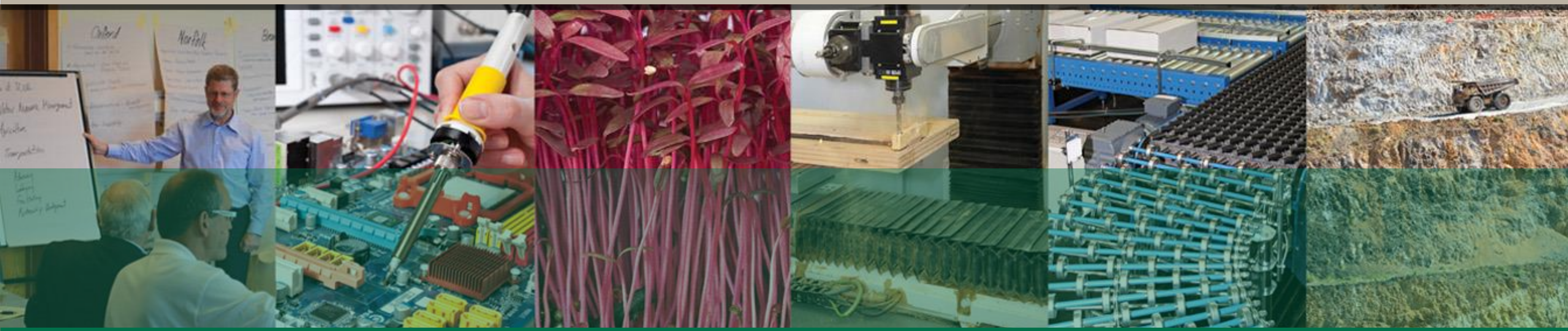


Target Market Study

Central Almaguin
It's better here.

Sundridge • South River • Machar • Strong

Partnership funding provided by:
FedNor and the Ministry of Northern Development and Mines

Prepared by:

McSWEENEY
inspiring economic sustainability

December 2013

Table of Contents

List of Tables and Figures

Notes: This report uses multiple sources of data in its different sections. This data may not all be from the same year, but it is the most up-to-date data available. Our major data sources are:

- *Census Data for 2001, 2006 and 2011 from Statistics Canada*
- *Superdemographics 2013 from Manifold Data Mining Inc.*

1 SWOT Analysis, Target Sector Identification

This section provides a Strengths, Weaknesses, Opportunities and Threats (SWOT) analysis for the regional Central Almaguin community. Several sources of information were used to compile the SWOT, including:

- Background information prepared for the development of the 2009 Central Almaguin Strategic Plan;
- 2009 Central Almaguin Labour Market Overview;
- 2009 Central Almaguin Economic Base Review;
- Online web searches and review of Central Almaguin and related support agencies/organizations;
- A detailed site tour of the 4 partner municipalities; and,
- Personal interviews.

To demonstrate the priorities of the SWOT in a more visual context, *Wordles*™ have been prepared. In a *Wordle*™, those words or ideas that have been mentioned the most during the review and analysis are portrayed as the largest words in the graphic illustration. As such, the more often a word has been mentioned, the larger the word will appear.

1.1 Key Strengths

- The people that choose to make Central Almaguin (CA) their home or chose to locate their business
- Local business community is fairly diverse and starting to coordinate themselves
- There are several local businesses that are very recognizable outside of the CA region (i.e. Kent Trusts and Mac Lang Sundridge, etc.)
- The Central Almaguin Economic Development Association (CAEDA) – understands how to work together in a partnership environment
- CAEDA has a new brand
- Small town friendliness and atmosphere
- The CA region's natural beauty
- Perception of lower cost of living (including lower housing prices)
- New CAEDA website – excellent videos and testimonials
- Each of the four partner communities (Machar, South River, Strong and Sundridge) have something special yet different to offer. Each community has their own set of strengths and the CA region combines both urban and rural settings. For example:
    - Township of Machar has growth and development around Eagle Lake and opportunities for further waterfront development
    - Village of South River has some strong manufacturers and room to grow their industrial sector along highway 124

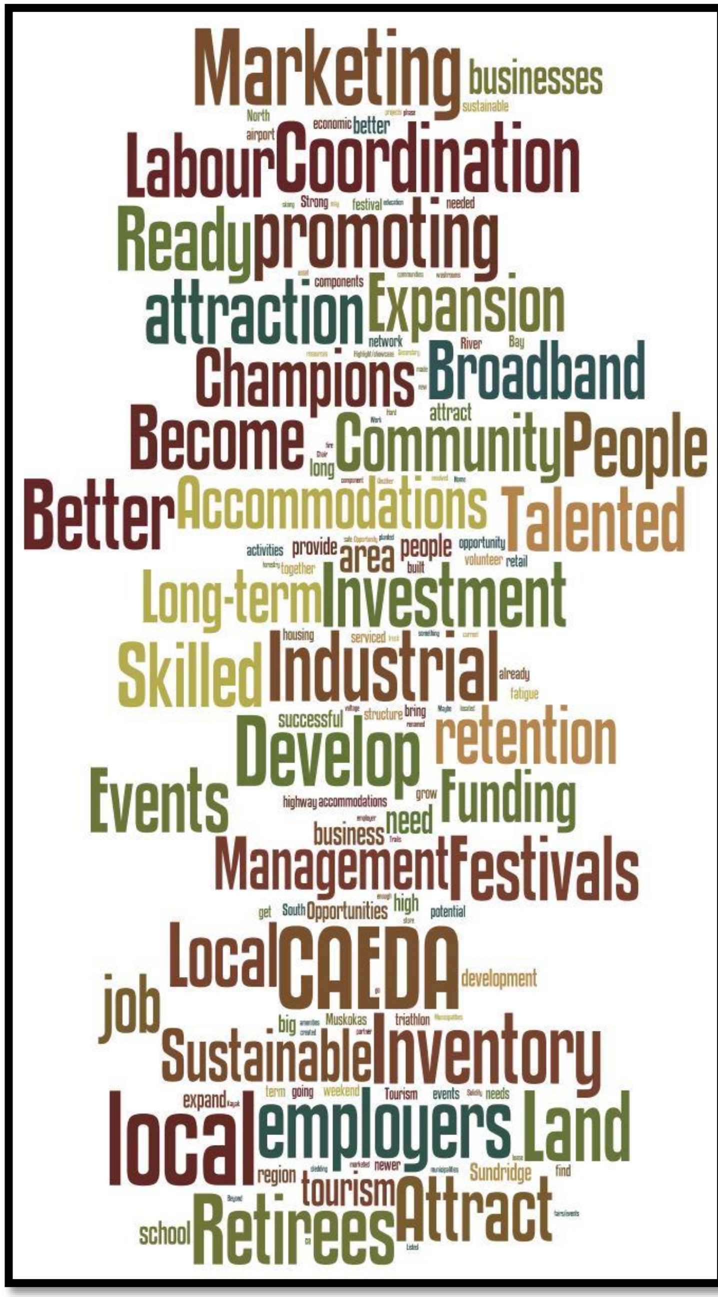
    - Township of Strong has activities and opportunities surrounding Lake Bernard
    - Village of Sundridge has a vibrant main street, closely related to activities around Lake Bernard and houses two of the CA's most recognizable employers
- Fully serviced region including housing, social services, health care, full complement of retail, restaurants, schools, etc.
- New high school
- The four partner communities are used to working together in partnership to complete projects
- From an outsider's perspective there are blurred lines separating the 4 communities so the CA region is a great descriptor of the 4 communities
- Mikisew and Algonquin Provincial Parks
- Growing arts and culture sector – including several restaurants, visual arts, performing arts. Most municipal partners are displaying local artistic works either in municipal buildings or in public venues.
- Almaguin Highlands Arts Council and the Arts Directory (also on Facebook)
- Some great sought out restaurants
- A very vibrant main street
- The new Environment Education Centre
- Good recreation facilities such as community arenas, local golf courses, libraries, local public parks, hockey camps, etc.
- Two very strong community festivals (Sunflower Festival and Triathlon)
- Broadband connectivity (albeit somewhat limited throughout the entire CA region)
- Almaguin Highlands Air Park
- Some industrial land (but not yet fully serviced or documented)
- Excellent relationships between Federal and Provincial government support staff and politicians
- Great central location between the GTA and North Bay
- Excellent road and rail connections north and south – easy connections into the northern United States
- Highways 11 and 124 allow for quick access into the area
- Strong manufacturing sector (some very large employers, medium sized and smaller or start-ups). Local manufacturers are also exporters.
- An abundance of natural assets (accessible lakes and forests)
- Some tourist accommodations (albeit limited number of rooms)
- Strong seasonal activity based tourism activities – hunting, fishing, snowmobiling, cottaging, water based summer activities, dog sledding

1.2 Key Weaknesses

- No formal sustainable structure to support CAEDA
- Municipal partners have no financial commitment to CAEDA
- Municipal partners do not really know what each partner wants to accomplish (CAEDA's overall goals and individual municipal partners goals)
- There is limited capacity for CAEDA to undertake economic development initiatives
- CAEDA is currently not truly "in the game" in terms of economic development
- High cost of labour for some major local employers
- Some major local employers will be facing detrimental staffing shortages in the next 5 years
- Limited available industrial land
- No industrial land inventory
- Very limited supply of municipally owned commercial or industrial land
- New website does not have an investment attraction component (yet)
- CAEDA and municipal partners are not investment ready
- The CA region has an aging population
- Youth are leaving the CA region
- Very limited and shrinking pool of skilled and unskilled labour
- Highway 11 bypasses two of the community partners originally serviced by Highway 124
- The topography of the land at the new Highway 11 interchanges will make development around the interchanges difficult and expensive

- The local and regional tourism industry is seasonal (strong focus on traditional activities such as hunting and fishing)
- Although housing and cost of living is more affordable than other centres, this may lead to a housing market that is viewed as lower quality
- There is a perception of businesses having to pay high taxes for very limited services – questionable value for money
- There are some economically depressed areas with the CA region
- There is a perceived water quality issue in South River (water is safe, but there is a perception the quality is not the best)
- Lagoons in Sundridge are reaching capacity which will make partially serviced development difficult
- The CA region does not have a updated community strategy so if there is an influx of residents (seasonal or permanent) the growth may not meet the vision of the existing community
- New growth occurring in the CA region is heavily dependent on "retirees" moving into the area – could lead to further unbalanced demographic profile

1.3 Key Opportunities



- Develop a sustainable structure and partnership funding model for CAEDA
- Continue to provide economic development training for CAEDA's support staff as well as staff from partner municipalities
- Create an action oriented economic strategy to outline the region's vision for economic development as well as the priority actions to achieve the CA's vision
- Undertake the development of a community strategy to identify how the CA region should be developed in the face of a potential influx of permanent and season residents
- Focus on existing local businesses to ensure they are given every opportunity to remain viable community partners and employers
- Continue to build stronger relationships with between CAEDA and the local business community
- Partner with the local high school and local employers to promote local employment opportunities
- Support the efforts of the Almaguin Highland Arts Council – but CAEDA does not have the mandate or resources to lead the Arts and Culture efforts
- Focus the efforts of CAEDA on the CA region's two strongest economic sectors – Manufacturing and Tourism
- CAEDA to lead the investment readiness efforts (i.e. investment readiness municipal partner training, investment protocol, investment attraction information/section on the CAEDA website, quick facts, industrial land inventory)

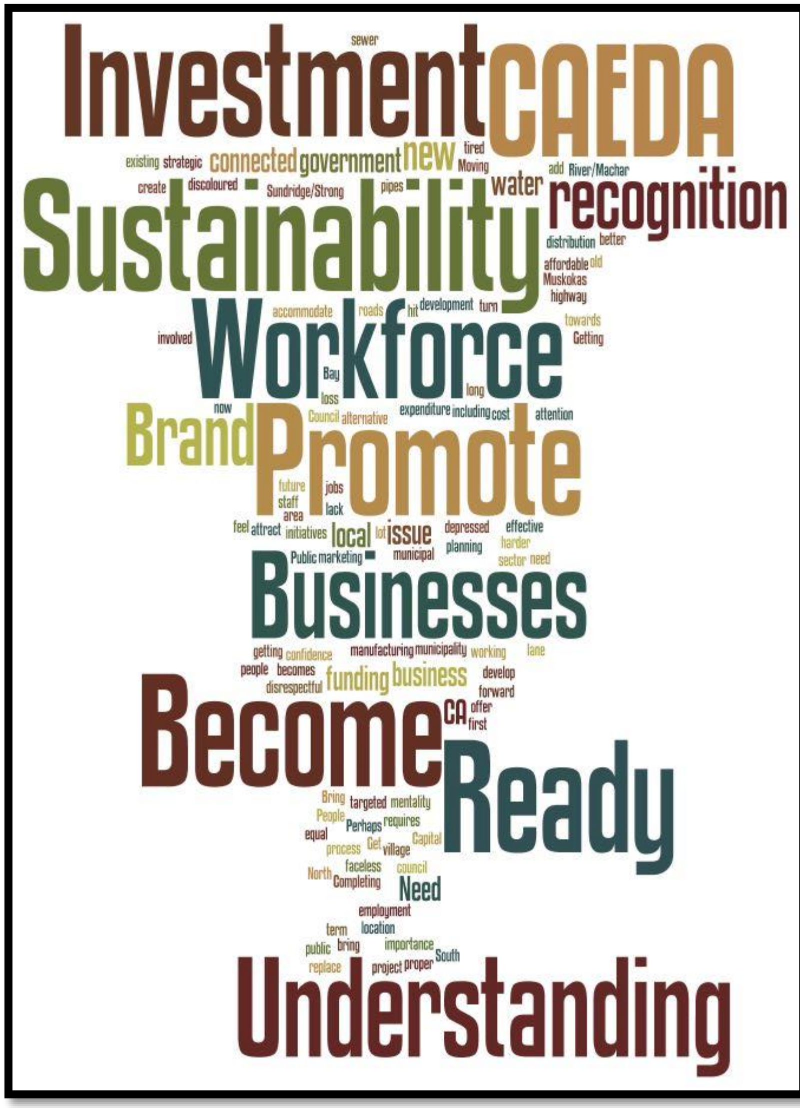
- Undertake an tourism accommodation needs analysis to determine actual supply and demand for tourism accommodation in the CA region
- Reach out to local employers by undertaking an on-going business retention program – goal would be to understand and help resolve any issues affecting the viability of local businesses
- Get more involved with regional Broadband initiatives to move forward with better/faster Broadband infrastructure and services in the CA region
- Undertake the development of additional shovel-ready industrial land

1.4 Threats and Constraints

- CAEDA has no long term sustainable operational or funding structure
- Partner municipalities unwilling or unable to invest in economic development program
- Continued youth outmigration
- Aging work force
- CAEDA and the municipal partners are not investment ready
- The loss of one or several of the CA region's major employers
- The loss of the airport (although currently not a direct economic driver, losing the airport would eliminate several future opportunities)
- Rising cost of oil and energy may make commuting and long-haul transportation too expensive
- Depletion of the CA region's natural resources
- Closing of CA region's Provincial Parks
- It CAEDA is successful in attracting permanent and seasonal residents the characteristics and small town feel of the partner municipalities may be lost
- CAEDA and partner municipal partners unable to implement strategic economic development initiatives

1.5 Highest Priority Issues

- Strategic action plans for CA's:
  - Economic Development
  - Community Development
  - Tourism sector
- The development of a long term vision, sustainable operational and funding model for CAEDA
- To continue building strong positive relationship with the CA business community
- CA's focus on local business retention and expansion
- The creation of an industrial land inventory
- Retaining a local and regional workforce
- CAEDA becoming investment ready
- Continue to build the CA Brand



2 Potential for Investment

The Central Almaguin (CA) region is located just north of the Muskoka District and south of the City of North Bay. Bisected by Highway 11, the CA region is made up of four municipal partners:

- Township of Machar
- Village of South River
- Township of Strong
- Village of Sundridge.

Each partner community offers a unique set of assets and issues, but together the CA region collectively combines the best aspects of urban and rural living to provide a very pleasing quality of life. Located roughly three hours from Toronto, and surrounded by a natural environment boasting several lakes and two Provincial Parks, this region is becoming a sought after destination for tourists, cottagers and retirees.

In terms of community amenities, the CA municipal partners offer a full complement of public and municipal services, including community assets such as:

- Arenas
- Libraries
- Medical Centre/Health Clinic
- Full service and fully staffed municipal offices
- Limited public water and sewer infrastructure
- Public parks (both waterfront and neighbourhood parks)
- Elementary and secondary schools
- Senior's centre
- Public art (whether located within municipal facilities or in outdoor public venues)
- Public landfills
- Museums
- Ball diamonds.

Outside of the community amenities, the CA region has come together to form the Central Almaguin Economic Development Association (CAEDA). Originally envisioned as a platform to address issues pertaining to the development of Highway 11, CAEDA has remained a strong advocate for the area and effectively has become the collective voice for the CA region on matters pertaining to regional community and economic development. CAEDA had originally developed an economic development strategy for the CA region and more recently has undertaken and has begun the implementation of a branding exercise.

Retaining and capturing investment is a core mandate of CAEDA and, as such, has the following economic development assets at their disposal to help in the promotion of the CA region:

- Four lane limited access highway (Highway 11)
- Access to rail

- Almaguin Highlands Air Park
- Central location between more northerly centres such as North Bay and Sudbury and Toronto and the northern US border to the south
- Located just north of the District of Muskoka
- Access to two very popular Provincial Parks (Algonquin and Mikisew Provincial Parks)
- Two very popular fresh water lakes (Eagle Lake and Bernard Lake)
- Strong Arts and Culture sector
- Tourism accommodations
- Tourism operations and attractions such as Glen Bernard Camp, Mac Lang, and the Hockey Opportunity Camp
- High quality restaurants
- Some local festivals and events (Sunflower and Triathlon)
- Natural beauty and pristine natural setting that is accessible to the public
- Major private sectors employers that are entrenched in the community (i.e. Kent Trusses, Anderson Windows, South River Planing Mill, Mac Lang, The Bear Chair, Waveform Plastics, Swift Canoe and Kayak) and some newer employers that are helping to promote the CA region (i.e. Highlander Brew Co.)
- Access to natural resources such as forestry products/fibre and aggregates
- Supply of industrial commercial land (currently a limited supply of partially serviced or unserviced land)
- Access to broadband, natural gas and electric power
- CAEDA currently has the support of an Economic Development Officer
- CAEDA has a new brand and is implementing the brand through social media
- The CA regional partners have an underlying understanding of how to work together in partnership.

Moving forward, CAEDA will find success in those sectors which have traditionally been and are still currently strong in the CA region, including manufacturing/processing, tourism and arts and culture. Located in a region that traditionally has supported these specific economic sectors, the CA's municipal partners have come to understand some of the benefits and implications of having several sector specific businesses located within their communities. Although the CA region demonstrates strengths that will support the manufacturing/processing, tourism and the arts and culture sectors, more work will need to be done to retain existing businesses and to attract new investment into the region.

2.1 Central Almaguin's Highest Potential Economic Sectors/Markets

Central Almaguin is a regional community that understands what it means to develop partnerships in order to achieve success. Being a region made up of smaller urban and rural communities, CA can build off of their existing partnerships and draw upon their many assets to strengthen their economic development and investment attraction activities.

To be more specific, the CA region does have the specific strengths, assets and advantages that will help to grow, expand and diversify very specific economic sectors. These advantages include:

- location just north of the GTA and District of Muskoka
- access to natural resources (raw and semi-processed material)
- immediate access to the natural environment
- existing tourism activities and amenities
- access to a 4-lane limited access highway.

In light of these assets and strengths, it is recommended that CA focus its resources and economic development efforts on the following sectors:

- Manufacturing and processing (both hard goods and food/beverage)
- Tourism.

Although the CA region does have strengths that will lead to attracting investment into the region, there are issues that need to be addressed, such as:

- current and future supply of skilled and unskilled labour
- availability of industrial and commercial land
- municipal water and sewer infrastructure capacity
- broadband accessibility
- better coordination of the target sectors
- CA's capacity to undertake economic development initiatives and projects.

It is also recommended that due to CAEDA's limited capacity and resources, CAEDA assist in the further development of the region's art and culture sector by offering supplementary support (where and when needed) to the Almaguin Highlands Arts Council and other more local arts and culture initiatives and efforts. Although arts and culture are a valid economic sector in the CA region, a lot of work has already been done to coordinate, grow and promote this sector. When considering both economic and community development initiatives, it would be beneficial for CAEDA to also consider how best to incorporate the arts and culture sector into the promotion of their economic and community development initiatives (i.e. tying the region arts and culture assets into any tourism mapping initiative).

3 Directions for Development

Given the data and information provided in this report, the current and projected economic activity in the Central Almaguin region, the state of the Ontario economy and CA's competitive strengths, it is recommended that CAEDA consider focusing their limited economic resources and investment attraction efforts on two specific economic sectors:

- Manufacturing/processing (both hard goods and food/beverage)
- Tourism.

These opportunities, although identified through the analysis of this report, should be further developed through a strategic action planning process to build a more thorough understanding of the benefits and opportunities offered by these developing these sectors. As such, before any immediate actions are taken, it is recommended that a strategy addressing community and economic development as well as tourism issues be undertaken.

3.1 Sustainability of CAEDA

The Central Almaguin Economic Development Association (CAEDA) is not an economic sector, but instead an economic development delivery agent based on a successful partnership between 4 neighbouring communities. Although not an economic development sector, CAEDA has the opportunity to have a major impact on the economic well-being of the 4 communities making up the CA region.

Currently, CAEDA has been tasked with the role of providing economic development support for the 4 partnering municipalities. In addition, neither of the 4 partner municipalities have an economic development program or a specific budgeted amount that would support a standalone municipal economic development program. It would appear that currently there is no sustainable structure or funding model for CAEDA.

Moving forward it is critical that the 4 municipal partners develop a long-term vision for CAEDA which is supported by a sustainable structure and funding model for CAEDA. To be successful, the CA region will need to begin investing in economic development both from an operational and project perspective. Too often economic development is looked upon as an expense to a municipality and not an investment. If CAEDA is not properly funded and supported, there is a risk that much of the work done to date will be lost and all of the future efforts required to strengthen and diversify the CA's regional economy will not happen.

3.2 Opportunities in Manufacturing/Processing

Due to CA's locational advantages, transportation infrastructure and the access to both raw and semi-processed materials, the CA region has an opportunity to attract those industries that:

1. Manufacture or assemble a product utilizing forestry products, aggregates or chemical by-products.
2. Process local/regional agri and food products (Niche local food products).

The investment factors that rate very high and affect/add strength to manufacturing and processing opportunities include:

- Central Almaguin's geographic location along Highway 11 (just south of North Bay, north of the GTA with access to the northern US border)
- Direct access to Highway 400 (which is one of the GTA's fastest growing corridors)
- Access to Highway 401 via Highways 11 and 400 improves transportation connections to improve both importing and exporting of goods
- The availability of rail services
- Availability of electricity, natural gas and broadband
- A growing housing and construction market in the GTA and along the Highway 400 corridor
- A successful manufacturing sector housing several notable businesses including Kent Trusses, Anderson Windows, Swift Canoe, the Bear Chair, Waveform Plastics and several other smaller manufacturers
- Increased demand for cottage and seasonal dwellings in and around the CA region
- A continued demand for locally manufactured and process goods
- An increase in demand for local foods
- A notable and growing craft brewery – Highlander Brew Co.
- The growth in the demand for food security.

3.3 Tourism

As a part of the Almaguin Highlands, the CA region is well positioned as a natural paradise with several outdoor pursuits and opportunities to explore some of Ontario's accessible pristine wilderness. By continuing to focus on its vast inventory of outdoor activities as well as supporting community celebrations, festivals, sporting events and the region's growing arts and cultural offerings CAEDA can continue to grow its tourism sector to help attract tourist from both the local CA region as well as from outside the area.

Due to CA's locational advantages, connection and access to the natural environment, several notable tourism assets, growing arts and culture sector, growing demand for seasonal dwellings, fairly diversified community assets and accessibility due to the new transportation connections the CA region has an opportunity to attract those tourism industries that focus on:

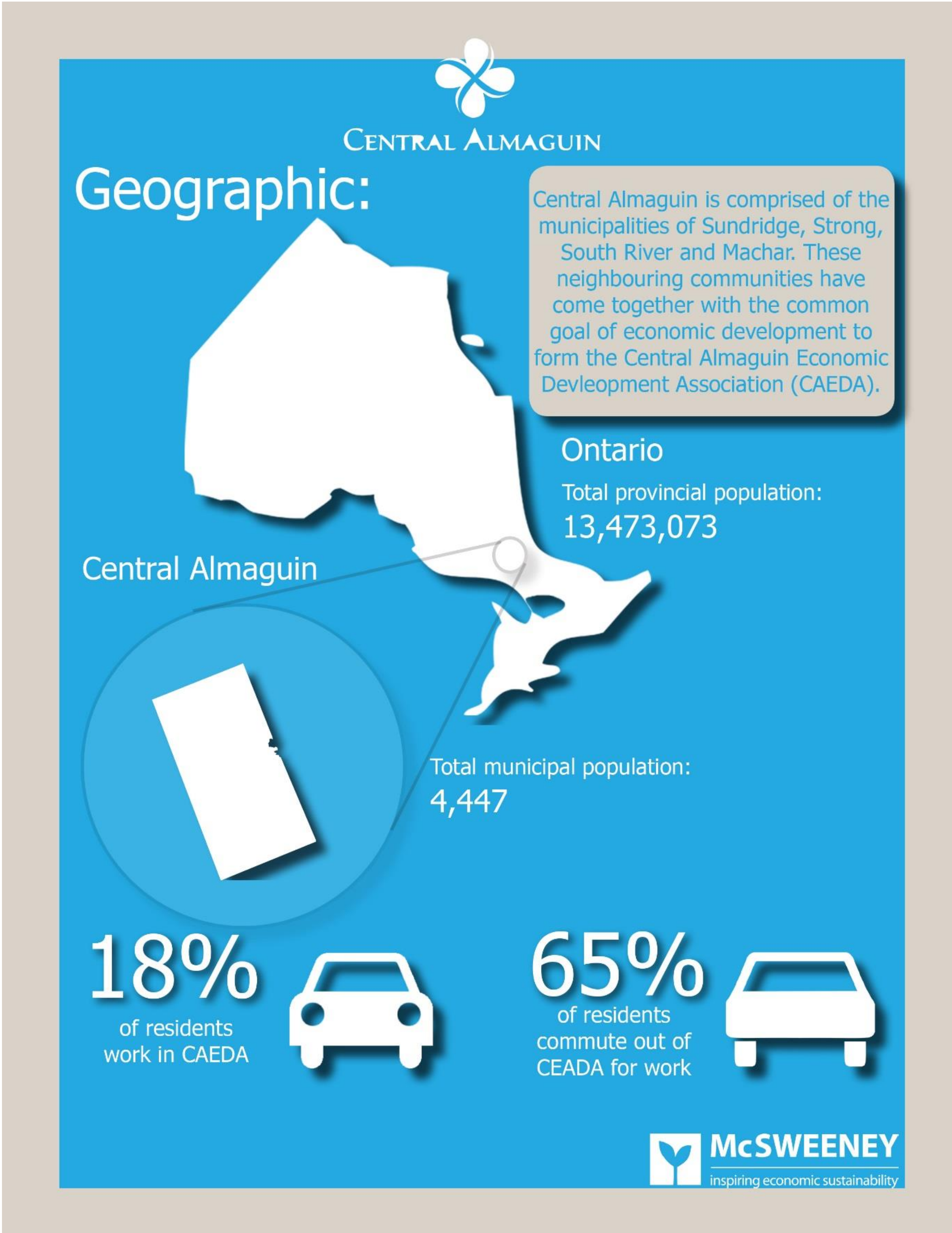
- Experiencing and interacting with the natural environment
- Local celebrations and community events
- Local arts and culture.

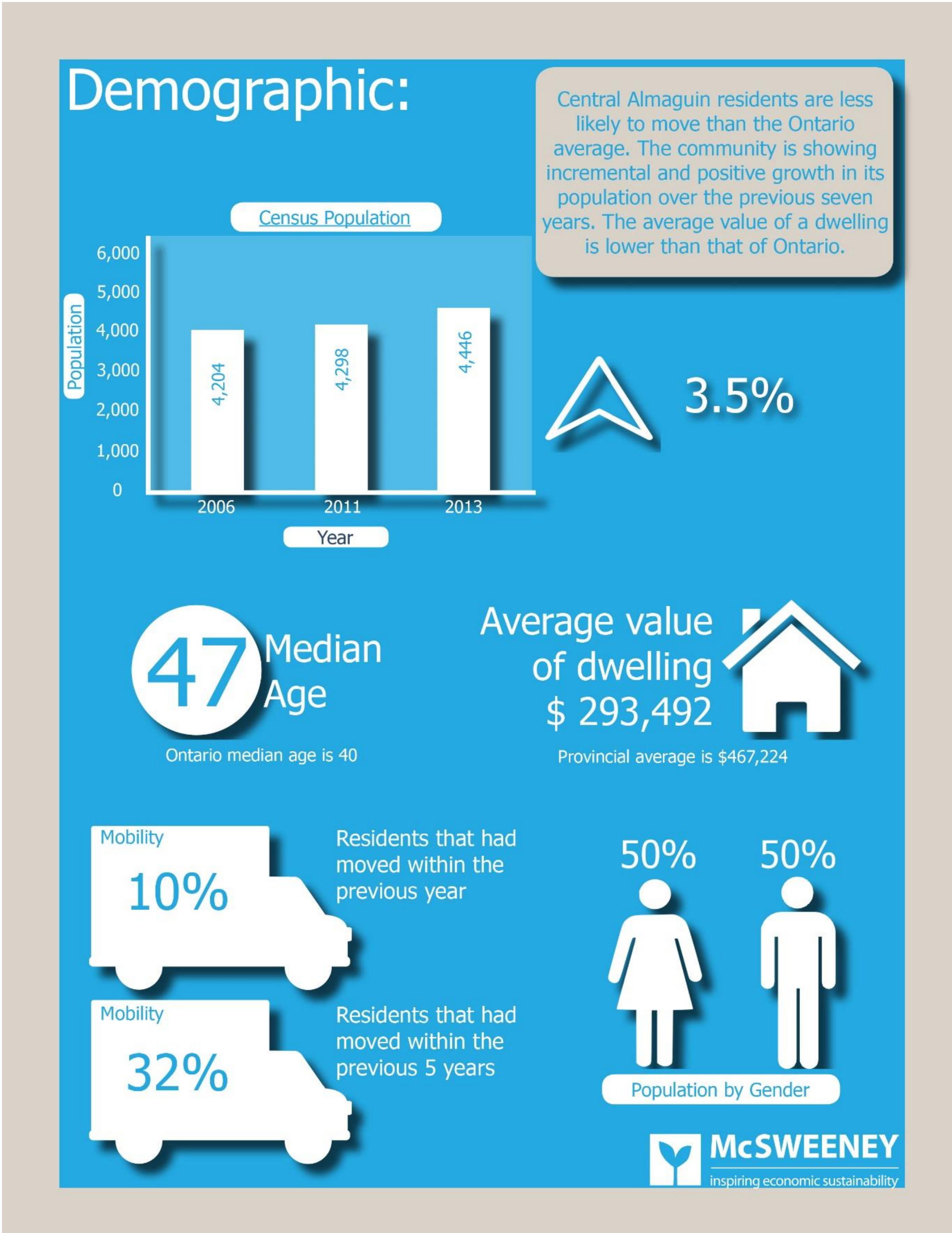
The investment factors that rate very high and affect/add strength to tourism opportunities include:

- Central Almaguin's geographic location along Highway 11 (just south of North Bay and north of both the Muskoka District and the GTA)
- Highway 11
- Direct access to Highway 400 (which is one of the GTA's fastest growing corridors)

- Availability of electricity, natural gas and broadband
- Access to major freshwater lakes including Eagle Lake and Lake Bernard
- Access to 2 active Provincial Parks (Algonquin and Mikisew)
- Growing arts and culture sector – including several restaurants, visual arts, performing arts
- Almaguin Highlands Arts Council and the Arts Directory
- Support from organizations such as Almaguin Highlands
- A vibrant and active downtown core
- A notable and growing craft brewery – Highlander Brew Co.
- Several sought after restaurants
- Good recreation facilities such as community arenas and local golf courses
- Several tourism operators in the CA region offering
- Available waterfront and water access development properties
- Tourism accommodations
- Several major tourism employers including Glen Bernard Camp, Mac Lang, Hockey Opportunities Camp
- Almaguin Highlands Air Park

4 Situation Summary




Demographic:
Central Almaguin residents are less likely to move than the Ontario average. The community is showing incremental and positive growth in its population over the previous seven years. The average value of a dwelling is lower than that of Ontario.
Census Population
Population
6,000
5,000
4,000
3,000
2,000
1,000
0
4,204
4,298
4,446
2006
2011
2013
Year
3.5%
47
Median Age
Ontario median age is 40
Average value of dwelling $ 293,492
Provincial average is $467,224
Mobility
10%
Residents that had moved within the previous year
Mobility
32%
Residents that had moved within the previous 5 years
50%
50%
Population by Gender
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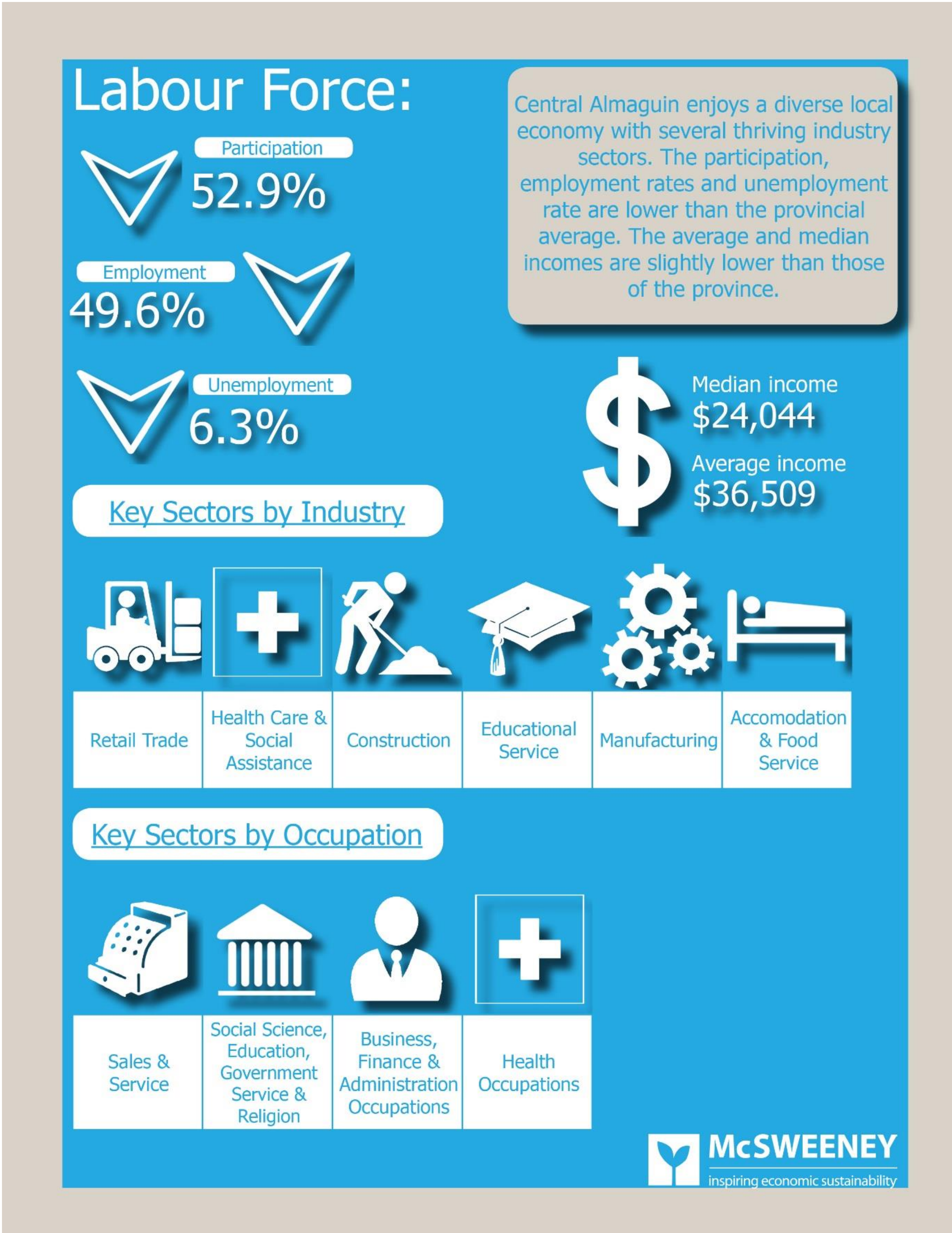
Labour Force:
Central Almaguin enjoys a diverse local economy with several thriving industry sectors. The participation, employment rates and unemployment rate are lower than the provincial average. The average and median incomes are slightly lower than those of the province.
Participation
52.9%
Employment
49.6%
Unemployment
6.3%
Median income
$24,044
Average income
$36,509
Key Sectors by Industry
Retail Trade
Health Care & Social Assistance
Construction
Educational Service
Manufacturing
Accomodation & Food Service
Key Sectors by Occupation
Sales & Service
Social Science, Education, Government Service & Religion
Business, Finance & Administration Occupations
Health Occupations
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5 Statistical Overview of Central Almaguin

The following table provides Central Almaguin's 2013 statistical estimates based on 2011 census data.

Table 1: Statistical Overview of Central Almaguin vs. Ontario, 2013[1]

Topic	Demographic Variable	Central Almaguin	Ontario
Population	Total population	4,446	13,473,073
	Projected population 2017	4,566	14,400,020
	Projected population 2022	4,677	15,336,022
Labour Force[2]	Total population 15 years and over	3,853	11,179,784
	In the labour force	2,040	7,416,901
	Participation rate (%)	52.94	66.34
	Employment rate (%)	49.6	61.07
	Unemployment rate (%)	6.31	7.95
Income ($)	Average total per capita income (2011) ($)	24,044	32,269
	Median total per capita income (2011) ($)	36,509	47,225
	Average household income (2011) ($)	60,343	71,508
	Median household income (2011) ($)	69,724	93,861
Households	Total number of private households	1,966	5,157,855
	Average number of persons in private households	2.23	2.57
Dwelling	Total number of occupied private dwellings	1,966	5157855
	Average value of dwelling ($)	293,492	467,224

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

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

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

6 Demographic Analysis

Highlights:

- ***In 2013, Central Almaguin had an older population than the provincial average.***
- ***Between 2000 and 2013, average and median incomes (total, family, household) in Central Almaguin rose, but were still generally lower than those of Ontario.***
- ***The percentage of Central Almaguin residents who have a college, CEGEP or other non-university certificate or diploma is higher than the provincial percentage in 2013. The percentage of Central Almaguin residents who have a university certificate or diploma is lower than that of Ontario in 2013.***
- ***The largest field of study in Central Almaguin is Architecture, engineering, and related technologies. The Educational, recreational and counselling services has a larger percentage than Ontario.***
- ***Residents in Central Almaguin were less likely to have moved than the provincial average. A smaller percentage of movers are from outside of the country in comparison to Ontario in 2013.***
- ***In 2013, over 98% of residents in Central Almaguin speak English only.***
- ***The average value of dwellings in Central Almaguin increased from $115,427 in 2001 to $293,492 in 2013; however, this is still lower than Ontario.***

6.1 Population and Age Structure Profile

Table 2, derived from 2006 and 2011 Census data and 2013 Manifold Superdemographics data, illustrates the population change in Central Almaguin from 2006 to 2013 in comparison to that of Ontario. According to the data, the population in Central Almaguin increased at a slower pace than in Ontario between 2006 and 2013.

Table 2: Population Change, Central Almaguin vs. Ontario, 2006 to 2013

	2006	2011	2013*
Central Almaguin Population Count	4,204	4,298	4,447
% Change from Previous Census		2.2%	3.5%
Ontario Population Count	12,160,282	12,851,821	13,473,073
% Change from Previous Census		5.7%	4.8%

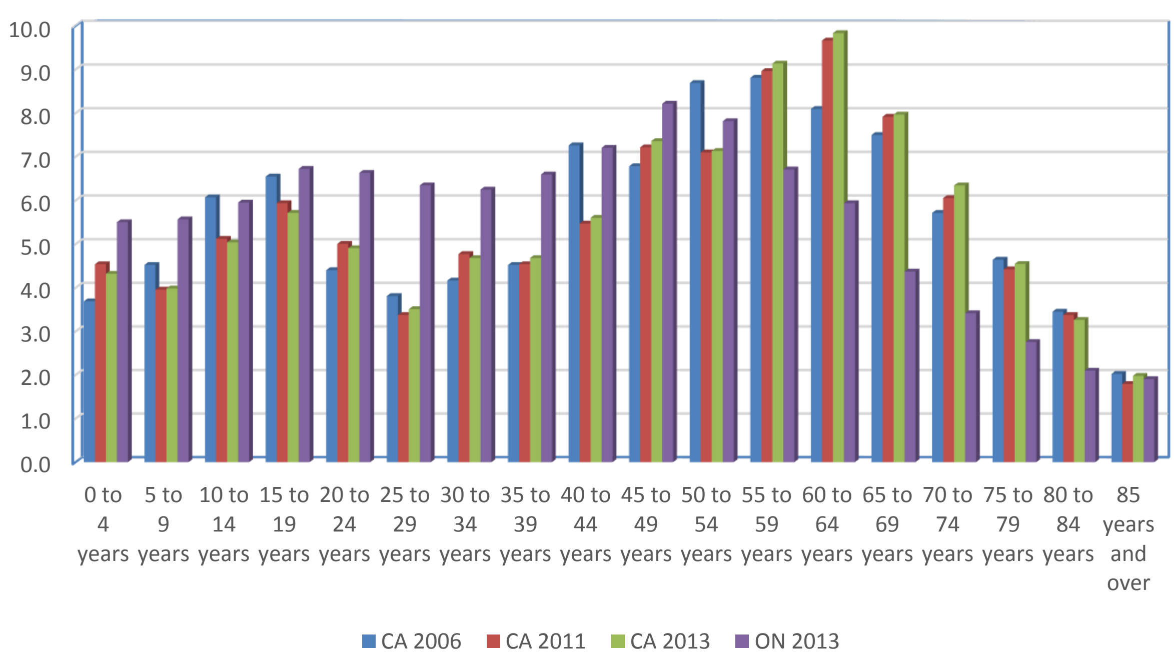
Source: Statistics Canada 2001, 2006 and Manifold Superdemographics 2013. * Estimated McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013

Figure 1, and Tables 4 and 5 in the Appendix, represent the changing demographics of Central Almaguin between 2006 and 2013 compared to Ontario in 2013.

Central Almaguin compared to Ontario, 2013:

- In 2013, Central Almaguin had an older population compared to the provincial average and had a higher portion of its population in the 55+ age categories.
- The median age of the area was 46.4, compared to 40.3 in Ontario.

Figure 1: % Population by Age, Central Almaguin, 2006, 2011 & 2013 vs. ON 2013



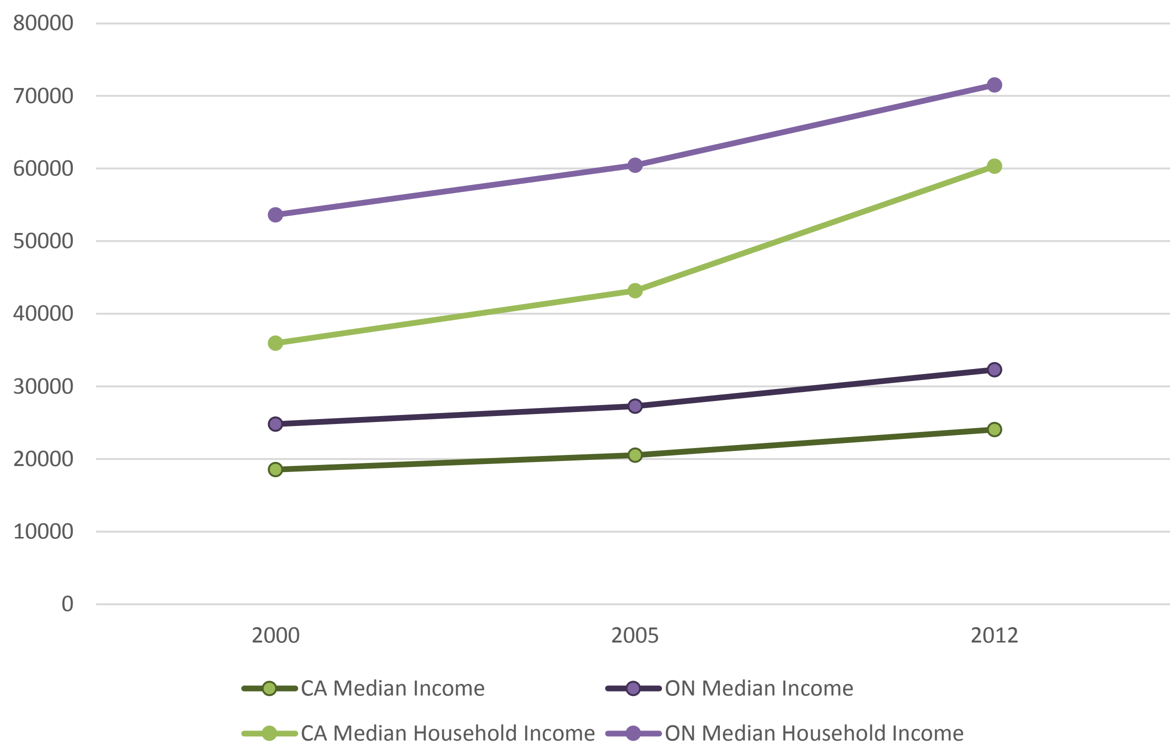
Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

6.2 Central Almaguin Incomes

Based upon Figures 2 and 3, as well as Tables 6 to 10 in the Appendix, the following observations[3] can be made with respect to incomes:

- Generally, incomes (total and household) have increased since 2000, however they are still lower than those of the province.
- In 2012, Central Almaguin had a higher percentage of residents with incomes of $12,000 to $24,999 than did Ontario.

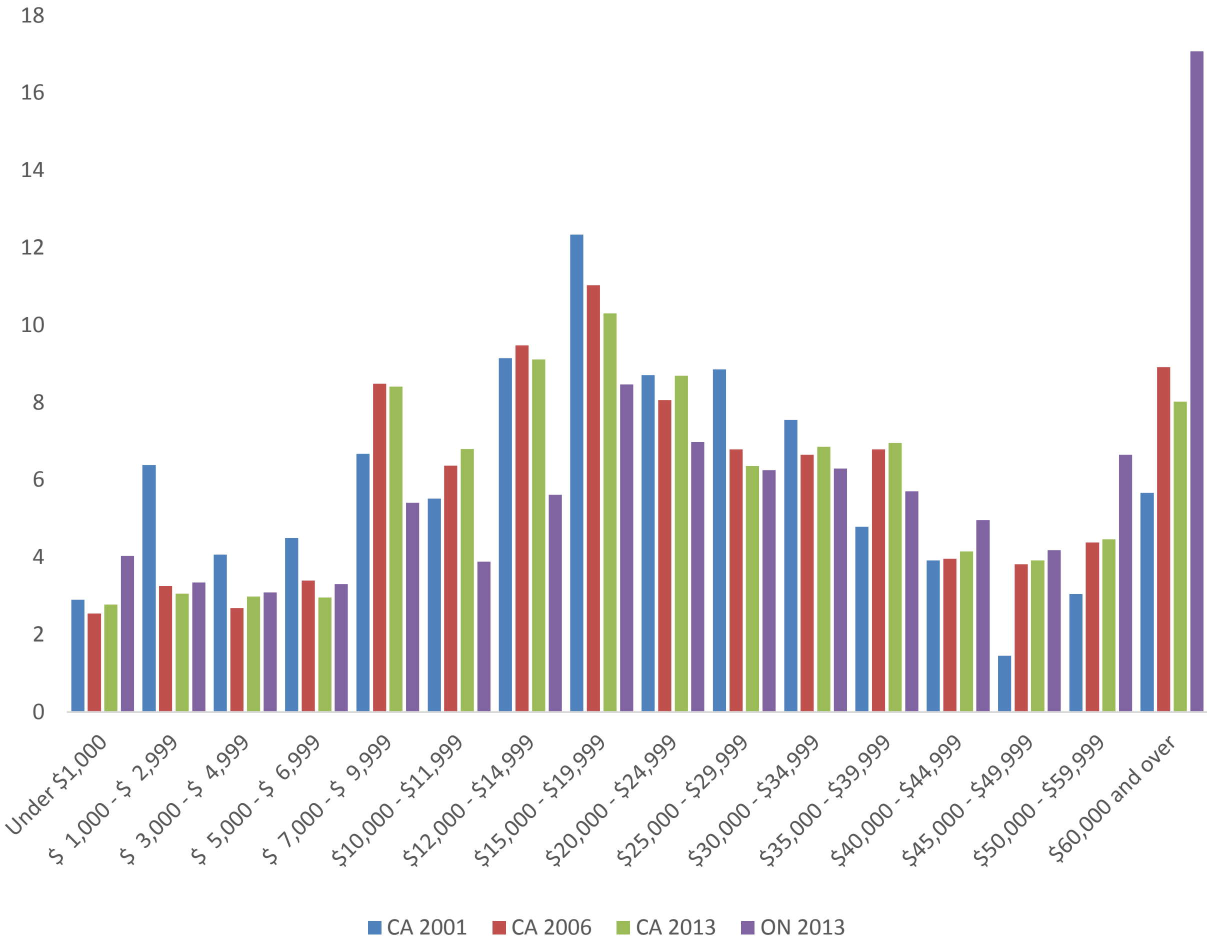
Figure 2: Total Median Individual and Household Income, Central Almaguin vs. ON, 2000, 2005 & 2012



Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes)

[3] Please note that Census data (2001 and 2006) is not exactly comparable to Superdemographics data (2013) estimates.

Figure 3: Population by Total Income, Central Almaguin, 2000, 2005 & 2012 vs. ON 2012

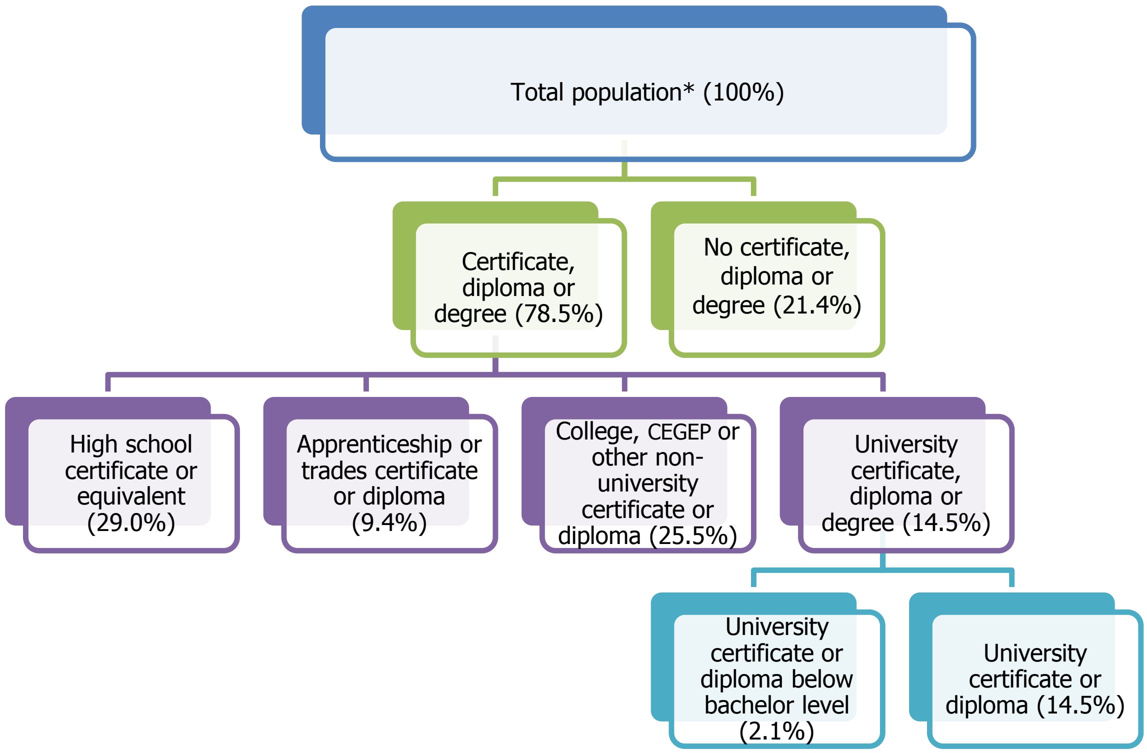


Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes).

6.3 Education

The following figure provides a visual breakdown of the educational attainment levels of the Central Almaguin population aged 25-64 in 2013. Definitions may be found in the footnotes.

Figure 4: Education Attainment Breakdown for Central Almaguin, 2013[4]



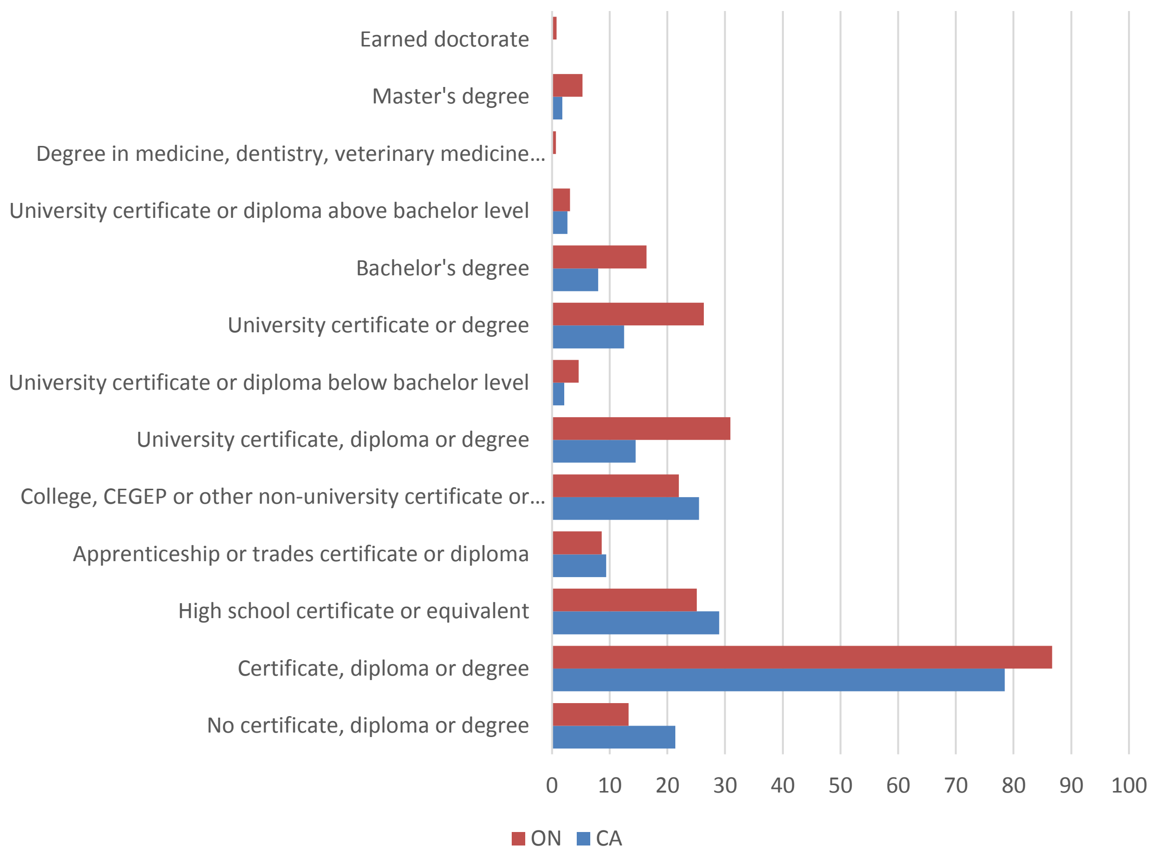
Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.
*Population aged 25 to 64 in Central Almaguin.

[4] 'Highest certificate, diploma or degree' refers to the highest certificate, diploma or degree completed based on a hierarchy which is generally related to the amount of time spent 'in-class.' For postsecondary completers, a university education is considered to be a higher level of schooling than a college education, while a college education is considered to be a higher level of education than in the trades. Although some trades requirements may take as long or longer to complete than a given college or university program, the majority of time is spent in on-the-job paid training and less time is spent in the classroom. 'High school certificate or equivalent' includes persons who have graduated from a secondary school or equivalent. Excludes persons with a postsecondary certificate, diploma or degree. Examples of postsecondary institutions include community colleges, institutes of technology, CEGEPs, private trade schools, private business colleges, schools of nursing and universities. 'College, CEGEP or other non-university certificate or diploma' replaces the category 'Other non-university certificate or diploma' used in previous censuses. This category includes accreditation by non-degree-granting institutions such as community colleges, CEGEPs, private business colleges and technical institutes.

Based on the following table, it can be concluded that:

- The percentage of Central Almaguin residents who have a college, CEGEP or other non-university certificate or diploma is higher than the provincial percentage in 2013.
- The percentage of Central Almaguin residents who have a university certificate or diploma is lower than that of Ontario in 2013.

Figure 5: Education Attainment, Central Almaguin vs. Ontario, 2012



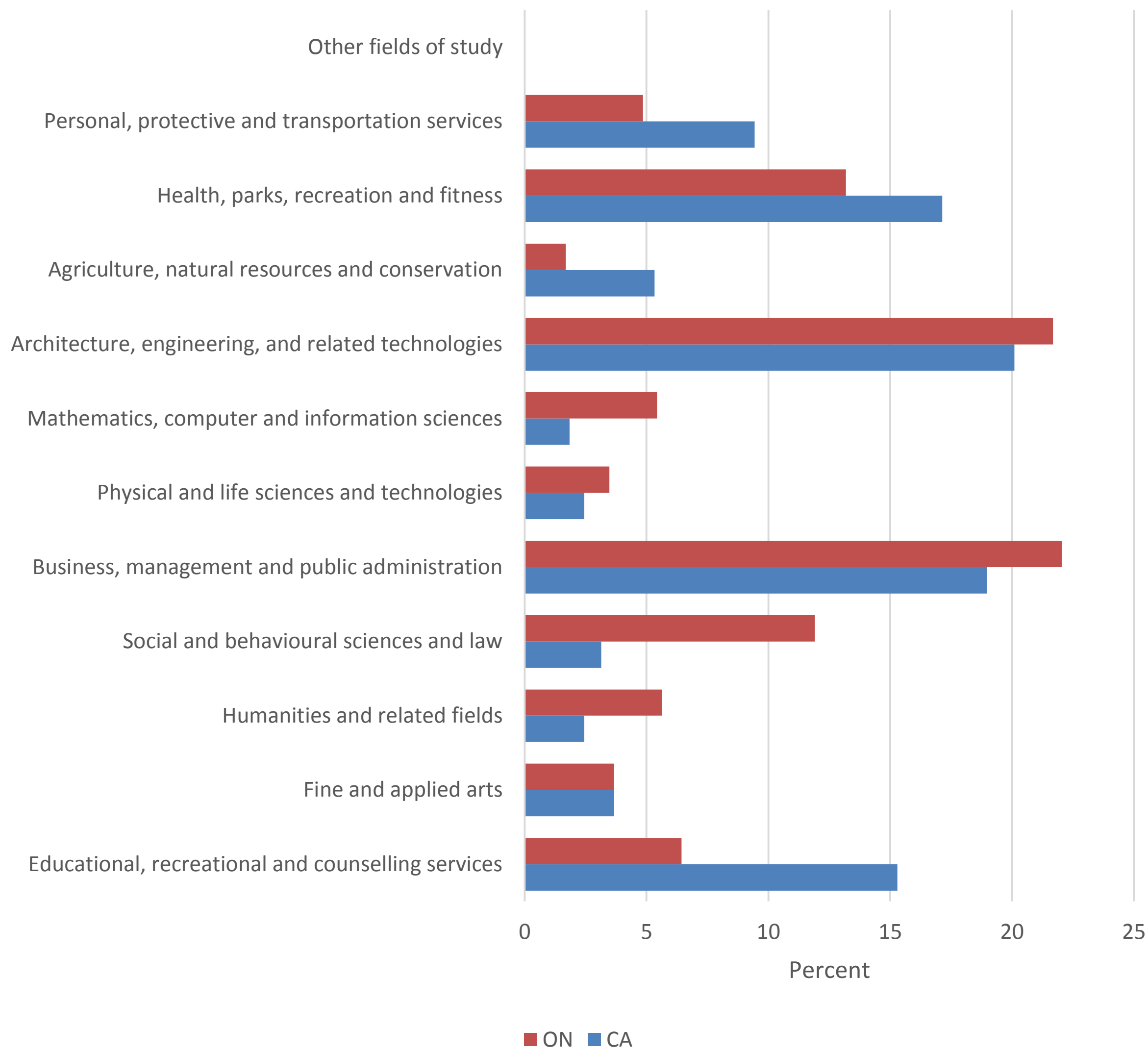
Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

6.4 Post-Secondary Field of Study

Based on Figure 6 and Tables 11 and 12 (in the Appendix)[5], the following observations can be made for persons aged 25-64 with post-secondary qualifications in 2013:

- The largest field of study in Central Almaguin is Architecture, engineering, and related technologies.
- The Educational, recreational and counselling services has a larger percentage than Ontario.

Figure 6: Post-Secondary Field of Study, Central Almaguin vs. Ontario, 2013[6]



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

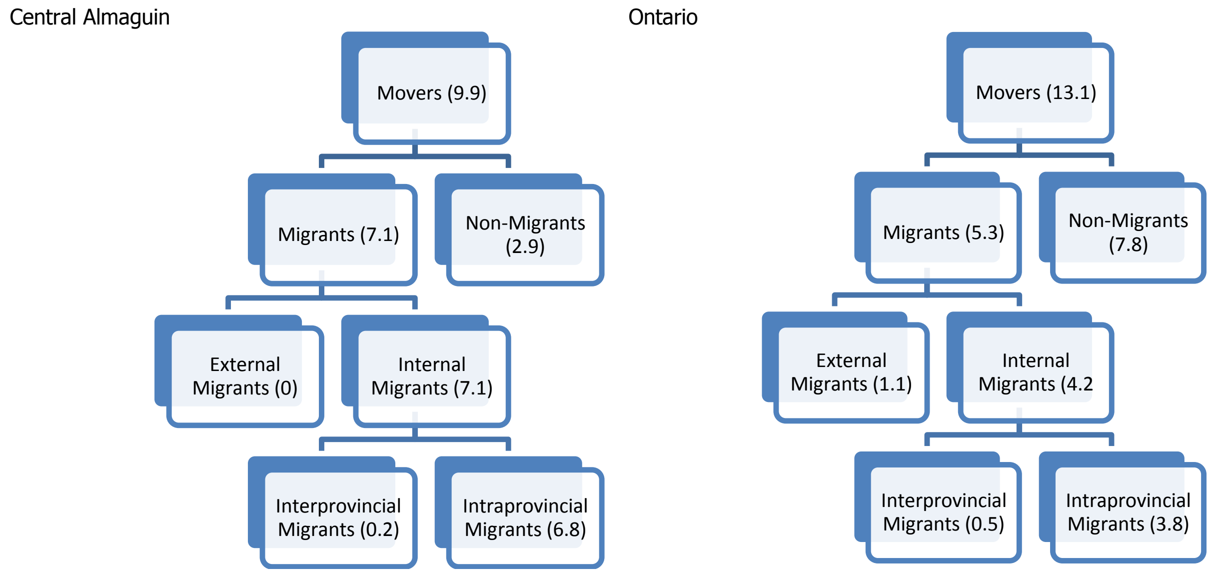
[5] Changes in census variables do not allow a direct comparison of 2001 and 2006 post-secondary fields of study.
[6] 'Field of study' is defined as the main discipline or subject of learning. It is collected for the highest certificate, diploma or degree above the high school or secondary school level.

6.5 Migration to Central Almaguin

The mobility (refers to whether or not people lived in the same dwelling unit either one year or five years ago) of Central Almaguin residents in 2013 can be seen in Figures 7 and 8, and Table 13 (in the Appendix).

The following figure is a visual breakdown of the mobility status in Central Almaguin compared to Ontario (2013 estimates data). Definitions may be found in the footnotes.

Figure 7: Mobility Status Breakdown, Central Almaguin vs. Ontario, 1 Year Ago [7]

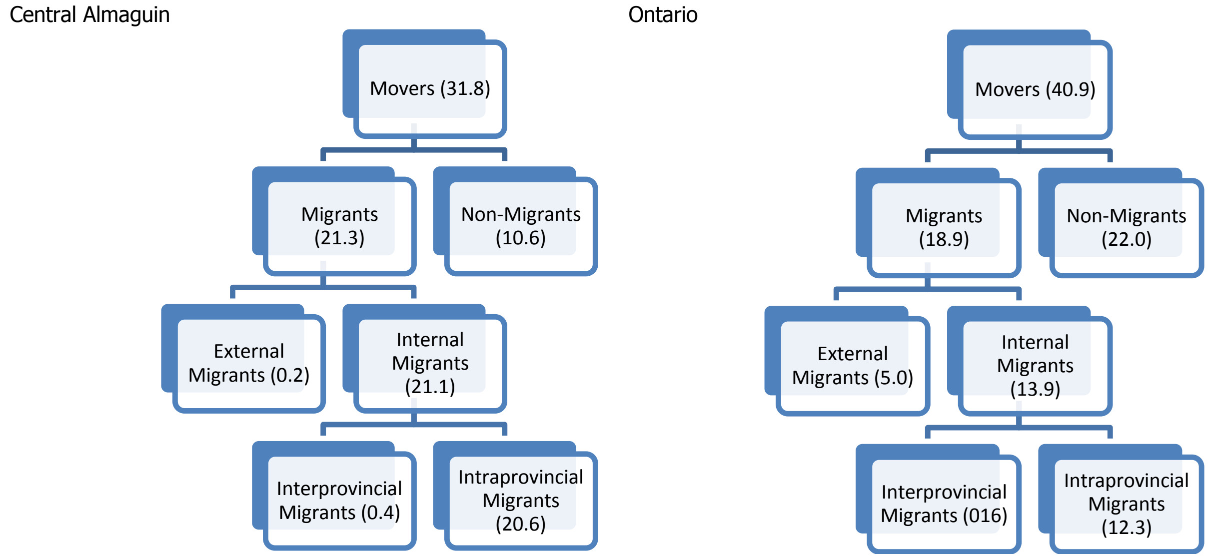


Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013

In 2013, the percentage of Central Almaguin residents that had moved within the previous year (9.9% movers) was less than the percentage of "movers" in Ontario. People moving to Central Almaguin were more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province.

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

Figure 8: Mobility Status Breakdown, Central Almaguin vs. Ontario, 5 Years Ago



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

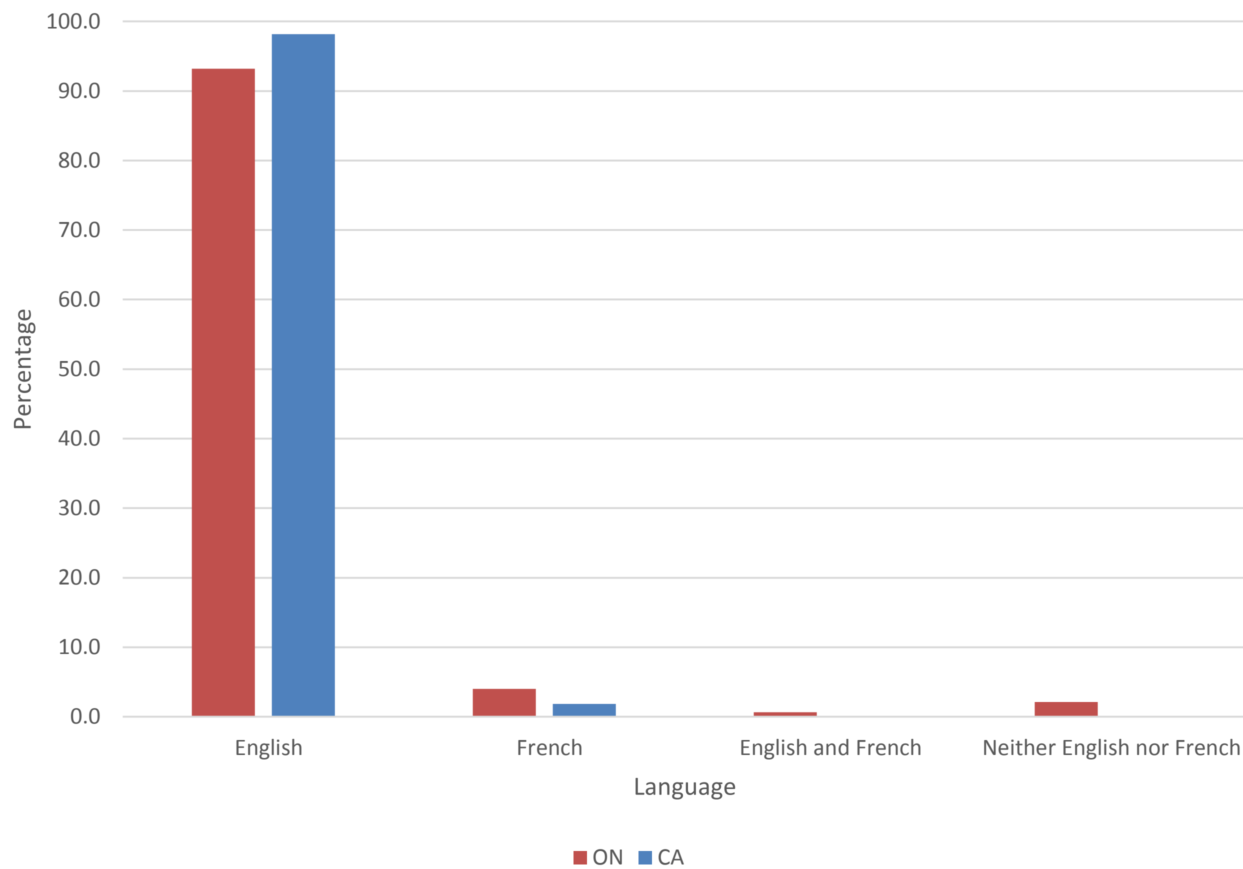
Figure 8 compares the mobility of Central Almaguin residents five years ago to that of Ontario. The percentage of Central Almaguin residents that had moved within the past five years was less than the percentage of "movers" in Ontario. People moving to Central Almaguin were more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province.

6.6 Knowledge of Official Languages

Figure 9 and Table 14 (in the Appendix) illustrate the official languages spoken in Central Almaguin compared to Ontario in 2013:

- Over 98% of residents in Central Almaguin speak English only.
- A lower percentage of Central Almaguin residents speak French than the provincial average.

Figure 9: Percentage of Official Language, Central Almaguin vs. Ontario, 2013



Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013

6.7 Dwelling Characteristics

Table 3 and Figure 10 present dwelling characteristics in Central Almaguin for 2001, 2006 and 2012[8] as compared to Ontario:

- The total number of dwellings in Central Almaguin increased from 1,760 in 2001 to 1,966 in 2013.
- The percentage of owned dwellings in Central Almaguin decreased while the percentage of rented dwellings increased between 2001 and 2013.
- The average value of dwellings in Central Almaguin increased from $115,427 in 2001 to $293,492 in 2013, however, this is still lower than the province.

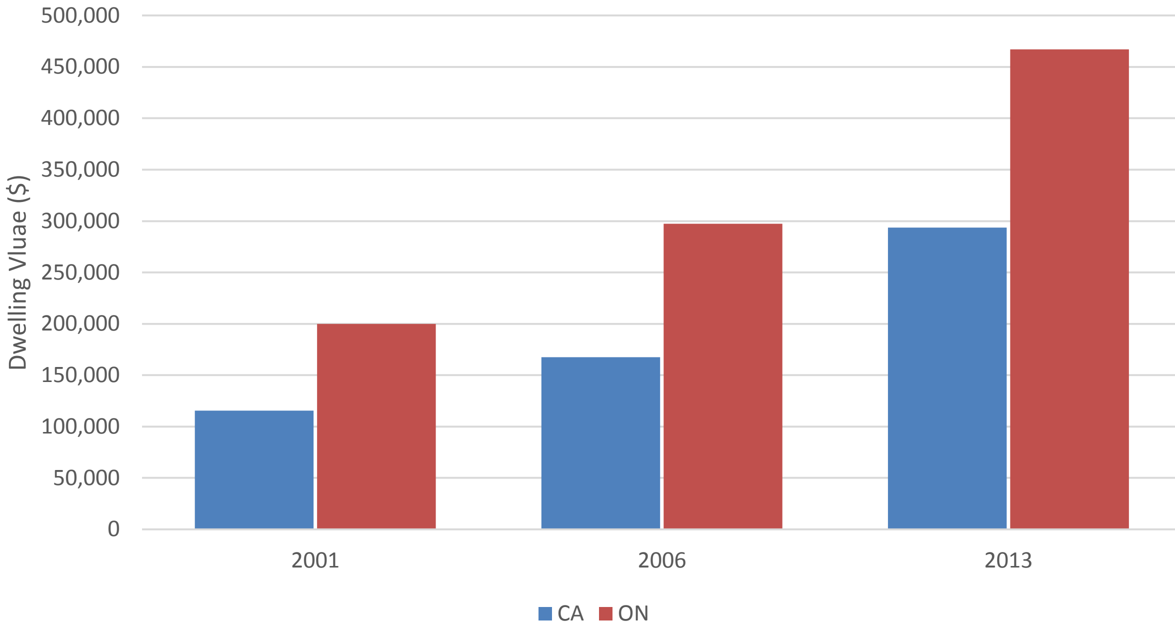
Table 3: Dwelling Characteristics, Central Almaguin vs. Ontario, 2001, 2006 & 2012

	2001		2006		2013	
	CA	**Ontario**	**CA**	**Ontario**	**CA**	**Ontario**
Total number of dwellings[9]	1,760	4,219,410	1,810	4,555,030	1,966	5,157,855
% of owned dwellings	84.1	67.8%	82.3	71.0%	82.8%	71.6%
% of rented dwellings	15.9	32.0%	17.4	28.8%	17.2%	28.3%
Average value of dwelling[10] ($)	115,427	199,884	167,487	297,479	293,492	467,224

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

[8] Manifold Data Mining Inc. Superdemographics 2013 (based on the self-reported values of the 2006 census adjusted for inflation).
[9] Dwelling refers to a set of living quarters in which a person or a group of persons resides or could reside, and includes all forms of rental units as well as single family homes.
[10] Dwelling value is not the same as average home value.

Figure 10: Average Dwelling Value, Central Almaguin vs. ON, 2001, 2006 & 2012



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

7 Labour Force Analysis

This section examines the characteristics of the labour force that resides in Central Almaguin, regardless of work location.

Highlights

- ***In 2001, 2006, and 2012, the labour force participation rates and employment rates were lower in Central Almaguin compared to the provincial rates. Since 2001, the unemployment rate in Central Almaguin has decreased. It is currently lower than that of Ontario.***

- ***In 2013, a larger percentage of Central Almaguin's resident labour force worked in the following industries as compared to Ontario:***
  - ***Agriculture, forestry, fishing and hunting***
  - ***Construction***
  - ***Retail trade***
  - ***Educational services***
  - ***Health care and social assistance***
  - ***Other services (except public administration)***
  - ***Public administration.***

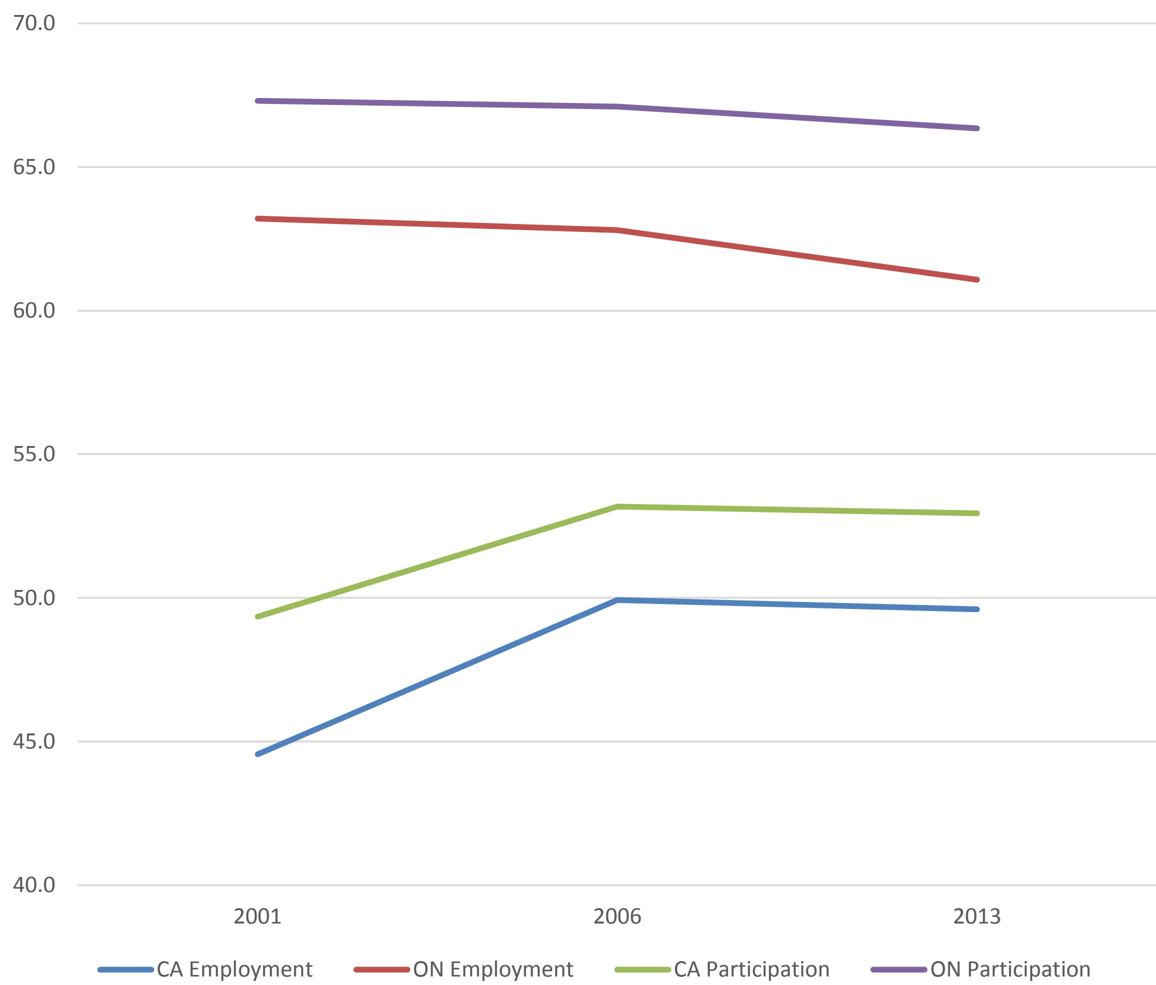
- ***In comparison to Ontario, Central Almaguin has larger percentages of its labour force working in these occupation:***
  - ***Sales and service***
  - ***Social science, education, government service and religion***
  - ***Trades, transport and equipment operators and related***
  - ***Unique to primary industry***
  - ***Unique to processing, manufacturing and utilities.***

7.1 Key Indicators

Figures 11 and 12, along with Table 15 in the Appendix, provide a comparison of key labour force indicators for Central Almaguin and Ontario from 2001 to 2013 (2013 estimates). The following observations can be made[11]:

- In 2001, 2006, and 2013, the labour force participation rates and employment rates were lower in Central Almaguin compared to the provincial rates.
- Since 2001, the unemployment rate in Central Almaguin has decreased. It is currently lower than that of Ontario.

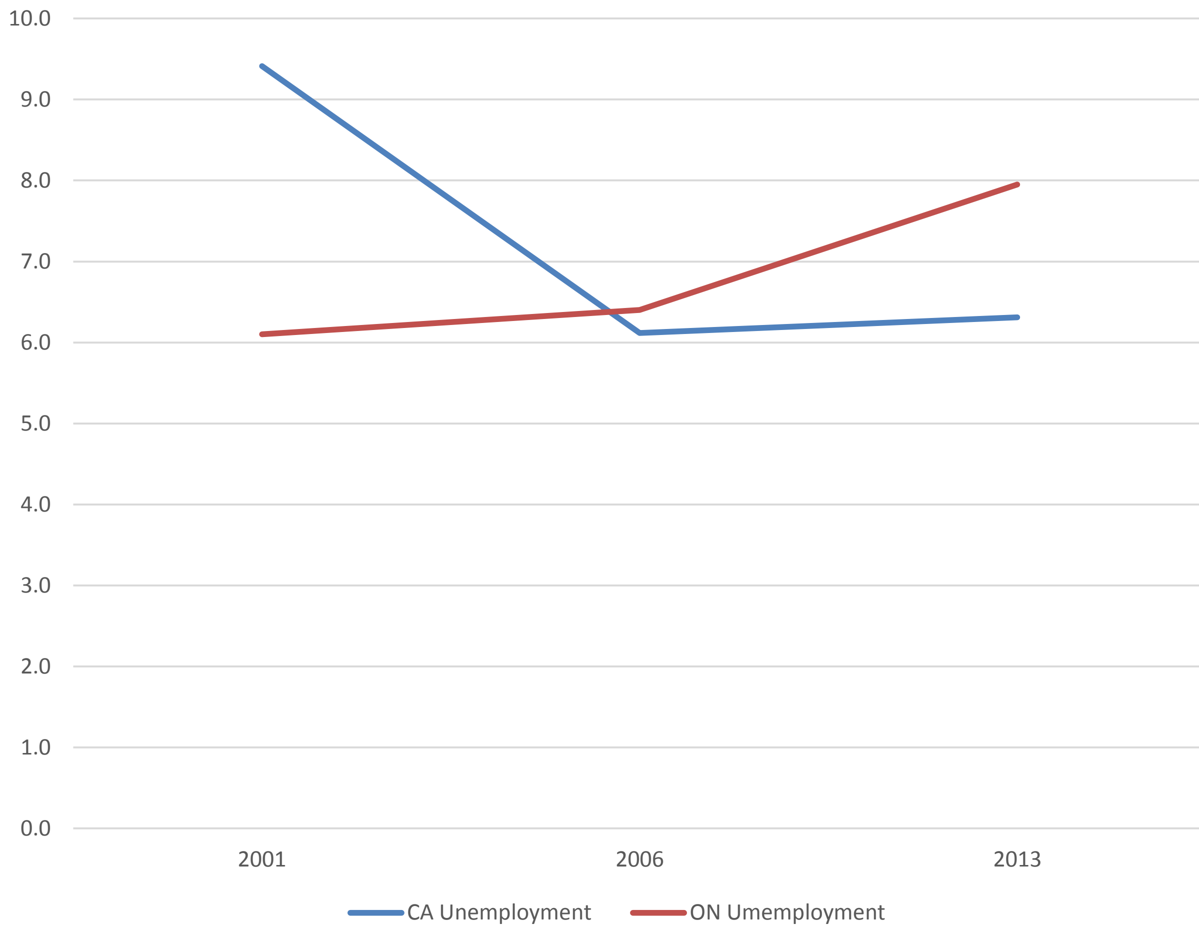
Figure 11: Labour Force Indicators, Central Almaguin vs. Ontario, 2001, 2006 & 2013



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

[11] Participation rate %=labour force/total population 15+
Employment rate %= employed/total population 15+
Unemployment rate %=unemployed/labour force

Figure 12: Unemployment Rate, Central Almaguin vs. Ontario, 2001, 2006 & 2013

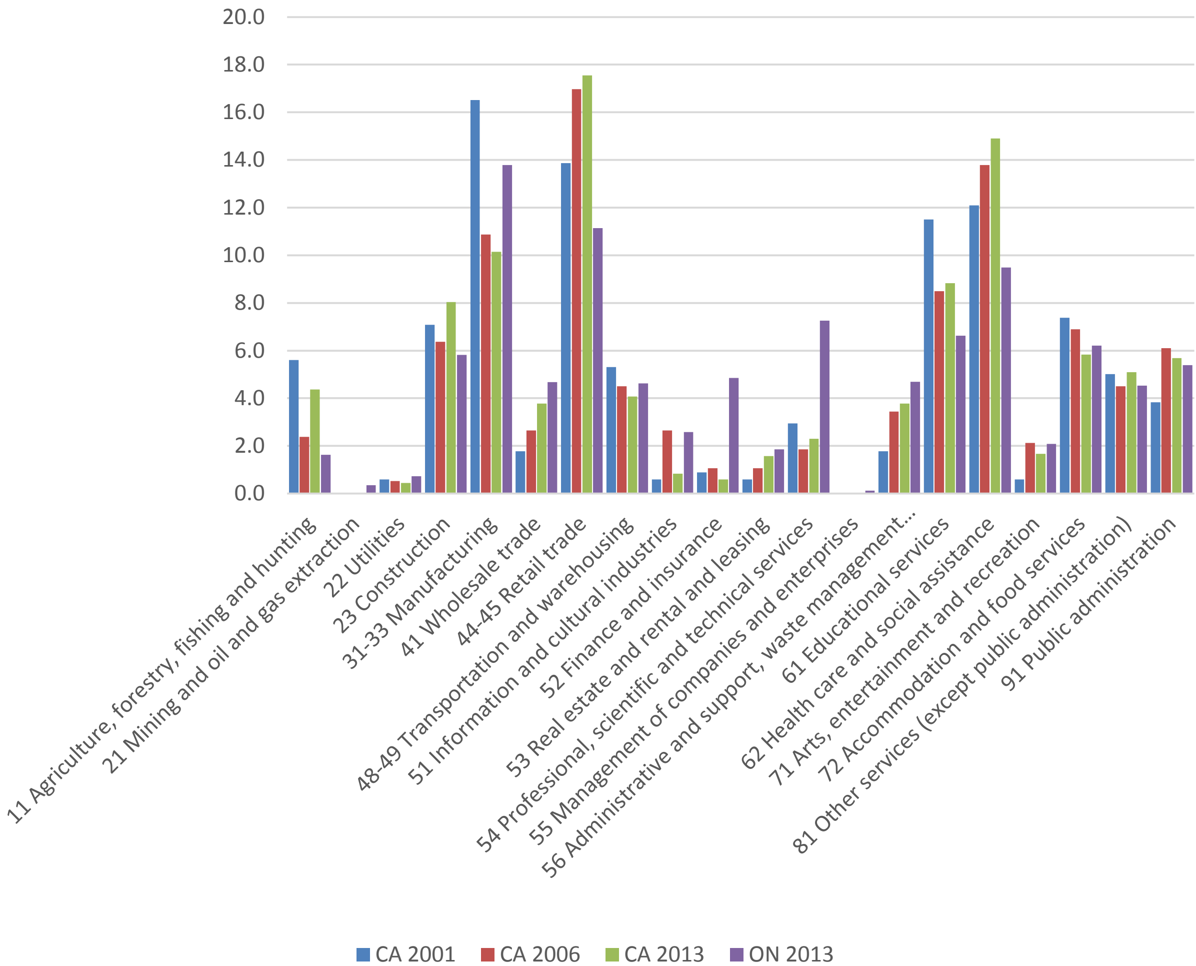


Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

7.2 Labour Force by Industry

Figure 13, and Tables 16 and 17 (in the Appendix), indicate that the experienced labour force in the Retail trade industry had the largest percentage for Central Almaguin.

Figure 13: Labour Force by Industry, Central Almaguin, 2001-2006-2013 vs. ON 2013



Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006 and Manifold Data Mining Inc. Superdemographics 2013

In 2013, a larger percentage of Central Almaguin's resident labour force worked in the following industries as compared to Ontario:

- Agriculture, forestry, fishing and hunting
- Construction
- Retail trade
- Educational services
- Health care and social assistance
- Other services (except public administration)
- Public administration

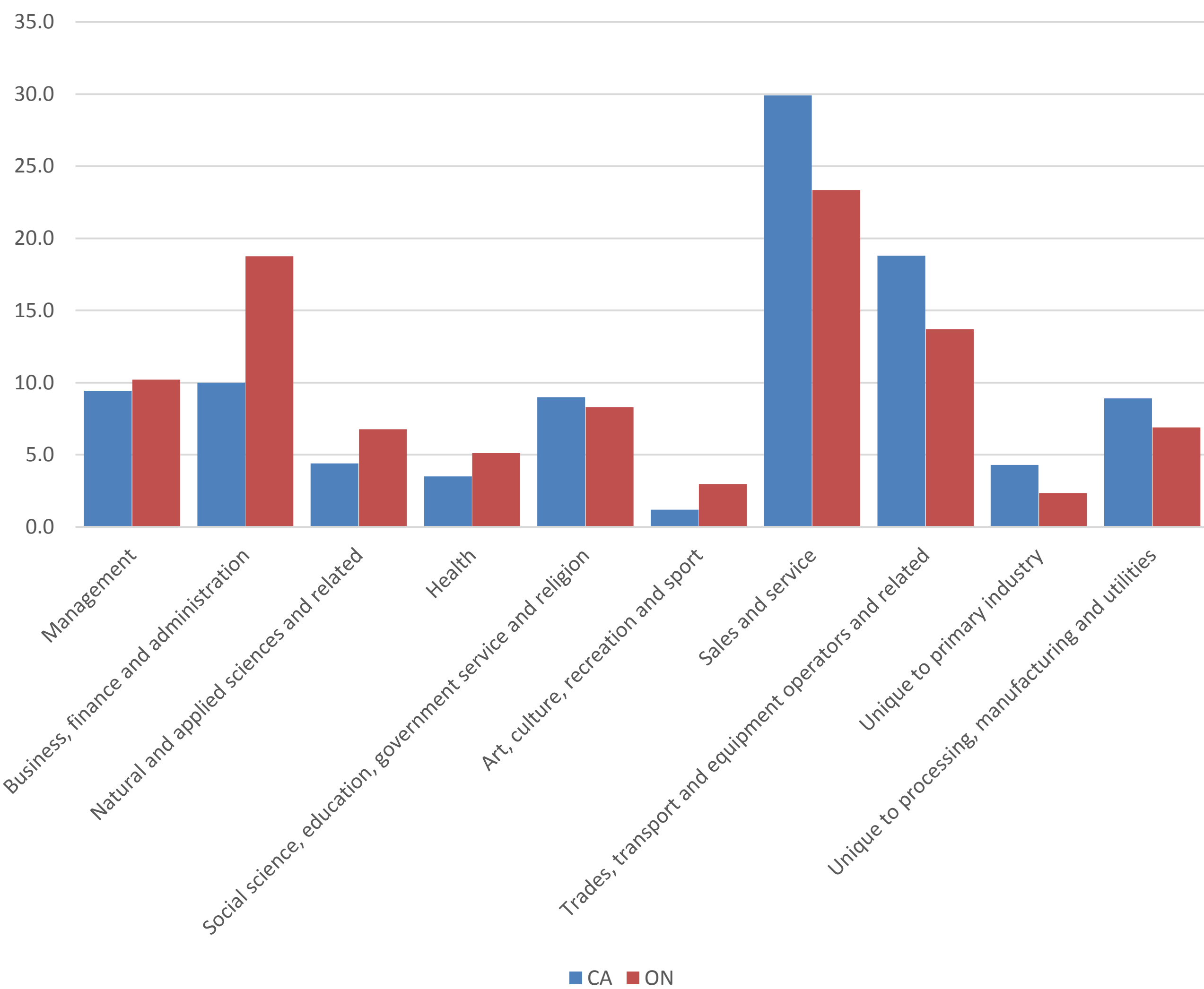
7.3 Labour Force by Occupation

Figure 14 and Table 18 (in the Appendix) compare the estimated percentages of the labour force in Central Almaguin to Ontario by occupation for 2013.

In comparison to Ontario, Central Almaguin has larger percentages of its labour force working in:

- Sales and service
- Social science, education, government service and religion
- Trades, transport and equipment operators and related
- Unique to primary industry
- Unique to processing, manufacturing and utilities

Figure 14: Labour Force by Occupation, Central Almaguin vs. Ontario, 2013



Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2013.

8 Economic Development Trends Analysis

8.1 Site Selection Factors

In 2012, Annual Corporate Survey and the Consultants Survey were conducted to rate site selection factors and the impact these factors have on planning decisions.[12] Highlighted points of the survey are as follows:

- *Highway accessibility*, *labour costs* and availability of skilled labour were consistently the top most important site selection factors.
- *Availability of advanced ICT services* jumped from 13th in 2011 to 4th in 2012 in the corporate survey.
- *State and local incentives* fell from 5th to 13th.
- *Waterway or ocean port accessibility* remained at the bottom of the list.
- In 2012, *low crime rate*, which is historically ranked as the primary quality-of-life concern as borne out by the survey's 26-year record, received an 80% importance rating from the corporate survey. The consultants' survey ranked it 2nd.
- The consultants survey ranked *expedited or "fast track"* permitting 5th versus the corporate ranking of 15.

The following two figures provide more detailed results of the 2012 Corporate Survey.

[12] For more information about the survey please go to : http://www.areadevelopment-digital.com

Figure 15: Site Selection Factors - Corporate Survey 2012

Area Development Combined Ratings* of 2012 Factors		
Ranking - Site Selection Factors	**2012**	**2011**
1. Labour costs	90.8	88.4 (2)**
2. Highway accessibility	90.1	93.8 (1)
3. Availability of skilled labour	89.4	88.4 (2T)
4. Availability of advanced ICT services	85.1	76.6 (13)
5. Occupancy or construction costs	82.8	85.9 (5)
6. Energy availability and cost	81.3	84.8 (7)
7. Corporate tax rate	79.3	86.0 (4)
8. Available buildings	78.4	76.3 (15)
9. Tax exemptions	75.4	83.6 (8)
10. Low union profile	73.5	81.0 (10)
11. Right-to-work state	72.6	77.5 (12)
12. Proximity to major markets	72.2	83.0 (9)
13. State and local incentives	71.1	85.9 (5T)
13T. Environmental regulations	71.1	76.4 (14)
15. Expedited or “fast-track” permitting	67.2	72.4 (17)
16. Inbound/outbound shipping costs	63.7	79.2 (11)
17. Availability of long-term financing	63.1	70.0 (18)
18. Available land	59.0	73.9 (16)
19. Proximity to suppliers	54.9	67.8 (19)
20. Training programs	54.7	50.6 (23)
21. Accessibility to major airport	52.9	55.7 (21)
22. Proximity to technical college/training	50.3	40.2 (24)
23. Raw materials availability	49.7	52.8 (22)
24. Railroad service	43.6	33.6 (25)
25. Availability of unskilled labour	42.9	58.9 (20)
26. Waterway or ocean port accessibility	19.9	24.5 (26)
Ranking - Quality-of-life Factors		
1. Low crime rate	79.9	82.0 (1)
2. Healthcare facilities	69.8	71.0 (2)
2T. Housing availability	69.8	64.1 (5)
4. Housing costs	66.9	69.9 (3)
5. Ratings of public schools	63.3	68.8 (4)
6. Colleges and universities	61.36	56.6 (6)
7. Climate	55.0	52.2 (8)
8. Recreational opportunities	52.9	53.2 (7)
9. Cultural opportunities	48.9	42.8 (9)
***All figures are percentages and are the total of “very important” and “important” ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent. **(2011 ranking)**		

Source: Area Development Site and Facility planning, Q1/Winter 2013

Figure 16: Consultants Survey 2012

Area Development Combined Ratings* of 2012 Factors		
Ranking – Site Selection Factors	**2012**	**2011**
1. Highway accessibility	98.3	98.3 (1)**
2. Availability of skilled labour	96.5	93.6 (4)
3. Labour costs	93.0	96.3 (2)
4. Proximity to major markets	92.9	93.8 (3)
5. Expedited or "fast-track" permitting	92.8	86.4 (10)
6. State and local incentives	91.1	88.3 (7)
7. Tax exemptions	90.3	86.9 (9)
7T. Corporate tax rate	90.3	85.0 (11)
9. Energy availability and cost	89.3	88.4 (6)
10. Low union profile	89.2	82.7 (13)
11. Occupancy or construction costs	88.3	87.1 (8)
12. Available land	86.6	92.7 (5)
13. Accessibility to major airport	83.6	80.3 (15)
14. Availability of advanced ICT services	81.9	81.2 (14)
15. Environmental regulations	81.1	79.0 (17)
16. Proximity to suppliers	80.9	83.9 (12)
17. Available buildings	80.1	79.1 (16)
18. Training programs	77.4	64.2 (20)
19. Inbound/outbound shipping costs	76.5	76.5 (18)
20. Right-to-work state	75.9	75.0 (19)
21. Proximity to technical college/training	75.4	56.0 (23)
22. Raw materials availability	65.4	61.2 (22)
23. Availability of long-term financing	61.2	63.0 (21)
24. Availability of unskilled labour	49.0	51.4 (24)
25. Railroad service	44.7	38.2 (25)
26. Waterway or ocean port accessibility	32.1	26.1 (26)
Ranking – Quality-of-life Factors		
1. Colleges and universities	79.8	69.6 (4)
2. Low crime rate	78.4	76.7 (2)
3. Ratings of public schools	73.7	76.8 (1)
4. Healthcare facilities	69.3	69.4 (5)
5. Housing availability	57.5	66.1 (6)
6. Recreational opportunities	54.3	52.2 (9)
7. Housing costs	52.7	72.1 (3)
8. Climate	51.8	52.7 (8)
9. Cultural opportunities	43.8	58.6 (7)
***All figures are percentages and are the total of "very important" and "important" ratings of the Area Development Corporate Survey and are rounded to the nearest tenth of a percent. **(2011 ranking)**		

Source: Area Development Site and Facility planning, Q1/Winter 2013

8.2 Economic Forecast

Industrial Outlook
Tables 19 to 21 in Appendix A provide the Industrial Outlook for Canada and Ontario. The following forecast can be observed:

Canada

- Canada's position as a small open economy will make it vulnerable to the global economic slowdown expected over 2012. Even as global growth rebounds in 2013, there are limits to how fast the Canadian economy can grow over the long term. In 2013, Canadian GDP has a positive forecasted outlook with a growth range of 1.3% to 2.4%.
- Canadian employers report conservative hiring plans for Quarter 1 2013 with a net employment outlook of 6%. Employment is forecasted to increase about 1.1% to 1.4% in 2013 and 1.3% to 1.5% in 2014. The unemployment rate is expected to be between 7.0% to 7.4% in 2013 and 6.8% to 7.1% in 2014.
- Inflationary pressures will likely remain subdued. Despite having a tightening bias, modest economic growth and inflation is expected to keep the Bank of Canada on the sidelines until October 2013. The Consumer Price Index is forecasted to be within the range of 1.3 to 2.2 in 2013 and 1.9 to 2.1 in 2014.

Ontario

- Ontario's economy is set to maintain a moderate, residential investment—a powerful economic engine in the province since the start of the recovery—will play a much smaller role. Overall, Ontario's GDP growth rate is estimated at 1.5% to 2.3% in 2013 and 2.3% to 2.6% in 2014.
- Employment growth is projected to be between 1.0% to 1.2% in 2013 and 1.3% - 1.4% in 2014.
- Home re-sales in the province slowed since summer, and we expect them to maintain a more moderate pace in 2013. This cooling of activity will translate into a decline in new home construction in the coming year. RBC forecasts housing starts to decline from a seven-year high of 76,200 units in 2012 to 63,600 units in 2013 and 58,500 units in 2014.
- With a Net Employment Outlook of +10% in Ontario, employers report cautiously optimistic hiring plans for the next three months. Employers in the Services sector report positive hiring plans with an Outlook of +16%. Transportation & Public Utilities sector employers also report an Outlook of +16%, while the Mining sector Outlook stands at +15%. Elsewhere, Manufacturing – Durables sector employers forecast a steady hiring pace with an Outlook of +13%, and Outlooks stand at +10% in both the Construction sector and the Finance, Insurance & Real Estate sector.
- EDC Economics forecasts that Canada had total export of 5% gain in 2012 and a further 7% increase in 2013 and Ontario had a 7% gain in 2012 and 3% increase in 2013. Over the next few years, Ontario will benefit from strong export demand—particularly for autos and parts, which typically account for about 30 per cent of the province's total international exports.
- Construction is likely to be a significant engine of growth in 2013, as a robust expansion in non-residential expenditures far outweighs the drop in residential investment.

- The expansion in manufacturing output is largely attributable to industries related to business investment - namely machinery and computer and electronics – as demand for these products is expected to grow robustly over the next few years.
- The goods-producing sector should outperform the economy as a whole as it continues to make up ground lost during the recession.
- Growth in the services sector was downgraded slightly, as export-related services will be hit during the first half of the year. Canadian exports of goods and services are expected to rise 5% in 2012 and an additional 6% in 2013. Forestry, supported by US housing starts of 1.05 million, will be the best performing sector in 2013. Growth in energy exports will nearly double, to 11%, lifted by higher oil production and natural gas prices. Food prices are also expected to increase which, when added to skyrocketing emerging market demand, will result in 10% expansions for both agri-food and fertilizers exports. Higher valued-added industries, such as aircraft and parts, industrial M&E and to a lesser extent services, are also expected to have a good year in 2013.
- Looking beyond the medium term, real economic growth will average slightly above 2 per cent a year. Energy related projects, the development of the mining sector in the northern part of the province, and high commodity prices will continue to encourage non-residential investment. Furthermore, public spending commitments to upgrade transportation and energy infrastructure will also support investment. In the long term, residential construction will increase at a steady pace as the number of new households rises in step with increasing net international migration and an aging population demanding more multiple-unit housing.

References:

- The Conference Board of Canada, *Canadian Outlook - Winter 2012*
- TD Economics, *Quarterly Economic Forecast –* 2012
- RBC Economic Research, *Provincial Outlook –* 2012
- Manpower, *Employment Outlook Survey –* Q1/2013
- EDC Economics, *Export Forecast Overview –* Spring 2013
- The Annual Corporate Survey & Annual Consultants Survey – *2012*
- The Conference Board of Canada, *Provincial Outlook 2012: Long-Term Economic Forecast*
- TD Economics, *Long Term Economic Forecast, 2012*
- TD Economics, *Provincial Economic Forecast,* 2012

Appendix A: Data Tables

Table 4: Percentage Population by Age, Central Almaguin, 2006, 2011 & 2013

	Central Almaguin 2006 %	Central Almaguin 2011 %	Central Almaguin 2013 %
Total population by sex and age groups	4,200	4,295	4,446
Population age 0-4	3.7	4.5	4.3
Population age 5-9	4.5	4.0	4.0
Population age 10-14	6.1	5.1	5.0
Population age 15-19	6.5	5.9	5.7
Population age 20-24	4.4	5.0	4.9
Population age 25-29	3.8	3.4	3.5
Population age 30-34	4.2	4.8	4.7
Population age 35-39	4.5	4.5	4.7
Population age 40-44	7.3	5.5	5.6
Population age 45-49	6.8	7.2	7.4
Population age 50-54	8.7	7.1	7.1
Population age 55-59	8.8	9.0	9.1
Population age 60-64	8.1	9.7	9.8
Population age 65-69	7.5	7.9	8.0
Population age 70-74	5.7	6.1	6.3
Population age 75-79	4.6	4.4	4.5
Population age 80-84	3.5	3.4	3.3
Population age 85+	2.0	1.8	2.0

Source: McSweeney & Associates from Statistics Canada Census data 2006, 2011 and Manifold Data Mining Inc. Superdemographics 2013

Table 5: Percentage Population by Age, Central Almaguin vs. Ontario, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total population	4,446		13,473,073
Population age 0-4	192	5.0	6.6
Population age 5-9	177	4.6	6.7
Population age 10-14	224	5.8	7.2
Population age 15-19	254	6.6	8.1
Population age 20-24	218	5.7	8.0
Population age 25-29	156	4.1	7.6
Population age 30-34	208	5.4	7.5
Population age 35-39	208	5.4	7.9
Population age 40-44	249	6.5	8.7
Population age 45-49	327	8.5	9.9
Population age 50-54	317	8.2	9.4
Population age 55-59	406	10.5	8.1
Population age 60-64	437	11.3	7.2
Population age 65-69	354	9.2	5.3
Population age 70-74	282	7.3	4.1
Population age 75-79	202	5.2	3.3
Population age 80-84	145	3.8	2.5
Population age 85+	88	2.3	2.3

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013

Table 6: Income Levels with % Change, Central Almaguin vs. Ontario, 2000, 2005 & 2012

	Central Almaguin 2000	Ontario 2000	Central Almaguin 2005	Ontario 2005	Central Almaguin 2012	Ontario 2012
Total population 15 years and over	3,445	9,048,040	3,535	9,819,420	3,853	11,179,784
% change from 2000	-	-	2.6	8.5	11.8	23.6
Average income $	24,414	32,865	27,900	38,099	36,509	47,225
% change from 2000	-	-	14.3	15.9	49.5	43.7
Median income $	18,854	24,816	20,787	27,258	24,044	32,269
% change from 2000	-	-	10.3	9.8	27.5	30.0
Census family income of all families	1,265	3,190,990	1,310	3,347,610	1,446	3,823,868
% change from 2000	-	-	3.6	4.9	14.3	19.8
Average family income $	51,679	73,849	58,537	90,526	78,127	114,465
% change from 2000	-	-	13.3	22.6	51.2	55.0
Median family income $	40,686	61,024	48,733	72,734	76,699	91,435
% change from 2000	-	-	19.8	19.2	88.5	49.8
Household income of all private households	1,765	4,219,410	1,815	4,555,025	1,966	5,157,855
% change from 2000	-	-	2.8	8.0	11.4	22.2
Average household income $	44,995	66,836	52,173	77,967	69,724	93,861
% change from 2000	-	-	16.0	16.7	55.0	40.4
Median household income $	36,269	53,626	43,724	60,455	60,343	71,508
% change from 2000	-	-	20.6	12.7	66.4	33.3

Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes)

Table 7: Total Income Levels, Central Almaguin vs. Ontario, 2012

	Central Almaguin	Central Almaguin %	Ontario %
Total income of population 15 years and over	3,853	100	11,179,784
Without income	160	4.2	4.7
With income	3,693	95.8	95.3
Under $1,000	107	2.8	4.0
$ 1,000 - $ 2,999	118	3.1	3.3
$ 3,000 - $ 4,999	115	3.0	3.1
$ 5,000 - $ 6,999	114	3.0	3.3
$ 7,000 - $ 9,999	324	8.4	5.4
$10,000 - $11,999	262	6.8	3.9
$12,000 - $14,999	351	9.1	5.6
$15,000 - $19,999	397	10.3	8.5
$20,000 - $24,999	335	8.7	7.0
$25,000 - $29,999	245	6.4	6.3
$30,000 - $34,999	264	6.9	6.3
$35,000 - $39,999	268	7.0	5.7
$40,000 - $44,999	160	4.2	5.0
$45,000 - $49,999	151	3.9	4.2
$50,000 - $59,999	172	4.5	6.7
$60,000 to $74,999	233	6.0	9.3
$75,000 to $99,999	48	1.2	4.9
$100,000 to $149,999	26	0.7	2.1
$150,000 and over	2	0.1	0.7
Median Total Income ($)	$24,044		$32,269
Average Total Income ($)	$36,509		$47,225

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013(2012 incomes)

Table 8: Total Income Levels, Central Almaguin vs. Ontario, 2000, 2005 & 2012

	Central Almaguin 2000 %	Ontario 2000 %	Central Almaguin 2005 %	Ontario 2005 %	Central Almaguin 2012 %	Ontario 2012 %
Total income of population 15 years and over	3,445	9,048,040	3,535	9,819,420	3,853	11,179,784
Without income	4.9	5.0	3.8	4.9	4.2	4.7
With income	95.4	95.0	96.2	95.1	95.8	95.3
Under $1,000	2.9	4.1	2.5	4.1	2.8	4.0
$ 1,000 - $ 2,999	6.4	4.3	3.3	3.4	3.1	3.3
$ 3,000 - $ 4,999	4.1	3.6	2.7	3.2	3.0	3.1
$ 5,000 - $ 6,999	4.5	3.9	3.4	3.4	3.0	3.3
$ 7,000 - $ 9,999	6.7	5.4	8.5	5.5	8.4	5.4
$10,000 - $11,999	5.5	4.1	6.4	3.9	6.8	3.9
$12,000 - $14,999	9.1	6.4	9.5	5.7	9.1	5.6
$15,000 - $19,999	12.3	8.5	11.0	8.5	10.3	8.4
$20,000 - $24,999	8.7	7.4	8.1	7.0	8.7	7.0
$25,000 - $29,999	8.9	6.8	6.8	6.2	6.4	6.2
$30,000 - $34,999	7.5	7.1	6.6	6.3	6.9	6.3
$35,000 - $39,999	4.8	5.7	6.8	5.7	7.0	5.7
$40,000 - $44,999	3.9	5.2	4.0	5.0	4.2	5.0
$45,000 - $49,999	1.5	3.8	3.8	4.2	3.9	4.2
$50,000 - $59,999	3.0	6.2	4.4	6.6	4.5	6.7
$60,000 and over	5.7	12.5	8.9	16.5	8.0	17.1

Source: McSweeney & Associates from Statistics Canada Census data 2001 (2000 incomes) and 2006 (2005 incomes) and Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes)

Table 9: Family Income Levels, Central Almaguin vs. Ontario, 2012

	Central Almaguin	Central Almaguin %	Ontario %
Census family income of all families	1,446	100.0	100.0
Under $10,000	54	3.7	2.3
$ 10,000 - $19,999	78	5.4	3.7
$ 20,000 - $29,999	221	15.3	6.6
$ 30,000 - $39,999	252	17.4	8.3
$ 40,000 - $49,999	192	13.3	8.7
$ 50,000 - $59,999	128	8.9	8.5
$ 60,000 - $69,999	162	11.2	8.4
$ 70,000 - $79,999	80	5.5	8.0
$ 80,000 - $89,999	50	3.5	7.3
$ 90,000 - $99,999	53	3.7	6.4
$100,000 and over	175	12.1	31.8
Median Family Income ($)	76,699		91,435
Average Family Income ($)	78,127		114,465

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes)

Table 10: Household Income Levels, Central Almaguin vs. Ontario, 2012

	Central Almaguin	Central Almaguin %	Ontario %
Household income of all private households	1,966	100	5,157,855
Under $10,000	48	2.4	4.1
$ 10,000 - $19,999	235	12.0	8.3
$ 20,000 - $29,999	314	16.0	8.8
$ 30,000 - $39,999	304	15.5	9.7
$ 40,000 - $49,999	241	12.3	9.2
$ 50,000 - $59,999	157	8.0	8.4
$ 60,000 - $69,999	196	10.0	7.9
$ 70,000 - $79,999	108	5.5	7.2
$ 80,000 - $89,999	78	4.0	6.2
$ 90,000 - $99,999	87	4.4	5.2
$100,000 to $124,999	124	6.3	12.5
$125,000 to $149,999	54	2.7	7.2
$150,000 and over	19	1.0	5.4
Median Household Income ($)	60,343		71,508
Average Household Income ($)	69,724		93,861

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013 (2012 incomes)

Table 11: Education Attainment, Central Almaguin vs. Ontario, 2006-2013

	2006 Central Almaguin %	2006 Ontario %	2013 Central Almaguin %	2013 Ontario %
Total population 25 to 64 years by highest certificate, diploma or degree				
No certificate, diploma or degree	21.7	13.6	21.4	13.3
Certificate, diploma or degree	78.3	86.4	78.6	86.7
High school certificate or equivalent	29.4	25.0	29.0	25.1
Apprenticeship or trades certificate or diploma	9.3	8.8	9.4	8.6
College, CEGEP or other non-university certificate or diploma	24.9	22.0	25.6	22.0
University certificate, diploma or degree	14.7	30.7	14.5	30.9
University certificate or diploma below bachelor level	1.6	4.7	2.1	4.6
University certificate or degree	12.8	26.0	12.4	26.3
Bachelor's degree	7.2	15.9	7.9	16.4
University certificate or diploma above bachelor level	3.3	3.2	2.7	3.1
Degree in medicine, dentistry, veterinary medicine or optometry	0.0	0.7	0.0	0.7
Master's degree	2.1	5.3	1.7	5.3
Earned doctorate	0.0	0.9	0.0	0.8

Source: McSweeney & Associates from Statistics Canada Census data 2006 and Manifold Data Mining Inc. Superdemographics 2013.

Table 12: Post-secondary Qualifications by Major Field of Study, Central Almaguin vs. ON, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total population with postsecondary qualifications by major field of study	1,144	100.0	
Educational, recreational and counselling services	175	15.3	6.4
Fine and applied arts	42	3.7	3.7
Humanities and related fields	28	2.4	5.6
Social and behavioural sciences and law	36	3.1	11.9
Business, management and public administration	217	19.0	22.0
Physical and life sciences and technologies	28	2.4	3.5
Mathematics, computer and information sciences	21	1.8	5.4
Architecture, engineering, and related technologies	230	20.1	21.7
Agriculture, natural resources and conservation	61	5.3	1.7
Health, parks, recreation and fitness	196	17.1	13.2
Personal, protective and transportation services	108	9.4	4.9
Other fields of study	0	0.0	0.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

Table 13: Mobility Status, Central Almaguin vs. Ontario, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total population 1 year and over by mobility status 1 year ago	4,447	100	13,473,073
Non-movers	4,004	90.0	86.9
Movers	442	9.9	13.1
Non-migrants	126	2.8	7.8
Migrants	314	7.1	5.3
Internal migrants	314	7.1	4.2
Intraprovincial migrants	304	6.8	3.8
Interprovincial migrants	11	0.2	0.5
External migrants	0	0.0	1.1
Total population 5 years and over by mobility status 5 years ago	4,447	100	13,473,073
Non-movers	3,030	68.1	59.1
Movers	1,416	31.8	40.9
Non-migrants	471	10.6	22.0
Migrants	946	21.3	18.9
Internal migrants	936	21.0	13.9
Intraprovincial migrants	917	20.6	12.3
Interprovincial migrants	19	0.4	1.6
External migrants	10	0.2	5.0

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

Table 14: Knowledge of Official Language, Central Almaguin vs. Ontario, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total population by knowledge of official languages	4,447	100	13,473,073
English only	4,364	98.1	93.2
French only	82	1.8	4.0
English and French	0	0	0.7
Neither English nor French	0	0	2.1

Source: McSweeney & Associates from Manifold Data Mining Inc. Superdemographics 2013.

Table 15: Key Labour Force Indicators, Central Almaguin vs. Ontario, 2001-2006-2013

	Central Almaguin			Ontario		
Characteristic	**2001**	**2006**	**2013**	**2001**	**2006**	**2013**
Total population 15 years and over by labour force activity	3,445	3,535	3,853	9,048,040	9,819,420	11,179,784
In the labour force	1,700	1,880	2,040	6,086,815	6,587,575	7,416,901
Employed	1,535	1,765	1,911	5,713,900	6,164,245	6,827,414
Unemployed	160	115	129	372,915	423,335	589,487
Not in the labour force	1,750	1,655	1,813	2,961,220	3,231,840	3,762,882
Participation rate (%)	49.3	53.2	52.94	67.3	67.1	66.3
Employment rate (%)	44.6	49.9	49.6	63.2	62.8	61.1
Unemployment rate (%)	9.4	6.1	6.31	6.1	6.4	8.0

Source: McSweeney & Associates from Statistics Canada 2001, 2006 Census data and Manifold Data Mining Inc. Superdemographics 2013.

Table 16: Labour Force by Industry, Central Almaguin, 2001-2006-2013

	Central Almaguin 2001 %	Central Almaguin 2006 %	Central Almaguin 2013 %
Total labour force 15 years and over by industry - 1997 North American Industry Classification System	100	100	100
Industry - Not applicable	1.2	1.3	0.6
All industries	98.8	84.4	99.4
11 Agriculture, forestry, fishing and hunting	5.6	2.4	4.4
21 Mining and oil and gas extraction	0.0	0.0	0.0
22 Utilities	0.6	0.5	0.4
23 Construction	7.1	6.4	8.0
31-33 Manufacturing	16.5	10.9	10.1
41 Wholesale trade	1.8	2.7	3.8
44-45 Retail trade	13.9	17.0	17.5
48-49 Transportation and warehousing	5.3	4.5	4.1
51 Information and cultural industries	0.6	2.7	0.8
52 Finance and insurance	0.9	1.1	0.6
53 Real estate and rental and leasing	0.6	1.1	1.6
54 Professional, scientific and technical services	2.9	1.9	2.3
55 Management of companies and enterprises	0.0	0.0	0.0
56 Administrative and support, waste management and remediation services	1.8	3.4	3.8
61 Educational services	11.5	8.5	8.8
62 Health care and social assistance	12.1	13.8	14.9
71 Arts, entertainment and recreation	0.6	2.1	1.7
72 Accommodation and food services	7.4	6.9	5.8

	Central Almaguin 2001 %	Central Almaguin 2006 %	Central Almaguin 2013 %
81 Other services (except public administration)	5.0	4.5	5.1
91 Public administration	3.8	6.1	5.7

Source: McSweeney & Associates from Statistics Canada 2001, 2006 Census data and Manifold Data Mining Inc. Superdemographics 2013.

Table 17: Labour Force by Industry, Central Almaguin vs. Ontario, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total labour force 15 years and over by industry - 1997 North American Industry Classification System	2,040	100	7,416,901
Industry - Not applicable	12	0.6	1.5
All industries	2,028	99.4	98.5
Agriculture, forestry, fishing and hunting	89	4.4	1.6
Mining and oil and gas extraction	0	0.0	0.4
Utilities	9	0.4	0.7
Construction	164	8.0	5.8
Manufacturing	207	10.1	13.8
Wholesale trade	77	3.8	4.7
Retail trade	358	17.5	11.1
Transportation and warehousing	83	4.1	4.6
Information and cultural industries	17	0.8	2.6
Finance and insurance	12	0.6	4.8
Real estate and rental and leasing	32	1.6	1.9
Professional, scientific and technical services	47	2.3	7.3
Management of companies and enterprises	0	0.0	0.1
Administrative and support, waste management and remediation services	77	3.8	4.7
Educational services	180	8.8	6.6
Health care and social assistance	304	14.9	9.5
Arts, entertainment and recreation	34	1.7	2.1
Accommodation and food services	119	5.8	6.2
Other services (except public administration)	104	5.1	4.5
Public administration	116	5.7	5.4

Source: McSweeney & Associates from Manifold Data Mining's Superdemographics 2013.

Table 18: Labour Force by Occupation, Central Almaguin vs. Ontario, 2013

	Central Almaguin	Central Almaguin %	Ontario %
Total labour force 15 years and over by occupation - 2006 National Occupational Classification for Statistics	3,041		7,416,901
Occupation - Not applicable	12	0.4	1.5
All occupations	3,030	99.6	98.4
A Management occupations	287	9.4	10.4
A0 Senior management occupations	29	1.0	1.3
A1 Specialist managers	18	0.6	3.1
A2 Managers in retail trade, food and accommodation services	89	2.9	2.8
A3 Other managers, n.e.c.	152	5.0	3.2
B Business, finance and administration occupations	304	10.0	19.1
B0 Professional occupations in business and finance	27	0.9	2.8
B1 Finance and insurance administration occupations	21	0.7	1.2
B2 Secretaries	35	1.2	1.4
B3 Administrative and regulatory occupations	24	0.8	2.3
B4 Clerical supervisors	16	0.5	0.6
B5 Clerical occupations	181	6.0	10.8
C Natural and applied sciences and related occupations	135	4.4	6.9
C0 Professional occupations in natural and applied sciences	65	2.1	4.1
C1 Technical occupations related to natural and applied sciences	70	2.3	2.7
D Health occupations	107	3.5	5.2
D0 Professional occupations in health	10	0.3	1.1
D1 Nurse supervisors and registered nurses	21	0.7	1.6
D2 Technical and related occupations in health	27	0.9	1.1
D3 Assisting occupations in support of health services	50	1.6	1.4
E Occupations in social science, education, government service and religion	275	9.0	8.4
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	49	1.6	2.3
E1 Teachers and professors	145	4.8	4.1
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	81	2.7	2.1

	Central Almaguin	Central Almaguin %	Ontario %
F Occupations in art, culture, recreation and sport	36	1.2	3.0
F0 Professional occupations in art and culture	21	0.7	1.3
F1 Technical occupations in art, culture, recreation and sport	14	0.5	1.7
G Sales and service occupations	908	29.9	23.7
G0 Sales and service supervisors	18	0.6	0.8
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	71	2.3	2.3
G2 Retail salespersons and sales clerks	180	5.9	4.6
G3 Cashiers	39	1.3	1.9
G4 Chefs and cooks	35	1.2	1.2
G5 Occupations in food and beverage service	43	1.4	1.4
G6 Occupations in protective services	99	3.3	1.6
G7 Occupations in travel and accommodation, including attendants in recreation and sport	31	1.0	0.8
G8 Child care and home support workers	38	1.2	1.4
G9 Sales and service occupations, n.e.c.	354	11.6	7.8
H Trades, transport and equipment operators and related occupations	572	18.8	13.9
H0 Contractors and supervisors in trades and transportation	50	1.6	0.7
H1 Construction trades	68	2.2	2.3
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	34	1.1	0.9
H3 Machinists, metal forming, shaping and erecting occupations	4	0.1	1.3
H4 Mechanics	70	2.3	2.1
H5 Other trades, n.e.c.	22	0.7	0.7
H6 Heavy equipment and crane operators, including drillers	22	0.7	0.4
H7 Transportation equipment operators and related workers, excluding labourers	152	5.0	3.2
H8 Trades helpers, construction and transportation labourers and related occupations	152	5.0	2.4
I Occupations unique to primary industry	132	4.3	2.4
I0 Occupations unique to agriculture, excluding labourers	70	2.3	1.4
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	30	1.0	0.2
I2 Primary production labourers	30	1.0	0.7

	Central Almaguin	Central Almaguin %	Ontario %
J Occupations unique to processing, manufacturing and utilities	272	8.9	7.0
J0 Supervisors in manufacturing	5	0.2	0.4
J1 Machine operators in manufacturing	85	2.8	2.5
J2 Assemblers in manufacturing	116	3.8	2.4
J3 Labourers in processing, manufacturing and utilities	66	2.2	1.7

Source: McSweeney & Associates Manifold Data Mining Inc. Superdemographics 2013.

Table 19: Ontario Merchandise Export Outlook

Main Sectors	% Share of Exports(2012)	Global Outlook (% growth)		
		2012	2013 f	2014 f
Industrial Goods	33.8	-4.4	15	2
Motor Vehicle	35.9	16.6	4	3
M&E	13.1	1.9	8	8
Agri-Food	6.6	9.3	6	5
Forestry	2.7	-6.0	7	5
Consumer Goods	2.4	-15.2	5	4
All Others	5.6	14.0	8	6
Total	**100**	**4.7**	**8**	**4**

Source: EDC Global Export Forecast Spring 2013, p. 42.

Table 20: Canadian Industrial Outlook – GDP by Industry

Industry	% change (Y/Y)	
	2012f	2013f
All industries (GDP)	1.7	2.2
Good Industries	2.1	3.4
Primary Industries	2.0	2.8
Manufacturing	2.3	3.8
Construction	1.6	4.1
Residential	0.3	-0.7
Non-res. & Engineering	2.2	6.2
Utilities	2.9	1.2
Service Industries	1.5	1.8
Wholesale Trade	2.6	3.4
Retail Trade	1.8	2.1
Transportation & Warehousing	2.3	3.0
Information & Cultural Industries	0.3	0.9
Finance, Insurance & Real Estate	1.5	1.4
Professional Services	1.7	3.5
Accommodation & Food Services	1.4	1.8
Public services*	0.8	0.7
Other Services	1.5	2.4

Source: TD Economics Industrial Outlook, Dec. 2011.

Table 21: Canada and Ontario Employment Outlook by Industry – Q1/2013

Industry	Canada Net Employment Outlook (%)	Ontario Net Employment Outlook (%)
All Industries	6	6
Construction	0	-40
Education	11	6
Finance, Insurance & Real Estate	13	30
Manufacturing - Durables	3	0
Manufacturing – Non-Durables	-1	0
Mining	4	-5
Public Administration	1	7
Services	10	16
Transportation & Public Utilities	16	16
Wholesale & Retail Trade	2	9

Source: Manpower Employment Outlook Survey – Q1/2013.