 - Residential Building Construction	9199	144	212	122	-22	85%	1.6
238220 - Plumbing, Heating and Air-Conditioning Contractors	3065	48	71	44	-4	92%	1.7
238210 - Electrical Contractors and Other Wiring Installation Contractors	2978	47	69	49	2	105%	2.0
236210 - Industrial Building and Structure Construction	339	5	8	7	2	132%	2.5
237130 - Power and Communication Line and Related Structures Construction	164	3	4	5	2	195%	3.7
238291 - Elevator and Escalator Installation Contractors	27	0	1	1	1	237%	4.4

NAIC 31 Manufacturing – Food and Clothing Manufacturing

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
311111 - Dog and Cat Food Manufacturing	10	0	0	0	0	0%	0.0
311119 - Other Animal Food Manufacturing	71	1	2	0	-1	0%	0.0
311211 - Flour Milling	10	0	0	0	0	0%	0.0
311214 - Rice Milling and Malt Manufacturing	2	0	0	0	0	0%	0.0
311224 - Oilseed Processing	6	0	0	0	0	0%	0.0
311225 - Fat and Oil Refining and Blending	3	0	0	0	0	0%	0.0
311230 - Breakfast Cereal Manufacturing	3	0	0	0	0	0%	0.0
311310 - Sugar Manufacturing	1	0	0	0	0	0%	0.0
311320 - Chocolate and Confectionery Manufacturing from Cacao Beans	2	0	0	0	0	0%	0.0
311330 - Confectionery Manufacturing from Purchased Chocolate	5	0	0	0	0	0%	0.0
311340 - Non-Chocolate Confectionery Manufacturing	5	0	0	0	0	0%	0.0
311410 - Frozen Food Manufacturing	24	0	1	0	0	0%	0.0
311420 - Fruit and Vegetable Canning, Pickling and Drying	21	0	0	0	0	0%	0.0
311511 - Fluid Milk Manufacturing	195	3	4	0	-3	0%	0.0
311515 - Butter, Cheese, and Dry and Condensed Dairy Product Manufacturing	25	0	1	0	0	0%	0.0
311520 - Ice Cream and Frozen Dessert Manufacturing	10	0	0	0	0	0%	0.0
311611 - Animal (except Poultry) Slaughtering	59	1	1	0	-1	0%	0.0
311614 - Rendering and Meat Processing from Carcasses	99	2	2	0	-2	0%	0.0
311615 - Poultry Processing	10	0	0	0	0	0%	0.0
311710 - Seafood Product Preparation and Packaging	4	0	0	0	0	0%	0.0
311811 - Retail Bakeries	87	1	2	0	-1	0%	0.0
311814 - Commercial Bakeries and Frozen Bakery Product Manufacturing	55	1	1	0	-1	0%	0.0
311821 - Cookie and Cracker Manufacturing	3	0	0	0	0	0%	0.0
311822 - Flour Mixes and Dough Manufacturing from Purchased Flour	6	0	0	0	0	0%	0.0
311823 - Dry Pasta Manufacturing	7	0	0	0	0	0%	0.0
311911 - Roasted Nut and Peanut Butter Manufacturing	3	0	0	0	0	0%	0.0
311919 - Other Snack Food Manufacturing	12	0	0	0	0	0%	0.0
311920 - Coffee and Tea Manufacturing	9	0	0	0	0	0%	0.0
311930 - Flavouring Syrup and Concentrate Manufacturing	1	0	0	0	0	0%	0.0
311940 - Seasoning and Dressing Manufacturing	13	0	0	0	0	0%	0.0
311990 - All Other Food Manufacturing	54	1	1	0	-1	0%	0.0
312110 - Soft Drink and Ice Manufacturing	31	0	1	0	0	0%	0.0
312120 - Breweries	3	0	0	0	0	0%	0.0
312130 - Wineries	4	0	0	0	0	0%	0.0
312140 - Distilleries	3	0	0	0	0	0%	0.0
311221 - Wet Corn Milling	0	0	0	0	0	#DIV/0!	#DIV/0!
311830 - Tortilla Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!
312210 - Tobacco Stemming and Redrying	0	0	0	0	0	#DIV/0!	#DIV/0!
312220 - Tobacco Product Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
313110 - Fibre, Yarn and Thread Mills	7	0	0	0	0	0%	0.0
313210 - Broad-Woven Fabric Mills	6	0	0	0	0	0%	0.0
313220 - Narrow Fabric Mills and Schiffli Machine Embroidery	2	0	0	0	0	0%	0.0
313310 - Textile and Fabric Finishing	20	0	0	0	0	0%	0.0
314110 - Carpet and Rug Mills	5	0	0	0	0	0%	0.0
314120 - Curtain and Linen Mills	31	0	1	0	0	0%	0.0
314990 - All Other Textile Product Mills	84	1	2	0	-1	0%	0.0
315110 - Hosiery and Sock Mills	1	0	0	0	0	0%	0.0
315190 - Other Clothing Knitting Mills	2	0	0	0	0	0%	0.0
315210 - Cut and Sew Clothing Contracting	46	1	1	0	-1	0%	0.0
315222 - Men's and Boys' Cut and Sew Suit, Coat and Overcoat Manufacturing	23	0	1	0	0	0%	0.0
315226 - Men's and Boys' Cut and Sew Shirt Manufacturing	5	0	0	0	0	0%	0.0
315227 - Men's and Boys' Cut and Sew Trouser, Slack and Jean Manufacturing	2	0	0	0	0	0%	0.0
315229 - Other Men's and Boys' Cut and Sew Clothing Manufacturing	14	0	0	0	0	0%	0.0
315232 - Women's and Girls' Cut and Sew Blouse and Shirt Manufacturing	2	0	0	0	0	0%	0.0
315234 - Women's and Girls' Cut and Sew Suit, Coat, Tailored Jacket and Skirt Manufacturing	8	0	0	0	0	0%	0.0
315239 - Other Women's and Girls' Cut and Sew Clothing Manufacturing	11	0	0	0	0	0%	0.0
315291 - Infants' Cut and Sew Clothing Manufacturing	4	0	0	0	0	0%	0.0
315292 - Fur and Leather Clothing Manufacturing	3	0	0	0	0	0%	0.0
315299 - All Other Cut and Sew Clothing Manufacturing	11	0	0	0	0	0%	0.0
315990 - Clothing Accessories and Other Clothing Manufacturing	22	0	1	0	0	0%	0.0
316110 - Leather and Hide Tanning and Finishing	6	0	0	0	0	0%	0.0
316210 - Footwear Manufacturing	8	0	0	0	0	0%	0.0
316990 - Other Leather and Allied Product Manufacturing	25	0	1	0	0	0%	0.0
314910 - Textile Bag and Canvas Mills	18	0	0	1	1	355%	6.7
315233 - Women's and Girls' Cut and Sew Dress Manufacturing	8	0	0	1	1	799%	15.0
313230 - Nonwoven Fabric Mills	0	0	0	0	0	#DIV/0!	#DIV/0!
313240 - Knit Fabric Mills	0	0	0	0	0	#DIV/0!	#DIV/0!
313320 - Fabric Coating	0	0	0	0	0	#DIV/0!	#DIV/0!
315221 - Men's and Boys' Cut and Sew Underwear and Nightwear Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!
315231 - Women's and Girls' Cut and Sew Lingerie, Loungewear and Nightwear Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 32 Manufacturing – Wood, Chemicals and Non-Metal

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
321114 - Wood Preservation	13	0	0	0	0	0%	0.0
321211 - Hardwood Veneer and Plywood Mills	3	0	0	0	0	0%	0.0
321212 - Softwood Veneer and Plywood Mills	3	0	0	0	0	0%	0.0
321215 - Structural Wood Product Manufacturing	41	1	1	0	-1	0%	0.0
321216 - Particle Board and Fibreboard Mills	3	0	0	0	0	0%	0.0
321217 - Waferboard Mills	4	0	0	0	0	0%	0.0
321911 - Wood Window and Door Manufacturing	33	1	1	0	-1	0%	0.0
321919 - Other Millwork	105	2	2	0	-2	0%	0.0
321991 - Manufactured (Mobile) Home Manufacturing	18	0	0	0	0	0%	0.0
322111 - Mechanical Pulp Mills	1	0	0	0	0	0%	0.0
322112 - Chemical Pulp Mills	10	0	0	0	0	0%	0.0
322121 - Paper (except Newsprint) Mills	4	0	0	0	0	0%	0.0
322122 - Newsprint Mills	1	0	0	0	0	0%	0.0
322211 - Corrugated and Solid Fibre Box Manufacturing	9	0	0	0	0	0%	0.0
322212 - Folding Paperboard Box Manufacturing	1	0	0	0	0	0%	0.0
322219 - Other Paperboard Container Manufacturing	3	0	0	0	0	0%	0.0
322220 - Paper Bag and Coated and Treated Paper Manufacturing	6	0	0	0	0	0%	0.0
322230 - Stationery Product Manufacturing	4	0	0	0	0	0%	0.0
322299 - All Other Converted Paper Product Manufacturing	4	0	0	0	0	0%	0.0
323113 - Commercial Screen Printing	68	1	2	0	-1	0%	0.0
323114 - Quick Printing	49	1	1	0	-1	0%	0.0
323115 - Digital Printing	56	1	1	0	-1	0%	0.0
323116 - Manifold Business Forms Printing	39	1	1	0	-1	0%	0.0
323120 - Support Activities for Printing	56	1	1	0	-1	0%	0.0
324110 - Petroleum Refineries	40	1	1	0	-1	0%	0.0
324121 - Asphalt Paving Mixture and Block Manufacturing	10	0	0	0	0	0%	0.0
324122 - Asphalt Shingle and Coating Material Manufacturing	7	0	0	0	0	0%	0.0
325110 - Petrochemical Manufacturing	10	0	0	0	0	0%	0.0
325190 - Other Basic Organic Chemical Manufacturing	24	0	1	0	0	0%	0.0
325210 - Resin and Synthetic Rubber Manufacturing	20	0	0	0	0	0%	0.0
325220 - Artificial and Synthetic Fibres and Filaments Manufacturing	7	0	0	0	0	0%	0.0
325313 - Chemical Fertilizer (except Potash) Manufacturing	16	0	0	0	0	0%	0.0
325314 - Mixed Fertilizer Manufacturing	15	0	0	0	0	0%	0.0
325320 - Pesticide and Other Agricultural Chemical Manufacturing	6	0	0	0	0	0%	0.0
325410 - Pharmaceutical and Medicine Manufacturing	27	0	1	0	0	0%	0.0
325520 - Adhesive Manufacturing	5	0	0	0	0	0%	0.0
325610 - Soap and Cleaning Compound Manufacturing	32	1	1	0	-1	0%	0.0
325620 - Toilet Preparation Manufacturing	12	0	0	0	0	0%	0.0
325910 - Printing Ink Manufacturing	2	0	0	0	0	0%	0.0
325920 - Explosives Manufacturing	2	0	0	0	0	0%	0.0
325991 - Custom Compounding of Purchased Resins	6	0	0	0	0	0%	0.0
326111 - Plastic Bag and Pouch Manufacturing	10	0	0	0	0	0%	0.0
326114 - Plastic Film and Sheet Manufacturing	14	0	0	0	0	0%	0.0
326121 - Unlaminated Plastic Profile Shape Manufacturing	4	0	0	0	0	0%	0.0
326122 - Plastic Pipe and Pipe Fitting Manufacturing	16	0	0	0	0	0%	0.0

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
326130 - Laminated Plastic Plate, Sheet (except Packaging), and Shape Manufacturing	7	0	0	0	0	0%	0.0
326140 - Polystyrene Foam Product Manufacturing	7	0	0	0	0	0%	0.0
326150 - Urethane and Other Foam Product (except Polystyrene) Manufacturing	14	0	0	0	0	0%	0.0
326160 - Plastic Bottle Manufacturing	3	0	0	0	0	0%	0.0
326191 - Plastic Plumbing Fixture Manufacturing	16	0	0	0	0	0%	0.0
326193 - Motor Vehicle Plastic Parts Manufacturing	3	0	0	0	0	0%	0.0
326196 - Plastic Window and Door Manufacturing	10	0	0	0	0	0%	0.0
326198 - All Other Plastic Product Manufacturing	113	2	3	0	-2	0%	0.0
326210 - Tire Manufacturing	14	0	0	0	0	0%	0.0
326290 - Other Rubber Product Manufacturing	17	0	0	0	0	0%	0.0
327120 - Clay Building Material and Refractory Manufacturing	8	0	0	0	0	0%	0.0
327214 - Glass Manufacturing	18	0	0	0	0	0%	0.0
327215 - Glass Product Manufacturing from Purchased Glass	38	1	1	0	-1	0%	0.0
327310 - Cement Manufacturing	7	0	0	0	0	0%	0.0
327330 - Concrete Pipe, Brick and Block Manufacturing	9	0	0	0	0	0%	0.0
327410 - Lime Manufacturing	2	0	0	0	0	0%	0.0
327420 - Gypsum Product Manufacturing	11	0	0	0	0	0%	0.0
327910 - Abrasive Product Manufacturing	4	0	0	0	0	0%	0.0
323119 - Other Printing	311	5	7	1	-4	21%	0.4
321111 - Sawmills (except Shingle and Shake Mills)	97	2	2	1	-1	66%	1.2
325999 - All Other Miscellaneous Chemical Product Manufacturing	82	1	2	1	0	78%	1.5
327320 - Ready-Mix Concrete Manufacturing	116	2	3	2	0	110%	2.1
327990 - All Other Non-Metallic Mineral Product Manufacturing	58	1	1	1	0	110%	2.1
327390 - Other Concrete Product Manufacturing	52	1	1	1	0	123%	2.3
321920 - Wood Container and Pallet Manufacturing	39	1	1	1	0	164%	3.1
321992 - Prefabricated Wood Building Manufacturing	33	1	1	1	0	194%	3.6
324190 - Other Petroleum and Coal Product Manufacturing	30	0	1	1	1	213%	4.0
325510 - Paint and Coating Manufacturing	29	0	1	1	1	220%	4.1
321999 - All Other Miscellaneous Wood Product Manufacturing	102	2	2	4	2	251%	4.7
325189 - All Other Basic Inorganic Chemical Manufacturing	24	0	1	1	1	266%	5.0
327110 - Pottery, Ceramics and Plumbing Fixture Manufacturing	20	0	0	1	1	319%	6.0
325120 - Industrial Gas Manufacturing	24	0	1	2	2	532%	10.0
321112 - Shingle and Shake Mills	0	0	0	0	0	#DIV/0!	#DIV/0!
322130 - Paperboard Mills	0	0	0	0	0	#DIV/0!	#DIV/0!
322291 - Sanitary Paper Product Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!
325130 - Synthetic Dye and Pigment Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!
325181 - Alkali and Chlorine Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!
326220 - Rubber and Plastic Hose and Belting Manufacturing	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 33 Manufacturing – Metal and Computers

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
331210 - Iron and Steel Pipes and Tubes Manufacturing from Purchased Steel	32	1	1	0	-1	0%	0.0
331221 - Cold-Rolled Steel Shape Manufacturing	2	0	0	0	0	0%	0.0
331222 - Steel Wire Drawing	7	0	0	0	0	0%	0.0
331313 - Primary Production of Alumina and Aluminum	2	0	0	0	0	0%	0.0
331317 - Aluminum Rolling, Drawing, Extruding and Alloying	9	0	0	0	0	0%	0.0
331410 - Non-Ferrous Metal (except Aluminum) Smelting and Refining	4	0	0	0	0	0%	0.0
331420 - Copper Rolling, Drawing, Extruding and Alloying	5	0	0	0	0	0%	0.0
331490 - Non-Ferrous Metal (except Copper and Aluminum) Rolling, Drawing, Extruding and Alloying	4	0	0	0	0	0%	0.0
331511 - Iron Foundries	8	0	0	0	0	0%	0.0
331514 - Steel Foundries	2	0	0	0	0	0%	0.0
331529 - Non-Ferrous Foundries (except Die-Casting)	1	0	0	0	0	0%	0.0
332113 - Forging	8	0	0	0	0	0%	0.0
332118 - Stamping	14	0	0	0	0	0%	0.0
332210 - Cutlery and Hand Tool Manufacturing	35	1	1	0	-1	0%	0.0
332311 - Prefabricated Metal Building and Component Manufacturing	48	1	1	0	-1	0%	0.0
332314 - Concrete Reinforcing Bar Manufacturing	6	0	0	0	0	0%	0.0
332321 - Metal Window and Door Manufacturing	47	1	1	0	-1	0%	0.0
332410 - Power Boiler and Heat Exchanger Manufacturing	15	0	0	0	0	0%	0.0
332431 - Metal Can Manufacturing	2	0	0	0	0	0%	0.0
332439 - Other Metal Container Manufacturing	23	0	1	0	0	0%	0.0
332510 - Hardware Manufacturing	11	0	0	0	0	0%	0.0
332611 - Spring (Heavy Gauge) Manufacturing	5	0	0	0	0	0%	0.0
332619 - Other Fabricated Wire Product Manufacturing	27	0	1	0	0	0%	0.0
332720 - Turned Product and Screw, Nut and Bolt Manufacturing	11	0	0	0	0	0%	0.0
332991 - Ball and Roller Bearing Manufacturing	1	0	0	0	0	0%	0.0
332999 - All Other Miscellaneous Fabricated Metal Product Manufacturing	144	2	3	0	-2	0%	0.0
333110 - Agricultural Implement Manufacturing	85	1	2	0	-1	0%	0.0
333120 - Construction Machinery Manufacturing	58	1	1	0	-1	0%	0.0
333130 - Mining and Oil and Gas Field Machinery Manufacturing	282	4	6	0	-4	0%	0.0
333210 - Sawmill and Woodworking Machinery Manufacturing	19	0	0	0	0	0%	0.0
333220 - Rubber and Plastics Industry Machinery Manufacturing	1	0	0	0	0	0%	0.0
333291 - Paper Industry Machinery Manufacturing	1	0	0	0	0	0%	0.0
333299 - All Other Industrial Machinery Manufacturing	43	1	1	0	-1	0%	0.0
333413 - Industrial and Commercial Fan and Blower and Air Purification Equipment Manufacturing	7	0	0	0	0	0%	0.0
333511 - Industrial Mould Manufacturing	19	0	0	0	0	0%	0.0
333611 - Turbine and Turbine Generator Set Unit Manufacturing	4	0	0	0	0	0%	0.0
333619 - Other Engine and Power Transmission Equipment Manufacturing	25	0	1	0	0	0%	0.0
333910 - Pump and Compressor Manufacturing	72	1	2	0	-1	0%	0.0
333990 - All Other General-Purpose Machinery Manufacturing	116	2	3	0	-2	0%	0.0
334110 - Computer and Peripheral Equipment Manufacturing	31	0	1	0	0	0%	0.0

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
334210 - Telephone Apparatus Manufacturing	6	0	0	0	0	0%	0.0
334220 - Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing	12	0	0	0	0	0%	0.0
334290 - Other Communications Equipment Manufacturing	13	0	0	0	0	0%	0.0
334310 - Audio and Video Equipment Manufacturing	11	0	0	0	0	0%	0.0
334410 - Semiconductor and Other Electronic Component Manufacturing	52	1	1	0	-1	0%	0.0
334511 - Navigational and Guidance Instruments Manufacturing	43	1	1	0	-1	0%	0.0
334512 - Measuring, Medical and Controlling Devices Manufacturing	146	2	3	0	-2	0%	0.0
334610 - Manufacturing and Reproducing Magnetic and Optical Media	17	0	0	0	0	0%	0.0
335110 - Electric Lamp Bulb and Parts Manufacturing	4	0	0	0	0	0%	0.0
335120 - Lighting Fixture Manufacturing	13	0	0	0	0	0%	0.0
335210 - Small Electrical Appliance Manufacturing	5	0	0	0	0	0%	0.0
335223 - Major Kitchen Appliance Manufacturing	1	0	0	0	0	0%	0.0
335229 - Other Major Appliance Manufacturing	2	0	0	0	0	0%	0.0
335311 - Power, Distribution and Specialty Transformers Manufacturing	3	0	0	0	0	0%	0.0
335312 - Motor and Generator Manufacturing	20	0	0	0	0	0%	0.0
335315 - Switchgear and Switchboard, and Relay and Industrial Control Apparatus Manufacturing	38	1	1	0	-1	0%	0.0
335910 - Battery Manufacturing	3	0	0	0	0	0%	0.0
335920 - Communication and Energy Wire and Cable Manufacturing	14	0	0	0	0	0%	0.0
335930 - Wiring Device Manufacturing	5	0	0	0	0	0%	0.0
335990 - All Other Electrical Equipment and Component Manufacturing	36	1	1	0	-1	0%	0.0
336110 - Automobile and Light-Duty Motor Vehicle Manufacturing	3	0	0	0	0	0%	0.0
336120 - Heavy-Duty Truck Manufacturing	7	0	0	0	0	0%	0.0
336211 - Motor Vehicle Body Manufacturing	28	0	1	0	0	0%	0.0
336215 - Motor Home, Travel Trailer and Camper Manufacturing	20	0	0	0	0	0%	0.0
336310 - Motor Vehicle Gasoline Engine and Engine Parts Manufacturing	18	0	0	0	0	0%	0.0
336320 - Motor Vehicle Electrical and Electronic Equipment Manufacturing	12	0	0	0	0	0%	0.0
336330 - Motor Vehicle Steering and Suspension Components (except Spring) Manufacturing	2	0	0	0	0	0%	0.0
336340 - Motor Vehicle Brake System Manufacturing	4	0	0	0	0	0%	0.0
336360 - Motor Vehicle Seating and Interior Trim Manufacturing	4	0	0	0	0	0%	0.0
336370 - Motor Vehicle Metal Stamping	2	0	0	0	0	0%	0.0
336390 - Other Motor Vehicle Parts Manufacturing	23	0	1	0	0	0%	0.0
336510 - Railroad Rolling Stock Manufacturing	1	0	0	0	0	0%	0.0
336611 - Ship Building and Repairing	6	0	0	0	0	0%	0.0
336612 - Boat Building	16	0	0	0	0	0%	0.0
336990 - Other Transportation Equipment Manufacturing	20	0	0	0	0	0%	0.0
337121 - Upholstered Household Furniture Manufacturing	17	0	0	0	0	0%	0.0
337127 - Institutional Furniture Manufacturing	36	1	1	0	-1	0%	0.0
337213 - Wood Office Furniture, including Custom Architectural Woodwork, Manufacturing	38	1	1	0	-1	0%	0.0
337214 - Office Furniture (except Wood) Manufacturing	9	0	0	0	0	0%	0.0
337215 - Showcase, Partition, Shelving and Locker Manufacturing	19	0	0	0	0	0%	0.0

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
337910 - Mattress Manufacturing	15	0	0	0	0	0%	0.0
337920 - Blind and Shade Manufacturing	18	0	0	0	0	0%	0.0
339910 - Jewellery and Silverware Manufacturing	78	1	2	0	-1	0%	0.0
339920 - Sporting and Athletic Goods Manufacturing	67	1	2	0	-1	0%	0.0
339930 - Doll, Toy and Game Manufacturing	30	0	1	0	0	0%	0.0
339940 - Office Supplies (except Paper) Manufacturing	21	0	0	0	0	0%	0.0
339950 - Sign Manufacturing	236	4	5	0	-4	0%	0.0
339990 - All Other Miscellaneous Manufacturing	341	5	8	1	-4	19%	0.4
332319 - Other Plate Work and Fabricated Structural Product Manufacturing	223	3	5	1	-2	29%	0.5
332810 - Coating, Engraving, Heat Treating and Allied Activities	135	2	3	1	-1	47%	0.9
337123 - Other Wood Household Furniture Manufacturing	128	2	3	1	-1	50%	0.9
333519 - Other Metalworking Machinery Manufacturing	120	2	3	1	-1	53%	1.0
333310 - Commercial and Service Industry Machinery Manufacturing	95	1	2	1	0	67%	1.3
339110 - Medical Equipment and Supplies Manufacturing	324	5	7	4	-1	79%	1.5
332329 - Other Ornamental and Architectural Metal Product Manufacturing	143	2	3	2	0	89%	1.7
332710 - Machine Shops	467	7	11	7	0	96%	1.8
333416 - Heating Equipment and Commercial Refrigeration Equipment Manufacturing	64	1	1	1	0	100%	1.9
332910 - Metal Valve Manufacturing	50	1	1	1	0	128%	2.4
336410 - Aerospace Product and Parts Manufacturing	50	1	1	1	0	128%	2.4
337110 - Wood Kitchen Cabinet and Counter Top Manufacturing	178	3	4	4	1	144%	2.7
336212 - Truck Trailer Manufacturing	44	1	1	1	0	145%	2.7
333920 - Material Handling Equipment Manufacturing	79	1	2	2	1	162%	3.0
332420 - Metal Tank (Heavy Gauge) Manufacturing	68	1	2	2	1	188%	3.5
337126 - Household Furniture (except Wood and Upholstered) Manufacturing	24	0	1	1	1	266%	5.0
331110 - Iron and Steel Mills and Ferro-Alloy Manufacturing	18	0	0	1	1	355%	6.7
336350 - Motor Vehicle Transmission and Power Train Parts Manufacturing	12	0	0	1	1	532%	10.0
331523 - Non-Ferrous Die-Casting Foundries	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 41 Wholesale Trade

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
411110 - Live Animal Wholesaler-Distributors	190	3	4	0	-3	0%	0.0
411120 - Oilseed and Grain Wholesaler-Distributors	71	1	2	0	-1	0%	0.0
411130 - Nursery Stock and Plant Wholesaler-Distributors	47	1	1	0	-1	0%	0.0
411190 - Other Farm Product Wholesaler-Distributors	26	0	1	0	0	0%	0.0
413110 - General-Line Food Wholesaler-Distributors	122	2	3	0	-2	0%	0.0
413130 - Poultry and Egg Wholesaler-Distributors	10	0	0	0	0	0%	0.0
413140 - Fish and Seafood Product Wholesaler-Distributors	24	0	1	0	0	0%	0.0

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
413150 - Fresh Fruit and Vegetable Wholesaler-Distributors	42	1	1	0	-1	0%	0.0
413220 - Alcoholic Beverage Wholesaler-Distributors	72	1	2	0	-1	0%	0.0
413310 - Cigarette and Tobacco Product Wholesaler-Distributors	16	0	0	0	0	0%	0.0
414120 - Footwear Wholesaler-Distributors	5	0	0	0	0	0%	0.0
414130 - Piece Goods, Notions and Other Dry Goods Wholesaler-Distributors	35	1	1	0	-1	0%	0.0
414210 - Home Entertainment Equipment Wholesaler-Distributors	25	0	1	0	0	0%	0.0
414220 - Household Appliance Wholesaler-Distributors	27	0	1	0	0	0%	0.0
414310 - China, Glassware, Crockery and Pottery Wholesaler-Distributors	7	0	0	0	0	0%	0.0
414320 - Floor Covering Wholesaler-Distributors	53	1	1	0	-1	0%	0.0
414330 - Linen, Drapery and Other Textile Furnishings Wholesaler-Distributors	15	0	0	0	0	0%	0.0
414390 - Other Home Furnishings Wholesaler-Distributors	104	2	2	0	-2	0%	0.0
414420 - Book, Periodical and Newspaper Wholesaler-Distributors	76	1	2	0	-1	0%	0.0
414430 - Photographic Equipment and Supplies Wholesaler-Distributors	12	0	0	0	0	0%	0.0
414440 - Sound Recording Wholesalers	4	0	0	0	0	0%	0.0
414450 - Video Cassette Wholesalers	9	0	0	0	0	0%	0.0
414460 - Toy and Hobby Goods Wholesaler-Distributors	52	1	1	0	-1	0%	0.0
414510 - Pharmaceuticals and Pharmacy Supplies Wholesaler-Distributors	86	1	2	0	-1	0%	0.0
414520 - Toiletries, Cosmetics and Sundries Wholesaler-Distributors	122	2	3	0	-2	0%	0.0
415190 - Recreational and Other Motor Vehicles Wholesaler-Distributors	81	1	2	0	-1	0%	0.0
415310 - Used Motor Vehicle Parts and Accessories Wholesaler-Distributors	72	1	2	0	-1	0%	0.0
416340 - Paint, Glass and Wallpaper Wholesaler-Distributors	51	1	1	0	-1	0%	0.0
417110 - Farm, Lawn and Garden Machinery and Equipment Wholesaler-Distributors	452	7	10	0	-7	0%	0.0
418120 - Recyclable Paper and Paperboard Wholesaler-Distributors	11	0	0	0	0	0%	0.0
418190 - Other Recyclable Material Wholesaler-Distributors	118	2	3	0	-2	0%	0.0
418210 - Stationery and Office Supplies Wholesaler-Distributors	74	1	2	0	-1	0%	0.0
418220 - Other Paper and Disposable Plastic Product Wholesaler-Distributors	62	1	1	0	-1	0%	0.0
418310 - Agricultural Feed Wholesaler-Distributors	89	1	2	0	-1	0%	0.0
418320 - Seed Wholesaler-Distributors	66	1	2	0	-1	0%	0.0
418390 - Agricultural Chemical and Other Farm Supplies Wholesaler-Distributors	293	5	7	0	-5	0%	0.0
418910 - Log and Wood Chip Wholesaler-Distributors	11	0	0	0	0	0%	0.0
418920 - Mineral, Ore and Precious Metal Wholesaler-Distributors	8	0	0	0	0	0%	0.0
418930 - Second-Hand Goods (except Machinery and Automotive) Wholesaler-Distributors	17	0	0	0	0	0%	0.0
419110 - Business-to-Business Electronic Markets	12	0	0	0	0	0%	0.0
419120 - Wholesale Trade Agents and Brokers	1189	19	27	2	-17	11%	0.2
418990 - All Other Wholesaler-Distributors	796	12	18	2	-10	16%	0.3
417930 - Professional Machinery, Equipment and Supplies Wholesaler-Distributors	361	6	8	1	-5	18%	0.3
417310 - Computer, Computer Peripheral and Pre-Packaged Software Wholesaler-Distributors	243	4	6	1	-3	26%	0.5

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
415110 - New and Used Automobile and Light-Duty Truck Wholesaler-Distributors	205	3	5	1	-2	31%	0.6
417920 - Service Establishment Machinery, Equipment and Supplies Wholesaler-Distributors	190	3	4	1	-2	34%	0.6
414110 - Clothing and Clothing Accessories Wholesaler-Distributors	153	2	4	1	-1	42%	0.8
416320 - Lumber, Plywood and Millwork Wholesaler-Distributors	144	2	3	1	-1	44%	0.8
417990 - All Other Machinery, Equipment and Supplies Wholesaler-Distributors	268	4	6	2	-2	48%	0.9
414470 - Amusement and Sporting Goods Wholesaler-Distributors	132	2	3	1	-1	48%	0.9
417320 - Electronic Components, Navigational and Communications Equipment and Supplies Wholesaler-Distributors	222	3	5	2	-1	58%	1.1
415290 - Other New Motor Vehicle Parts and Accessories Wholesaler-Distributors	430	7	10	5	-2	74%	1.4
412110 - Petroleum Product Wholesaler-Distributors	572	9	13	7	-2	78%	1.5
417910 - Office and Store Machinery and Equipment Wholesaler-Distributors	234	4	5	3	-1	82%	1.5
413160 - Red Meat and Meat Product Wholesaler-Distributors	70	1	2	1	0	91%	1.7
417220 - Mining and Oil and Gas Well Machinery, Equipment and Supplies Wholesaler-Distributors	686	11	16	10	-1	93%	1.7
416120 - Plumbing, Heating and Air-Conditioning Equipment and Supplies Wholesaler-Distributors	329	5	8	5	0	97%	1.8
418410 - Chemical (except Agricultural) and Allied Product Wholesaler-Distributors	327	5	8	5	0	98%	1.8
416390 - Other Specialty-Line Building Supplies Wholesaler-Distributors	383	6	9	6	0	100%	1.9
413120 - Dairy and Milk Products Wholesaler-Distributors	60	1	1	1	0	106%	2.0
416310 - General-Line Building Supplies Wholesaler-Distributors	119	2	3	2	0	107%	2.0
415120 - Truck, Truck Tractor and Bus Wholesaler-Distributors	111	2	3	2	0	115%	2.2
418110 - Recyclable Metal Wholesaler-Distributors	111	2	3	2	0	115%	2.2
416110 - Electrical Wiring and Construction Supplies Wholesaler-Distributors	270	4	6	5	1	118%	2.2
417230 - Industrial Machinery, Equipment and Supplies Wholesaler-Distributors	1099	17	25	21	4	122%	2.3
416210 - Metal Service Centres	240	4	6	5	1	133%	2.5
417210 - Construction and Forestry Machinery, Equipment and Supplies Wholesaler-Distributors	225	4	5	5	1	142%	2.7
414410 - Jewellery and Watch Wholesaler-Distributors	86	1	2	2	1	149%	2.8
416330 - Hardware Wholesaler-Distributors	242	4	6	6	2	158%	3.0
413190 - Other Specialty-Line Food Wholesaler-Distributors	383	6	9	10	4	167%	3.1
415210 - Tire Wholesaler-Distributors	60	1	1	3	2	319%	6.0
413210 - Non-Alcoholic Beverage Wholesaler-Distributors	97	2	2	6	4	395%	7.4

NAIC 44 Retail Trade

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
442291 - Window Treatment Stores	129	2	3	0	-2	0%	0.0
445220 - Fish and Seafood Markets	18	0	0	0	0	0%	0.0
445230 - Fruit and Vegetable Markets	38	1	1	0	-1	0%	0.0
446199 - All Other Health and Personal Care Stores	231	4	5	0	-4	0%	0.0
448191 - Fur Stores	14	0	0	0	0	0%	0.0
445299 - All Other Specialty Food Stores	240	4	6	1	-3	27%	0.5
446110 - Pharmacies and Drug Stores	830	13	19	4	-9	31%	0.6
446120 - Cosmetics, Beauty Supplies and Perfume Stores	168	3	4	1	-2	38%	0.7
441120 - Used Car Dealers	488	8	11	3	-5	39%	0.7
446191 - Food (Health) Supplement Stores	293	5	7	2	-3	44%	0.8
442298 - All Other Home Furnishings Stores	278	4	6	2	-2	46%	0.9
442292 - Print and Picture Frame Stores	136	2	3	1	-1	47%	0.9
443110 - Appliance, Television and Other Electronics Stores	983	15	23	8	-7	52%	1.0
442110 - Furniture Stores	455	7	10	4	-3	56%	1.1
441110 - New Car Dealers	436	7	10	4	-3	59%	1.1
445292 - Confectionery and Nut Stores	108	2	2	1	-1	59%	1.1
445210 - Meat Markets	210	3	5	2	-1	61%	1.1
446130 - Optical Goods Stores	304	5	7	3	-2	63%	1.2
443120 - Computer and Software Stores	401	6	9	4	-2	64%	1.2
441320 - Tire Dealers	357	6	8	4	-2	72%	1.3
441210 - Recreational Vehicle Dealers	177	3	4	2	-1	72%	1.4
448199 - All Other Clothing Stores	352	6	8	4	-2	73%	1.4
444130 - Hardware Stores	259	4	6	3	-1	74%	1.4
442210 - Floor Covering Stores	255	4	6	3	-1	75%	1.4
445110 - Supermarkets and Other Grocery (except Convenience) Stores	933	15	21	11	-4	75%	1.4
448140 - Family Clothing Stores	677	11	16	8	-3	76%	1.4
447190 - Other Gasoline Stations	1605	25	37	19	-6	76%	1.4
441220 - Motorcycle, Boat and Other Motor Vehicle Dealers	252	4	6	3	-1	76%	1.4
445291 - Baked Goods Stores	80	1	2	1	0	80%	1.5
448120 - Women's Clothing Stores	706	11	16	9	-2	81%	1.5
444190 - Other Building Material Dealers	433	7	10	6	-1	89%	1.7
448210 - Shoe Stores	344	5	8	5	0	93%	1.7
441310 - Automotive Parts and Accessories Stores	538	8	12	8	0	95%	1.8
444110 - Home Centres	200	3	5	3	0	96%	1.8
448150 - Clothing Accessories Stores	133	2	3	2	0	96%	1.8
443130 - Camera and Photographic Supplies Stores	59	1	1	1	0	108%	2.0
448110 - Men's Clothing Stores	174	3	4	3	0	110%	2.1
445310 - Beer, Wine and Liquor Stores	1132	18	26	20	2	113%	2.1
447110 - Gasoline Stations with Convenience Stores	950	15	22	17	2	114%	2.1
448310 - Jewellery Stores	501	8	12	9	1	115%	2.2
445120 - Convenience Stores	1066	17	25	20	3	120%	2.2
444220 - Nursery Stores and Garden Centres	156	2	4	3	1	123%	2.3
448320 - Luggage and Leather Goods Stores	103	2	2	2	0	124%	2.3
448130 - Children's and Infants' Clothing Stores	134	2	3	3	1	143%	2.7
444120 - Paint and Wallpaper Stores	134	2	3	4	2	191%	3.6
444210 - Outdoor Power Equipment Stores	31	0	1	1	1	206%	3.9

NAIC 45 Retail Trade

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
452910 - Warehouse Clubs and Superstores	17	0	0	0	0	0%	0.0
453310 - Used Merchandise Stores	335	5	8	0	-5	0%	0.0
453910 - Pet and Pet Supplies Stores	187	3	4	0	-3	0%	0.0
453920 - Art Dealers	137	2	3	0	-2	0%	0.0
453930 - Mobile Home Dealers	47	1	1	0	-1	0%	0.0
454111 - Internet Shopping	101	2	2	0	-2	0%	0.0
454112 - Electronic Auctions	3	0	0	0	0	0%	0.0
454113 - Mail-Order Houses	110	2	3	0	-2	0%	0.0
454319 - Other Fuel Dealers	160	3	4	0	-3	0%	0.0
452999 - All Other Miscellaneous General Merchandise Stores	840	13	19	4	-9	30%	0.6
453110 - Florists	386	6	9	2	-4	33%	0.6
453210 - Office Supplies and Stationery Stores	143	2	3	1	-1	45%	0.8
451130 - Sewing, Needlework and Piece Goods Stores	141	2	3	1	-1	45%	0.8
451120 - Hobby, Toy and Game Stores	272	4	6	2	-2	47%	0.9
454390 - Other Direct Selling Establishments	343	5	8	3	-2	56%	1.0
451140 - Musical Instrument and Supplies Stores	98	2	2	1	-1	65%	1.2
453999 - All Other Miscellaneous Store Retailers (except Beer and Wine-Making Supplies Stores)	678	11	16	7	-4	66%	1.2
451220 - Pre-Recorded Tape, Compact Disc and Record Stores	88	1	2	1	0	73%	1.4
453220 - Gift, Novelty and Souvenir Stores	714	11	16	9	-2	81%	1.5
451110 - Sporting Goods Stores	697	11	16	9	-2	83%	1.5
454210 - Vending Machine Operators	223	3	5	3	0	86%	1.6
451210 - Book Stores and News Dealers	206	3	5	3	0	93%	1.7
452110 - Department Stores	103	2	2	2	0	124%	2.3
454312 - Liquefied Petroleum Gas (Bottled Gas) Dealers	50	1	1	1	0	128%	2.4
452991 - Home and Auto Supplies Stores	48	1	1	1	0	133%	2.5
453992 - Beer and Wine-Making Supplies Stores	43	1	1	1	0	149%	2.8
454311 - Heating Oil Dealers	21	0	0	1	1	304%	5.7

NAIC 48-49 Transportation and Warehousing

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
482112 - Short-Haul Freight Rail Transportation	7	0	0	0	0	0%	0.0
482113 - Mainline Freight Rail Transportation	10	0	0	0	0	0%	0.0
482114 - Passenger Rail Transportation	2	0	0	0	0	0%	0.0
483115 - Deep Sea, Coastal and Great Lakes Water Transportation (except by Ferries)	6	0	0	0	0	0%	0.0
483214 - Inland Water Transportation by Ferries	3	0	0	0	0	0%	0.0
485320 - Limousine Service	85	1	2	0	-1	0%	0.0
485990 - Other Transit and Ground Passenger Transportation	86	1	2	0	-1	0%	0.0
486910 - Pipeline Transportation of Refined Petroleum Products	14	0	0	0	0	0%	0.0

486990 - All Other Pipeline Transportation	35	1	1	0	-1	0%	0.0
487110 - Scenic and Sightseeing Transportation, Land	11	0	0	0	0	0%	0.0
487990 - Scenic and Sightseeing Transportation, Other	12	0	0	0	0	0%	0.0
488210 - Support Activities for Rail Transportation	48	1	1	0	-1	0%	0.0
488310 - Port and Harbour Operations	6	0	0	0	0	0%	0.0
488320 - Marine Cargo Handling	3	0	0	0	0	0%	0.0
488332 - Ship Piloting Services	6	0	0	0	0	0%	0.0
488339 - Other Navigational Services to Shipping	1	0	0	0	0	0%	0.0
488511 - Marine Shipping Agencies	4	0	0	0	0	0%	0.0

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
484239 - Other Specialized Freight (except Used Goods) Trucking, Long Distance	702	11	16	2	-9	18%	0.3
488519 - Other Freight Transportation Arrangement	271	4	6	1	-3	24%	0.4
484221 - Bulk Liquids Trucking, Local	1183	19	27	6	-13	32%	0.6
484121 - General Freight Trucking, Long Distance, Truck-Load	2437	38	56	17	-21	45%	0.8
488190 - Other Support Activities for Air Transportation	265	4	6	2	-2	48%	0.9
484110 - General Freight Trucking, Local	3585	56	82	28	-28	50%	0.9
488490 - Other Support Activities for Road Transportation	383	6	9	3	-3	50%	0.9
484231 - Bulk Liquids Trucking, Long Distance	378	6	9	3	-3	51%	1.0
484232 - Dry Bulk Materials Trucking, Long Distance	250	4	6	2	-2	51%	1.0
484122 - General Freight Trucking, Long Distance, Less Than Truck-Load	242	4	6	2	-2	53%	1.0
484223 - Forest Products Trucking, Local	472	7	11	4	-3	54%	1.0
484229 - Other Specialized Freight (except Used Goods) Trucking, Local	969	15	22	9	-6	59%	1.1
485310 - Taxi Service	2153	34	50	22	-12	65%	1.2
481215 - Non-Scheduled Specialty Flying Services	89	1	2	1	0	72%	1.3
486110 - Pipeline Transportation of Crude Oil	86	1	2	1	0	74%	1.4
484233 - Forest Products Trucking, Long Distance	169	3	4	2	-1	76%	1.4
484210 - Used Household and Office Goods Moving	231	4	5	3	-1	83%	1.6
485410 - School and Employee Bus Transportation	293	5	7	4	-1	87%	1.6
488119 - Other Airport Operations	61	1	1	1	0	105%	2.0
485510 - Charter Bus Industry	60	1	1	1	0	106%	2.0
486210 - Pipeline Transportation of Natural Gas	60	1	1	1	0	106%	2.0
488410 - Motor Vehicle Towing	237	4	5	5	1	135%	2.5
488990 - Other Support Activities for Transportation	170	3	4	4	1	150%	2.8
487210 - Scenic and Sightseeing Transportation, Water	32	1	1	1	0	200%	3.7
485110 - Urban Transit Systems	31	0	1	1	1	206%	3.9
481110 - Scheduled Air Transportation	60	1	1	2	1	213%	4.0
484222 - Dry Bulk Materials Trucking, Local	1453	23	33	53	30	233%	4.4
481214 - Non-Scheduled Chartered Air Transportation	150	2	3	7	5	298%	5.6
488111 - Air Traffic Control	14	0	0	1	1	456%	8.6
485210 - Interurban and Rural Bus Transportation	27	0	1	2	2	473%	8.9
483213 - Inland Water Transportation (except by Ferries)	11	0	0	1	1	581%	10.9
488390 - Other Support Activities for Water Transportation	7	0	0	1	1	913%	17.1
483116 - Deep Sea, Coastal and Great Lakes Water Transportation by Ferries	0	0	0	0	0	#DIV/0!	#DIV/0!
488331 - Marine Salvage Services	0	0	0	0	0	#DIV/0!	#DIV/0!

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
491110 - Postal Service	61	1	1	0	-1	0%	0.0
493130 - Farm Product Warehousing and Storage	59	1	1	0	-1	0%	0.0
493110 - General Warehousing and Storage	389	6	9	2	-4	33%	0.6
492110 - Couriers	793	12	18	8	-4	64%	1.2
492210 - Local Messengers and Local Delivery	396	6	9	6	0	97%	1.8
493190 - Other Warehousing and Storage	101	2	2	2	0	127%	2.4
493120 - Refrigerated Warehousing and Storage	41	1	1	1	0	156%	2.9

NAIC 51 Information

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
511120 - Periodical Publishers	191	3	4	0	-3	0%	0.0
511130 - Book Publishers	115	2	3	0	-2	0%	0.0
511140 - Directory and Mailing List Publishers	30	0	1	0	0	0%	0.0
511190 - Other Publishers	31	0	1	0	0	0%	0.0
512120 - Motion Picture and Video Distribution	11	0	0	0	0	0%	0.0
512190 - Post-Production and Other Motion Picture and Video Industries	34	1	1	0	-1	0%	0.0
512210 - Record Production	9	0	0	0	0	0%	0.0
512220 - Integrated Record Production/Distribution	17	0	0	0	0	0%	0.0
512230 - Music Publishers	23	0	1	0	0	0%	0.0
512240 - Sound Recording Studios	48	1	1	0	-1	0%	0.0
512290 - Other Sound Recording Industries	7	0	0	0	0	0%	0.0
515120 - Television Broadcasting	25	0	1	0	0	0%	0.0
515210 - Pay and Specialty Television	11	0	0	0	0	0%	0.0
517111 - Wired Telecommunications Carriers (except Cable)	54	1	1	0	-1	0%	0.0
517410 - Satellite Telecommunications	25	0	1	0	0	0%	0.0
519110 - News Syndicates	12	0	0	0	0	0%	0.0
519122 - Archives	7	0	0	0	0	0%	0.0
519130 - Internet Publishing and Broadcasting and Web Search Portals	105	2	2	0	-2	0%	0.0
519190 - All Other Information Services	27	0	1	0	0	0%	0.0
512110 - Motion Picture and Video Production	563	9	13	2	-7	23%	0.4
518210 - Data Processing, Hosting and Related Services	201	3	5	1	-2	32%	0.6
517910 - Other Telecommunications	177	3	4	1	-2	36%	0.7
519121 - Libraries	169	3	4	1	-2	38%	0.7
512130 - Motion Picture and Video Exhibition	103	2	2	1	-1	62%	1.2
511210 - Software Publishers	210	3	5	3	0	91%	1.7
517210 - Wireless Telecommunications Carriers (except Satellite)	64	1	1	1	0	100%	1.9
515110 - Radio Broadcasting	99	2	2	2	0	129%	2.4
517112 - Cable and Other Program Distribution	46	1	1	1	0	139%	2.6
511110 - Newspaper Publishers	157	2	4	4	2	163%	3.1

NAIC 52 Finance and Insurance

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
521110 - Monetary Authorities - Central Bank	1	0	0	0	0	0%	0.0
522112 - Corporate and Institutional Banking Industry	5	0	0	0	0	0%	0.0
522190 - Other Depository Credit Intermediation	126	2	3	0	-2	0%	0.0
522210 - Credit Card Issuing	3	0	0	0	0	0%	0.0
522220 - Sales Financing	100	2	2	0	-2	0%	0.0
522321 - Central Credit Unions	1	0	0	0	0	0%	0.0
522329 - Other Financial Transactions Processing and Clearing House Activities	44	1	1	0	-1	0%	0.0
523120 - Securities Brokerage	153	2	4	0	-2	0%	0.0
523130 - Commodity Contracts Dealing	50	1	1	0	-1	0%	0.0
523140 - Commodity Contracts Brokerage	26	0	1	0	0	0%	0.0
524111 - Direct Individual Life, Health and Medical Insurance Carriers	49	1	1	0	-1	0%	0.0
524112 - Direct Group Life, Health and Medical Insurance Carriers	23	0	1	0	0	0%	0.0
524121 - Direct General Property and Casualty Insurance Carriers	49	1	1	0	-1	0%	0.0
524124 - Direct Property Insurance Carriers	2	0	0	0	0	0%	0.0
524125 - Direct Liability Insurance Carriers	2	0	0	0	0	0%	0.0
524129 - Other Direct Insurance (except Life, Health and Medical) Carriers	40	1	1	0	-1	0%	0.0
524134 - Property Reinsurance Carriers	1	0	0	0	0	0%	0.0
524139 - General and Other Reinsurance Carriers	1	0	0	0	0	0%	0.0
526111 - Trusteed Pension Funds	8	0	0	0	0	0%	0.0
526112 - Non-Trusteed Pension Funds	3	0	0	0	0	0%	0.0
526911 - Equity Funds - Canadian	18	0	0	0	0	0%	0.0
526912 - Equity Funds - Foreign	1	0	0	0	0	0%	0.0
526913 - Mortgage Funds	7	0	0	0	0	0%	0.0
526915 - Bond and Income / Dividend Funds - Canadian	4	0	0	0	0	0%	0.0
526916 - Bond and Income / Dividend Funds - Foreign	1	0	0	0	0	0%	0.0
526919 - Other Open-Ended Funds	5	0	0	0	0	0%	0.0
526981 - Securitization Vehicles	1	0	0	0	0	0%	0.0
523930 - Investment Advice	639	10	15	1	-9	10%	0.2
524210 - Insurance Agencies and Brokerages	1379	22	32	3	-19	14%	0.3
523990 - All Other Financial Investment Activities	1371	21	32	3	-18	14%	0.3
522299 - All Other Non-Depository Credit Intermediation	827	13	19	2	-11	15%	0.3
523910 - Miscellaneous Intermediation	5395	84	124	20	-64	24%	0.4
523920 - Portfolio Management	2261	35	52	10	-25	28%	0.5
523110 - Investment Banking and Securities Dealing	396	6	9	3	-3	48%	0.9
524299 - All Other Insurance Related Activities	131	2	3	1	-1	49%	0.9
522310 - Mortgage and Non-mortgage Loan Brokers	392	6	9	4	-2	65%	1.2
522111 - Personal and Commercial Banking Industry	736	12	17	8	-4	69%	1.3
522130 - Local Credit Unions	170	3	4	2	-1	75%	1.4
522390 - Other Activities Related to Credit Intermediation	169	3	4	2	-1	76%	1.4

526989 - All Other Miscellaneous Funds and Financial Vehicles	174	3	4	3	0	110%	2.1
522291 - Consumer Lending	110	2	3	2	0	116%	2.2
523210 - Securities and Commodity Exchanges	53	1	1	1	0	121%	2.3
524291 - Claims Adjusters	156	2	4	4	2	164%	3.1
524122 - Direct, Private, Automobile Insurance Carriers	22	0	1	1	1	290%	5.4
524123 - Direct, Public, Automobile Insurance Carriers	0	0	0	0	0	#DIV/0!	#DIV/0!
524131 - Life Reinsurance Carriers	0	0	0	0	0	#DIV/0!	#DIV/0!
524132 - Accident and Sickness Reinsurance Carriers	0	0	0	0	0	#DIV/0!	#DIV/0!
524133 - Automobile Reinsurance Carriers	0	0	0	0	0	#DIV/0!	#DIV/0!
524135 - Liability Reinsurance Carriers	0	0	0	0	0	#DIV/0!	#DIV/0!
526914 - Money Market Funds	0	0	0	0	0	#DIV/0!	#DIV/0!
526917 - Balanced Funds / Asset Allocation Funds	0	0	0	0	0	#DIV/0!	#DIV/0!
526930 - Segregated (except Pension) Funds	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 53 Real Estate and Rental and Leasing

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
532220 - Formal Wear and Costume Rental	15	0	0	0	0	0%	0.0
532310 - General Rental Centres	88	1	2	0	-1	0%	0.0
532420 - Office Machinery and Equipment Rental and Leasing	42	1	1	0	-1	0%	0.0
532120 - Truck, Utility Trailer and RV (Recreational Vehicle) Rental and Leasing	324	5	7	1	-4	20%	0.4
532290 - Other Consumer Goods Rental	196	3	5	1	-2	33%	0.6
533110 - Lessors of Non-Financial Intangible Assets (Except Copyrighted Works)	189	3	4	1	-2	34%	0.6
531190 - Lessors of Other Real Estate Property	1392	22	32	8	-14	37%	0.7
532490 - Other Commercial and Industrial Machinery and Equipment Rental and Leasing	561	9	13	4	-5	46%	0.9
531120 - Lessors of Non-Residential Buildings (except Mini-Warehouses)	7359	115	169	53	-62	46%	0.9
531111 - Lessors of Residential Buildings and Dwellings (except Social Housing Projects)	2896	45	67	24	-21	53%	1.0
531130 - Self-Storage Mini-Warehouses	105	2	2	1	-1	61%	1.1
532112 - Passenger Car Leasing	98	2	2	1	-1	65%	1.2
531310 - Real Estate Property Managers	1941	30	45	21	-9	69%	1.3
531320 - Offices of Real Estate Appraisers	365	6	8	4	-2	70%	1.3
531212 - Offices of Real Estate Brokers	2678	42	62	33	-9	79%	1.5
532410 - Construction, Transportation, Mining, and Forestry Machinery and Equipment Rental and Leasing	1593	25	37	23	-2	92%	1.7
531390 - Other Activities Related to Real Estate	1414	22	33	21	-1	95%	1.8
532210 - Consumer Electronics and Appliance Rental	61	1	1	1	0	105%	2.0
531211 - Real Estate Agents	3477	54	80	59	5	108%	2.0
532230 - Video Tape and Disc Rental	344	5	8	6	1	111%	2.1
532111 - Passenger Car Rental	162	3	4	3	0	118%	2.2
531112 - Lessors of Social Housing Projects	147	2	3	3	1	130%	2.4

NAIC 54 Professional, Scientific and Technical Services

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
541120 - Offices of Notaries	5	0	0	0	0	0%	0.0
541320 - Landscape Architectural Services	143	2	3	0	-2	0%	0.0
541490 - Other Specialized Design Services	130	2	3	0	-2	0%	0.0
541720 - Research and Development in the Social Sciences and Humanities	103	2	2	0	-2	0%	0.0
541810 - Advertising Agencies	446	7	10	0	-7	0%	0.0
541820 - Public Relations Services	137	2	3	0	-2	0%	0.0
541830 - Media Buying Agencies	9	0	0	0	0	0%	0.0
541840 - Media Representatives	39	1	1	0	-1	0%	0.0
541860 - Direct Mail Advertising	12	0	0	0	0	0%	0.0
541870 - Advertising Material Distribution Services	27	0	1	0	0	0%	0.0
541899 - All Other Services Related to Advertising	214	3	5	0	-3	0%	0.0
541910 - Marketing Research and Public Opinion Polling	115	2	3	0	-2	0%	0.0
541360 - Geophysical Surveying and Mapping Services	1476	23	34	1	-22	4%	0.1
541310 - Architectural Services	596	9	14	1	-8	11%	0.2
541430 - Graphic Design Services	583	9	13	1	-8	11%	0.2
541340 - Drafting Services	952	15	22	2	-13	13%	0.3
541710 - Research and Development in the Physical, Engineering and Life Sciences	447	7	10	1	-6	14%	0.3
541510 - Computer Systems Design and Related Services	7438	116	171	17	-99	15%	0.3
541611 - Administrative Management and General Management Consulting Services	7069	111	163	19	-92	17%	0.3
541420 - Industrial Design Services	281	4	6	1	-3	23%	0.4
541212 - Offices of Accountants	3482	54	80	20	-34	37%	0.7
541940 - Veterinary Services	664	10	15	4	-6	38%	0.7
541619 - Other Management Consulting Services	2033	32	47	13	-19	41%	0.8
541690 - Other Scientific and Technical Consulting Services	5799	91	133	38	-53	42%	0.8
541110 - Offices of Lawyers	3489	55	80	24	-31	44%	0.8
541380 - Testing Laboratories	1453	23	33	10	-13	44%	0.8
541330 - Engineering Services	7098	111	163	49	-62	44%	0.8
541920 - Photographic Services	506	8	12	4	-4	51%	0.9
541612 - Human Resources Consulting Services	471	7	11	4	-3	54%	1.0
541190 - Other Legal Services	470	7	11	4	-3	54%	1.0
541990 - All Other Professional, Scientific and Technical Services	2445	38	56	22	-16	57%	1.1
541620 - Environmental Consulting Services	1277	20	29	12	-8	60%	1.1
541410 - Interior Design Services	634	10	15	6	-4	60%	1.1
541215 - Bookkeeping, Payroll and Related Services	1478	23	34	14	-9	61%	1.1
541930 - Translation and Interpretation Services	100	2	2	1	-1	64%	1.2
541213 - Tax Preparation Services	275	4	6	3	-1	70%	1.3
541891 - Specialty Advertising Distributors	166	3	4	2	-1	77%	1.4
541850 - Display Advertising	149	2	3	2	0	86%	1.6
541350 - Building Inspection Services	311	5	7	8	3	164%	3.1
541370 - Surveying and Mapping (except Geophysical) Services	314	5	7	13	8	265%	5.0

NAIC 56 Administrative and Support and Waste Management and Remediation Services

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
561210 - Facilities Support Services	4	0	0	0	0	0%	0.0
561330 - Professional Employer Organizations	4	0	0	0	0	0%	0.0
561410 - Document Preparation Services	210	3	5	0	-3	0%	0.0
561420 - Telephone Call Centres	94	1	2	0	-1	0%	0.0
561440 - Collection Agencies	46	1	1	0	-1	0%	0.0
561450 - Credit Bureaus	10	0	0	0	0	0%	0.0
561520 - Tour Operators	149	2	3	0	-2	0%	0.0
561613 - Armoured Car Services	6	0	0	0	0	0%	0.0
561710 - Exterminating and Pest Control Services	55	1	1	0	-1	0%	0.0
561910 - Packaging and Labelling Services	29	0	1	0	0	0%	0.0
561920 - Convention and Trade Show Organizers	113	2	3	0	-2	0%	0.0
562920 - Material Recovery Facilities	13	0	0	0	0	0%	0.0
561740 - Carpet and Upholstery Cleaning Services	291	5	7	1	-4	22%	0.4
561799 - All Other Services to Buildings and Dwellings	285	4	7	1	-3	22%	0.4
551113 - Holding Companies	11192	175	258	49	-126	28%	0.5
562910 - Remediation Services	180	3	4	1	-2	35%	0.7
561990 - All Other Support Services	1711	27	39	10	-17	37%	0.7
561510 - Travel Agencies	558	9	13	4	-5	46%	0.9
561110 - Office Administrative Services	2840	44	65	21	-23	47%	0.9
561730 - Landscaping Services	2108	33	49	16	-17	48%	0.9

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
551114 - Head Offices	539	8	12	6	-2	71%	1.3
561590 - Other Travel Arrangement and Reservation Services	83	1	2	1	0	77%	1.4
562990 - All Other Waste Management Services	166	3	4	2	-1	77%	1.4
561310 - Employment Placement Agencies and Executive Search Services	308	5	7	4	-1	83%	1.6
561611 - Investigation Services	147	2	3	2	0	87%	1.6
561430 - Business Service Centres	142	2	3	2	0	90%	1.7
561621 - Security Systems Services (except Locksmiths)	212	3	5	3	0	90%	1.7
562210 - Waste Treatment and Disposal	207	3	5	3	0	93%	1.7
561490 - Other Business Support Services	268	4	6	4	0	95%	1.8
562110 - Waste Collection	246	4	6	4	0	104%	1.9
561722 - Janitorial Services (except Window Cleaning)	2688	42	62	46	4	109%	2.1
561721 - Window Cleaning Services	113	2	3	2	0	113%	2.1
561791 - Duct and Chimney Cleaning Services	102	2	2	2	0	125%	2.3
561320 - Temporary Help Services	245	4	6	5	1	130%	2.4
561612 - Security Guard and Patrol Services	108	2	2	4	2	237%	4.4
561622 - Locksmiths	133	2	3	5	3	240%	4.5

NAIC 61 Educational Services

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
611310 - Universities	33	1	1	0	-1	0%	0.0
611410 - Business and Secretarial Schools	15	0	0	0	0	0%	0.0
611630 - Language Schools	34	1	1	0	-1	0%	0.0
611430 - Professional and Management Development Training	266	4	6	1	-3	24%	0.5
611510 - Technical and Trade Schools	214	3	5	1	-2	30%	0.6
611110 - Elementary and Secondary Schools	319	5	7	2	-3	40%	0.8
611610 - Fine Arts Schools	282	4	6	2	-2	45%	0.8
611620 - Athletic Instruction	423	7	10	3	-4	45%	0.8
611210 - Community Colleges and C.E.G.E.P.s	86	1	2	1	0	74%	1.4
611710 - Educational Support Services	340	5	8	4	-1	75%	1.4
611690 - All Other Schools and Instruction	904	14	21	13	-1	92%	1.7
611420 - Computer Training	100	2	2	2	0	128%	2.4

NAIC 62 Health Care and Social Assistance

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
621410 - Family Planning Centres	39	1	1	0	-1	0%	0.0
621912 - Air Ambulance Services	3	0	0	0	0	0%	0.0
621990 - All Other Ambulatory Health Care Services	29	0	1	0	0	0%	0.0
622310 - Specialty (except Psychiatric and Substance Abuse) Hospitals	30	0	1	0	0	0%	0.0
623210 - Residential Developmental Handicap Facilities	44	1	1	0	-1	0%	0.0
623221 - Residential Substance Abuse Facilities	15	0	0	0	0	0%	0.0
623310 - Community Care Facilities for the Elderly	96	2	2	0	-2	0%	0.0
623992 - Homes for Emotionally Disturbed Children	16	0	0	0	0	0%	0.0
623993 - Homes for the Physically Handicapped or Disabled	25	0	1	0	0	0%	0.0
624210 - Community Food Services	32	1	1	0	-1	0%	0.0
624220 - Community Housing Services	24	0	1	0	0	0%	0.0
624230 - Emergency and Other Relief Services	41	1	1	0	-1	0%	0.0
624310 - Vocational Rehabilitation Services	175	3	4	0	-3	0%	0.0
621330 - Offices of Mental Health Practitioners (except Physicians)	259	4	6	1	-3	25%	0.5
623110 - Nursing Care Facilities	237	4	5	1	-3	27%	0.5
621499 - All Other Out-Patient Care Centres	468	7	11	3	-4	41%	0.8
621110 - Offices of Physicians	4768	75	110	31	-44	42%	0.8
621210 - Offices of Dentists	1942	30	45	14	-16	46%	0.9
624120 - Services for the Elderly and Persons with Disabilities	263	4	6	2	-2	49%	0.9
621310 - Offices of Chiropractors	616	10	14	5	-5	52%	1.0
621390 - Offices of All Other Health Practitioners	696	11	16	6	-5	55%	1.0
624410 - Child Day-Care Services	881	14	20	8	-6	58%	1.1
621340 - Offices of Physical, Occupational, and Speech Therapists and Audiologists	432	7	10	4	-3	59%	1.1
621320 - Offices of Optometrists	316	5	7	3	-2	61%	1.1
622111 - General (except Paediatric) Hospitals	103	2	2	1	-1	62%	1.2
621610 - Home Health Care Services	199	3	5	2	-1	64%	1.2
621510 - Medical and Diagnostic Laboratories	287	4	7	3	-1	67%	1.3
623999 - All Other Residential Care Facilities	92	1	2	1	0	69%	1.3
621494 - Community Health Centres	120	2	3	2	0	106%	2.0
624110 - Child and Youth Services	113	2	3	2	0	113%	2.1
624190 - Other Individual and Family Services	439	7	10	8	1	116%	2.2
621911 - Ambulance (except Air Ambulance) Services	103	2	2	2	0	124%	2.3
623222 - Homes for the Psychiatrically Disabled	51	1	1	1	0	125%	2.3
621420 - Out-Patient Mental Health and Substance Abuse Centres	63	1	1	2	1	203%	3.8
623991 - Transition Homes for Women	15	0	0	1	1	426%	8.0
622210 - Psychiatric and Substance Abuse Hospitals	8	0	0	1	1	799%	15.0
622112 - Paediatric Hospitals	0	0	0	0	0	#DIV/0!	#DIV/0!

NAIC 71 Arts, Entertainment, and Recreation

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
711111 - Theatre (except Musical) Companies	54	1	1	0	-1	0%	0.0
711120 - Dance Companies	19	0	0	0	0	0%	0.0
711130 - Musical Groups and Artists	194	3	4	0	-3	0%	0.0
711190 - Other Performing Arts Companies	16	0	0	0	0	0%	0.0
711213 - Horse Race Tracks	121	2	3	0	-2	0%	0.0
711218 - Other Spectator Sports	91	1	2	0	-1	0%	0.0
711311 - Live Theatres and Other Performing Arts Presenters with Facilities	31	0	1	0	0	0%	0.0
711319 - Sports Stadiums and Other Presenters with Facilities	56	1	1	0	-1	0%	0.0
711322 - Festivals without Facilities	39	1	1	0	-1	0%	0.0
711329 - Sports Presenters and Other Presenters without Facilities	76	1	2	0	-1	0%	0.0
711410 - Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures	57	1	1	0	-1	0%	0.0
711511 - Independent Artists, Visual Arts	133	2	3	0	-2	0%	0.0
712111 - Non-Commercial Art Museums and Galleries	19	0	0	0	0	0%	0.0
712115 - History and Science Museums	15	0	0	0	0	0%	0.0
712130 - Zoos and Botanical Gardens	12	0	0	0	0	0%	0.0
712190 - Nature Parks and Other Similar Institutions	25	0	1	0	0	0%	0.0
713110 - Amusement and Theme Parks	16	0	0	0	0	0%	0.0
713930 - Marinas	17	0	0	0	0	0%	0.0
711513 - Independent Writers and Authors	249	4	6	1	-3	26%	0.5
713910 - Golf Courses and Country Clubs	345	5	8	2	-3	37%	0.7
713940 - Fitness and Recreational Sports Centres	530	8	12	5	-3	60%	1.1
711512 - Independent Actors, Comedians and Performers	268	4	6	3	-1	72%	1.3
712119 - Other Museums	84	1	2	1	0	76%	1.4
713990 - All Other Amusement and Recreation Industries	733	11	17	10	-1	87%	1.6
713299 - All Other Gambling Industries	63	1	1	1	0	101%	1.9
711211 - Sports Teams and Clubs	110	2	3	2	0	116%	2.2
713950 - Bowling Centres	83	1	2	2	1	154%	2.9
711321 - Performing Arts Promoters (Presenters) without Facilities	38	1	1	1	0	168%	3.2
713920 - Skiing Facilities	38	1	1	1	0	168%	3.2
713210 - Casinos (except Casino Hotels)	37	1	1	1	0	173%	3.2
713291 - Lotteries	78	1	2	3	2	246%	4.6
712120 - Historic and Heritage Sites	25	0	1	1	1	256%	4.8
713120 - Amusement Arcades	51	1	1	3	2	376%	7.0
711112 - Musical Theatre and Opera Companies	13	0	0	1	1	492%	9.2

NAIC 72 Accommodation and Food Services

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
721120 - Casino Hotels	4	0	0	0	0	0%	0.0
721192 - Housekeeping Cottages and Cabins	34	1	1	0	-1	0%	0.0
721198 - All Other Traveller Accommodation	72	1	2	0	-1	0%	0.0
721213 - Recreational (except Hunting and Fishing) and Vacation Camps	61	1	1	0	-1	0%	0.0
721111 - Hotels	576	9	13	5	-4	55%	1.0
722110 - Full-Service Restaurants	3859	60	89	37	-23	61%	1.1
721114 - Motels	397	6	9	4	-2	64%	1.2
721211 - RV (Recreational Vehicle) Parks and Campgrounds	197	3	5	2	-1	65%	1.2
722210 - Limited-Service Eating Places	3785	59	87	39	-20	66%	1.2
721113 - Resorts	78	1	2	1	0	82%	1.5
722410 - Drinking Places (Alcoholic Beverages)	529	8	12	8	0	97%	1.8
722320 - Caterers	316	5	7	5	0	101%	1.9
721112 - Motor Hotels	153	2	4	3	1	125%	2.3
722330 - Mobile Food Services	44	1	1	1	0	145%	2.7
721212 - Hunting and Fishing Camps	161	3	4	4	1	159%	3.0
721310 - Rooming and Boarding Houses	78	1	2	2	1	164%	3.1
722310 - Food Service Contractors	199	3	5	9	6	289%	5.4
721191 - Bed and Breakfast	131	2	3	8	6	390%	7.3

NAIC 81 Other Services (Except Public Administration)

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
811430 - Footwear and Leather Goods Repair	76	1	2	0	-1	0%	0.0
812220 - Cemeteries and Crematoria	27	0	1	0	0	0%	0.0
812921 - Photo Finishing Laboratories (except One-Hour)	17	0	0	0	0	0%	0.0
812922 - One-Hour Photo Finishing	25	0	1	0	0	0%	0.0
812930 - Parking Lots and Garages	47	1	1	0	-1	0%	0.0
812990 - All Other Personal Services	189	3	4	0	-3	0%	0.0
813930 - Labour Organizations	130	2	3	0	-2	0%	0.0
813940 - Political Organizations	12	0	0	0	0	0%	0.0
812320 - Dry Cleaning and Laundry Services (except Coin-Operated)	323	5	7	1	-4	20%	0.4
811119 - Other Automotive Mechanical and Electrical Repair and Maintenance	274	4	6	1	-3	23%	0.4
811490 - Other Personal and Household Goods Repair and Maintenance	448	7	10	2	-5	29%	0.5
813920 - Professional Organizations	300	5	7	2	-3	43%	0.8
813910 - Business Associations	599	9	14	4	-5	43%	0.8
812910 - Pet Care (except Veterinary) Services	291	5	7	2	-3	44%	0.8
811411 - Home and Garden Equipment Repair and Maintenance	139	2	3	1	-1	46%	0.9
811412 - Appliance Repair and Maintenance	278	4	6	2	-2	46%	0.9
813990 - Other Membership Organizations	1902	30	44	14	-16	47%	0.9
812115 - Beauty Salons	1842	29	42	14	-15	49%	0.9
812190 - Other Personal Care Services	977	15	22	8	-7	52%	1.0
813110 - Religious Organizations	1915	30	44	17	-13	57%	1.1
811192 - Car Washes	445	7	10	4	-3	57%	1.1
811121 - Automotive Body, Paint and Interior Repair and Maintenance	861	13	20	8	-5	59%	1.1
812116 - Unisex Hair Salons	750	12	17	7	-5	60%	1.1
811122 - Automotive Glass Replacement Shops	203	3	5	2	-1	63%	1.2
811210 - Electronic and Precision Equipment Repair and Maintenance	684	11	16	8	-3	75%	1.4
811111 - General Automotive Repair	1868	29	43	22	-7	75%	1.4
811420 - Reupholstery and Furniture Repair	254	4	6	3	-1	75%	1.4
812210 - Funeral Homes	134	2	3	2	0	95%	1.8
813410 - Civic and Social Organizations	1444	23	33	24	1	106%	2.0
811112 - Automotive Exhaust System Repair	60	1	1	1	0	106%	2.0
811310 - Commercial and Industrial Machinery and Equipment (except Automotive and Electronic) Repair and Maintenance	6285	98	145	110	12	112%	2.1
812310 - Coin-Operated Laundries and Dry Cleaners	156	2	4	3	1	123%	2.3
813210 - Grant-Making and Giving Services	256	4	6	5	1	125%	2.3
811199 - All Other Automotive Repair and Maintenance	149	2	3	3	1	129%	2.4
813310 - Social Advocacy Organizations	288	5	7	6	1	133%	2.5
812114 - Barber Shops	116	2	3	3	1	165%	3.1
812330 - Linen and Uniform Supply	33	1	1	1	0	194%	3.6
814110 - Private Households	4282	67	99	160	93	239%	4.5

NAIC 92 Public Administration

Industry (6-Digit NAICS)	ALBERTA	Theoretical Capacity (Population 51,496)	Theoretical Capacity (Population 75,717)	WOOD BUFFALO	+/-	% of Theoretical Capacity (Population 51,496)	LQ
911110 - Defence Services	2	0	0	0	0	0%	0.0
911210 - Federal Courts of Law	3	0	0	0	0	0%	0.0
911220 - Federal Correctional Services	2	0	0	0	0	0%	0.0
911230 - Federal Police Services	2	0	0	0	0	0%	0.0
911310 - Federal Labour and Employment Services	2	0	0	0	0	0%	0.0
911320 - Immigration Services	2	0	0	0	0	0%	0.0
911410 - Foreign Affairs	1	0	0	0	0	0%	0.0
911420 - International Assistance	1	0	0	0	0	0%	0.0
911910 - Other Federal Government Public Administration	44	1	1	0	-1	0%	0.0
912110 - Provincial Courts of Law	11	0	0	0	0	0%	0.0
912120 - Provincial Correctional Services	7	0	0	0	0	0%	0.0
912130 - Provincial Police Services	2	0	0	0	0	0%	0.0
912140 - Provincial Fire-Fighting Services	2	0	0	0	0	0%	0.0
912150 - Provincial Regulatory Services	9	0	0	0	0	0%	0.0
912190 - Other Provincial Protective Services	7	0	0	0	0	0%	0.0
912210 - Provincial Labour and Employment Services	4	0	0	0	0	0%	0.0
912910 - Other Provincial and Territorial Public Administration	255	4	6	0	-4	0%	0.0
913130 - Municipal Police Services	2	0	0	0	0	0%	0.0
913140 - Municipal Fire-Fighting Services	2	0	0	0	0	0%	0.0
913150 - Municipal Regulatory Services	7	0	0	0	0	0%	0.0
913190 - Other Municipal Protective Services	2	0	0	0	0	0%	0.0
919110 - International and Other Extra-Territorial Public Administration	1	0	0	0	0	0%	0.0
913910 - Other Local, Municipal and Regional Public Administration	334	5	8	1	-4	19%	0.4
914110 - Aboriginal Public Administration	64	1	1	5	4	499%	9.4
911240 - Federal Regulatory Services	0	0	0	0	0	#DIV/0!	#DIV/0!
911290 - Other Federal Protective Services	0	0	0	0	0	#DIV/0!	#DIV/0!
911390 - Other Federal Labour Employment and Immigration Services	0	0	0	0	0	#DIV/0!	#DIV/0!
913110 - Municipal Courts of Law	0	0	0	0	0	#DIV/0!	#DIV/0!
913120 - Municipal Correctional Services	0	0	0	0	0	#DIV/0!	#DIV/0!

Appendix IV

High and Medium Priority Business Attraction Targets

Wood Buffalo Priorities - Construction

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

other heavy and civil engineering construction; glass and glazing contractors; other foundation, structure and building exterior contractors; all other building equipment contractors; flooring contractors; structural steel and precast concrete contractors; land subdivision; masonry contractors; oil and gas pipeline and related structures construction; water and sewer line and related structures construction; commercial and institutional building construction; and tile and terrazzo contractors

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

siding contractors; framing contractors; site preparation contractors; finish carpentry contractors; drywall and insulation contractors; poured concrete foundation and structure contractors; other building finishing contractors; all other specialty trades contractors; highway, street and bridge construction; roofing contractors; residential building construction; and plumbing, heating and air-conditioning contractors

Wood Buffalo Priorities – Wholesalers and Distributors

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

piece goods, notions and other dry goods; home entertainment equipment; household appliance; other home furnishing; book, periodical and newspaper; toy and hobby goods; pharmaceuticals and pharmacy supplies; toiletries, cosmetics and sundries; recreational and other motor vehicles; used motor vehicle parts and accessories; paint, glass and wallpaper; farm, lawn and garden machinery and equipment; other recyclable material; stationery and office supplies; other paper and disposable plastic product; professional machinery equipment and supplies; computer, computer peripheral and pre-packaged software; new and used automobile and light duty truck; service establishment machinery equipment and supplies; clothing and clothing accessories; lumber, plywood and millwork; and amusement and sporting goods

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

electronic components, navigational and communications equipment; other new motor vehicle parts and accessories; petroleum product; office and store machinery and equipment; red meat and meat product; mining and oil and gas well machinery, equipment and supply; plumbing, heating and air-conditioning equipment and supply; and chemical and allied product

Wood Buffalo Priorities - Retail

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

fruit and vegetable markets; all other health and personal care; used merchandise; pet and pet supply; art dealers; mobile home dealers; internet shopping; mail-order houses; other fuel dealers; all other specialty food; all other miscellaneous general merchandise; pharmacies; florists; cosmetics, beauty supplies and perfume; used car dealers; health supplements; office supplies and stationery; sewing, needlework and piece goods; all other home furnishings; print and picture frame; hobby, toy and game stores

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

appliance television and other electronics; other direct selling; furniture; new car dealers; confectionary and nut; meat markets; optical goods; computer and software; musical instrument and supplies; all other miscellaneous store retailers; tire dealers; recreational vehicle dealers; all other clothing stores, pre-recorded tape, compact disc and record; hardware; floor covering; supermarkets; family clothing; gasoline stations; motorcycle, boat and other motor vehicle dealers; baked goods; gift, novelty and souvenir; women's clothing; sporting goods; vending machine operators; other building material dealers; shoe; book and news; automotive parts and accessories; home centres; and clothing accessories stores

Wood Buffalo Priorities – Transportation and Warehousing

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

limousine service; other transit and ground passenger transport; all other pipeline transportation; support activities for rail; other long distance specialized freight trucking; other freight; bulk liquids trucking; general warehousing and storage; general long distance freight trucking; other support activities for air; general local freight trucking; and other support activities for road transport

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

long distance bulk liquids trucking; long distance dry bulk materials trucking; long distance less than truckload general freight; local forest products trucking; other local specialized freight trucking; couriers, taxi service; non-scheduled specialty flying; long distance forest products trucking; used household and office goods moving; school and employee bus transport; and local messengers and local delivery

Wood Buffalo Priorities – Finance and Insurance

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

other deposit credit intermediation; other financial transactions processing and clearing house activities; securities brokerage; commodity contracts dealing; direct individual life, health and medical insurance carriers; other direct insurance carriers; investment advice; insurance agencies and brokerage; all other financial investment activities; all other non-depository credit intermediation; miscellaneous intermediation; portfolio management; investment banking and securities dealing; all other insurance related activities; mortgage and non-mortgage loan brokers; personal and commercial banking; local credit unions; and other activities related to credit intermediation

Wood Buffalo Priorities – Professional, Scientific and Technical Services

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

landscape architecture; other specialized design; research and development and social sciences and humanities; advertising; public relations; all other services related to advertising; marketing research and public opinion polling; geophysical surveying and mapping; architecture; graphic design; drafting; research and development in physical, engineering and life sciences; computer systems design and related services; administrative management and general management consulting; industrial design; accountants; veterinary services; other management consulting; other scientific and technical consulting; lawyers; testing laboratories; engineering services; and photographic services

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

human resources consulting; other legal services; all other professional, scientific and technical services; environmental consulting; interior design; bookkeeping, payroll and related services; translation and interpretation; tax preparation; specialty advertising distributors; and display advertising

Wood Buffalo Priorities – Arts, Entertainment and Recreation

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY

Theatre companies; musical groups and artists; horse race tracks; other spectator sports; live theatres and other performing arts presenters with facilities; sports stadiums and other presenters with facilities; festivals without facilities; sports presenters and other presenters without facilities; agents and managers for artists, athletes, entertainers and other public figures; independent visual artists; independent writers and authors; and golf courses and country clubs

Industries with LQ>1 AND below theoretical capacity: MEDIUM PRIORITY

Fitness and recreation sports centres; independent actors, comedians and performers; other museums; and all other amusement and recreation industries

Wood Buffalo Priorities – Accommodation and Food Services

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY
Housekeeping cottages and cabins; all other traveller accommodation; and recreational and vacation camps
Industries with LQ >1 AND below theoretical capacity: MEDIUM PRIORITY
Hotels; full-service restaurants; motels; RV parks and campgrounds; limited-service eating places; resorts; and drinking places

Wood Buffalo Priorities – Other Services

Industries with LQ <1 AND below theoretical capacity: HIGH PRIORITY
Footwear and leather goods repair; one-hour photo finishing; all other personal services; dry cleaning and laundry services; other automotive mechanical and electrical repair and maintenance; other personal and household goods repair and maintenance; appliance repair and maintenance; pet care; home and garden equipment repair and maintenance; and beauty salons
Industries with LQ >1 AND below theoretical capacity: MEDIUM PRIORITY
Other personal care services; car washes; automotive body, paint and interior repair and maintenance; unisex hair salons; automotive glass replacement; electronic and precision equipment repair and maintenance; general automotive repair; and reupholstery and furniture repair

Appendix V

Focus Group Participants

Focus Group Participants:

Randy Edison

Bryan Lutz

Dave Kirschner

Dianne Farkouh

Sandra Stevens

Susan Shave

Don Pugh

Tiffany Meady

Steve McGregor

Les Diachinsky

Steve Jani

Nick Sanders

Catherine Gouthro

Mary MacLean

Cherie Cormier

Lisa Zaharichuk

Wes Holodniuk

Appendix VI

General Goods and Services Focus Group Priorities

INDUSTRY GROUPS	Top 20	INDUSTRY GROUPS	Top 20	INDUSTRY GROUPS	Top 20
722110 - Full-Service Restaurants	12	311811 - Retail Bakeries	2	453999 - All Other Miscellaneous Store Retailers	1
448120 - Women's Clothing Stores	11	323114 - Quick Printing	2	454390 - Other Direct Selling Establishments	1
448140 - Family Clothing Stores	11	441120 - Used Car Dealers	2	522111 - Personal and Commercial Banking Industry	1
452110 - Department Stores	11	441210 - Recreational Vehicle Dealers	2	721114 - Motels	1
812320 - Dry Cleaning and Laundry Services (except Coin-Operated)	11	441220 - Motorcycle, Boat and Other Motor Vehicle Dealers	2	811420 - Reupholstery and Furniture Repair	1
443110 - Appliance, Television and Other Electronics Stores	10	441320 - Tire Dealers	2	812116 - Unisex Hair Salons	1
811430 - Footwear and Leather Goods Repair	9	442210 - Floor Covering Stores	2	812190 - Other Personal Care Services	1
448110 - Men's Clothing Stores	8	443130 - Camera and Photographic Supplies Stores	2	812310 - Coin-Operated Laundries and Dry Cleaners	1
445110 - Supermarkets and Other Grocery (except Convenience) Stores	8	444190 - Other Building Material Dealers	2	812922 - One-Hour Photo Finishing	1
445299 - All Other Specialty Food Stores	8	445291 - Baked Goods Stores	2	813310 - Social Advocacy Organizations	1
811192 - Car Washes	8	451130 - Sewing, Needlework and Piece Goods Stores	2	441310 - Automotive Parts and Accessories Stores	0
442110 - Furniture Stores	7	451140 - Musical Instrument and Supplies Stores	2	442292 - Print and Picture Frame Stores	0
452910 - Warehouse Clubs and Superstores	6	452999 - All Other Miscellaneous General Merchandise Stores	2	444120 - Paint and Wallpaper Stores	0
813920 - Professional Organizations	6	453110 - Florists	2	444210 - Outdoor Power Equipment Stores	0
444130 - Hardware Stores	5	453210 - Office Supplies and Stationery Stores	2	445120 - Convenience Stores	0
445230 - Fruit and Vegetable Markets	5	485310 - Taxi Service	2	445292 - Confectionery and Nut Stores	0
446110 - Pharmacies and Drug Stores	5	523920 - Portfolio Management	2	445310 - Beer, Wine and Liquor Stores	0
451120 - Hobby, Toy and Game Stores	5	541940 - Veterinary Services	2	446120 - Cosmetics, Beauty Supplies and Perfume Stores	0
713940 - Fitness and Recreational Sports Centres	5	561730 - Landscaping Services	2	447110 - Gasoline Stations with Convenience Stores	0
442298 - All Other Home Furnishings Stores	4	713910 - Golf Courses and Country Clubs	2	447190 - Other Gasoline Stations	0
443120 - Computer and Software Stores	4	811119 - Other Automotive Mechanical and Electrical Repair and Maintenance	2	448150 - Clothing Accessories Stores	0
444110 - Home Centres	4	811122 - Automotive Glass Replacement Shops	2	448191 - Fur Stores	0
445210 - Meat Markets	4	811199 - All Other Automotive Repair and Maintenance	2	448310 - Jewellery Stores	0
448130 - Children's and Infants' Clothing Stores	4	811310 - Commercial and Industrial Machinery and Equipment Repair and Maintenance	2	448320 - Luggage and Leather Goods Stores	0
448210 - Shoe Stores	4	811411 - Home and Garden Equipment Repair and Maintenance	2	452991 - Home and Auto Supplies Stores	0
451110 - Sporting Goods Stores	4	811412 - Appliance Repair and Maintenance	2	453930 - Mobile Home Dealers	0
453310 - Used Merchandise Stores	4	811490 - Other Personal and Household Goods Repair and Maintenance	2	453992 - Beer and Wine-Making Supplies Stores	0
453910 - Pet and Pet Supplies Stores	4	812910 - Pet Care (except Veterinary) Services	2	454111 - Internet Shopping	0
811121 - Automotive Body, Paint and Interior Repair and Maintenance	4	441110 - New Car Dealers	1	454112 - Electronic Auctions	0
812115 - Beauty Salons	4	444220 - Nursery Stores and Garden Centres	1	454113 - Mail-Order Houses	0
812930 - Parking Lots and Garages	4	446130 - Optical Goods Stores	1	454210 - Vending Machine Operators	0
323115 - Digital Printing	3	446191 - Food (Health) Supplement Stores	1	454311 - Heating Oil Dealers	0
442291 - Window Treatment Stores	3	446199 - All Other Health and Personal Care Stores	1	454312 - Liquefied Petroleum Gas (Bottled Gas) Dealers	0
445220 - Fish and Seafood Markets	3	448199 - All Other Clothing Stores	1	454319 - Other Fuel Dealers	0
523930 - Investment Advice	3	451210 - Book Stores and News Dealers	1	485320 - Limousine Service	0
721111 - Hotels	3	451220 - Pre-Recorded Tape, Compact Disc and Record Stores	1	524210 - Insurance Agencies and Brokerages	0
722210 - Limited-Service Eating Places	3	453220 - Gift, Novelty and Souvenir Stores	1	811112 - Automotive Exhaust System Repair	0
811111 - General Automotive Repair	3	453920 - Art Dealers	1	811210 - Electronic and Precision Equipment Repair and Maintenance	0
812114 - Barber Shops	0	812921 - Photo Finishing Laboratories	0	813410 - Civic and Social Organizations	0
812210 - Funeral Homes	0	812990 - All Other Personal Services	0	813910 - Business Associations	0
812220 - Cemeteries and Crematoria	0	813110 - Religious Organizations	0	813930 - Labour Organizations	0
812330 - Linen and Uniform Supply	0	813210 - Grant-Making and Giving Services	0	813940 - Political Organizations	0
				813990 - Other Membership Organizations	0

Appendix VII

Resident Businesses in Identified Secondary Sector Industries

NAIC 2131

Bayzik Electric Valve & Instrumentation	Oilsands Expediting Ltd.	Comco Pipe & Supply Ltd
Eveready Income Fund	Hugo Zbinden Contracting	Flowserve Inc Fsd Div
Wood Buffalo Alliance	Ma O'Kane Consultants Inc.	Wellsite Masters Ltd.
Centurion Energy Services Ltd.	Multicultural Contracting Ltd	Flint Energy Services Ltd.
Karborah Contracting Services Ltd.	Thibault Contracting	Wood Buffalo Oilfield Services Ltd.

NAIC 3329

Alberta Fluid Components Ltd	Marking Services Canada
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NAIC 5324

Air Mikisew Ltd	Neegan Development Corporation Ltd	Aluma Systems Canada Inc
Deni Sky Enterprises	Hertz Equipment Rentals	Mc Murray Aviation
Ketek Industries Ltd.	Easyhome	Lakeside Scaffolding
Lakeshore Contracting Ltd	L Robert	L Robert
Aeromedical Services	Aluma Systems	United Rentals Of Canada Inc
Northward Development Ltd	Safway Scaffold Svc	Wood Buffalo Scaffolding
Wood Buffalo Helicopters	ThyssenKrupp Safway	Venture Scaffolding & Insulation
		Steeplejack Services Group

NAIC 3331

Giw Ksb Mining Group	J&L Supply Co. Ltd.
Groundhog Hydro Vacs Ltd	Transwest Mining Systems

NAIC 3328

Class One Collision Inc.	Cooperheat MQS Canada Inc.
Line-X	Douglas Coatings Ltd.

NAIC 3339

GIW Industries Inc.	R&D Enterprises	Air Con Technologies
Bishop Towing and Salvage	Metso	Fastenal Company
Ward's Hydraulics	Linde Canada Ltd.	

NAIC 5413

Associated Engineering Ab Ltd	Oho Technologies Inc	Dmi Engineering Inc.
Kova Engineering Ltd	Metalcare Inspection Services Inc	The Equity Engineering Group I
Colt Engineering	Shawn Penney Enterprises	Isl Engineering & Land Service

Twd Technologies Ltd	Mc Kay's Rotating Equipment	Bmt Fleet Technology Limited
Mc Murray Resources Research	B. Slaney	Fransen Engineering Ltd.
Jacques Whitford	McElhanney Land Survey	Karayu Consulting Ltd
Thurber Engineering Ltd.	Power Point Surveys	Buckland & Taylor Ltd.
Aecom	Powerpoint Surveys Ltd	Municipal & Regulatory Consult
Norwest Corp	Challenger Geomatics Ltd.	Cybertech Automation
Babco Electric & Engineering	Foresite Geomatics Ltd	Steepside Engineering Ltd.
Sea Jay Engineering Svc	Hcs Focus Ltd	Conestoga-Rovers
Red Associates Engineering Ltd	Can-Am Geo Matics	Mdh Engineered Solutions Corp
Terracon Geotechnique Ltd	Usher Canada Ltd	Catalin Construction
Bel-Mk Engineering Ltd	Usw Surveys Fm Ltd.	Cicon Engineering
Tracer Industries Canada Ltd.	Athabasca Resource Co. Inc.	Klohn Crippen Berger Ltd
Bantrel Inc	Brinson Construction Services	Rotaflo Controls Inc.
Earth Tech Canada Inc	Sure Shot Surveys Ltd	TISI Canada Inc
Fluor Canada Inc	Summit Survey's Inc.	Breton Nd Testing Inc
Hatch	Sands Surveys 2000 Ltd	Alberta Permit Pro Inc
Ice-Pros Inc	MMM Geomatics Alberta Limited	Acuren Group Inc
Infrastructure Systems Ltd	Casca Tech Inc	Cic Inspection & Consulting
L P Electrical Contracting	Irisndt	T I S I Inspctn Svc West Inc
Uma	Als Environmental	Acuran Group Inc
Cb Engineering	Rtd Quality Svc Inc	Acuren Group Inc.
Baker Risk	Northstar Fire Protection	Gunn Architecture
Corrpro Canada Inc	Quality Consulting Services Ltd	Architect Circle
E-T Energy Ltd.	SGS McMurray Resources Ltd.	Upstream Controls Ltd
Acfn - Allnorth Ltd	CannAmm OTS/ division of DynaLIFE dx	Nokohoos Consulting Inc
Washington Group	Streamline Testing Inc.	Magna Iv Engineering
Allnorth Consultants Limited	Terracon McKay Ltd	Terracon Geotechnique Ltd

NAIC 2212

B P Canada Energy Plant	Atco Gas & Pipelines Ltd
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NAIC 3241

Bassett Petroleum Dist. Ltd.

NAIC 4861

Enbridge Pipelines Inc	Pembina Pipelines Corporation	Corridor Pipeline Ltd
Plains Pacific Pipeline Inc	Trans Canada Pipe Lines Ltd	Simmons Group Inc

NAIC 5617

Poulin's Exterminators	Shanago's Specialties	Aoc Cleaning
Fort MacKay Expediting & Labour	Spotless Cleaners	Double, F
B J's Janitorial Svc	Shinyman Window Washing	Supreme Cleaning And Restorati
Spencer Steam Cleaning	Abc Janitorial Services	King Koshen Cleaning Service
A-1 Janitorial Svc & Supplies	Go Cleaning	M & J Commercial Cleaner's
Just Like New Pro Cleaning Svc	Mcmurray Nature Maid	Cleaning By Gabby
Lone Wolfe Distributors	Tkm Cleaners Inc	Executive House Cleaning Ltd
Maid In Mc Murray	Durty Gurlz Cleaning	Cleaning At Its Best
Denesoline Environment Ltd	Island Girls Cleaning Services	Rose Building Maintenance Ltd.
Northern Canadian Supplies Ltd	Quick Vic's Cleaning	Gina's Home Detailing
o/a Aurora Janitorial Services (820508 Alberta Ltd.)	Divine Cleaning Services	G's Cleaning
Hines Janitorial	T & B Commercial Cleaning	Gloria's Cleaning Services
Fort McMurray Janitorial Services	Skorpion Industrial Services I	Dynamic Cleaning & Supply
Sylvie's Cleaning Services	Property Maintenance	St. Jean Cleaning Services Inc
Best Cleaners & Contractors	Zack's Cleaning Services	Lucky's Facility
Davis Enterprises	Savard Landscaping-Excavation	Issa Cleaning Contractors (Icc
Albrite Ltd	Red Sky Ltd	Super Cleaning Supply
419 Enterprises	Northern Lights Landscaping	Wood Buffalo
Ed's Janitorial Services	Wilco Landscape Contractors	Albrite Janitor Service
Dapa Cleaners Ltd	Wilson's Vinyl Fences	Padd Janitorial Services
DO-Rite Cleaners	Dig Dug Bobcat Svc	Above The Rest Cleaning

Rita Cleaning	Henley Bobcat Svc	Clean Bees
Sunshine	A 1 Topsoil & Construction Services Ltd	Dtl Housekeeping
Singh Building Maintenance	G F Construction	Gabriel Cleaning Services Ltd.
Dira Cleaning Services	S & E Leasing Ltd	1184188 Alberta Ltd
A & M Cleaning	Ted's Landscaping & Excavating	J & R Cleaning
United Janitorial Services Ltd	Your Yard Guy	Mop A Minute
Mawel Janitorial Services	Lincoln's Skidsteer Service	White Knight Services
Cleaneeze Domestic /	Westec Contracting & Landscape	Tings Cleaning Service
Stay Clean	Grass Keepers	Karen's Cleaning Service
Shiny Cleaning	Bryan's Labor Services	The Executive Housekeeper
Decena Contracting Ltd.	C W Landscaping	Nagpaton Cleaning Services
Alma Nokohoo	Fitzgerald's Bobcat Services L	Mighty Maids
A's Tip Top Cleaning Services	No Big Deal Contracting	T&L Cleaning And Maintenance
Dustbunnies Cleaning	D Mac & Son Ltd	B & B Custodial Services
A & P Cleaners	Go Lawn Maintenance	Three Feathers Maintenance Ltd
Lap Cleaners	Eidos Consultants Inc.	Nice-N-Tidy
A & J Specialties	Seahorse Industry Lt	Northern Lights Janitorial Ser
Unique Cleaning & Maintenance	Wilco Contractors Northwest In	A.J Cleaning Services
Cindy's Cleaning Service	Ericsons Bobcat Service	Star Cleaner
Mcmurray Steam Clean	The Great Little Yard Company	Hygienic Cleaning Services
Betty's Cleaning Ltd.	G & R Contracting	Rayan Cleaning Services
Bev's Cleaning	Lorco Management Ltd	Mj Janitorial Services
B & K Cleaning Services	Kn's Kwik Kerb	Willow Lake Cleaners
Bill's General Cleaning Busine	North Mountain Construction	G.B Gelle Boys
Superior Quality Cleaning Serv	Forevergreen Lawn Care	Dirt Devil's Cleaning
Jlb Inc.	Jomha Landscaping	Melody Casselman Cleaning
Bee Clean Building Maintenance	The Yard Barber & More	M And M Amazing Cleaning Services
Hygienic Homes	Keep It Green	Kiwi Cleaning Services

Tara Cleaning Service	E And R Bobcat Services Ltd	Vision Crosstown Western
Loretta Home Service	Landscape Gardening Services	A And W
Housekeepers For Hire	Dig Dug Bobcat Services	M & M Crystal Cleaning
New Home Cleaning Ltd.	Clearview Maintenance And Lawn	Boom-Town Cleaning Services
Maid With Confidence	Sb Contracting	Mobe Cleaning
Focus Cleaning Service Inc	The Rain Man Plumbing Ltd.	Narinder Goraya
D & S Cleaning	Ever Green Lawncare	C & N Fresh Gear
Sparkling Cleaners	3KE Limited	Wood Buffalo Cleaning
Nordel Cleaning Services	Mc Murray Steam	Clean Freaks
Finishing Touch Cleaners	Image Pipeline Services	City Janitorial Services And
1399912 Alberta Ltd.	Sears Carpet & Upholstery Cleaning	Patrick Mallet
Pinette's A+ Cleaning	Big Eagle Services	Mohamed Ould Sidi
Dorothy Marcel	Hydrodig Fort Mc Murray	Jlt's House Cleaning & Janitor
Vally's Cleaning	Action Carpet Cleaning	Care Clean
E & C Cleaners	Mc Murray Carpet & Duct Clnearing	Sora Cleaning Services
Fort McMurray Strippers &	Crystal Cleaners	Picture It Clean
Thickwood Cleaning	Service Master-Fort Mc Murray	Northern Lights Custodial
Happy Healthy Home Cleaning	Hi-Tech Maintenance Ltd	C&S Cleaning
La General Maintenance	Steamtech Energy Services Ltd.	Sandy's Suds
		Grandison Contracting

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