

Strathcona County Economic Diversification Review



STRATHCONA
COUNTY

Prepared by:



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1 Strathcona County Economic Diversification Review

Background

Strathcona County is a global competitor in petrochemical and hydrocarbon processing, and is a western Canadian hub for the storage, transportation and distribution of these products. This is the primary economic engine driving the local and regional economy. Related sectors, such as engineering, construction, manufacturing, business accommodation and the service sector, are all highly dependent on this primary industry.

Due to this robust economy, Strathcona has clearly benefitted from the success of these sectors and sub-sectors and has a high quality of place as a result of this long-term investment. Jobs in these sectors support above average incomes. These higher incomes result in more spending in the housing, retail and services sectors. Strathcona County, as a community, is in an enviable situation.

Strathcona County has a corporate mission of “Creating Canada’s Most Livable Community”. This would suggest that the County needs to maintain a very high quality of life and provide a full set of services to ensure it maintains itself as the most livable community. This requires high paying jobs and a solid tax base, which it presently enjoys. The success of the petrochemical and hydrocarbon based industries has supported the success of this community.

Strathcona County continues to be a strong regional player in the agricultural and food processing sectors. These are important sectors that, while not as financially significant, certainly enhance the area’s image and quality of place, while providing valued lifestyle options. The County has completed a comprehensive Agriculture Master Plan to guide the agricultural sector to develop further opportunities.

Agriculture is one example of diversification outside of the petrochemical and hydrocarbon sectors that can provide attainable opportunities. A long downturn in the petrochemical and hydrocarbon sectors would potentially impact Strathcona’s economic certainties. Also, a downturn in these industries would have a domino effect in Strathcona, impacting jobs, wages, real estate, tax rates and overall quality of place.

A survey of local economic stakeholders revealed that 82% of respondents ranked economic diversification as an important endeavor. The County’s Economic Development and Tourism Departmental Business Plan identify one of the team’s core functions as “Diversification and Innovation”. Diversification both within and outside of the petrochemical and oil sector is the best way for an economy to insulate itself from negative global or market shifts. Keeping that in mind, Strathcona County cannot lose sight of the fact that petrochemical and hydrocarbon sectors are its economic powerhouse for now and well into the foreseeable future.

A diversified economy to expand all sectors will help broaden and protect the economy but may also dilute the community wealth that is currently created for the County and region.



2 Summary of Findings

From an economic diversification perspective, Strathcona County is a community in transition. Strathcona County is maturing as a community. It has a proven reputation of being a high-end community boasting a high quality of life, well-paying jobs, high real estate values (urban and rural single detached dwellings), as well as a top-end community infrastructure and maintenance program. These qualities are rare among Canadian communities. Strathcona's economy is in the process of evolving. It now includes more affordable and diverse supply or housing (multi-residential and apartment style dwellings), a variety of jobs in the retail, services and other lower paying employment sectors, as well as a more culturally diverse make up.

Historically, Strathcona County has been a community reserved for primarily the financially well-off. In many ways, this persists today; however, community leaders do recognize the importance of adding more affordable options to Strathcona's housing mix. This shift will continue to be important as Strathcona adds new industries and sectors to its economy. Labour issues will need to be addressed. Those not working in the high paying jobs of the petrochemical and hydrocarbon sector would find it difficult to live in Strathcona because of the high real estate prices.

Defined as a "specialized municipality", Strathcona County is made up of two very different, yet complementary, community characteristics - urban and rural. This brings economic diversification opportunities and challenges to the community. These will be important issues as the municipality determines future community growth priorities, maintains economic development focus and sets community priorities.

2.1 Diversification within the Petrochemical and Hydrocarbon Sector

Strathcona's main economic drivers are the petrochemical and hydrocarbon sector. The success of the industries within these sectors have spurred growth in other employment areas such as construction, retail trade, and manufacturing. In addition, this success has supported community services in health care and social assistance, education and professional scientific and technical services.

Beyond powering the local economy, the petrochemical and hydrocarbon sectors also support Strathcona's high quality of life through municipal taxes and strong wages. This high standard and cost of living result in a high wage expectation potentially making it difficult for employers outside those industries to compete and contribute to the tax-base. As such, diversification within Strathcona's main economic generator, the petrochemical and hydrocarbon sectors, would bring the greatest economic and employment benefits to the community. Diversification, therefore, would look to downstream processing within petrochemical and hydrocarbon. This would be within highly specialized manufacturing and processing industries.

Announced in late 2016, Inter Pipeline Ltd and Pembina Pipeline Corporation will both benefit from Alberta's petrochemical diversification funding program. Since both companies are heavily investing in propane processing (dehydrogenation) facilities within Strathcona County, these two major investments have the potential to provide the needed feedstock for the further diversification of downstream processing and advanced manufacturing within petrochemical and



hydrocarbon industry. These are good examples of how Strathcona County's economy can be further diversified within petrochemical and hydrocarbon sector.

2.2 Diversification outside of Petrochemical and Hydrocarbon Sector

With the recent completion of the Northeast Edmonton Ring Road (Anthony Henday ring road) Strathcona County, most notably Sherwood Park, will have better and more direct access to and around the Edmonton region. This will improve access to and the movement of goods. As such, any industrial lands with improved access, due to the Anthony Henday ring road, will have an increased competitive advantage in terms of attracting those businesses or industries that rely on trucking, ground shipping, or logistics. This new piece of transportation infrastructure will also benefit any manufacturing or processing industries that have a need to move (via ground shipping) their primary materials and finished products.

Looking outside of the petrochemical and hydrocarbon sector, there are other potential areas within Strathcona's economy that illustrate opportunities for growth. But as discussed previously, these opportunities would not have the same economic or community impact as those created within the petrochemical and hydrocarbon sector because they would pay lower wages and provide generally lower tax assessment (due to less capital investment). In addition, it may prove difficult for other industries to thrive due to cost and the availability of land and labour. If the community desires change, Strathcona County does have the economic development infrastructure and assets needed to pursue:

- Opportunities within Sherwood Park:
 - Advanced manufacturing (downstream processing and manufacturing, metal fabrication and assembly)
 - Transportation and logistics
 - Food processing – secondary processing (mainly grains and cereals)
 - Service sector and retail
 - Health care and services supporting an aging population
 - Sport tourism and event attraction
- Opportunities in rural Strathcona County
 - Food processing – primary processing (mainly grains and cereals)
 - Agri-tourism
 - Eco-tourism.

2.3 Main Issues Impeding Economic Diversification

Strathcona County is an oil and gas town and, although not as severely impacted as other communities, its economy does ebb and flow in concert with the ups and downs of the oil industry. Strathcona County is currently taking stock to see if the community has the necessary components to further diversify its local economy. There are several approaches to diversification but the two prominent views of Strathcona County are:

- Diversification within petrochemical and hydrocarbon sectors (including advanced manufacturing and processing)



- Diversification in other sectors outside of petrochemical and hydrocarbon (i.e. advanced manufacturing, transportation and logistics, tourism, food processing, health care, agriculture).

No matter which direction Strathcona County chooses to pursue, there are three main issues currently impacting the success of Strathcona County's economic diversification efforts, as indicated in the following sections.

2.3.1 Maintaining a Focus on Diversification

The financial benefits and wealth created through existing petrochemical and hydrocarbon operations are extremely lucrative, making it difficult to move resources away from pursuing and attracting further investments outside of these sectors. If the County chooses to attract investment outside of petrochemical and hydrocarbon, it will require an unwavering dedication during both the downturns in the petrochemical and hydrocarbon sector but also in any upsurges. That focus may prove to be difficult in times of upsurge in the petrochemical and hydrocarbon sector, which normally brings immediate financial and community benefits that are not as bountiful in other sectors of the economy.

2.3.2 Providing or Supplying the Required Workforce Needed to Support a More Diversified Economy

Salaries and wages within petrochemical and hydrocarbon sector are typically higher than other sectors. A highly-paid workforce does result in higher spending in a community and an overall wealthier community, but it also causes issues with respect to the overall labour supply. Other sectors competing with petrochemical and hydrocarbon sector for workers may face difficulties in securing and retaining workers. If petrochemical and hydrocarbon sector employers are paying premium wages, it is very difficult for employers from other sectors to compete with those wages.

2.3.3 Providing or Supplying the Required Shovel Ready Land Needed to Grow a More Diversified Economy

Shovel ready industrial land is a sought-after commodity in Strathcona County. It may appear that there is an ample supply of vacant land, but Strathcona County currently has a limited supply of land available for development. To attract investment into Strathcona, be it for the petrochemical and hydrocarbon sectors or other sectors, strategies will need to be implemented to bring more industrial employment land to the market.

Notwithstanding the above, with the policy amendments currently being contemplated for Strathcona County's Area Structure Plan, specifically on those lands within the Albert's Industrial Heartland, the County can greatly increase the amount of land dedicated to Heavy Industrial, Light/Medium Industrial and Agri-Industrial uses. If these adjustments are approved, this will effectively increase the amount of un-serviced industrial land available for development and will have a major impact on easing the current industrial land pressures within the County. In turn it will benefit the County not only in their immediate economic development and investment attraction efforts but also in their overall economic diversification efforts.

Outside of the lands within Alberta's Industrial Heartland there is still a need to provide a supply of serviced land to support light industrial and thereby adding to Strathcona's economic development diversification efforts.

2.4 Gaining Perspectives

To gain perspective into what economic diversification meant to Strathcona County, a very thorough interview campaign was undertaken during the preparation of this report. One-on-one interviews included the mayor, all members of Strathcona County's Council, senior staff from all departments in the County, real estate professionals and several other community representatives and local economic development stakeholders.

Many of those consulted have a very good grasp of Strathcona County's economic drivers. They also understand the issues related to being an economy driven by a limited number of industrial sectors and what a more diversified economy could look like for Strathcona County. There were several perspectives on a more economically diverse Strathcona County, but most of those interviewed agreed that diversification within petrochemical and hydrocarbon would generate the greatest financial and economic benefits.

3 Process Followed

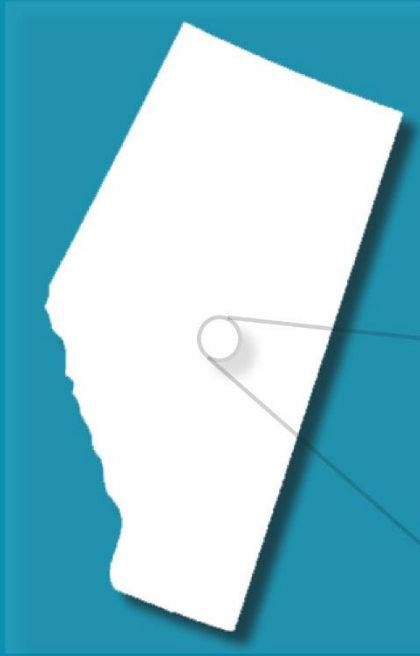
To complete this report, several steps were taken, including:



1. Situational Analysis Report included a detailed local economic review and analysis, as well as a thorough review of Strathcona County’s strategic documentation.
2. Comprehensive stakeholder interviews – 29 in total – with Strathcona County’s community and economic development leaders including:
 - Mayor and all members of Council
 - Senior managers (i.e. Commissioners, Directors) representing all Departments (except Parks & Rec)
 - Chamber of Commerce
 - Strathcona Industrial Association
 - Former EDTAC committee members
 - Real Estate.
3. Preparation of the Strathcona County Economic Diversification Review report.

4 Local Economic Highlights

Geographic:



Located in the centre of Alberta's energy and agricultural heartland and situated just to the east of the City of Edmonton, Strathcona County is a successful and vibrant community of 99,000 residents. The oil and gas industry, including processing and supporting industries, drive the local economy.



Alberta

Total provincial population:
4,209,546

Strathcona County

Total municipal population:
99,000

50%

of labour force commutes into Strathcona for work



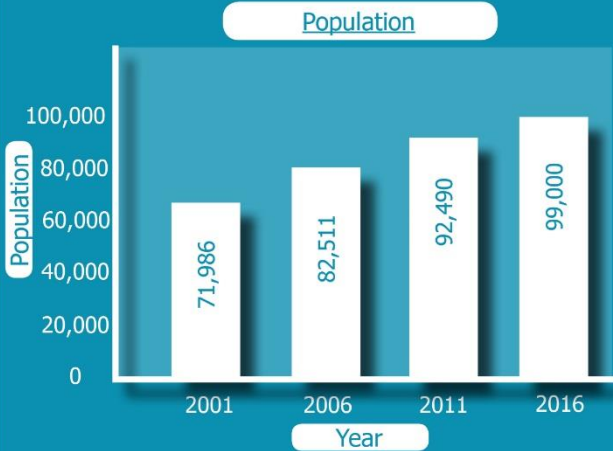
65%

of resident labour force commutes out of Strathcona for work



Demographic:

Strathcona County is home to a growing population, with a growth rate is slightly above the Edmonton CMA and provincial rates. The community is slightly older than the provincial average. Residents of Strathcona are less likely to move and newcomers are more likely to be from other parts of Alberta, rather than elsewhere in Canada.



Population by Gender

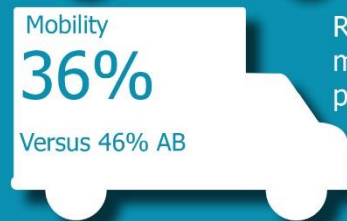


41 Median Age

Alberta median age is 38



Residents that had moved within the previous year



Residents that had moved within the previous 5 years

Labour Force:

Participation

76.3%

Alberta 73.0%

Employment

72.3%

Alberta 67.3%

Unemployment

5.3%

Alberta 7.8%

Strathcona County's participation and employment rates are above those of Alberta, while the unemployment rate is lower. Income levels are higher than those of the province. Major industries include Construction, Retail trade and Health care and social assistance.

*Note the data here relates to the resident labour force.



Median income:

\$54,437

Alberta is \$42,732

Average income:

\$82,716

Alberta is \$66,430

Key Sectors by Industry



Construction (12%)



Retail trade (10%)



Health care & social assistance (10%)



Educational services (8%)



Professional, scientific & technical services (8%)



Manufacturing (7%)

Key Sectors by Occupation



Business; finance & administration (18%)



Sales & service (17%)



Trades; transport & equipment operators & related (17%)



Management (14%)

5 Strathcona’s Micro Economic Analysis Summarized

The following section highlights some of the observations and data found in Strathcona’s Situational Analysis. For a more detailed compilation please refer to Strathcona’s Situational Analysis.

5.1 Demographics

The following information is derived from Manifold SuperDemographics 2016. Detailed data can be found in the Strathcona County Situational Analysis.

5.1.1 Population

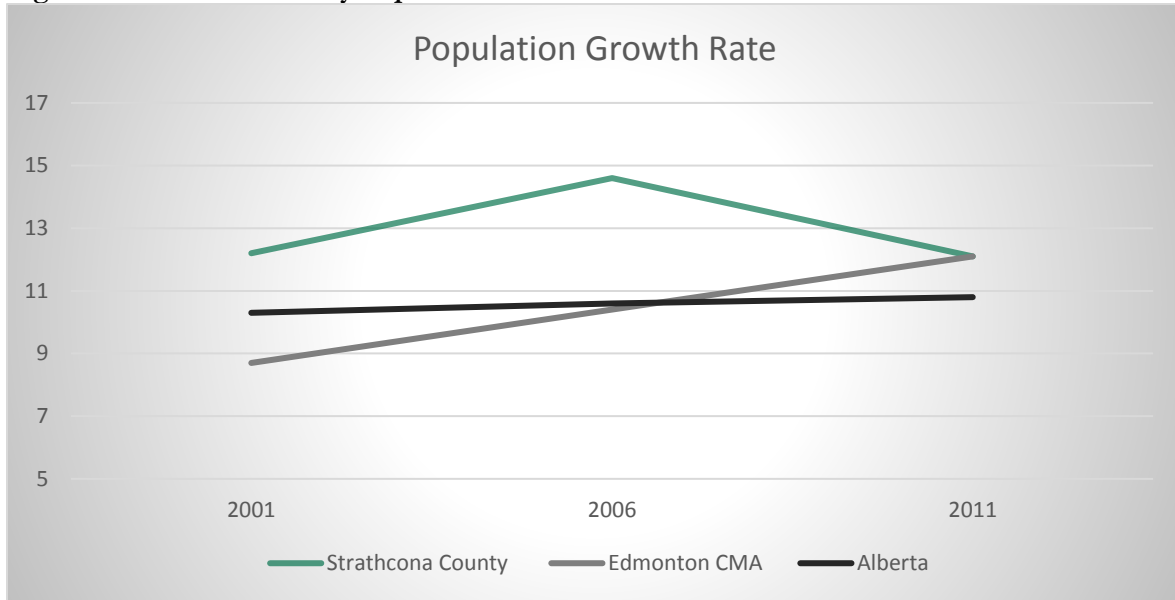
Strathcona County’s 2016 population is approximately 99,000 residents. Looking at the past three census periods, 2001, 2006 and 2011, there was constant population growth. Over these same Census periods, the county grew by 38.9% and Alberta by 31.7% from 11,410,046 to 12,851,821.

Table 1: Population Growth, 2001-2015

	2001	2006	2011	2016*
Strathcona County Population Count	71,986	82,511	92,490	99,000
% Change from Previous Census	12.2	14.6	12.1	
Edmonton CMA Population Count	937,845	1,034,945	1,159,869	1,369,278
% Change from Previous Census	8.7	10.4	12.1	
Alberta Population Count	2,974,807	3,290,350	3,645,257	4,209,546
% Change from Previous Census	10.3	10.6	10.8	

Source: McSweeney & Associates from Statistics Canada Census data 2001, 2006, 2011. * Estimates of Total Population (versus Census population) Manifold Data Mining Inc. SuperDemographics 2016.

Figure 1: Strathcona County Population Growth Rates versus Alberta and Edmonton



Source: Statistics Canada 2001, 2006, 2011 *Estimated McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2016 and not directly comparable to Census data.

Overall, the County’s age profile is an older population than that of Alberta. The 2016 median age of 41 is higher than the provincial median of 38, as is the average age of 40 versus the provincial average of 39. The 45-54 age segment is the largest of all age segments in Strathcona County, while in Alberta the largest is the 30-34 age segment.



What We Heard

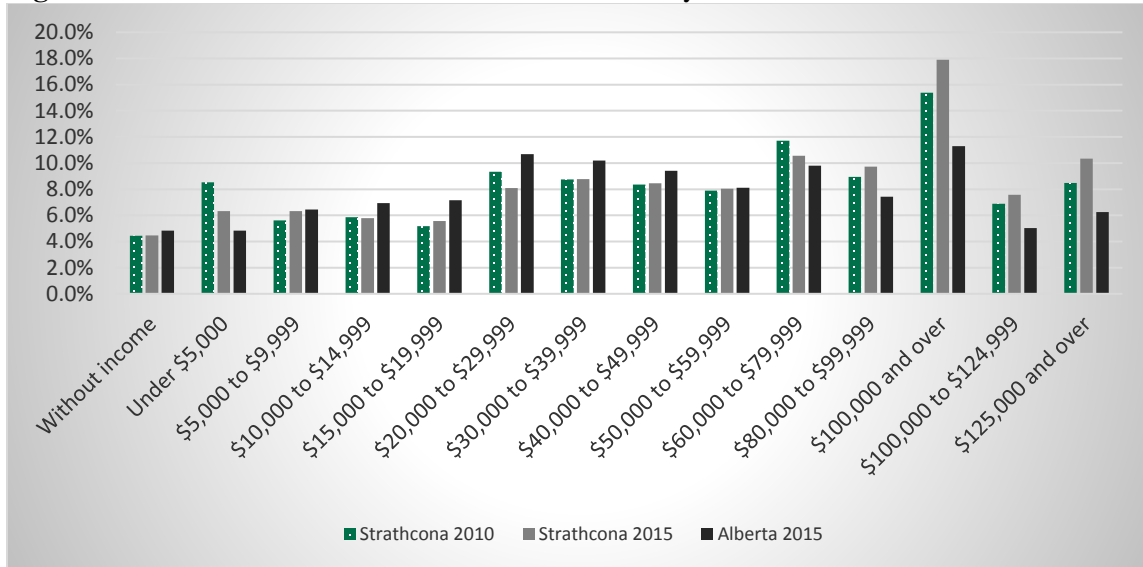
In general, most interviewed understood Strathcona County to be a slightly older, more established, well-to-do community with higher than average incomes. Although there are young families in the community, it appears that affordability is an issue for those just entering the workforce or those looking at entering the housing market for the first time.

Viewed as a very safe community by almost everyone interviewed, most agreed that not all those living in Strathcona County actually work in Strathcona County but instead commute to other areas of the Greater Edmonton Region for work.

5.1.2 Income Levels

In 2015, the County’s average income was \$82,716 and the median income was \$54,437. The median and average household incomes were \$125,489 and \$165,451, respectively. The median and average household and family income levels were all higher in Strathcona County than in Edmonton CMA, or Alberta. Compared to Alberta, the percentage of Strathcona County residents making more than \$40,000 annually was 72% compared to 57% Alberta. There has been little change in the income levels since 2010. The largest percentage of Strathcona County’s income level was the income segment \$100,000 and over annually. This is also true for the province.

Figure 2: Total Individual Incomes - Strathcona County Income Levels Versus Alberta, 2010/2015



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2016 (2015 incomes).

5.1.3 Levels of Education

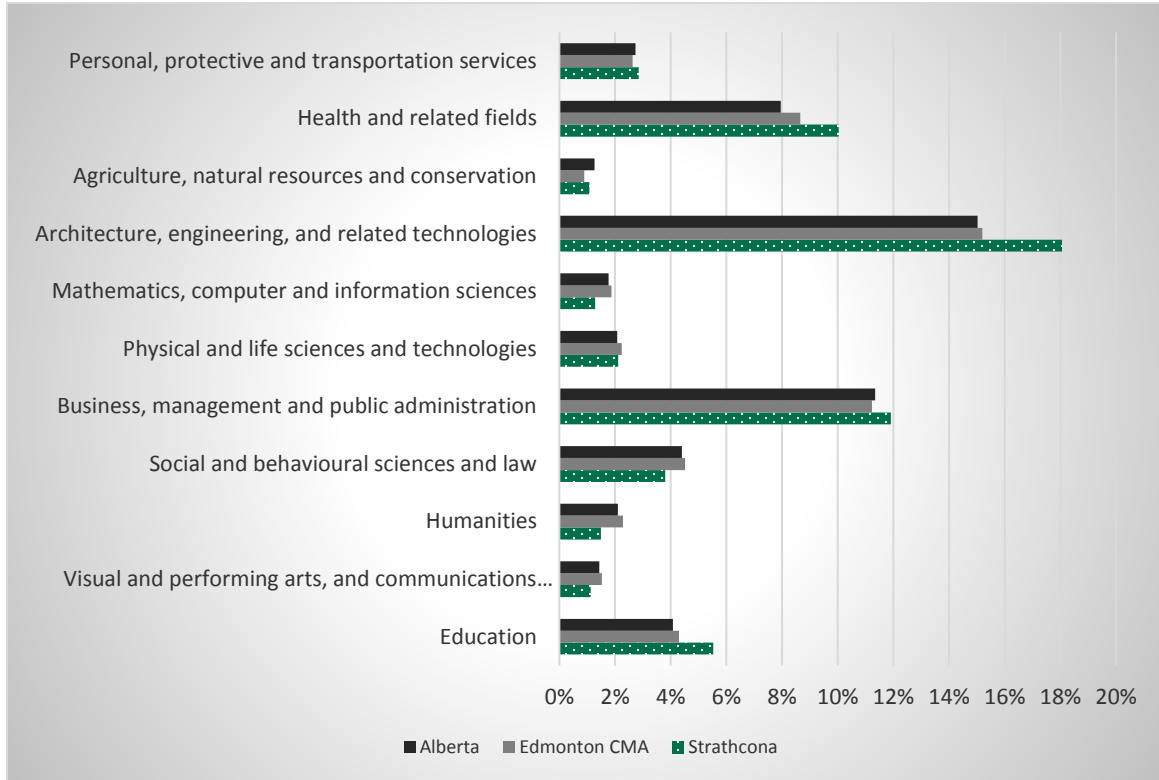
In 2016, the percentage of Strathcona County residents who had only a High school diploma or equivalent is the same as the provincial percentage (23%). The County has a higher percentage of residents with post secondary education, specifically higher attainment in Apprenticeship or trades certificate/diploma and college than Alberta.

In Strathcona County, the largest field of post-secondary study by percentage was Architecture, engineering and related technologies¹ - this percentage was higher than that of Alberta. Strathcona County also demonstrated a higher percentage of residents with education in Personal, protective and transportation services, Business/administration, Education as well as Health and related fields.

¹ This field includes: Architecture and related services; Engineering; Engineering technologies and engineering-related fields; Historic preservation and conservation; Construction trades; Mechanic and repair technologies/technicians; and Precision production.



Figure 3: Strathcona County Field of Post-Secondary Education Versus Alberta & Edmonton CMA, 2016



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2016

What We Heard

What was gleaned from interviews was very consistent with the stats and data reporting on Strathcona County’s income levels and level of education. In general, it is a commonly held view that Strathcona County is a wealthy community with higher than average household incomes.

That said, the interviewees also noted that often the household incomes are higher as there are normally several wage earners in the household and although reported as having higher than average incomes, Strathcona does have a segment of its population that are not as well off financially as the numbers suggest. These individuals and families do need the support and assistance of the community.

5.1.4 Strathcona County's Residential Make Up

In 2016, the percentage of Strathcona County residents (10.6%) that had moved within the previous year was less than the percentage of “movers” in Alberta (15.5%). People moving to Strathcona County were much more likely to be relocating from other parts of Alberta as opposed to moving from outside of the country or province. The percentage (63.7%) of Strathcona County residents that had moved within the past five years was lower than the percentage of “movers” in the province (54.3%). People moving to Strathcona County within the last five years were more likely to be relocating from within the province as opposed to moving from outside of Alberta.

The percentage of residents that speak only French in the County (1.7%) is about the same as Alberta (1.8%). Over 98% of residents in Strathcona County speak English, which is above the provincial average. Most Strathcona County residents are of North American (non-Aboriginal) and European origins.

Table 2: Strathcona County Residents Area of Origin Versus Alberta

Area of Origin	Strathcona County	Alberta
North American Indigenous origins	5.4%	8.2%
Other North American origins	26.6%	24.0%
European origins	86.2%	71.3%
Caribbean origins	0.5%	0.8%
Latin, Central and South American origins	1.0%	1.7%
African origins	1.0%	2.7%
Asian origins	5.8%	16.7%
Oceania origins	0.4%	0.4%

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

Note: the above table represents the sum of persons who reported single ethnic origins and multiple ethnic origins in the census; therefore, percentages do not add up to 100%. The County's ethnic makeup is lower in Indigenous residents and North American origins than the Provincial makeup.

According to Manifold Data Mining Inc. estimates, the total number of dwellings in Strathcona County increased from 28,650 in 2006 to 36,418 in 2016. The average value of dwellings in Strathcona County increased from \$323,857 in 2006 to \$498,434 in 2016, which is above the provincial average for 2016 (\$486,907).

What We Heard

Not surprising, and also reflected in the comments and observations of the interviewees, Strathcona County is not yet very culturally diverse, but efforts are being made to be more inclusive and diverse.

5.2 Labour Force

5.2.1 Key Labour Indicators

In 2006, 2011, and 2016, the labour force participation rates and employment rates were higher in Strathcona County than the provincial rates. The unemployment rate in Strathcona has risen since 2006 and but is below the Alberta rate.

In 2016, a larger percentage of Strathcona County's resident labour force worked in the following industries as compared to Alberta:

- Public administration
- Educational Services
- Professional, scientific and technical services
- Finance and insurance
- Wholesale trade
- Manufacturing
- Construction
- Utilities.

In comparison to the province, the Strathcona County has larger percentages of its labour force working in the following occupations:

- Occupations in education, law and social, community and government services
- Trades, transport and equipment operators and related occupations
- Occupations in manufacturing and utilities
- Natural resources, agriculture and related production occupations.

In 2011, 65% of the workers living in Strathcona County had a usual place of work outside of the community, while 50% of workers declaring a usual place of work in Strathcona County did not live in Strathcona County. Most of the local resident labour force who worked outside of Strathcona County commuted to work in Edmonton and the City of Fort Saskatchewan.

What We Heard

The main comments received concerning labour force didn't pertain to the types of jobs/workforce in Strathcona County, but instead to the difficulties accessing and retaining labour during the periods of economic growth. Due to the high wages in the petrochemical and hydrocarbon sector, there was a feeling that often when economic times are good, other lower-paying jobs are hard to fill and employee retention becomes an issue.

Workforce attraction and retention then will be an issue to consider as a part of Strathcona County's future economic diversification efforts.

5.3 Economic Base Analysis

Note: Data for this analysis relies on Canadian Business Pattern data prepared by Statistics Canada. The boundary of Strathcona County utilized to compile Canadian Business Pattern data does not align with the actual municipal boundary, excluding a substantial area of employment in Sherwood Park. This results in an under-count of employment/jobs in Strathcona County, which particularly under-estimates the employment in the petrochemical and hydrocarbon sector. No adjustment is possible, and so the job/employment numbers reported in this section underestimate the actual jobs/employment, particularly in the petrochemical and hydrocarbon sector and related industries.

In addition, and according to Statistics Canada, economic data for a community is gathered through the use of postal codes. In Strathcona County (most notably in Alberta's Industrial Heartland and the Strathcona Industrial Area), there are major refineries and industries whose postal codes identify these businesses as being in either Fort Saskatchewan (T8L 1A1) or Edmonton (T8H 2G2). As such, the data reported by Statistics Canada in these specific areas is erroneously reported as being in communities other than Strathcona County. This in turn makes the Canadian Business Pattern data as collected and reported by Statistics Canada incorrect as it relates to number of jobs in Strathcona County. As a result, the Employment Profile and Location Quotient Analysis reflect these inaccuracies.

5.3.1 *Employment Profile*

Of the estimated 48,132 jobs in Strathcona County, 10,506 jobs are in the construction sector making it the largest employer in the County. Retail is the second largest employer with 7,971 jobs in the local economy.

5.3.2 *Location Quotient Analysis— Sectors*

Note: Location Quotient is used to quantify the concentration of a particular industry within a community compared to the province or country based upon the relative number of jobs within that industry. This helps to identify unique attributes of the community.

High location quotients identify local economic strengths (higher than average number of jobs when compared to the province or national averages) and are therefore of primary interest in local economy analysis.

Compared to Alberta and Canada, sectors in Strathcona County with a higher than normal concentration of jobs were:

- Agriculture and forestry
- Construction
- Retail
- Holding companies
- Education Service
- Professional, scientific and technical services.

5.3.3 *Location Quotient – Subsectors*

Sub-sectors with high concentrations compared to Alberta and Canada are as follows:



- Heavy and civil engineering construction (4100 jobs)
- Motor vehicle and parts dealers (1486 jobs)
- Waste management and remediation services (433 jobs)
- Personal and laundry services (1118 jobs)
- Construction of buildings (2460 jobs)
- General merchandise stores (1482 jobs)
- Truck transportation (750 jobs)
- Management of companies and enterprises (1875 jobs)
- Specialty trade contractors (3,946 jobs).
- Professional, science and technical services (4253 jobs).

5.3.4 *Location Quotient – Industries*

In terms of jobs at the industry level, the following industries have very high concentrations:

- Non-residential building construction
- Utility system construction
- Other heavy & civil engineering construction
- Foundation, structure & related contractors
- Building finishing contractors
- Automobile dealers
- Specialized freight trucking
- Accounting, tax prep. & bookkeeping services
- Architectural, engineering & related services
- Management of companies & enterprises
- Services to buildings & dwellings
- Elementary & secondary schools.

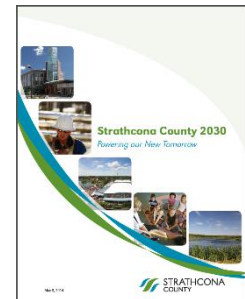
6 Strategic Document Review

Several strategic documents and reports were reviewed during the preparation of this report, but four specific documents stood out as being most relevant to Strathcona County's diversification efforts. These documents included:

- Strathcona County 2030 Powering our New Tomorrow (2014)
- Strathcona County 2013-2030 Strategic Plan for Strathcona County (2016)
- Strathcona County Competitive Ready Seal (2015)
- Strathcona County Foreign Direct Investment Strategy (2015)
- Strathcona County Economic Development and Tourism Business Plan (2016).

6.1 Strathcona County 2030 Powering Our New Tomorrow (2014)

As an overarching Council strategic planning framework, this document aligns Corporate activities to achieve Council's vision. Used as the County's principal guiding document for governance, community development, infrastructure and service delivery, this strategic document directs all the County's long-term planning efforts.



Specific to economic diversification, major directions include:

- Strathcona County being a world leader in petrochemical cluster;
- A focus on Agri-business;
- Promoting Strathcona County locally, nationally and internationally as a place that is open for business and investment.

This document is important to the County's diversification efforts as it sets the direction for the Strathcona County Economic Development and Tourism team to pursue diversification initiatives focused on petrochemical and agricultural businesses.

6.2 2013-2030 Strategic Plan for Strathcona County

Updated in June 2016, this Strategic Plan for Strathcona County lays out community priorities to ensure that when Council and Administration make decisions (ie. Budget, planning, economic development, etc.) they have a guiding document to assist in providing directions and rationale. Containing a community vision, this strategic document also identifies twelve (12) strategic priorities, a planning framework for Council as well as County-wide priority areas.



In terms of economic diversification, this tactical document is a critical piece of Strathcona's economic diversification efforts as it identifies two very important strategic priority areas for Strathcona County:

Priority area: World leader in petrochemical cluster

As a world leader in the petroleum industry, we create favourable conditions in our County to enable and stimulate economic growth. Through our policies, civic alliances and private partnerships, we support a positive business climate in which to advance petrochemical development in our community.

We ensure critical infrastructure (such as transportation, water and sewer) is available, that land is zoned for industry, and use efficient permitting processes to encourage industry investment and expansion. We support workforce education and training, and work collaboratively with local educational institutions to meet future economic needs.

To help position our County for long-term success and gain real momentum in the global arena, we advocate to all levels of government, and the public, to raise awareness of the growing demand for our petrochemical products.

Strategic goal

Increase and diversify the petrochemical business

Outcome

A diversified energy sector is leveraged through Strathcona County's advantages, providing a resilient tax base, innovative opportunities and a variety of jobs

Priority area: Diverse economy

To help diversify the economy, and attract and retain large and small business to the community, we encourage innovative businesses that embrace future technologies. We continue to invest in our natural capital and promote locally-produced food and sustainable practices.

Strategic goal

Increase and diversify agricultural business

Outcome

Strathcona County supports primary agricultural opportunities, while fostering an environment for innovative and value-added agricultural business

Strategic goal

Promote Strathcona County locally, nationally and internationally as a place that is open for business and investments

Outcome

Continuous investment and business growth in Strathcona County reflects its standing as a competitive and attractive business environment

6.3 Strathcona County Competitive Ready (2015)

In 2015, the Strathcona County Economic Development and Tourism team underwent a thorough program critique and investment readiness review process to attain a Competitive Ready Seal for the County. Though successful in achieving the Competitive Ready Seal, the process did uncover three specific areas that needed significant improvement. These three areas included:



1. Availability of a sufficient supply of serviced industrial land;
2. An adequate website for economic development and investment attraction purposes;
3. Sufficient information and data organized in a template ready for customization in response to investment enquiries.

In terms of items that would specifically limit Strathcona County’s economic diversification efforts, industrial land is the most important. As outlined in the Competitive Ready Seal approval letter issued pertaining to industrial land included:

- Strathcona has a very limited supply of heavy industrial lands available on the market, with a rather concentrated ownership, to the extent that the supply and availability would normally be judged to be insufficient to meet potential market demands and to sustain a competitive market supply condition. This is however offset by the following facts:
 - heavy industry is a target industry;
 - plastics and biochemicals are secondary targets, and these uses will typically be co-located with their upstream feedstock processor. There is substantial availability of developable lands from existing users that could be used for these projects and companies if they are judged by the existing companies as being compatible and non-competitive to their current use of the land.
- Strathcona has a limited supply of available shovel ready lands designated for medium industrial uses.
- Strathcona has a very limited supply of available light industrial land – insufficient to meet demands and a competitive supply situation in a municipality the size of Strathcona. This is offset somewhat by the current availability of light industrial/office space available for lease, spec space, and limited build to suit opportunities.

As such, the availability of serviced and heavy industrial zoned land is one of the major challenges that will limit Strathcona County’s economic diversification efforts.

6.4 Strathcona County Foreign Direct Investment Strategy (2015)

Strathcona County’s Foreign Direct Investment Strategy (2015) identified four key target areas that demonstrated high potential for industry growth. All four of these targets relied on oil, gas and petrochemicals as the base for the feedstocks available and are examples of diversification within the oil and gas and petrochemical sectors:

- Plastics
- Paints, Coatings, Solvents and Biochemicals
- Bioplastics
- Digital Oilfield.

A fifth opportunity which falls outside of oil and gas and petrochemicals was Logistics & Distribution. Although examined as a potential opportunity in 2015, it was determined to have only medium to lower potential. With the recent completion of the Anthony Henday ring road, Strathcona County, most notably areas within Sherwood Park, will have improved access to and



around the Edmonton region. As such, any industrial lands with improved access due to the completed ring road will have a competitive advantage in terms of attracting those local businesses or industries that rely on trucking, ground shipping or logistics – including the logistics and distribution industry.

6.5 Strathcona County Economic Development & Tourism Business Plan (2016)

Following Council's vision and strategic plan (Municipal Development Plan, Economic Sustainability Framework and Implementation Plan) the Strathcona County Economic Development & Tourism (SCEDT) Department's mission includes striving to support a strong diversified and resilient economy. Economic diversification is built into the Department's guiding principals and makes up a key directive to Strathcona's economic development efforts. In addition, the Department's core functions are not focused on any specific industry or sector, but instead are focused on actions that would support diversification efforts.



7 Stakeholder Perspectives

As a part of the process to complete Strathcona County's Economic Diversification Review, a major undertaking included consultation with Strathcona's main economic development stakeholders. This included one-on-one interviews with all of Council, the County's senior management team, members of the Strathcona County Economic Development and Tourism team, and other economic development stakeholders including representatives from real estate, the Alberta's Industrial Heartland, Chamber of Commerce, etc. In general, conversations revolved around specific questions that focused on economic diversification and what specifically economic diversification meant for Strathcona County. A summary of the stakeholders' perspectives on Strathcona County's economic diversification is found below.

1. What does the terms economic diversification mean to you?

Generally, those interviewed understood the current impacts oil, gas and petrochemicals have on Strathcona's economy. Beyond that, opinions on what economic diversification means were mixed. The responses can be categorized into two views:

- Diversify within oil, gas and petrochemical to build off existing strengths and add more downstream processing past just refining and processing.
- Diversify into other segments of the economy such as more tourism, agriculture, manufacturing and more environmentally friendly industries.

2. What would a more diversified economy for Strathcona County look like?

There was more consensus around the concept that a more diversified economy included building a more complete community. Economic diversification often included building a community that was more complete, including various types of housing to accommodate differing income levels as well as a wide-ranging business and industry make-up, outside of oil, gas and the petrochemical sectors. Most consulted understood that Strathcona County was part of the larger Edmonton Capital Region but felt that Strathcona was a unique and individual community and not simply a suburb of Edmonton. As such, economic diversification often looked at Strathcona County as being its own local economy.

3. Any thoughts on how a more diversified economy for Strathcona County can be achieved – become a reality? What needs to be done?

This question was the most difficult for interviewees to answer. The one constant response was that there is a need for Strathcona to remain focused and that any diversification efforts be built off local strengths. Look long-term and begin planning or implementing actions for community building and economic diversification now.

4. Diversification is typically a 30 to 50-year process. Is that realistic or something that can be achieved?

Those consulted felt that diversification is realistic and achievable. They also acknowledged that it would be a difficult process. The need to remain focused on diversification, and the need or ability to focus during any periods of both boom and bust, was an often heard comment.



8 Diversification Strengths, Weaknesses, Opportunities, Threats

The following is a summary of the Strengths, Weaknesses, Opportunities and Threats (SWOT) that was prepared by analyzing the Situational Analysis, a detailed document review and the input from the Strathcona County one-on-one interviews. Grounded in the research, analysis and consultation, the following SWOT summary has been crafted.

Strengths - Does Strathcona County have what it takes create a more diversified economy?

- Located within the Greater Edmonton Region
- Specialized municipality – urban and rural mix
- Known world leader in oil, gas and petrochemical
- A main partner in the Alberta’s Industrial Heartland
- Municipality is forward thinking, has completed several strategic initiatives and understands the need to plan ahead
- Lead by a Council and Senior Management team that understands the impacts the oil, gas and petrochemical sectors have on the community
- Very sophisticated, knowledgeable and successful Economic Development program
- Exceptionally well maintained local road infrastructure
- Large and intensive end users in the Strathcona County portion of the Industrial Heartland – mainly oil and energy based
- Feedstock from oil, gas and petrochemical to supply further downstream processing
- Sherwood Park offers high-end residential, commercial and industrial areas (although nearing buildout in some areas)
- Sherwood Park has a reputation as being an exclusive high-end residential community
- Growth in commercial and retail over the past several years
- Strathcona County is currently planning for future expansion of Sherwood Park to allow for future growth
- Fully serviced urban commercial and industrial land within Sherwood Park (water, sewer, electrical, natural gas, high speed broadband)
- Comprehensive transportation networks:
 - Connected to main Canadian National (CN) and Canadian Pacific (CP) rail lines
 - Located on main TransCanada highway 16 with easy access to Edmonton and the surrounding region through comprehensive road network
 - Sophisticated and well planned pipeline network with room for growth and added capacity
 - Easy access to Edmonton International Airport
- Infrastructure is best suited for processing and manufacturing within petrochemical and hydrocarbon sector but would also support general manufacturing and other types of processing
- Community and recreation assets complement growth in sports tourism
- Growing inventory of hotel rooms and restaurants support growing sports tourism and business tourism sectors
- Several local eco-tourism assets (i.e. Bird watching, hiking, camping, etc.)

- Direct access to natural environment/eco-systems and landscapes
- Excellent and thorough Agriculture Master Plan
- Strong agricultural sector (largest land user in the County)

Weaknesses - What are the items hindering Strathcona County from a more diversified economy?

- Availability of reliable data. The Situational Analysis Report created for this diversification review uncovered an error in how the workforce/labourforce data is collected by StatsCanada. The statistical information for Strathcona County is incomplete as StatsCanada does not separate Strathcona County from the Alberta's Industrial Heartland. It therefore is very difficult to get accurate and reliable information on the manufacturing and secondary processing employment numbers for Strathcona County
- Currently there is limited availability of shovel ready land – heavy, medium and light industrial
- Housing stock focused on upper end, single detached dwellings – not yet a diversified complement of housing available to accommodate other income classes. May impact accessing labour
- A large portion of those consulted did not appreciate or understand the reasoning of why diversification within oil, gas and petrochemicals should be a main focus of Strathcona's diversification efforts instead of moving into other economic sectors (i.e. Agriculture, manufacturing, logistics, etc.)

Opportunities - Are there areas that Strathcona County could improve that would enhance its economic diversification efforts?

- Better, more consistent and focused communications of the benefits of diversifying within oil, gas and petrochemical. Why it just makes sense.
- Continue long range community and economic planning to include strategic industrial land planning and development
- Undertake research, analysis and strategic action planning focusing on labour force development to ensure Strathcona County understands the issues related to securing and retaining the right workforce to support any existing and/or new industries

Threats - What items threaten Strathcona County's move towards a more diversified economy?

- The only real threat is Strathcona County's capacity to stay focused on evolving to a more diversified economy. Raised as an issue during the consultations, diversification is a long-term process and due to the highs, lows and booms of Strathcona's current economic climate it may prove very difficult to stay focused on industries outside of Strathcona's current economic base.

9 Economic Diversification Observations

McSweeney & Associates developed the Formula for Economic Development Success® to better simplify and to have order to the many ongoing activities that take place within the realm of economic development. The Formula for Economic Development Success involves people and organizations working in collaboration, to apply leverage to the economic development process, to inspire economic sustainability in communities. To better understand Strathcona County's current state of economic diversification readiness, this model will be used to assist in the review and discussion.

Formula *for* Economic Development Success™



Broken further into its separate components:

1. **People:** The right attitude and belief of people and organizations that they can affect change resulting in growth and sustainability
2. **Process:** The McSweeney E.D. Process Wheel indicates a logical build order for economic activities. **Preparing** activities are fundamental, upon which **Strategizing** activities can occur, all of which support **Economic Doing**™ activities that are core to economic development, such as business visitation and investment attraction.
3. **Power of Economic Development® :** is to increase the economic sustainability (and quality of life) by keeping, growing, and getting businesses that succeed – thereby supporting other aspects of community development.

With regard to the Strathcona County economic diversification review, both the *People and Process* portions are applicable.

9.1 Strathcona County Economic Diversification from a People Perspective



When reviewing economic diversification from a People perspective, the major aspect that needs to be examined is Economic Development Leadership, including elected officials, Strathcona staff and leaders in the business community and workforce.

A major component of this review was consultation with Strathcona County's economic development leaders. This included in-depth conversations focused on economic diversification with all of Strathcona County's elected officials, senior municipal staff representing all of Strathcona's departments and business leaders including Chamber of Commerce, real estate, and members of Strathcona's Economic Development Advisory Committee.

Currently, Strathcona County appears to be lead by a Municipal Council and senior management team that can see the big picture. It is commonly understood that Strathcona County is a community within the Capital Region that is very fortunate from a tax revenue and quality of place perspective. They also understand that the high quality of place is an expectation of their residents. In addition, most understand that Strathcona County is a financially wealthy community, but also an expensive community in which to buy a house. To add new economic sectors (outside of petrochemical and hydrocarbon processing) to Strathcona's economy to further diversify its economy would also require further community diversification efforts (i.e. multiple forms of housing). Strathcona's community leaders understood the link between economic and community diversification.

Strathcona County's Economic Development and Tourism team has a proven reputation as delivering one of the country's best and most successful economic development programs. Well connected and very experienced in economic development, Strathcona's Economic Development and Tourism team understands what is needed to create a more diversified economy and has already undertaken several steps including completing two significant reports:

- In 2015 a Foreign Direct Investment Strategy
- In 2015 a Competitive Ready Seal.

Both these reports lay the groundwork for what Strathcona County needs to do to attract more investment in a number of sectors that are well suited to Strathcona's strengths and competitive advantages.

In general, most people we consulted understood the economic importance of the energy and petrochemical industry in Strathcona County. As reported in Strathcona County's 2015 FDI Strategy, 75% of petrochemical refining in Western Canada is in Strathcona County. This represents not only a major economic driver for Strathcona County but also a major strength that could be leveraged to assist Strathcona in its economic diversification efforts.

It is logical for Strathcona County to continuing focusing the majority of their diversification efforts within the petrochemical and hydrocarbon sector for several reasons:

- Strathcona County is already a major player in this sector and has the reputation of being a world leader.
- Infrastructure is already in place (work needs to be done to ensure available land and workforce).
- The feedstock to support second and third level processing within petrochemical and hydrocarbon processing is already in Strathcona County.
- The petrochemical and hydrocarbon sector not only generates higher paying jobs than other sectors but also generally result in properties and investments that generate a higher level of taxes to the municipality than other economic sectors.

The above points were not clearly understood by all stakeholders interviewed, but at the same time most everyone interviewed welcomed the opportunity to create a more diversified economy that would ease the dramatic highs and lows that are often associated with an economy solely reliant on one industry.

In an ideal world, Strathcona County would have unlimited resources to allocate to economic development, have an unlimited supply of affordable shovel ready land to support investment opportunities and an endless supply of affordable labour to support industry labour needs. Unfortunately, this ideal is never reflected in reality. For Strathcona County, economic development resources are limited, marketable shovel ready land is often in short supply and labour is always subject to supply and demand issues.

If we look at Strathcona County’s economic diversification from a *Process* perspective, it becomes fairly evident that Strathcona is well positioned with the exception of a few areas:

- Update to date employment data (mainly labour and workforce data from the Alberta’s Heartland)
- Labour force analysis and availability
- Available shovel ready employment land.

9.2 Strathcona County Economic Diversification from a Process Perspective

The *Process* wheel represents the notion that the work of economic developers is never finished. Projects need to be revisited and refreshed to ensure the local economy is healthy. Each colour denotes a different category of action. Below is the visual representation of the formula.

Breaking down the McSweeney E.D. *Process Wheel* illustrates a logical order of economic activities. **Preparing** activities are fundamental, upon which analyzing and **Strategizing** activities can be applied, all of which support **Economic Doing™** activities that are core of economic development, such as business visitation and investment attraction.



1. **Preparing:** These activities form a strong foundation for economic success and include: current year data; economic profile; sufficient supply of employment lands; available property inventory; maps, and economic development website.
2. **Strategizing:** One of the great challenges of economic development is focus. Analyzing and strategizing activities (such as preparing an economic development strategy) provide the focus required to achieve the greatest return on investment of economic development resources.
3. **Economic Doing@:** These are the pay-off activities (such as BR+E, investment attraction) whereby economic development officers interact directly with businesses to help them prosper. Preparing and Strategizing activities enhance chances of success.

In terms of the Strathcona County's Economic Diversification from a *Process* perspective, there are several items that the County already has in place that is currently assisting their diversification efforts.

Preparing: One of the main areas of the *Preparing* phase is understanding what Strathcona County is all about and understanding economic foundations. Data is a major component of the this *Preparing* phase and Strathcona County does an excellent job sourcing data and information and tracking success of business and the growth and evolution of its business community. The only critique relating to data that Strathcona is lacking is getting more accurate job data relating specifically to the Alberta's Industrial Heartland. Due to how StatsCanada collects and reports data within Alberta's Industrial Heartland, there is incomplete information pertaining specifically to Strathcona County. Having accurate and up to date data would assist Strathcona in its planning and reporting efforts.



Other areas within the *Preparing* phase that have been completed, are strengths for Strathcona County and will assist in its economic diversification efforts include:

- Economic Profile
- Economic Development Website
- GIS Mapping and Data system
- Mapping
- Property Inventory
- Industrial Lands Strategy
- Retail Market Analysis
- On-going economic development updates and outlooks.

Analyzing and Strategizing: Analyzing and strategizing activities really examine where a community wants to go in the future and what type of community they want to remain or become. In Strathcona County's case much work has been done in trying to best understand where Strathcona wants to be in the future. This includes both economic and community development outlooks both from a local and more recently a regional level as well.



From a pure economic development diversification perspective Strathcona County has undertaken several very important strategies and reviews including:

- An FDI Strategy
- A Competitive Ready Seal
- Detailed demographic analysis (as a part of Situational Analysis prepared for this review)
- Economic Sustainability Framework
- Strathcona County Corporate Business Plan (2015-2018)
- Strathcona County 2030 – Powering our New Tomorrow
- Agricultural Master Plan.

In light of the above strategies and reviews, the only area that seems to be lacking in terms of economic diversification is getting a better understanding of the current and future labour and workforce needs of the area. Although not documented in any reports or strategies, workforce issues were raised several times during the consultations. More specifically the issues impacting labour are more focused around the availability and cost of labour associated with the oil, gas and petrochemical as well as the impacts on retention and availability of labour for those sectors outside of oil, gas and petrochemical.

The main issue pertaining to labour appears to be the highest wages being paid in the oil, gas and petrochemical sectors and the pressure that creates on any other sectors that require similar labour. An example of costs related to industries in Alberta is found in Appendix A.

Economic Doing™: The final phase in the *Process* is *Economic Doing™*. This phase examines where Strathcona County begins to interact with the economy and with the business community. In summary, Strathcona County does an excellent job understanding and connecting with its business community. Whether it is through its BR&E program, or working one-on-one with its local businesses, Strathcona's Economic Development and Tourism team is very well known and very well connected within the local and regional business community.



The main issue identified that will limit Strathcona's diversification efforts is the current and future availability of shovel ready/market ready industrial land. As outlined through the Competitive Ready Seal program, Strathcona County, whether looking to diversify within the oil, gas and petrochemical sectors or to other economic sectors (i.e. manufacturing, food processing, etc.), is currently lacking industrial land.

As noted earlier:






- Strathcona has a very limited supply of heavy industrial lands available on the market, with a rather concentrated ownership, to the extent that the supply and availability would normally be judged to be insufficient to meet potential market demands and to sustain a competitive market supply condition.
- Strathcona has a limited supply of available shovel ready lands designated for medium industrial uses.
- Strathcona has a very limited supply of available light industrial land – insufficient to meet demands and a competitive supply situation in a municipality the size of Strathcona.






As such, any continued diversification efforts will need to include addressing issues related to Strathcona’s current and future supply of industrial land.

9.3 Economic Diversification and Investment Readiness Process Components

Finally, the last factor impacting Strathcona County’s economic diversification to be considered is the community’s current state of investment readiness. As shown in the below table, the Top 10 Investment Readiness Process Components, Strathcona County is well positioned to attract investment, but work needs to be done to address the top 3 Investment Readiness Components:

- Complete and up to date data (jobs data)
- Actual locations to do business (availability of industrial land)
- People/labourforce.

Top 10 Investment Readiness Process Components		
Importance	What is it?	Why is this Important
Top 3	 Up to date data	Current up to date data is the basis for most decisions made by investors. Do not get eliminated as a result of poor or no data.
	 Actual locations to do business	For a business (investor) to expand within or relocate to your community they need an actual location (land or building) where they can operate. This may also mean having the competitive home-based business policies.
	 People/labourforce	People are the lifeblood of all communities. Most businesses need workers (people). To help local business grow or to attract new businesses they need the right people to fit their labourforce needs.
Top 5	 ED Website	Investors start their search online; if you’re community is not online, it does not exist. Once your community has the interest of an investor, make sure they can find you and contact you directly. Need to provide maps and images.
	 Profile/Asset inventory	This is not a marketing tool as much as it is a resource toolkit. This document should provide your community’s up-to-date data and basic answers any potential investor would ask of your local Economic Development Officer.

Top 10 Investment Readiness Process Components		
Importance	What is it?	Why is this Important
Top 10	 Communication infrastructure/ Broadband	Telecommunication infrastructure has become as important to business as hydro, gas and water. Have information available outlining the telecommunication infrastructure in your community as well as the services provided. If you are lacking adequate broadband, look to develop a strategy aimed at improving this essential service.
	 Online property inventory	A physical location to do business is necessary for a business to operate in your community. Providing multiple options to an investor and making those options easy to find online improves your chances at demonstrating that your community is a viable option for an investor.
	 How to deal with investors/ attitude	Knowing how to deal with any investor, including excellent customer service and having a positive business environment is essential in demonstrating to a potential investor that your community is where they belong. This can elevate your community above the competition.
	 ED Strategy/Action Plan	A strategy/action plan provides you with direction so that your economic development efforts are efficient and effective. The proper strategy/action plan shows an investor your community has focus and a commitment to economic development.
	 Relationships and Partnerships	Often the softer side of economic development and specifically Investment Readiness this component is all about being able to work with others. In dealing with investors you will not have all the answers to their questions, but your ability to respond quickly will make a difference and you will be relying on others to work closely with you in helping to retain or attract the investor in your community.

Appendix A: Alberta Average Hourly Wage

Alberta Average Hourly Wage Rates by National Occupational Classification Titles (NOC-S)			
Average hourly wage in Sales and service occupations: \$ 18.90	Trades, transport and equipment operators and related occupations: \$30.90	Occupations unique to processing, manufacturing and utilities: \$25.53	Occupations unique to primary industry: \$ 31.64
Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers: \$33.40	Contractors and supervisors in trades and transportation: \$37.69	Labourers in processing, manufacturing and utilities: \$20.05	Agricultural service contractors, farm supervisors and specialized livestock workers: \$20.96
Retail salespersons, sales clerks, cashiers, including retail trade supervisors: \$15.77	Construction trades : \$30.15	Industrial butchers and meat cutters, poultry preparers and related workers: \$25.36	Agricultural and fish products inspectors: \$24.88
Chefs and cooks, and occupations in food and beverage service, including supervisors : \$ 15.64	Trades helpers, construction, and transportation labourers and related occupations : \$22.07	Petroleum, gas and chemical process operators: \$44.65	Agricultural representatives, consultants and specialists: \$37.52
Accommodation, travel, tourism and related services supervisors: \$20.80	Heavy equipment operators (except crane): \$30.42	Plastics processing machine operators: \$23.92	General farm workers: \$19.93
Sales and account representatives - wholesale trade (non-technical): \$34.55	Transportation route and crew schedulers: \$27.58	Supervisors, other mechanical and metal products manufacturing: \$ 35.46	Logging machinery operators \$29.29
Hotel front desk clerks: \$15.30	Supervisors, supply chain, tracking and scheduling co-ordination occupations: \$36.87	Supervisors, petroleum, gas and chemical processing and utilities : \$61.43	Oil and gas well drillers, servicers, testers and related workers: \$35.76

Sources: <http://www5.statcan.gc.ca/cansim/a47>; <http://occinfo.alis.alberta.ca/occinfopreview/info/browse-wages.html>; <https://alis.alberta.ca/js/icr/wage.html>

