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Economic Development Council South West Nova

Five-Year Strategic Economic Development Plan

March 18, 2013

Contents

Section 1: Introduction

1 Introduction

The Economic Development Council of South West Nova (EDCSWN) represents a region of nine constituent municipalities. They include:

- Municipal District of Clare
- Municipal District of Shelburne
- Town of Shelburne
- Municipal District of Barrington
- Town of Clark's Harbour
- Town of Lockeport
- Town of Yarmouth
- Municipal District of Yarmouth
- Municipal District of Argyle

These communities are a unique area of Nova Scotia and Canada. Located at the south west tip of Nova Scotia, the area is surrounded by three water bodies: the Bay of Fundy, the Gulf of Maine and the Atlantic Ocean. The immediate proximity to the sea makes for a very large shoreline that connects the area to an international shipping system. The main provincial highways that pass through the geographic area are provincial highways 101 and 103. Collector roads 203 and 340 make the inland communities accessible. South West Nova is largely rural, but urban centres such as Yarmouth and Shelburne serve as regional commercial centres.

The region's primary industry has been built on fisheries. Unfortunately, this region has experienced population decline over the previous years as many young people have sought employment opportunities in Ontario and Western Canada. However, there are a number of actions that the EDCSWN and stakeholders can take over the next five years to sustain the local economy and livelihood of the residential population.

1.1 Objectives + Outcomes

The EDCSWN was created to facilitate development and expansion of business and economic opportunities across the region. The partners who established the EDCSWN realize that economic development in the region requires new ways of collaboration if the region is to move forward with a strong and united approach.

This strategic economic development plan will assist in informing the challenges and opportunities that confront the region and constituent communities and identify actions to ensure sustainable economic growth and investment from both the public and private sector.

Consideration has been given to a number of strategic planning documents and initiatives from the constituent municipalities that have a direct impact on the overall direction of the five-year strategic economic development plan.

1.2 Approach

This document represents a five-year strategic economic development plan for the communities of the South West Nova region, and is comprised of five major components.

- The first section consists of an economic base analysis, which describes the current state of the regional economy, and places that information in a larger economic context

- The second section reviews community input into this process, which has come from both direct one-on-one interviews with key local stakeholders, and from a detailed review of other recent consultation exercises in the region
- The third section maps out a series of emerging economic development opportunities within the region, and seeks to connect local economic and community strengths to areas of potential growth and investment
- The fourth section lays out an action plan that will assist local organizations and communities in achieving economic development goals and objectives
- The fifth and final section is comprised of series of appendices, containing information such as:
    - A detailed community-by-community economic base analysis for the region, providing data that may be used for both wider regional cooperation and more focused local efforts
    - A series of community profiles for each municipality in the region, where the labour force and business patterns and concentrations are described in detail
    - a list of stakeholders consulted during the project

It is important to note that the report includes a wide variety of data to support an economic base analysis for the South West Nova region and constituent municipalities. Every effort has been made to ensure consistent time series and that the most recent data has been used where available. In the absence of 2011 census information, the report relies on sophisticated third-party sources of demographic and economic projections, as identified in footnotes and other references throughout the document.

Section 2: Regional Economic Development Overview

2 Regional Economic Development Overview

In order to develop a comprehensive strategy for economic prosperity it is important to understand the current policy framework of South West Nova. This section provides a review of the existing economic development efforts of the region. Overall, it was seen that each of the communities within the region share similar characteristics, market opportunities and aspirations and by working together these economic goals can become achievable.

2.1 Existing Local Economic Development Efforts

The South West Nova region has been economically hard hit by the restructuring of resource-based industries including forestry and the fisheries. To combat this long-term economic decline, municipalities have developed policies and frameworks that promote a sustainable and prosperous regional economy including the diversification of the local economy to include services, tourism, education and value-added manufacturing.

In developing a comprehensive strategic five-year economic development plan for the Economic Development Council of South West Nova, consideration must be given to other significant municipal and regional initiatives and plans that will have direct impacts on the implementation of the strategy and the overall development of South West Nova in the future. A focused review of key documents was conducted to ensure effective alignment between this new economic development strategic plan and the region's existing policy framework.

In order to develop a comprehensive review of nine lower tier municipalities each municipality was grouped within their particular upper tier counties, including:

- The County of Shelburne, which consists of:
    - The Town of Shelburne
    - The Town of Lockeport
    - The Municipality of the District of Shelburne
    - The Town of Lockeport
- The County of Yarmouth, which consists of:
    - The Municipality of the District of Yarmouth
    - The Town of Yarmouth
    - The Municipality of Argyle
- The County of Digby, which has one municipality that falls within the jurisdiction of the EDCSWN:
    - The Municipality of the District of Clare

2.1.1 County of Shelburne

The County of Shelburne is situated on the southern tip of Nova Scotia. Tourism is an important sector in the area and the County of Shelburne operates a county-wide Discover Shelburne County tourism website. Many of the lower tier municipalities within the county have developed Integrated Community Sustainability Plans (ICSP) as per the requirements of the Federal Gas Tax Funding many of the communities received. Each of these ICSPs outlines a number of sustainability issues and highlights the importance of developing a robust local economy while working to protect the rural nature and culture of area as well as the natural environment[1].

In addition to these policies the Municipality of the District of Shelburne has developed a Municipal Planning Strategy in order to "establish a planning policy and regulatory framework in support of the development and management of wind energy resources within the District of Shelburne"[2]. The policy framework generally outlines that wind energy is permitted in most regions aside from within the built-up areas including the Town of Shelburne. The purpose of this policy prescription is to "enabl[e] community and small scale wind energy, while mitigating potential negative impacts of the wind turbines by minimizing risks to public health and safety and the natural environment"[3]. In addition to this policy, the Municipality of the District of Shelburne has also developed a Coastal Management Strategy which was identified as a key component of the ICSP and has been working to develop a Municipal Climate Change Action Plan.

Many of the lower tiers have also highlighted particular sectors of importance. The Town of Clark's Harbour, for example, highlights the importance of lobstering, fishing, processing and boat building as key components of their local economy. The Municipality of the District of Barrington also highlights fishing and processing as key components of their economy in addition to consumer services and forestry.

2.1.2 County of Yarmouth

The County of Yarmouth encompasses the Municipality of the District of Yarmouth, the Town of Yarmouth and the Municipality of Argyle. The Town of Yarmouth has developed a Municipal Planning Strategy (MPS) in order to "promote orderly development to ensure a high quality working and living environment while enhancing the health and vitality of the community"[4]. This plan's explicit objectives are to:

- Promote Yarmouth as a regional commercial, education, industrial and service hub
- Create a positive climate for investment in the community
- Ensure development costs are minimized and fairly allocated among the public and private sector
- Cooperate with surrounding municipalities in infrastructure development and service delivery.

In addition to the Town of Yarmouth's ICSP that was developed in 2010, the Town has also developed a 2011-2012 Report Card on the progress made to date. This document further highlights the need for responsible development to generate sustainable economic prosperity while also investing sustainably in transportation systems, public infrastructure and the health and safety of their community"[5].

The Municipality of Yarmouth has developed a MPS that highlights seven key goals and objectives:

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[1] Municipality of the District of Shelburne (2010). Integrated Community Sustainability Plan.

[2] Municipality of the District of Shelburn (2011). Municipal Planning Strategy.

[3] Ibid.

[4] Town of Yarmouth (2010). Municipal Planning Strategy.

[5] Town of Yarmouth (2012). Integrated Community Sustainability Plan – Report Cade 2011-2012.

- Residential development (particularly highlighted were concerns over incompatible land use encroachment and affordable housing)
- Environmental protection
- Municipal servicing maintenance
- Economic development (sectors highlighted include increased commercial and industrial uses as well as tourism development)
- Transportation system development
- Recreation and education programming
- General government services accessibility

Unlike most MPSs this document deals directly with social inequity and the need for increased access to affordable housing, prosperous and sustainable jobs and income, social service accessibility and rural public transit. Highlighting the importance of developing a sustainable social and economic environment in the region will need to be stressed in the five-year strategic economic development plan.

The Municipality of Argyle has highlighted sustainability and health living as key components of their policy framework. An ICSP was conducted in 2011, and most recently a Healthy Community Survey was conducted with local residents to understand the needs of local community members. The municipality's MPS and the Land Use By-law (LUB) have been under review by the Planning Advisory Committee (PAC).

The Municipality of Argyle has also developed a comprehensive economic development strategy for strengthening and diversifying their economy. This strategy particularly focuses on the need for community-based economic diversification, youth retention and attraction, improving services for local residents, promoting the areas heritage, culture and community assets and improving the local transportation system.

2.1.3 County of Digby

Within the County of Digby only one municipality is represented under the broader Economic Development Council of South West Nova: the Municipality of the District of Clare. The Municipality of the District of Clare is a largely francophone population with a total population of approximately 8,300 residents. Clare has recently hired an external consultant to develop an Economic Development Master Plan for the municipality. Within the Terms of Reference for the Economic Development Master Plan the municipality highlights a number of key strategic economic development initiatives that have been underway for a number of years. The municipality recently acquired land to develop an industrial park in the Meteghan area[6]. In addition, the Municipality of Clare recently invested a portion of its Federal Gas Tax Funds to purchase a heat and power plant located at the site of the former Comeau Lumber Ltd. in Meteghan. The idle one megawatt combined heat and power biomass plant and all of its associated equipment is now under complete ownership of the municipality which supports Clare's 2006 comprehensive plan that included an energy audit of the Municipality, identified possible renewable energy projects and outlined an implementation plan.

In addition to these initiatives the Municipality of Clare has also identified existing and emerging sectors of interest for the municipality, these include:

Existing	Emerging
▪ Fisheries	▪ Value-added manufacturing/processing
▪ Forestry	▪ Biomass/bioenergy
▪ Retail	▪ Hospitality and accommodation
▪ Personal Services	▪ Health and wellness
▪ Tourism	▪ Cultural tourism/eco-tourism
▪ Business Services	▪ Knowledge-based industries/services
▪ Agriculture	

It is important to note that while the Municipality of Clare is within the jurisdiction of the EDCSWN it has strong and predominant ties to the Digby region. The Municipality of Clare as a lower tier municipality in the County of Digby, as well as its geographic location has a number of ties to the City of Digby – which is not included in the Economic Development Council of South West Nova. In addition to these challenges of inclusion related to the Municipality of Clare it is a largely francophone, Acadian population. It does have a number of ties to the Yarmouth region, including their collaboration on the Yarmouth and Acadian Shores tourism association. The Municipality of Clare's jurisdictional reality, although able to present key challenges of inclusion in regional activities can also present key opportunities. Working as a key buffer and liaison between Yarmouth and Digby the Municipality of Clare can foster collaboration between the two regions and utilize the initiatives to further regional prosperity.

2.2 Existing Regional Collaboration Efforts

Although each of the lower tier municipalities is responsible, on some level, with economic development, there are a number of regional organizations and associations that encompass all of, or some of, the members of the EDCSWN, these include:

- Three Community Business Development Corporations, in addition to the Le Conseil de développement économique de la Nouvelle-Écosse (CDÉNÉ)
- Three tourism development organizations

Community Business Development Corporations (CBDCs):

Three Community Business Development Corporations cover the region of Southwest Nova Scotia. The Municipality of Shelburne, the Town of Shelburne, the Town of Lockeport, the Town of Clark's Harbour and the Municipality of Barrington are within the jurisdiction of the Shelburne CBDC. The Municipality of Argyle, the Town of Yarmouth and the Municipality of the District of Yarmouth are within the jurisdiction of the Yarmouth CBDC and the Municipality of the District of Clare is within the jurisdiction of the Digby CBDC. CBDCs are not-for-profit organizations, funded by the Government of Canada through the Atlantic Canada Opportunities Agency, that work to "strengthen and diversify rural communities by providing financing, business counseling and training of entrepreneurs"[7]. In terms of these services CBDCs offer:

[7] Business Services (2009). Retrieved from: www.mynovascotiabusiness.ca

- **Financial assistance**: to a maximum of $150,000 in the form of loans, loan guarantees and equity financing to existing and aspiring entrepreneurs
- **Business counselling and advice**: advisory assistance usually takes the form of guidance and coaching, and sometimes advocating on behalf of clients to other lending establishments or regulatory agencies.
- **Entrepreneurship development and training**: workshops, training seminars and one-on-one support in developing skills related to business planning, succession planning, human resources and additional skills as necessary.

Currently CBDC Shelburne operates a full-time office in Shelburne, part time offices in Barrington Passage and Lockeport and outreach services to all residents of Shelburne County. The Yarmouth CBDC is located in Yarmouth and does similar outreach work throughout the County. The Municipality of Clare's CBDC head office is located in Digby with much of the support provided in that location. In addition to the three CBDC's in the region there is the Conseil de développement économique de la Nouvelle-Écosse (CDÉNÉ). The CDÉNÉ is dedicated to enhancing the economic development and enhancement of the Acadian people within Nova Scotia. The CDÉNÉ works with the large Acadian populations and provides employment services and entrepreneurship training and support.

Tourism Organizations:

Tourism organizations within South West Nova are generally regional and collaborative. Within the South West Nova region there are three primary tourism organizations:

- **Discover Shelburne County (discovershelburnecounty.com)** is a tourism website and marketing campaign administered by the County of Shelburne in conjunction with their lower tier municipalities. Each of the lower tier municipalities is highlighted individually on the tourism website and attractions, restaurants, accommodations, festivals and events from across the county are promoted.
- **Yarmouth Acadian Shores (yarmouthacadianshores.com):** The tourism activities of Yarmouth and Acadian Shores are managed by the Yarmouth and Acadian Shores Tourism Association (YASTA), a non-profit association comprised of staff and board members. The jurisdiction of YASTA spans the region from the County of Yarmouth into the Municipality of the District of Clare. The association is comprised of government and industry officials from throughout the region and is mandated to lead tourism development through product development and marketing. Currently YASTA's high priorities include:
    - Launching a new association & sector branding and communication strategy
    - Increasing the sale of room nights, event spaced and visits to attractions through:
        - Promoting Yarmouth and Acadian Shores as an event capital
        - Direct sale activities
        - Developing a stronger partnerships with Mariners Centre and other event locations
- **Destination South West Nova Scotia:** Destination Southwest Nova Association, the Regional Tourism Industry Association (RTIA), is an industry-led, tourism management and marketing association that provides destination marketing for three of the seven provincially recognized tourism regions. The association includes the entire South West Nova region.

Non-governmental Regional Collaboration:

Communities across Nova Scotia that utilized funding from the Federal Gas Tax were required to develop Integrated Community Sustainability Plans (ICSPs) by 2010 as a key requirement of the Federal Gas Tax Agreement and the Municipal Funding Agreement with the Nova Scotia Government. Although it is true that a large number of communities within South West Nova utilized this funding mechanism, ICSPs can also be seen as an extension of sustainability tendencies in pre-existing policy. A number of key policy documents including land use and economic development policy throughout South West Nova show a commitment to sustainability, environmental stewardship and climate change mitigation and adaptation.

In conjunction with this policy framework, a number of key research projects related to climate change mitigation and adaptation have test sites throughout South West Nova. The CoastalCURA: Communities Managing Coasts Together, for example, is working across Atlantic Canada in developing research for collaborative, inclusive and community-based sustainable management of marine and coastal resources[8]. In addition to this project, the Partnership for Canada-Caribbean Community Climate Change Adaptation (ParCA) is a five year international research project spanning Jamaica, Tobago, Nova Scotia and Prince Edward Island and is investigating how small and medium sized communities along coastal areas will adapt to the impact of rising sea levels and other climatic changes[9]. The Town of Yarmouth is currently working on developing a Climate Change Adaptation Plan. By understanding both the opportunities and the challenges that climate change can place on the local community South West Nova can become a living laboratory and research center of climate change research. By partnering with non-traditional actors like researchers, environmental organizations and other non-governmental organizations South West Nova can leverage its assets and become a national leader in climate change adaptation and mitigation.

There are a large number of municipalities and collaborations occurring in the South West Nova communities. A regional economic development strategy needs to account for the existing efforts and opportunities for future collaborations/partnerships. Having explored the strategic directions for the South West Nova area's lower tier municipalities and collaboration efforts between municipalities, the next section will describe the context for economic growth in the Province of Nova Scotia. In addition, the section will explore some of the demographic, labour force and business attributes that have shaped the region.

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[8] CoastalCURA: Communities Managing Coasts Together (2011). About Us. Retrieved from: http://www.coastalcura.ca/about.html

[9] Charles, Tony (2011). Partnership for Canada-Caribbean Community Climate Change Adaptation (ParCA). Retrieved from: http://husky1.stmarys.ca/~charles/WEBPAGES/research_projects.htm

Section 3: Economic Context

3 Economic Context

3.1 National and Provincial Growth

3.1.1 Economic Trends

Nova Scotia's Real Gross Domestic Product (GDP) growth was limited to 1.2 percent (year over year growth) in 2011. Real GDP is estimated to grow by 1.7 percent in 2012 and 1.9 percent in 2013. These growth rates are low and influenced by the European sovereign debt crisis and slow economic recovery in the United States.[10] Nova Scotia's real GDP growth is slightly lower compared to Canada (1.7% in 2012 and 2.0% in 2013) and the United States (1.8% in 2012 and 2.2% in 2013). It is the emerging economies of the world (e.g. India, China and Brazil) that are projected to drive growth in the coming years. Nova Scotia's trade linkages with these regions are considerably lower than the United States and the rest of Canada. The United States continues to be Nova Scotia's most important international trading partner.[11] There has been a continued slow private-sector recovery in the U.S. and the fiscal stimulus that was used to support growth through the recession has largely been withdrawn.

The rest of Canada is also an important trading partner for the Province of Nova Scotia. Nova Scotia's trade with the rest of the country exceeded trade with other international trading partners. These strong economic linkages with the rest of Canada have a direct influence on the income and prosperity of Nova Scotians. Unfortunately, private-sector recovery in Canada has also been slow and fiscal stimulus has largely been withdrawn. The industries across Canada that have largely driven recent economic growth include mining/oil/gas, utilities, construction and transportation. Industries such as agriculture, forestry, fishing, manufacturing and retail have lagged behind.[12]

Overall, the Canadian economy has generated increased employment over the past year. Employment was expected to continue to grow by 2.1 percent in 2012 and a further 1.4 percent in 2013, adding over 600,000 jobs across Canada. As a result, the unemployment rate was expected to fall to 6.7 percent in 2012 and to 6.4 percent in 2013, adding over 600,000 jobs.[13] Nova Scotia's employment prospects over the short term are favourable. Provincial employment was expected to grow from 452,800 in 2011 to 457,400 (+4,600 jobs) by the end of 2012 and 460,200 (+2,800 jobs) by the end of 2013.[14] Furthermore, provincial unemployment was expected to fall from a 2010 high of 9.3 percent to 7.9 percent at the end of 2012 and 7.2 percent by the end of 2013.[15] Provincial employment prospects over the medium term are promising. There are employment opportunities in combat vessel construction and ship construction. These opportunities should bring large and sustained investments for the province over the next decade.

Canadian exports have also grown recently. Most of this growth has come from industrial goods and materials, energy products and machinery and equipment. It is anticipated by the Province of Nova Scotia's Minister of Finance that growth in the exporting of goods and services will outpace the growth in

[10] Budget Assumptions and Schedules for the fiscal year 2012-2013, Province of Nova Scotia, p.3.43.

[11] International Monetary Fund, World Economic Outlook, January 2012.

[12] Budget Assumptions and Schedules for the fiscal year 2012-2013, Province of Nova Scotia, pp.3.61-3.62.

[13] Ibid. p.3.68.

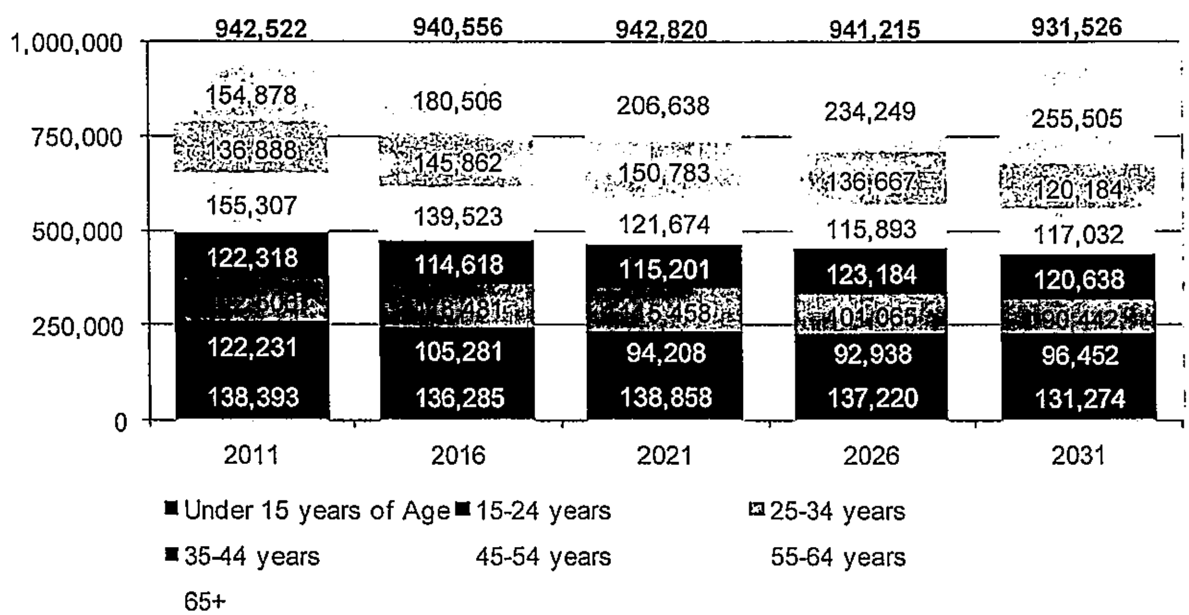
[14] Ibid. p. 3.89.

[15] Ibid. p. 3.103.

imports through to the end of 2013, although the province will remain in a net deficit trade position. A key industry that is driving export growth in Nova Scotia is natural gas production (i.e. the Deep Panuke project).[16]

Demographic Trends - Population growth across the province has been nearly flat over the past decade with between 925,000-950,000 residents. Interprovincial and international movements continue to be a key factor in overall population trends. Interprovincial migration has been heavily influenced by the strength of provincial economies in western Canada with many residents moving to Alberta and Saskatchewan to work. International migration has been stable, but has been subject to provincial and federal programs and policies. The natural rate of population increase (births/deaths) remains positive, but this trend is expected to change over the longer term. As Figure 3.1 indicates, Nova Scotia's population is expected to decline from 942,522 in 2011 to 940,556 in 2016.[17] Despite a small increase to 942,820 by 2021, the population is then expected to decline to 931,526 by 2031. Over this 20 year period, there is a net decrease of 1,307 residents (-0.1%) in Nova Scotia. The sharpest increase in the population will be the 65+ age group with a net increase of nearly 80,000 people (see Figure 3.2). The sharpest population decreases over the 20 year period will be in the 45-54 years of age group (-39,414, or -25.4% growth) and the 15-24 years of age group (-29,292, -24.0% growth). These negative growth rates will have significant implications for the province as more people will be exiting the working age population than entering.

FIGURE 3.1: NOVA SCOTIA POPULATION FORECAST



Source: Statistics Canada, Estimates of Population, CANSIM 051-0001 & NS Finance Projections

[16] Ibid. p. 3.70.

[17] Statistics Canada's 2011 Census reports a Nova Scotia population of 921, 727. Despite the difference (2.2%)in provincial estimate the age compositions trend is similar.

FIGURE 3.2: NET ACCUMULATIVE GROWTH (2011-2031)

	2011-2016		2011-2031	
	5 year Net Accumulative growth	% Growth	20 year Net Accumulative growth	% Growth
Under 15 years	-2,108	-1.5%	-1,174	-0.8%
15-24 years	-16,950	-13.9%	-29,292	-24.0%
25-64 years (Working Age Population)	-8,536	-1.6%	-50,211	-9.5%
25-34 years	5,974	5.3%	-11,441	-10.2%
35-44 years	-7,700	-6.3%	866	0.7%
45-54 years	-15,784	-10.2%	-39,414	-25.4%
55-64 years	8,974	6.6%	-222	-0.2%
65+	25,628	16.5%	79,371	51.2%
Total	**-1,966**	**-0.2%**	**-1,307**	**-0.1%**

Source: Statistics Canada, Estimates of Population, CANSIM 051-0001 & NS Finance Projections

3.2 Attributes of South West Nova's Economy

Demographic Characteristics – South West Nova has experienced population decline over the last decade. The region has gone from a population of 52,023 in 2001 to 47,933 in 2011, a net decrease of 4,090 residents. This decline has been most pronounced in the towns of Yarmouth, Shelburne, Lockeport, Clark's Harbour and the Municipal District of Barrington. Over the same time, the Province of Nova Scotia's population has increased, but at a fraction of a percentage on a yearly basis. Nova Scotia's population growth is very slow in comparison to other provinces such as Alberta, BC and Ontario.

South West Nova's population is aging. The proportion of the population over the age of 55 increased from 31 percent in 2006 to 36 percent in 2011. This aging trend holds true across the region. Furthermore, there is no community in South West Nova with a higher proportion of people under the age of 34 than the Province of Nova Scotia average for this age cohort, which indicates a more pronounced older population in the region.

It is clear that the aging of the larger "baby boomer" cohort (born between about 1946 and 1965) is having a significant effect on the region's demographic composition. These aging trends have important implications for the region. Though this large "boomer" generation often has a higher level of disposable income, their transition out of the labour force will create a need for people to fill employment positions. Without a focused strategy to retain and develop the population, there is a risk of losing the local employment base, which is a key component of economic development in South West Nova. Furthermore, the aging of the population concentrated in the municipalities may begin to raise concerns about the level and nature of services that the region provides, including health care and emergency services, transportation, recreation and leisure. The constituent municipalities will need to be proactive in planning for both labour force replacement and enhanced social service delivery.

Immigration is becoming an increasingly important consideration for provinces across Canada, as immigrants are becoming a driver of population and labour force growth. Immigration is of major importance for communities across Canada if the labour force is to grow and remain vibrant. Unfortunately, the Province of Nova Scotia has not attracted large numbers of immigrants. Over the course of the previous ten years, the province has averaged approximately 2,130 immigrants each year. A large majority (approximately 75%) of these immigrants settle in Halifax and the remaining immigrants settle in communities across the province. As of 2006, there was only 3 percent of the South West Nova population classified as part of the immigrant population, which is lower than the 5 percent average for the province. This strategy should consider the attraction of immigrants to the South West Nova region and the integration and settlement services that can be provided as part of an attraction and retention effort.

Much like the immigration trends, the visible minority proportion of the population is low in the region at 2 percent. A visible minority population that is present in the South West Nova region is the Black visible minority group, which is primarily located in the towns of Yarmouth and Shelburne.

The South West Nova region is largely composed of English speaking people (75% of the population); however, there is a large French speaking population in the municipal districts of Clare and Argyle. The large French speaking population in these two communities are linguistically and culturally linked to the larger Acadian community across the Maritimes. The Acadian community has a strong sense of a community development and cultural preservation. The only university in the region, Université Sainte-Anne is located in Clare and supports the development of the Acadian labour force. The Acadian community must be consulted and engaged across all sectors of the economy to foster greater economic development and strategic partnerships.

One of the fastest growing populations in Canada is the aboriginal population. There is a sizable concentration of people (9% of the population) in the region that identify themselves as aboriginal. It will be important to recognize the growth of this segment of the population and the culture and heritage this community offers and can promote for the region.

Education is a key priority in the economic and workforce development efforts of many communities across Canada. It is clear that the economy has for many years been slowly shifting away from goods and export-based industries and towards a knowledge-based economy, which rewards higher-order analytical and problem solving skills to drive innovation and further add value to industries. Naturally, these trends mean communities need to retain and attract highly educated people to sustain their livelihood and quality of life.

As of 2006, approximately half (51%) of the working age population in South West Nova had a high school diploma or less as their highest educational attainment. Nova Scotia's working age population with a high school diploma or less was much lower at 36 percent. With the exception of a few communities, the most common educational attainment was a post-secondary certificate. All of the South West Nova communities have lower proportions of the population with university degrees than the province of Nova Scotia. Lower educational attainment levels in South West Nova communities are concerning. People who earn post-secondary credentials generally have higher incomes and can better respond to changing industrial demands in the economy. Efforts should be made by South West Nova community stakeholders to increase the high school and post-secondary education and training levels and bring the region's human capital to a level where it can be competitive.

Income levels of South West Nova residents can provide an indication of the overall economic health of the region as well as the purchasing power available to drive local consumption for retail and commercial services. The median family income in each of the South West Nova communities is lower than the

Province of Nova Scotia's, ranging from a low 69 percent of the province's median in the town of Yarmouth to 99 percent in the municipal district of Argyle. These income findings in each South West Nova community in comparison to the province indicate a lower level of available income for household purchases.

Labour Force and Employment Characteristics – An important consideration in evaluating the overall economy of South West Nova is the state of the local labour force. According to 2012 estimates developed by demographic specialists Manifold Data Mining, the region has a total labour force of 26,377 persons. The region's unemployment rate of 15.2 percent is higher than the province of Nova Scotia's unemployment rate of 11.9 percent. Unemployment levels have traditionally been high in Atlantic Canada compared to other provinces and Canada as a whole. Of additional concern is the higher unemployment rate experienced by young workers, aged 15 to 24, which is currently at 24.1 percent for South West Nova. While it is expected that youth will have lower levels of employment as they pursue education, low rates of youth employment suggest there are limited employment opportunities in the region.

The industries with the highest concentration of the region's labour force in 2012 were:

- Agriculture, forestry, fishing and hunting (5,002 workers or 19% of the labour force)
- Manufacturing (3,785 workers of 15% of the labour force)
- Retail trade (3,531 workers of 14% of the labour force) and
- Health care and social assistance (2,883 workers of 11% of the labour force).

These four industries have collectively increased their share of the labour force since 2006. This indicates a continued importance and reliance on agriculture, fishing and manufacturing employment to sustain the regional economy. Health care and social assistance emerged both as an industry with a high concentration of workers and an industry with a sizable increase in the labour force, which indicates that there are employment opportunities in this industry. The continued aging of the regional population will support future local employment opportunities.

National Occupational Classification (NOC) system labour force estimates for 2012 revealed that the occupations that employ the highest share of South West Nova's resident labour force are:

- Sales and service occupations (6,387 workers or 25% of the labour force)
- Occupations unique to primary industry (4,553 workers of 18% of the labour force)
- Trades, transport and equipment operators and related occupations (3,429 workers or 13% of the labour force) and
- Business, finance and administrative occupations (3,126 workers of 12% of the labour force).

The dominance of sales and primary industry based occupations, which together account for 43 percent of the region's labour force, may become a growing economic development concern for the region. Earlier findings revealed that the region has a lower share of university educated workers than the province. Productivity enhancements have led to declining employment in primary and manufacturing industries in the province, across Canada and for many advanced economies around the world. A slow-growth economy also makes for limited employment opportunities in retail and commercial services, which typically employ people in sales and service occupations.

The tourism industry also employs many people in sales and service occupations. Tourism has become a very competitive industry across Canada and requires community stakeholders and influencers to collaborate with each other and make regions more attractive for visitors and tourists.

During the 2006 to 2012 time period, there have been some success stories in terms of local job growth. Those occupations that have shown the strongest growth were:

- Sales and service occupations (+407 workers or a +7% change)
- Business, finance and administrative occupations (+186 workers or a +6% change)
- Trades, transport and equipment operators and related occupations (+139 workers or a +4% change).

Overall, labour force growth has been low at 4 percent over the six year period. Much of the labour force growth is in service-based occupations, which are typically found in retail and commercial services. Labour force growth is estimated to be lower among occupations in primary industry and in decline among occupations unique to processing, manufacturing and utilities. This finding suggests there are fewer new employment opportunities in the primary, processing and manufacturing industries in the region.

Commuting flows by place of work can reveal geographic trends in employment concentrations throughout the South West Nova region and identify economic linkages between municipalities as represented by the flow of labour. Many of the jobs in each community are filled by the local residential labour force or by residents in neighbouring communities. This trend is true for each of the communities, indicating short commute times and a favourable live-work balance. Yarmouth accounts for a large share of jobs held by the region's labour force accounting for 6,180 jobs filled by residents within the region. This finding indicates that the town serves as a regional employment centre.

Industry Sector Analysis – To examine the level and degree of industrial concentration throughout the South West Nova region as it compares to the rest of Nova Scotia, a location quotient (LQ) analysis was completed using 2006 and 2012 labour force data. LQs are a commonly used tool in local and regional economic analysis, as they measure the degree to which employment or businesses are concentrated in a certain geographic area, relative to a larger benchmark geography. This approach allows researchers to identify areas of strength – and potentially of local competitive advantage – as compared to other regions. Based on this analysis, the industries in South West Nova that shows the highest labour force concentrations relative to Nova Scotia are:

- Agriculture, forestry, fishing and hunting and
- Manufacturing.

These two industries were the only two industries that had high labour force concentrations for 2006 and 2012. These two industries are also two of the largest industry concentrations, as discussed earlier. Given their strong local concentration, they represent growth opportunities to generate higher value added products and services. This region is in a unique position to pursue opportunities in value-added agriculture, fishing, and food production. In addition, the region is in a unique position for tourism offerings and could integrate agriculture, fishing and seafood production as part of the regional tourism experience. The region may be also able to leverage the local construction industry's labour force to drive new export growth in new industry segments such as green building construction, green energy and ship construction.

Low LQs in other industries suggest that the businesses are not accommodating local needs and are a source of consumption leakage especially in trade or service industries. This finding suggests that there may be gaps in the local economy.

A shift-share analysis was also used to analyze the competitiveness of the region's industries. The analysis deconstructs labour force changes within an economy over a time period into three components:

1. Growth that is attributed to **regional economic growth.** Specifically, if the region is experiencing employment growth in general, it is reasonable to expect that growth will influence the local area.
2. Growth that is attributed to the mix of faster or slower than average growing industries. Some industries add jobs more rapidly than others. The **industrial mix share** reflects the difference in industry 'mix' between local and national levels. This mix-factor examines how regional growth or decline of a particular industry translates into local growth or decline of that industry.
3. Growth that is attributable to the competitive nature of the local industries. Growth is uneven across industries. The **local share** describes the extent to which unique local factors relate to regional industrial employment growth or decline.[18]

The benefit of the shift-share analysis is that the technique compares regional growth or decline with growth or decline at a local level. Based on the results from this analysis, the regional (i.e. Province of Nova Scotia) labour force growth shares have increased by approximately 10 percent from 2006 to 2012. This has led to a net increase of over 2,430 people in the labour force and driven by growth in the municipal districts of Yarmouth, Argyle and Clare (refer to Appendix B for specific community results).

Growth has been most pronounced in the following industries:

- Agriculture, forestry, fishing and hunting
- Manufacturing
- Retail trade.

The industrial mix share indicates that growth in the region's industries has led to nearly 1,250 more people in the labour force. Communities that have experienced higher growth would be the municipal districts of Barrington (a net increase of 411), Argyle (a net increase of 311) and Clare (a net increase of 213). The key drivers of economic growth in the South West Nova Region are:

- Agriculture, forestry, fishing and hunting (a net increase of nearly 1,350 people in the labour force)
- Manufacturing (a net increase of over 250 people in the labour force)

The local shares indicate that each local community within South West Nova is dragging labour force growth downward. Again, the municipal districts of Barrington (a net decrease of 579), Argyle (a net decrease of 638) and Clare (a net decrease of 471) are the largest "driver" communities of labour force decline. The agriculture, forestry, fishing, hunting (a net decrease of 1,595) and manufacturing (a net decrease of 441) industries are driving much of the labour force decline. One industry that is driving local growth is the health care and social assistance industry, which is driven in large part by the communities of Yarmouth and Clare.

Key Business Characteristics - Understanding the trends in business growth in the region's constituent municipal districts and towns provides valuable insight into the shape that future growth and investment in the region might take in future years. It also provides an indication of where the priorities of the region should lie, especially with regards to economic development program delivery. In June 2012, there were a total of 3,885 businesses in the region.[19] In terms of concentration, the following sectors exhibit the highest proportion of business establishments:

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[18] Shields, Martin, Using Employment Data to Better Understand Your Local Economy: Tool 4. Shift-Share Analysis Helps Identify Local Growth Engines, Pennsylvania State University, College of Agricultural Sciences, 2003

[19] This figure excludes those businesses in the towns of Shelburne and Lockeport because the data was unavailable from Statistics Canada

- Agriculture, forestry, fishing and hunting (1,286 businesses, 33% of total. It is notable that approximately 90% of these businesses are classified as 'salt water fishing operations')
- Retail trade (375 businesses, 10% of total)
- Construction (285 businesses, 7% of total)
- Other services (except public administration) (271 businesses, 7% of total).
- Manufacturing (260 businesses, 7% of total)

When the "indeterminate" category (self-employed) is removed, the five sectors with the highest business establishment proportions remain consistent. The top four sectors include:

- Agriculture, forestry, fishing and hunting (944 businesses, 37% of all businesses with employees)
- Retail trade (296 businesses, 12% of all businesses)
- Other services (except public administration) (197 businesses, 8% of all businesses) and
- Manufacturing (190 businesses, 7% of all businesses).

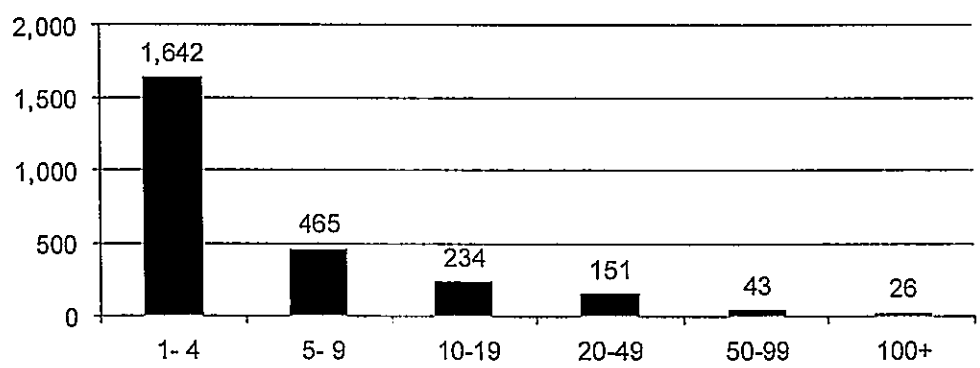
It is also valuable to examine the change in business concentration by industry, so as to better understand areas of emerging opportunity and importance to the regional economy. The two industries that have experienced the largest concentration increases were:

- Agriculture, forestry, fishing and hunting (+16 businesses, 1% increase) and
- Health care and social assistance (+11 businesses, 7% increase).

As previously noted, the agriculture, forestry, fishing and hunting industry is primarily composed of salt water fishing operations (approximately 90%).

Business establishments in South West Nova are overwhelmingly characterized by small companies and enterprises that employ less than 10 people. In 2012, excluding the businesses consisting of the self-employed – which themselves are small enterprises – there were 2,107 businesses that had under 10 employees. Of these businesses, 1,642 (64% of business with employees) of them had 1-4 employees and 465 (18% of businesses) of them had 5-9 employees.

FIGURE 3.3: BUSINESS ESTABLISHMENTS BY SIZE, SOUTH WEST NOVA, JUNE 2012



Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2012) by Millier Dickinson Blais Inc.

In supporting future growth and investment in the South West Nova, it is essential to understand and support the needs of these small businesses. This is particularly relevant in light of existing research and trends which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there.

Large companies in South West Nova or those that employ over 50 people have a much different sector composition than small business concentrations. Naturally, different strategies must be employed to support those sectors where a larger share of employment is concentrated in these larger firms. The industries with the highest number of establishments in this category are:

- Manufacturing (24 businesses)
- Health care and social assistance (12 businesses)
- Retail trade (11 businesses)

Large scale manufacturing operations are responsible for a third of all businesses in the region that employ over 50 people. Manufacturing also accounts for a quarter of those businesses that employ over 100 people in the region. As reflected in this and other areas of the region's economic base analysis, the manufacturing sector is vital to this region's economic prosperity.

Results from the economic base analysis need to be balanced with community stakeholder input to confirm these trends and to better understand community economic opportunities and challenges. The following section provides this local stakeholder and community context.

Section 4: Stakeholder Consultations

4 Stakeholder Consultations

Community consultation is an invaluable component in developing South West Nova's Strategic Economic Development Plan. Consultation provides a more up-to-date and complete understanding of the information previously garnered through the in-depth policy analysis and economic base analysis. Furthermore, local knowledge and local insight drives and shapes the key objectives and goals of a successful strategy. By better understanding the views and perceptions of key stakeholders within the region, the strategic plan can better encapsulate the needs of the local community and lead to higher levels of local commitment to implementation plans.

There were primarily two community consultation methods utilized in this strategic planning process. First, a series of key informant interviews was conducted in order to develop a nuanced understanding of the assets, trends and opportunities that exist within the South West Nova region. A number of questions were asked relating to the regional economy, some of which include:

- What key assets exist in South West Nova that enhance economic prosperity and quality of life in the region?
- How can traditional sectors continue to be developed and sustained to generate prosperity for the region?
- What emerging sectors are being developed (or should be developed) to increase prosperity?
- What are the current strengths of South West Nova's workforce?
- What do you consider to be the greatest opportunities for South West Nova to enhance prosperity?

The second method in which stakeholder input was garnered was a review of relevant stakeholder sessions and focus groups that had occurred within the region within the past two years. A number of community consultation sessions have been conducted over the past two years throughout the region by a number of organizations. These stakeholder sessions are summarized with key themes highlighted subsequently.

4.1 Key Stakeholder Interviews

The summary highlights key themes that have been identified through the stakeholder interviews. A listing of those interviewed is included in the appendices to this document, but all responses have been aggregated to preserve the anonymity of individual respondents.

4.1.1 Key Assets in South West Nova

Stakeholders largely referred to the cultural significance of the region, the economic history of the region and the local people as key assets in developing the local economy. Acadian traditions and the close-knit nature of Acadian communities were often highlighted as a significant advantage in terms of community development. In addition, significant emphasis was placed on shipbuilding traditions, as well as the fisheries heritage, with many noting that the area still has one of the most productive lobster fisheries in North America.

In addition to identifying the cultural and economic history of the region, many of the stakeholders also pointed to the region's resilience as a key asset. Many of the stakeholders explicitly stated that the region's economy has fared poorly in the past two decades, but there is potential within traditional and emerging sectors that can enhance the region's economic viability. There was also a general consensus that this resilience is often not seen by younger generations who move away from the region and seldom return as young professionals, due to a lack of economic opportunities and the feeling that things will never improve in the region.

Physical infrastructure and location were also key assets and strengths highlighted by many of the stakeholders. Yarmouth's port infrastructure and ferry connections between Yarmouth and New England were highlighted as key assets. This infrastructure and connections suggest that there is binational tourism potential. However, it was noted that this ferry service has stopped, but local municipalities are working to get it restored. It was also noted that these many of these facilities and physical assets need to be updated. Stakeholders also noted the importance of high speed internet connections and the investment the Province had made in the last decade, but emphasized that some communities within the area are still without high speed capabilities.

4.1.2 Potential for Traditional Sectors

Many of the stakeholders interviewed felt there is still tremendous value in developing traditional sectors including fisheries, agriculture and forestry. Generally, when discussing any of these three sectors, two main themes arose:

- The need for sustainable management of the resources
- The need to diversify and create value-added opportunities within the sectors

In terms of the fisheries, stakeholders noted the continued and emerging influence of aquaculture and the potential sustainability and longevity it can provide to the local economy. In addition to aquaculture's possible role in improving the sustainability of the fisheries sector, lobster fishing was also highlighted as an important component of the local economy with the region having the most productive lobster industry in North America. By focusing on sustainable practices and developing some levels of value-added around these traditional sectors South West Nova could see growth related to these sectors. It should be highlighted that – in public perception at least – the value-added opportunities typically associated with the fisheries industry steered away from processing and focused primarily on culinary and cultural tourism.

In terms of agriculture, a number of stakeholders noted its continued importance but also highlighted the need to develop more value-added processes, which included agri-tourism and bioenergy. The need for diversified agricultural products was also highlighted with multiple stakeholders emphasizing the need to diversify crops into higher valued produce (including haskap berries, grapes and tender fruit) and commodity grains.

Outlooks on the forestry sector seemed to be bleak overall. The sustainability of the forestry sector has been questioned throughout the province and the provincial government recently announced that they plan on developing community-managed forests. There were mixed opinions of this change, but overall there was need for creating new employment within the forestry sector.

In addition to fisheries, agriculture and forestry, shipbuilding and tourism were also identified as traditional sectors. Ship building and repair is still an important component of the economy in the region.

4.1.3 Emerging Sectors

The green energy sector was the primary response highlighted when discussing emerging sectors within the region. Although many of the respondents focused on wind energy production there was also significant attention placed on tidal power and algae as renewable resources. Many respondents discussed developing green energy solutions. In particular, development needed to happen throughout the value chain from energy systems installations to maintenance and repair. Other environmental and conservation activities were also highlighted as emerging strengths in the area.

In addition to green energy, cultural and experiential tourism were also highlighted as existing and emerging sector opportunities. New methods of engaging tourists are being developed to take full advantage of the ways in which tourists want to interact with the area. Increasing emphasis on cultural attractions including festivals, historical reenactments and culinary activities are taking place. In addition, outdoor adventure businesses and programs are coming online to meet the needs of visitors interested in exploring the area.

There was also considerable attention placed on the role of Yarmouth as a service centre for the region with retail and accommodation services available, but also higher paying governmental, health care and professional services jobs being created. While this is an existing strength, many stakeholders highlighted the potential for these sectors to grow.

4.1.4 Strengths of the Local Workforce

In terms of the strengths of the workforce, all of the stakeholders commented that workers within the region are both hard working and resilient. The region has undergone a number of economic transitions in the past and the stakeholders believed this resilience was an important component of developing a competitive workforce for the future. Many of the workers in the area are skilled in traditional sectors including ship building & repair and fisheries. Stakeholders stressed the importance of retraining and reeducation programming to allow workers who have been laid off or who work in seasonal sectors to become skilled in other occupations. Partnerships between all levels of the education system need to work together to promote the development of a competitive workforce within the region.

Many of the stakeholders commented that there is a shortage of university-educated professionals within the region and that more should be done to attract these professionals to the area. Youth retention and attraction was also highlighted as a main concern when discussing the local workforce and many stakeholders noted the importance of developing proactive retention programming and attraction incentives to combat the region's declining population.

4.1.5 Greatest Opportunities for South West Nova

A number of opportunities for South West Nova were highlighted throughout the consultation process. Many of the stakeholders felt that with continued expansion of infrastructure, most importantly, wireless telecommunications, the region has the ability to attract professionals based on the lower cost of living, quality of life factors and natural environment.

In addition, the tourism sector has been growing within the province. This continuing strength will provide increased economic opportunities for the region; however, there is a need to market the region throughout the year so that the sector is not as seasonal.

Stakeholders also discussed the opportunity that exists in the region to reeducate or educate older workers, and to provide youth with skills training and apprenticeship opportunities to become more competitive in the workforce.

4.2 Additional Community Consultation Summaries

4.2.1 Tourism Sector Consultation Summary

The Yarmouth & Acadian Shores Tourism Association (YASTA) completed a number of community consultation projects over the past two years to garner community feedback on a number of their projects. YASTA has primarily consulted with two large groups, the first being local residents in the region and the second being tourists who have visited the region. Through its work developing a Visitor Profile, YASTA has highlighted a number of key assets that tourists are attracted to in the region including:

- Natural landscape and wildlife
- Seacoast
- History and heritage
- Culture and people
- Interesting activities

Many of the tourists consulted liked to be actively participating in the community and the local culture. Typically, this meant visitors liked fishing and attending local events. Most visitors highlighted the importance of the environment of the region and taking part in outdoor adventures. In addition to these findings, YASTA found that culture, people, heritage and history were vitally important to the visitors' overall experience.

In addition to consulting with visitors, YASTA also hosted three community consultation sessions that occurred from September 18-20, 2012. The purpose of these sessions was to gain feedback around the YAS Destination Development Plan. A total of 57 participants were involved in this consultation process. Overall this consultation worked to develop community feedback on the destination development mechanisms for Clare, Yarmouth and Argyle, and concluded that participants felt the area was highly competitive in attracting tourists interested in culinary tourism, historic sites and buildings, and cultural attractions including music and dance.

4.2.2 Additional Consultation Summaries

In addition to the work being done across the region in relation to the tourism sector, most of the municipalities in the region have undertaken extensive consultation processes (typically including interviews, focus groups, workshops, asset mapping and SWOT exercises) during the process of developing local Integrated Community Sustainability Plans (ICSPs). The federal government requires these plans to be in place in order to receive funding from gas tax revenues. In terms of these consultations, the asset mapping components added a particular depth that other consultations did not provide. It is important to highlight the assets deemed important to the community members of the region. Through the ICSP process communities identified five key asset groups, these include:

- Natural assets
- Built assets
- Social assets
- Economic assets
- Service assets

Generally from these consultations the assets highlighted throughout the region included those highlighted in the following table.

FIGURE 4.1: ASSET MAPPING

Asset Category	Type of Asset			
Natural	Coastline/Beaches	Water views	Forests	
Built	Heritage buildings	Fisheries related infrastructure (ports, marinas)	Recreational facilities	Public buildings
Social	Friendly people	Wide network of community organizations	Community minded people	Work ethic
Economic	Lobster/fishery	Tourism	Ship building	
Service	Education and Health	Commercial business districts	Recreational services	Fire Dept. and emergency services

The consultation results have provided a range of perspectives, experiences and ideas. These responses will be used to help frame a strategic economic development plan for the South West Nova region.

Section 5:
Emerging Opportunities

5 Emerging Opportunities

The South West Nova region's communities must be aligned with the Province of Nova Scotia's development efforts if this economic development plan is to be sound and implementable, particularly in light of the uncertain nature of future local and regional economic development organizations. The Province is at a crossroads and wants to shape its future instead of taking the future as it comes. The *jobsHere –The Plan to Grow Our Economy* report states that if things stay the same, the results will be the same. Instead, the Province is seeking to be more proactive and to avoid another 20 years of slow or no economic growth and rural decline by committing $200 million to the provincial economic plan. Approximately $140 million is being directed to productivity, innovation and international commerce and $60 million is being directed to skills development.[20] The provincial plan is made up of three interrelated priorities:

- Learning the right skills for good jobs
- Growing the economy through innovation and
- Helping businesses become more competitive globally

The Province of Nova Scotia has assets and significant opportunities to accelerate economic growth. These assets and opportunities relevant for the South West Nova region include:

- A highly developed education and training system with advanced research and development capacities.
- Untapped potential for renewable energy production.
- Vital rural communities built on plentiful natural resources and well-managed ecosystems.
- A rich and diverse cultural heritage supporting and expanding the creative economy.
- A location that intersects global transportation and communications networks[21]

To focus local efforts of specific opportunities, while simultaneously linking local effort to provincial policies and preferences, this document explores the five target sectors that appear to have the greatest economic development potential for the South West Nova region. These are:

- Alternative energy
- Shipbuilding and drone technologies (sea, air and land)
- Niche agriculture
- Value-added fisheries and
- Tourism

5.1 Alternative Energy

5.1.1 Industry Trends and Opportunities

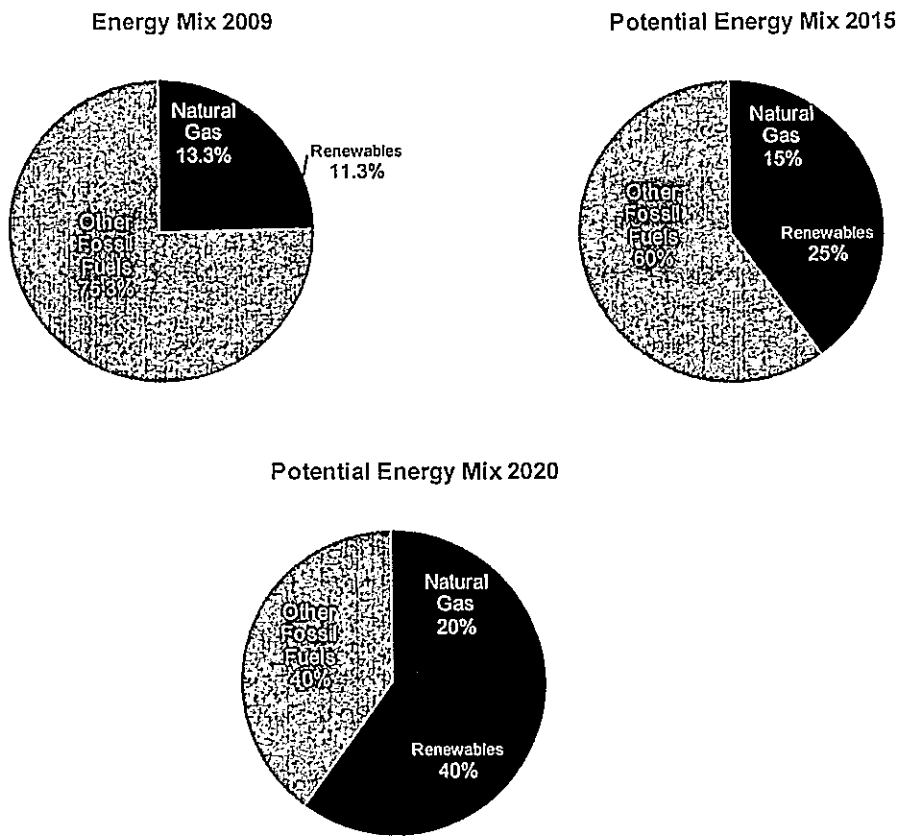
As outlined in the *jobsHere –The Plan to Grow Our Economy*, the Province of Nova Scotia is committed to encouraging the continued adoption of new technology and clean energy opportunities. The Province's *Environmental Goals and Sustainable Prosperity Act* requires that by 2020 provincial greenhouse gas

[20] jobsHere – The Plan to Grow Our Economy, The Province of Nova Scotia, November 2010, p.3.
[21] Ibid. pp.2-3.

emissions are to be reduced by 10 percent from the 1990 levels. There are caps on greenhouse gas emissions from electricity production.

The Province's *Renewable Electricity Plan* sets out a program to move Nova Scotia away from carbon-based electricity (e.g. oil, coal and diesel) and towards more local renewable sources (e.g. hydro, wind, biomass, peat and tidal). There is a recognition from provincial decision-makers that the over-reliance on single fossil fuel sources weakens the province's energy security and binds the province to volatile and rising prices, which in turn drains wealth from the province. This plan commits the 2015 target of 25 percent renewable electricity to law, and establishes a new goal for 2020 of 40 percent renewable electricity (up from 11.3 percent in 2009). This is highlighted in the following figure.

FIGURE 5.1: NOVA SCOTIA'S ENERGY MIX, 2009, 2015 AND 2020.



Source: Renewable Energy Plan, The Province of Nova Scotia Department of Energy, April 2020, p.17.

The implications of these bold goals are an expanded power grid and an expanded role for renewable and natural gas energy. The plan makes for an orderly transition to new, local and renewable energy sources and creates a wide range of opportunities in Nova Scotia. These opportunities include:

- Large and medium sized renewable electricity projects are to be split evenly between Nova Scotia Power and Independent Power Producers. Independent producers are given opportunities to compete for projects in a bidding process managed by the Renewable Electricity Administrator.
- Fixed price (feed in tariff) community projects are expected to encourage a range of renewable electricity projects at the 100 megawatt scale, which can be connected to the electricity grid.
- Enhanced net metering for individuals and small businesses to use two-way meters and receive payment at retail rates for any excess power they produce.
- Tidal energy research and development is expected to continue in hopes that this resource can contribute to the province's energy needs. A feed-in tariff for distribution connected tidal projects is encouraged by the province.
- Solar energy projects qualify as a renewable resource under the enhanced net metering program.
- Locally-produced natural gas is also encouraged by the province.

This energy transition in Nova Scotia will support an estimated $1.5 billion in green investment and create jobs in construction, supply, manufacturing and maintenance for both urban and rural areas.[22]

Wind Energy - The largest and fastest growing alternative energy source in Canada is wind energy. Wind energy is generated through turbines, which produce kinetic energy from wind power that is converted to electricity. Turbine developments in Canada and Nova Scotia can be produced at a variety of scales. A location benefit for wind energy is that large scale installations occupy very small tracts of land. In 2011, Canada became the ninth largest producer of wind energy in the world with an installed capacity of 5,641 megawatts (MW), which was 2.3 percent of Canada's total electricity demand. The Canadian Wind Energy Association reported that there are more than 6,000 MW of wind energy projects contracted to be built from 2012 to 2016. Much of the installed capacity (2,020.3 MW or 36% of Canada's installed total) is located in Ontario. Nova Scotia lags other jurisdictions with 317 MW (6% of the total) of total installed capacity.[23] The leading companies in Nova Scotia that are poised to benefit from wind energy projects are Cape Breton Power, DSME, Scotian WindFields and Shear Wind. Additional wind energy projects will create opportunities for component manufacturers (e.g. manufacturers of blades and mechanisms for wind turbines), construction, transportation, engineering, and operations and maintenance.

Tidal Energy - One of the unique energy opportunities for the province is marine renewable energy. The Bay of Fundy has more than 160 billion tonnes of water flow with each tide, delivering a commercial potential of approximately 2,400 MW of power.[24] The tidal energy industry is in its infancy and many technical challenges remain before large-scale commercial development will take place; however, tidal power technology is evolving rapidly. The province is already a leader in tidal energy development and is positioned favourably to become a global leader in this emerging energy industry because of its unique tidal resources. The Province has supported tidal energy opportunities through the Fundy Ocean Research Centre for Energy (FORCE), a non-profit test centre that encourages public and private research for tidal energy. FORCE is currently monitoring and researching tidal power technology in three main categories: in-stream devices, barrages and tidal lagoons. In-stream devices make use of the kinetic

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[22] Renewable Energy Plan, Nova Scotia Department of Energy, April 2010, p.3.
[23] Canadian Wind Energy Association, Wind by the Numbers, Economic Benefits of Wind Energy, http://www.canwea.ca/images/uploads/File/NRCan - Fact Sheets/canwea-factsheet-economic-web.pdf, viewed on January 9th, 2013, last modified October 2012.
[24] Nova Scotia Marine Renewable Energy Strategy, Nova Scotia Department of Energy, May 2012, p.2.

energy of moving water to power turbines. This method of energy generation is removable and can be scaled up gradually from one device to several devices. Barrages make use of the potential energy in the difference in height between high and low tides. They serve as dams across the width of a tidal estuary, but are very expensive to build and are criticized for being damaging to the environment. Tidal lagoons can be constructed as self-contained structures which can continuously generate energy.[25] The *Renewable Electricity Plan* expands the support of FORCE with the following commitments:

- A marine renewable energy task force will assist with the commercializing of marine renewable energy (e.g. tidal, offshore wind and wave resources).
- A tidal feed-in tariff (FIT) to authorize special FITs for development of tidal arrays connected at the transmission level that reflects the cost of the turbines and their deployment.
- Identifying additional potential tidal sites that have current velocities of at least 1.5 metres/second.

Natural Gas Energy - Natural gas will play a larger role in the province's energy mix as identified earlier. Natural gas releases less carbon and sulphur dioxide and virtually no ash or particulate matter than coal or oil. Natural gas turbines can start up and down quickly to match changes in the wind and tides. There are also substantial deposits of natural gas both offshore and onshore. The Sable Offshore Energy project is the province's largest natural gas facility. This facility includes three offshore platforms, an onshore gas plant, and an onshore fractionation plant.[26] The Deep Panuke Project will process offshore natural gas which can in turn be transported via the subsea pipeline and then to market via the Maritimes and Northeast Pipeline. This facility is expected to be operating later in 2013.[27]

Peat Energy – Nova Scotia's peat resource has economic use for fuel production. The development of peatlands for extraction of moss peat and fuel peat products shows great potential. Peat is biomass, and can be a profitable and sustainable (i.e. carbon neutral) energy supply. It is used in electricity generation stations and other facilities that require a long term assured supply of fuel. This resource can be harvested and processed into fuel-grade material with energy values equivalent to coal. The peat is in three main forms when it is used as fuel: sod meat, milled peat and peat briquettes. Sod peat are slabs of peat and air-dried for household fuel. Milled peat is granulated peat used either as a power station fuel or as raw material for briquettes. Peat briquettes are small dried blocks and used mainly for household fuel.[28] When peat is burned it is cleaner than coal and oil with low sulphur and minor ash content. Production cost of peat fuel is competitive with coal and less expensive than oil or natural gas.[29]

Two Atlantic Canadian companies that have advanced peat biomass production are Peat Resources Limited and BioEnergy Inc. In 2010, these two firms collaborated on technological research and development that would lead to advancing biomass processing technologies and products derived from peat. Together these companies have developed new technologies for biomass densification processes for the manufacture of specialized biomass products, derived from peat for energy generation.[30]

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[25] Fundy Ocean Research Centre for Energy, Tidal Energy Generation, http://fundyforce.ca/renewable-and-predictable/tidal-energy-generation , viewed on March 11th, 2013.
[26] ExxonMobil Canada, http://www.soep.com/cgi-bin/getpage?pageid=1/0/0, viewed on January 9th, 2013.
[27] Encana Corporation, http://www.encana.com/communities/canada/atlantic/about.html, viewed on January 9th, 2013,
[28] International Peat Society, http://www.peatsociety.org/peatlands-and-peat/peat-energy-resource, viewed on March 12th, 2013.
[29] Peat Resources Limited, Presentation titled 'Long term sustainable biomass fuel,' http://www.peatresources.com/Banff-July%206%202009.pdf, July 6th, 2009, viewed on March 12th, 2013.
[30] BioEnergy Inc, Peat Resources Limited and BioEnergy Inc. sign Letter of Intent - December 08, 2010, http://www.bioenergyinc.ca/News/7/, viewed on March 12th, 2013

Countries that are leading in the production of peat for energy generation are Finland, Ireland, Russia and Estonia. Energy peat in these countries is mainly used locally, but there are small amounts exported to nearby countries. With significant quantities of peat present in the South West Nova region, these countries may provide valuable models for the integration of peat resources into the overall energy market.

5.1.2 Sector Assets

The Province of Nova Scotia has created an alternative energy policy environment that encourages and stimulates investment. These policies encourage local communities in Nova Scotia to initiate alternative energy projects and to be compensated favourably. Small business owners are also encouraged to pursue renewable energy projects. They are given equal opportunities through the competitive bidding process to supply alternative energy to the Province.

The Bay of Fundy and the Fundy Ocean Research Centre of Energy (FORCE) is a significant asset for the province in terms of leading edge research and development in tidal energy. Although much of the South West Nova region does not border the Bay of Fundy, the municipal district of Clare in particular offers a unique location for tidal research.

Natural gas will continue to play an important part in the province's energy mix. Natural gas deposits generate new wealth for the province of Nova Scotia since natural gas is exported out of province and to markets in eastern United States. Two of the largest natural gas projects and assets in Nova Scotia are Sable Offshore Energy and Deep Panuke project.

South western Nova Scotia has over 85,000 hectares (over half) of peat resources in the province. With over one million cubic metres of moss grade peat there is a great deal of peat moss that can be processed for energy generation.[31]

5.1.3 Growth Opportunities and Strategic Focus

Local Policy Environment – Many of the communities in South West Nova have used Federal Gas Tax funding to support the development of Integrated Community Sustainability Plans (ICSP). The nature of these plans is to provide direction for the municipality for sustainability measures, environmental stewardship and climate change mitigation. For example, the Municipality of the District of Shelburne has developed an ICSP focused on the principle of minimizing the consumption of non-renewable resources and the creation of pollution and waste, in order to preserve resources and the environment for future generations. Over the course of the next few years, as plans like the Municipality of the District of Shelburne's ICSP are implemented, opportunities will emerge to generate renewable and alternative energy to meet local needs, but also to export this energy product to the United States.

The Municipality of Clare has a unique growth opportunity with its heat and power biomass plant. This is a local community asset and should be further investigated to determine if and how the plant can be viable for renewable energy generation. Clare is currently developing its own economic development strategy, and the results of that project should be integrated with other regional efforts on this front.

Skilled labour force with growing technical occupations – The resident labour force is a notable asset for the South West Nova region. Overall, there was a growing concentration of people in:

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[31] *Peat Moss in Nova Scotia*, Nova Scotia Department of Natural Resources Mines and Energy. 1993, p.4.

- Business, finance and administrative occupations (an estimated +186 people from 2006 to 2012)
- Natural and applied sciences occupations (an estimated +15 people from 2006 to 2012)
- Trades, transport and equipment operator occupations (an estimated +139 people from 2006 to 2012)

This latter segment of occupations includes people engaged in construction trades, electrical engineering and utilities, finance, machining and metal forming and a range of occupations supporting marine transportation. This finding has positive implications for the industrial and professional services segments of the alternative energy sector.

Proposed areas of strategic focus are divided into three categories:

1. Expanding small scale renewable energy

- Coordinate among the South West Nova municipalities to align planning policies and land use bylaws to facilitate small scale investments in renewable, alternative energy.
- Host workshops with the local business community to promote the concept of small scale renewable investment including wind, tidal and biomass (i.e. peat).
- Promote provisions in the municipal development plans for single wind conversion systems.
- Together with entrepreneurs, research and plan to attract small scale wind and tidal energy parts, components and turbine manufacturers to the South West Nova region.

2. Realizing energy to waste projects

- Develop a business plan for the heat and power biomass plant in the Municipality of Clare, building on directions identified in its economic development strategy.
- Focus industry attraction efforts on industries that are complimentary to a heat and power biomass facility.

3. Position the South West Nova region as a renewable and alternative energy centre

- Use local business directories and databases to identify companies in the South West Nova region with the capacity to provide specific support to key alternative energy sectors, including wind, tidal and biomass (i.e. peat).
- Raise local awareness of existing local knowledge and resident technical experts, who have the skills to help grow alternative energy applications and anchor the presence of local alternative energy suppliers.
- Initiate discussions with the executive team at the Fundy Ocean Research Centre for Energy (FORCE) for pilot test projects and research stations along the waters adjacent to the municipal district of Clare.
- Highlight the availability of industrial land in the South West Nova communities for potential alternative energy pilot projects.

5.2 Shipbuilding and Drone Technologies

5.2.1 Industry Trends

One of the single largest boosts to the Nova Scotia economy over the next few years is the federal government's awarding of a $25 billion shipbuilding contract to Irving Shipbuilding Inc. (ISI) for building combat ships for the Royal Canadian Navy through to 2030. The Conference Board of Canada estimates an average of more than 8,400 jobs per year will be sustained in Nova Scotia between 2012 and 2030. Jobs are estimated to peak in 2020 at approximately 11,500. Annual gross domestic product (GDP) (in constant 2002 dollars) from this project to build 21 combat vessels is estimated to average $661 million a year.[32] This combat vessel activity is expected to foster a renewed shipbuilding industry in Nova Scotia. Combat vessels will include the Navy's Arctic/offshore patrol ships and Canadian surface combatant ships. The general details for each ship are provided in the following table.

FIGURE 5.1 COMBAT VESSELS BEING BUILT IN NOVA SCOTIA

Arctic/Offshore Patrol Ships (6 to 8 vessels)	Canadian Surface Combatants (15 vessels)
The Arctic/offshore patrol ships will conduct armed seaborne surveillance in Canada's waters, including in the Arctic. They will enhance the government's ability to assert Canadian sovereignty and provide surveillance and support to other government departments.	These warships will replace Canada's destroyers and frigates. While the ships will be based on a common hull design, the frigate and destroyer variants will be fitted with different weapons, communications, surveillance and other systems. These new ships will ensure that the military can continue to monitor and defend Canadian waters and make significant contributions to international naval operations.

Source: Public Works and Government Services Canada, http://www.tpsgc-pwgsc.gc.ca/app-acq/sam-mps/ddi-bkgr-7-eng.html, last modified on August 14th, 2012, viewed on January 15th, 2013.

ISI's head office is located in Halifax and decisions related to supply chain and partner relationships are made in Halifax. It is estimated that in 2009 and 2010, ISI worked with 630 suppliers in the province, including:

- 37 suppliers earning more than $1 million in purchased products or services
- 21 suppliers earning $500,000 to $1 million in purchased products or services and
- 78 suppliers earning $100,000 to $500,000 in purchased products or services[33]

The economic benefits for this federal contract go beyond the fabrication and assembly of ships and into new innovative technological developments, as the previous Canada Patrol Frigate (CPF) program has proven. In the 1980s, the federal government's CPF program had five key objectives:

1. Achieve Canadian content through direct and indirect commitments to 100 per cent total contract value.
2. Ensure regional distribution in Atlantic Canada, Quebec, Ontario and the western provinces.
3. Maximize participation of small business.
4. Utilize industrial offsets to generate high technology work in Canada.
5. Stimulate research and development (R&D) requirements.[34]

These benefits were distributed throughout central, eastern and western Canada. It was estimated that one-third (33%) of the total economic activity (i.e. direct spending dollars) benefited Atlantic Canada.

[32] Conference Board of Canada (May 2011) in *Shipbuilding in Halifax A Pillar of Nova Scotia's Economic Transformation*, Greater Halifax Partnership, May 2011, p.4.
[33] Ships Start Here (2011) in *Shipbuilding in Halifax A Pillar of Nova Scotia's Economic Transformation*, Greater Halifax Partnership, May 2011, p.15.
[34] Ibid. p. 16.

Total direct spending was estimated at $4.8 billion (1985 dollars).[35] The largest number of companies benefitting from R&D spending was located in Ontario, followed by Quebec, and many of these companies developed or acquired significant new technology as a result of the program. These technologies have been used in federal patrol ships and have the potential to be transferred to other sectors of the economy, specifically aerospace & defence. Companies in the aerospace and defence sector are involved in activities such as advanced engineering, information systems and component manufacturing.

A related economic opportunity in Nova Scotia is in the area of drone technologies and their application in not only naval ships, but other defence carriers, aircraft and aviation equipment. Drone technologies allow for marine vessels, aircraft and land based vehicles to operate unmanned and without a human in control. Designing systems and methods to successfully allow a computer to control these vessels and other defence equipment requires a great deal of human ingenuity. The ISI contract is the largest shipbuilding project directed to Nova Scotia that can potentially benefit companies in South West Nova that develop drone technologies. Defence technology firms have a presence in Halifax and include Lockheed Martin Canada, L-3 Communications Electronic Systems, General Dynamics, MacDonald Dettwiler & Associates, Raytheon Canada and Ultra Electronics Maritime Systems.

Intriguingly, a number of local companies (in both the aerospace and shipbuilding sectors) have been experimenting with drone technologies, and testing a variety of drone prototypes. Economic development efforts should focus on developing and expanding this local expertise, and linking it to key resources and supports outside the region. There is potential for South West Nova communities to supply products and services to not only ISI, but to leading defence technology companies in Halifax, Canada and the United States as well.

Aside from the ISI contract, manufacturers in the ship and boat building industry have adapted their business models to supply vessels, parts and equipment for other growth sectors such as offshore wind energy and tidal power. [36]

5.2.2 Sector Assets

Active Research Capabilities at Dalhousie University - The province of Nova Scotia has active research that supports drone technologies and the defence sector. Dalhousie University's Faculty of Engineering is home to a number of related research laboratories, including:

- Innovation in Design Lab (iDLab) which creates inventive solutions using advanced, agile design methods, prototyping and testing.
- The Institute for Research in Materials which brings many traditional sciences such as chemistry, physics, earth sciences and biology together with engineering to develop new understandings, technologies and devices.
- The Advanced Manufacturing Group which provides product research and design assistance and product development and machining services such as prototyping and 3D physical scanning.

[35] Saint John Shipbulidng Limited Industrial Benefits Report (Final) CDRL092X, June 1998 in Ships Start Here (2011) in *Shipbuilding in Halifax A Pillar of Nova Scotia's Economic Transformation*, Greater Halifax Partnership, May 2011, p. 16.
[36] Economic Profile of Southwest Nova Scotia, Nova Scotia Department of Economic and Rural Development and Tourism, Atlantic Canada Opportunities Agnecy, completed by Gardner Pinfold, March, 2011, p.10.

Strong fisheries and manufacturing base – The South West Nova region is strongly rooted in fisheries and manufacturing. A high concentration of residents in the labour force in these industries has remained consistent over the 2006 to 2012 period.

Thirty-five manufacturers were engaged in ship or boat building in the South West Nova region. Local businesses have the potential to service smaller components of ISI's contract, where ISI outsources to local Nova Scotia suppliers, and service the growing offshore wind energy and tidal power firms who require ship and boat products and services.

5.2.3 Growth Opportunities and Strategic Focus

Skilled labour force with growing technical occupations – The resident labour force is a notable asset for the South West Nova region. As outlined in earlier sections of this report, there were increases in the resident labour force engaged in construction trades, electrical engineering and utilities, finance, machining and metal forming and a range of occupations supporting marine transportation. This finding has positive implications for the industrial segment of the shipbuilding and drone technologies industries. The local labour force and business community has the opportunity to service and supply industrial components to ISI and its suppliers.

In addition, the business community has the potential opportunity to provide higher value-added manufactured products and services for companies that develop and sell drone technologies for sea, air and land. However, to pursue opportunities in these technology areas requires high levels of skill and education, which can be acquired through the province's post-secondary education system. Dalhousie University is the leading research university in Atlantic Canada and Canada. There is a need to have a stronger linkage with Dalhousie University's innovative and leading edge researchers and the business community in South West Nova.

Proposed areas of strategic focus are divided into two broad categories:

1. Develop a stronger links with Dalhousie University and the Nova Scotia Community College.

- Develop a stronger partnership with Dalhousie University's advanced manufacturing, design and engineering researchers to encourage and support local entrepreneurship, innovation and commercialization. This can be achieved by:
  - Promoting business success stories that have attracted investment or generated growth among local companies engaged in shipbuilding and drone technologies.
  - Formalizing technology transfer opportunities and policies which allow for the creation of new innovative businesses in the region.
- Develop a stronger partnership with Nova Scotia Community College's senior administrators at the Shelburne and Yarmouth campuses to explore the feasibility of a business incubation program.

2. Improve regional marketing and promotion of South West Nova's shipbuilding and drone technologies industries.

- Use local business directories and databases to identify companies in the South West Nova region with the capacity to provide specific support to the shipbuilding and drone technologies industries.

- Develop a targeted shipbuilding and drone technologies regional industry profile and marketing strategy for ISI and major suppliers to attract investment and outsourcing to the South West Nova region.

5.3 Niche Agriculture

5.3.1 Industry Trends

The Canadian agri-food sector continues to grow rapidly and expand its overall share of global production, primarily based on more open trade policies and increasing demand in key developing markets. With rising levels of global population and economic growth, the Canadian agri-food sector has been able to improve its competitive position. The Canadian food and beverage manufacturing sector alone (exclusive of agricultural production) exported $20.7 billion in products in 2008, rising to $23.4 billion by 2011.[37]

Changing consumer and societal demands are influencing changes throughout the whole agriculture and agri-food system. Consumers are demanding more variety, more convenience and more environmentally-friendly and healthier food choices, as well as foods that align with their cultural values (including organic and halal products).[38] As a result of these trends, the food processing industry has become a growing and innovative industry in Canada. Food processing industry viability is critical for the primary agricultural industry, where 38 percent of agricultural production is used as raw material inputs.[39]

While primary agriculture accounts for only a small share of the total economy (1.7 percent of GDP), it is at the heart of the agriculture and agri-food system and is growing an average of 1.5 percent per year since 1997.[40] Within the primary agricultural industry, there are also an increasing number of farms diversifying production, producing niche products (e.g. organics), adopting environmentally-friendly production methods, and producing non-traditional products such as haskap berries and cranberries.

Nova Scotia has 403,044 hectares (ha) of total farm land, with the average size of a farm being 106 ha/farm, significantly smaller than the Canadian average of 295 ha/farm. South West Nova has approximately 12,967 ha of farmland and approximately 230 farms. In 2007 (the most recent data available for current $ GDP) the contribution to the provincial economy from the agriculture and food industries (less fish) as measured by GDP was $544.4 million – 1.8 percent of the provincial economy, with primary agriculture making up $198.9 million or 0.7 percent of the total economic output of Nova Scotia.[41]

Not only is the agriculture and agri-food industry a large contributor to the province's GDP, it is also employs a large number of people in Nova Scotia. In 2010, primary agriculture employed 5,800, while non-fishery food manufacturing employed 3,910 and beverage manufacturing 865 for a total of 10,575

[37] Industry Canada. (2012). Trade Data Online. Canadian Trade by Industry.

[38] Ibid.

[39] Ibid.

[40] Ibid.

[41] Nova Scotia Department of Agriculture (2010). An Overview of the Nova Scotia Agriculture and Agri-food Industry.

people. However, this total was less than the people employed in this industry in 2009 by 1,062 people. The decrease in employment was driven by primary agriculture losing 800 jobs[42].

With this decrease in employment, efforts need to be made to diversify and grow the province's agri-food sector through non-traditional agricultural production. Provincial economic development and agricultural stakeholders are encouraging the growth of specialty crops such as haskap berries and cranberries and tender fruits such as grapes and peaches.

The food processing sector (not including seafood products) also has 172 businesses in Nova Scotia, as of 2012. The number of food processing firms in the province has remained flat since 2008.[43] Efforts will need to be made to encourage a business environment that integrates innovative processes for production and marketing, particularly given that this sector of the economy is growing rapidly in many other jurisdictions, including other regions of Canada.

5.3.2 Sector Assets

Although there are areas throughout Nova Scotia that have a better-developed agricultural industry, South West Nova can become a key player in providing niche agricultural products to consumer markets. In 2012, the region had approximately 60 agricultural producers.[44] Currently there are support activities taking place to build a business case for attracting higher value added production and processing. The Nova Scotia Community College, with the support of the Shelburne Community Business Development Corporation and Atlantic Canada Opportunities Agency are in the second year of a climate monitoring project. This project has monitored micro-climates throughout the region for the past two years to better understand the growing potential of the area. Generally, in order to attract agricultural producers to the region, three full years of climate data is needed. This project will continue into the third year and additional work should be done afterwards to ensure the climate data is continually updated and marketed to the appropriate industry organizations.

In addition to climate research currently being conducted, the region has an established mink industry with work currently being done to ensure the sustainability and eco-friendliness of the mink industry. Sustainable waste management systems are being developed including an anaerobic digestion system that will keep mink waste out of local landfills and create bio-fuel opportunities.

5.3.3 Growth Opportunities and Strategic Focus

There are a number of growth opportunities the region can take advantage of in order to expand the agricultural sector. The region contains micro-climates that are able to support tender fruit and berry production, which can lead to high-valued added agricultural processing for the region. Some soil conditions are particularly suited for grape cultivation, and with growing interest across the province in viticulture development, this could lead to investment and economic development. In order to attract grape growers and viticulturists (or to develop these skills from within), additional climate and soil data must be collected. The climate modeling project is an excellent start, but soil testing should also be done to continue to build the business case for potential investment in the agricultural sector.

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[42] Nova Scotia Department of Agriculture (2010). An Overview of the Nova Scotia Agriculture and Agri-Food Industry

[43] Statistics Canada, Canadian Business Patterns Data, June 2012.

[44] Statistics Canada, Canadian Business Patterns Data ,June 2012.

By developing strategic partnerships and relationships with innovative organizations within the agricultural sector including NSCC, but also with agricultural organizations and associations, South West Nova can continue to develop research and pilot projects that can help build the business case for increased agricultural and food processing investment in the region. In particular, research needs to be conducted to better understand the soil conditions throughout the region.

In addition, developing value-added opportunities around the mink industry (including additional investments in waste management and anaerobic digestion) are important in supporting the already well-established industry.

The strategic focus for the South West Nova communities should be:

1. Initiate pilot projects to encourage farmers to diversity their operations or try value-added production. This could include developing a grape growers program at NSCC and piloting growing particular varietals of grapes.
2. Ensure water, natural gas and electricity infrastructure are in place to service value-added agricultural developments.
3. Continue to develop relevant research including the current climate monitoring program as well as soil testing projects to understand the potential in non-traditional agricultural products.
4. Develop policies and programming, on a regional scale, to support farmgate sales and small value-added operations. Examples include developing farmgate trails or "Grown in South West Nova" labeling for local products.
5. Coordinate meetings across the South West Nova region with planning staff, economic development officers and agri-tourism operators to explore the agri-tourism industry consumer demands and build support for further development of this industry.
6. Explore the opportunity for holding a special event to promote local produce and celebrate the South West Nova region's agricultural heritage.
7. Promote local farmer's markets within the region through potentially developing a website that can act as a one-stop-shop in understanding the local food economy in Southwest Nova.

5.4 Value Added Fisheries

5.4.1 Industry Trends

Global exports and imports of seafood products each total about $100 billion annually. Due to the perishable nature of fish, about 90 percent of internationally traded seafood is processed, according to the Food and Agriculture Organization of the United Nations. China is the largest seafood producer in the world with Japan, the US and the EU being the largest importing markets.

The US seafood processing industry consists of 550 companies with combined annual revenue of about $10 billion. However, the industry is extremely concentrated, with the 50 largest companies accounting for about 70 percent of all revenue. Many companies are vertically integrated and engaged in both seafood distribution and processing.

The Atlantic Canadian fisheries sector accounts for 73 percent of total landings in Canada, with top production in herring, shrimp, snow crab, scallops, mackerel and lobster. In 2005, the region's commercial lands totalled almost 800,000 tonnes, with a value of $1.5 billion. The processing and marketing of fish and shellfish harvested from open waters account for the majority of the industry's products. Atlantic Canada is well positioned to continue to see growth in the fisheries industry based on its rich traditional knowledge of the fisheries industry, its transportation infrastructure and its proximity to the large United States market.

Most of Atlantic Canada's fish exports go to the United States, with little of the catch being processed within Atlantic Canada. However, the region has been capturing significant new markets in both Europe and the Pacific Rim. These new markets, while providing new opportunities, also require a level of adaptability within the sector. For example, the European market is particularly concerned with fisheries sustainability accreditation, and while this accreditation increases costs for distributors and processors, it may be required of local fishing businesses to gain access to the market. In order to take advantage of new opportunities and to continue to growth the Atlantic seafood industry, local businesses must be creative and take initiative in experimenting with value-adding for traditional species, developing new markets for non-traditional and under-utilized species, and applying new technologies for a growing aquaculture industry. There is also a need to target specific niche markets worldwide with specialized products (such as sea urchins and frozen herring roe).

Although aquaculture is a controversial subject, it cannot be ignored as a key current and future economic driver within the fisheries industry in Atlantic Canada. The aquaculture industry is continuing to grow and develop with the total value of aquaculture production surpassing $255 million per year in 2005. Nova Scotia has over 370 aquaculture sites and offers a diverse range of established and new aquaculture ventures including farming of Atlantic salmon, blue mussels, oysters, steelhead trout, clams, halibut, arctic char and a range of sea plants. In addition to the established farmed species, Nova Scotia companies are exploring emerging species such as abalone and other marine species such as Sablefish.

Hatcheries related to increasing the stock of wild fish, as well as supplying aquaculture facilities, also have the potential to bring new strong value-added businesses to the region. The hatching of salmon has been well-developed and researched, however the hatching of additional species including cod has not been as fully explored. Research taking place at DFO's Northwest Atlantic Fisheries Centre since the 1990s has looked at understanding cod hatcheries and the ability to stock wild cod supplies. By undertaking such pilot projects and investing in research on additional species in Southwest Nova, it is possible that new opportunities may emerge. Although the full scope of hatchery-related opportunities is unclear, it is worthy of further examination from both a conservation and an economic development perspective.

There are threats to the traditional fisheries in South West Nova. Most notable among the threats is the depreciated value of lobster, which is at historic lows. In order for fishermen to sustain themselves, many have increased the volume of their lobster catch. This year the hauls in the first week along the coast of South West Nova, were 8,000 to 12,000 pounds a day, compared to between 3,000 and 4,000 pounds in previous years.[45] Efforts need to be made by the province and industry organizations representing lobster fishermen to develop mechanisms to increase the compensation to fisherman or many of them will no longer operate their businesses.

5.4.2 Sector Assets

South West Nova has a long and proud fishery history as well as one of the post productive fisheries in North America. There is a large population throughout the region that is specifically skilled and

[45] Taber, Jane (2012). Lobster glut threatens East Coast fishery. The Globe and Mail.

knowledgeable about fishing, small-scale processing, the ocean environment and the business of fishing. Many of the skills needed by fishermen are often transferable to the aquaculture industry.

The infrastructure built across the region in terms of wharfs and ports has developed to support the fisheries industry and can continue to do so.

An entrepreneurial spirit also exists within the region that lends itself well to small-scale niche processing opportunities as well as aquaculture opportunities. Although many people in the area remain skeptical, the aquaculture industry in the region has proven to be long-standing and profitable, with some small-scale businesses having operated for more than 30 years. Efforts need to be made to educate and share information on the potential risks of aquaculture production, but also the benefits and safety procedures that have been developed across the industry.

5.4.3 Growth Opportunities and Strategic Focus

South West Nova's assets, which include the workforce, productive fisheries, available infrastructure and entrepreneurial spirit, will continue to support the growth of the fisheries sector. In particular, it may be beneficial to highlight small-scale, local aquaculture operators to highlight that the industry can be environmentally sustainable and beneficial for the region. In addition, some fishermen have begun focusing on quality rather than the quantity of their catch and many have taken part in courses and certification programming to certify that their catch is of the highest quality. These initiatives increase the price of lobster and other species, and can better sustain the livelihoods of fishermen. Diversifying the wild catch and aquaculture opportunities to include alternative species and non-traditional catches also has the potential to increase the sustainability of the fisheries sector.

However, additional soft infrastructure should be developed to spur innovation and increased productivity in the industry. A business incubator program can be developed with help from strategic partners such as the educational institutions active in the region (e.g. Université Sainte-Anne, Nova Scotia Community College and Dalhousie University) in order to spur innovative businesses and activities. Traditional sectors, particularly the fisheries, will continue to be key players in the economic development of the region; it is important that these industries continue to push the envelope and reinvent themselves to increase value-added opportunities and prosperity in the region.

Proposed areas of growth opportunities and strategic focus include:

1. Provide for entrepreneurship training and support to small-scale niche processing and additional value-added businesses in the region. An incubation facility will require partnerships among municipalities and other economic development stakeholders in the region and a business plan and funding model for the facility to be sustained over the long term.
2. Work with fishery industry organizations to develop educational and training programming targeted at quality assurance and sustainability, and formal certification of product quality.
3. Work with fishery industry organizations and local researchers/education institutions to explore the viability to non-traditional fisheries and aquaculture production.
4. Work with the local population to more fully explore the benefits and risks associated with aquaculture and to promote small-scale business success stories.
5. Explore the opportunity for holding a special event to promote fishing and celebrate the South West Nova region's fishing heritage.

5.5 Tourism

5.5.1 Industry Trends

Tourism is one of the largest and fastest-growing economic sectors in the world. Even with economic, political and environmental shocks, global international tourism travel has shown virtually uninterrupted growth from 277 million international tourist arrivals in 1980, to 528 million in 1995 and to one billion in 2011.[46]

Analysts predict that the future of the global tourism industry will be characterized by new source markets, more travelers, and increasing consumer expenditures. Accordingly, the long-term outlook and assessment of global tourism is bright, with the number of international tourist arrivals expected to increase by 3.3 percent a year (on average) from 2010 to 2030.[47]

The Canadian tourism industry generated $78.8 billion in 2012 in total economic activity, and 603,400 jobs in the sector. Despite global tourism growth, Canada has experienced flat-line or modest increases in visits in most recent years, although it has also seen declines in certain years. The historic reliance on the US market, which has traditionally provided 75 percent of Canada's international visitors, has proven to be troubling in light of the recent decline in the U.S. economy and continued economic turmoil.[48]

Tourism plays a significant role in the Nova Scotian economy. In Nova Scotia, tourism is a $1.8 billion industry and accounts for two percent of all provincial economic activity. The industry contributes $646 million to the provincial GDP. It supports over 31,700 jobs, both directly and indirectly, and generates $795 million in household income, and tax revenues of $173 million provincially and $151 million federally[49].

South West Nova has a long history of tourism. Much of this asctivity was directly associated with the Yarmouth ferries, which transported visitors to and from Yarmouth and Maine. A Province of Nova Scotia report suggests that in 2002, there were some 95,000 visitors entering Nova Scotia via these Yarmouth-Maine ferry connections. This report suggests that by 2005, after the *Scotia Prince* service between Portland and Yarmouth ceased operation, the number had fallen to under 55,000. It further suggests that the decline continued, and by 2009 only 26,000 visitors arrived in Nova Scotia via Yarmouth – 73 percent fewer than in the 2002 peak when two ferries operated.

These findings have been disputed by other reputable sources. A Gardner Pinfold Yarmouth-Maine Ferry Analysis and a CPCS Transcom Report on Transportation Systems in South West Nova both quote substantially higher figures. Gardner Pinfold suggests that that as of 2002, some 90,000 visitors with cars arrived to Nova Scotia via Yarmouth's ferries. An additional 55,000 US visitors arrived by ferry as walk-on passengers, bringing the total number of tourists transported by the ferry in 2002 to 145,000. Ultimately, no matter which figures are utilized, it is clear that Yarmouth's ferry operations had an enormous significance for the local tourism sector, and the loss of these connections has had dramatic effects on tourism in the region.

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[46] World Tourism Organization (2012). UNWTO Tourism Highlights.

[47] United Nations' World Tourism Organization (2012). Tourism Highlights. 2012 Edition.

[48] Tourism Industry Association of Canada (2012) The Canadian Tourism Industry: A Special Report Fall 2012.

[49] Nova Scotia Ministry of Economic and Rural Development Tourism (2010). Nova Scotia Tourism Industry Facts.

Since the Yarmouth ferry closures, South West Nova's tourism sector has suffered. Many businesses associated with the tourism industry (including retailers, accommodation providers and tour operators) have ceased to operate. However, it should also be noted that visitor declines were also seen before the loss of ferry operations. The provincial government has linked this to several factors including the high Canadian dollar, increased border security (or perceived increases) due to terrorist attacks on September 11th, 2001 and recent global recessions and economic uncertainty. Whatever the cause, South West Nova's tourism industry has clearly suffered. The number of hotel rooms available in Yarmouth, for example, has almost been cut in half.

One of the primary limitations to the tourism sector in South West Nova is the lack of proximity to major markets. Being a two and a half hour drive to Halifax and largely having only one road to support visitors traveling to the region, South West Nova's tourism is relatively difficult to access. However, these trends do not account for the key assets that can draw visitors back to the region and bolster the tourism sector.

5.5.2 Sector Assets

There are a number of sector assets within the region that lend itself well to the revitalization of the tourism sector. There are a number of key festivals and events including Lobster Fest, Shelburne Founders' Days and Lights Along the Shore Lighthouse Festival that take place across the region, and that lure visitors to each of the municipalities. There is an active volunteer base that continues to support these events and activities for both visitors and residents. In addition, the region boasts miles of beautiful shoreline, beaches, lighthouses and fishing villages that continue to attract large numbers of visitors to the region. Local seafood and cuisine offer a unique experience for tourists. The Acadian culture represents another significant asset, both because of its inherent value, and because of its appeal to visitors from around the world.

There is also a vibrant and hardworking organizational framework already in place to support local and regional tourism in South West Nova. Destination Southwest Nova, Yarmouth and Acadian Shores Tourism Association and Discover Shelburne County are engaged in destination development, marketing, promotions, and festivals and events development. The region and its municipalities should continue to support the work being done by these organizations, and communications, information sharing and collaboration should continue to be facilitated in order to develop strong tourism products and experiences for the region.

5.5.3 Growth Opportunities and Strategic Focus

While the tourism sector has seen a decline in recent years there are number of initiatives that can be undertaken to bolster the economy. Proposed growth opportunities and areas of strategic focus include:

1. Collaborate with the private sector engaged in the tourism industry, local municipalities and provincial government to reinstate the Yarmouth Ferry service under a different funding model.
2. Advocate for strategic and collaborative tourism marketing efforts with the regional tourism organizations. This should include an emphasis on culinary tourism, ecotourism, special events and festivals. This collaborative approach will increase the length of time visitors spend in the region and better capitalize on the financial impact of tourism spending.
3. Develop and promote the region's harbours and waterfronts as key tourism destinations and focal points for festivals and events in the South West Nova region. Aim to improve the regional draw of these festivals and events.
4. Support the development and promotion of culinary tourism.

5. Undertake a regular evaluation of the South West Nova region's tourism promotional activities to ensure the delivery of a progressive marketing message.

In order to feasibly tackle these large-scale, sectoral opportunities within the region it is important to develop an action plan that not only highlights the incremental actions that can be taken in moving forward but also a means to prioritize and delegate key steps. In addition, evaluation mechanisms are necessary in order to measure progress and success. The action plan, set forth in the next section, will highlight these key factors that ensure this document provides real results for South West Nova.

Section 6: Action Plan

6 Action Plan

Any sound regional economic development action plan must build on the unique assets and resources of each community to form a framework for achieving economic and community prosperity. This framework must contain aspirational goals and objectives, as well as a set of associated actions for achieving these desired outcomes. A successful action plan implicates more than just the organizations that fall within the regional boundaries; it provides a blueprint for actions and potential partners that can assist with achieving new regional prosperity. For that reason, the action plan must be generated from a detailed assessment of each local economy and assets.

Communities in South West Nova Scotia are facing new challenges in economic planning, challenges that are fundamentally altering the approaches that must be used in pursuing local economic development in the region. These include:

- Little to no historic and projected population growth in many of Nova Scotia's rural communities.
- A largely homogenous population in terms of immigration status.
- The growing recognition that economic development comes from within (e.g. business retention and expansion) the communities, and not from some external "saviour"
- The growing integration of community sustainability and the environment into economic development concerns.
- The increasing need to collaborate and share resources with regional economic development partners to implement development projects.
- The movement towards economic globalization and outsourcing of lower value added products and services to lower cost economic markets.

By definition, economic development goals should seek to build on local strengths, mitigate local weaknesses and convey the desired outcomes of the action planning process. Objectives define what is to be accomplished while the actions outline how this is to be accomplished.

6.1 Goals, Objectives and Actions

The **GOALS, OBJECTIVES** and associated **ACTIONS** that follow are built around a desire to engage and collaborate with regional and local economic development stakeholders and foster a supportive and innovative regional economy. In short, this action plan articulates the kind of region that South West Nova intends to be in Atlantic Canada. Detailed research and consultation has identified three strategic goals to guide the long-term development of the region:

1. Engage with the entire business community in the South West Nova communities to improve the capacity for economic opportunities in rural areas
2. Facilitate economic development opportunities in South West Nova for five key sectors: alternative energy, shipbuilding and drone technologies (sea, air and land), niche agriculture, value-added fisheries, and tourism
3. Attract and retain the population base by embracing the view of South West Nova being a location of choice to live, work, and raise a family

6.1.1 Engage with the entire business community in the South West Nova communities to improve the capacity for economic opportunities in rural areas

Objective 1: South West Nova is known for the openness to innovative business development projects and diverse community engagement.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Coordinate a business retention and expansion program throughout the South West Nova communities.	Local municipalities, Regional Enterprise Networks, ERDT – Business Retention and Expansion Program	Low	Medium
2. Create an ambassador program that engages an alliance of individuals who have influence over South West Nova's economic growth.	Regional Enterprise Network, South West Nova's largest employers	Medium	Low
3. Promote Access Nova Scotia's one-stop portal for business processes that includes regulatory processes for start-up businesses.	Local municipalities, Access Nova Scotia	Medium	Low
4. Explore place branding, marketing and promotion as a method to raise the profile of South West Nova communities.	Regional Enterprise Networks, ERDT	High	Low
5. Expand the economic development website presence among municipalities to provide demographic, economic, taxation, and infrastructure information for business, immigrant, active retiree, and youth audiences.	Local municipalities	High	Low
6. Create a database of available industrial and commercial lands and properties for sale across South West Nova communities.	Local municipalities, Regional Enterprise Networks	High	Low
7. Conduct an annual survey of freelance professionals and active retirees who understand the context and needs of a strong local economy.	Regional Enterprise Networks, freelance professionals, active retirees	High	Low
8. Incorporate the needs and priorities of freelance professionals and	Local municipalities	Medium	High

active retirees into various municipal documents including the official plans and strategic plans.			
9. Use social media to promote freelance professionals and entrepreneurial success stories and promote active retirees engaged in the business community as an approach to attract more of them.	Regional Enterprise Networks, freelance professionals, active retirees	High	Medium
10. Explore the potential creation of a small business incubator, to help anchor and accelerate the growth of entrepreneurial ventures in the region.	Local municipalities, NSCC, ERDT – Business Retention and Expansion Program, Canadian Association of Business Incubators	High	High

Performance Measures:

- One-quarter of businesses contacted each year for the business retention and expansion program
- All of the executives of South West Nova's largest private sector employers (100+ employees) engaged in the ambassador program
- Uptake of local entrepreneurs and small business owners using the Access Nova Scotia services
- Number of available industrial and commercial properties for sale.
- Consultant hired to present a place branding and marketing workshop
- Consistent number of freelance professionals in South West Nova communities
- Consistent number of active retirees over the age of 60 in South West Nova communities
- Consistent number of youth under the age of 25 in South West Nova communities

6.1.2 Facilitate economic development opportunities in South West Nova for five key sectors: alternative energy, shipbuilding and drone technologies (sea, air and land), niche agriculture, value-added fisheries, and tourism

Objective 1: Southwest Nova is no longer reliant on fossil fuel energy and is generating sufficient energy from alternative sources (wind, biomass, peat, solar and natural gas).

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Coordinate among the South West Nova municipalities to align planning policies and land use bylaws that facilitate small scale investments in renewable, alternative energy.	All Municipalities, Service Nova Scotia and Municipal Relations	Medium	Medium

2. Host workshops with the local business community to promote the concept of small scale renewable investment including wind, tidal and biomass, peat.	Chambers of Commerce	Medium	Low
3. Promote provisions in the municipal development plans for single wind conversion systems.	All Municipalities	Medium	Low
4. Together with entrepreneurs, research and plan to attract small scale wind and tidal energy part, components and turbine manufacturers to the South West Nova region.	ACOA, All Municipalities, Chambers of Commerce, Nova Scotia Business Inc., ERDT	High	High
5. Develop a business plan for the heat and power biomass plant in the Municipality of Clare. ▪ Initiate discussions with Nova Scotia Power about this business opportunity ▪ Formulate an agreement to get the biomass plant on the power grid.	Municipality of Clare, Nova Scotia Power, ERDT	Medium	High
6. Use local business directories and databases to identify companies in the South West Nova region with the capacity to provide specific support to key alternative energy sectors, including wind, tidal, biomass, peat.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse	Medium	Medium
7. Raise the awareness of the existing the base of resident knowledge experts who have the technical skills in alternative energy applications and the presence of local alternative energy suppliers	Nova Scotia Community College, Université Sainte-Anne, Local business owners servicing the alternative energy sector	Medium	Medium
8. Initiate discussions with the executive team at the Fundy Ocean Research Centre for Energy (FORCE) for pilot test projects and research stations along the coast	Municipal District of Clare, ACOA, Université Sainte-Anne, ERDT	High	High
9. Highlight the availability of industrial land in the South West Nova	All Municipalities	Medium	Low

communities for potential alternative energy pilot projects.

Performance Measures:

- Direct dollar value of small-scale investments made in renewable, alternative energy
- Workshops developed and delivered to promote small scale renewable investment and uptake in the number of new investments made in the region
- Number and direct investment made by new small scale energy parts and components manufacturer to the region
- Dollar value of investment made into the biomass plant in Clare to make it fully functional and operational
- Research funding directed to pilot test projects

Objective 2: South West Nova shipbuilding companies will benefit economically from the Federal shipbuilding contract until 2030.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Develop a stronger partnership with the post-secondary institutions advanced manufacturing, design and engineering researchers to encourage and support local entrepreneurship, innovation and commercialization.	Dalhousie University, Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, ACOA, local innovative private sector companies	High	Medium
2. Develop a stronger partnership with Nova Scotia Community College's senior administrators at the Shelburne and Yarmouth campus to explore the feasibility of a business incubation program.	Nova Scotia Community College	Medium	Medium
3. Create an awareness campaign that educates people in the labour force about local career opportunities through the use of social media.	Nova Scotia Community College, Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, ACOA	Medium	Low
4. Use local business directories and databases to identify companies in the South West Nova region with the capacity to provide specific support to the shipbuilding and	Three Community Business Development Corporations	Medium	Low

drone technologies industries.			
5. Develop a targeted shipbuilding and drone technologies regional industry profile and marketing strategy for ISI and major suppliers to attract investment and outsourcing to the South West Nova region.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, ACOA	High	High

Performance Measures:

- Number of local firms and funding dollars directed to local firms that are engaged with the post secondary institutions for research partnerships
- The development of a feasibility study exploring a potential business incubator that is home to 15 start-up companies.
- Number of followers tracking local career opportunities in South West Nova
- Number and value of contracts awarded by ISI to local shipbuilders and drone technology companies.

Objective 3: Southwest Nova has redefined their agricultural sector through high-valued non-traditional agricultural production.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Initiate pilot projects to encourage farmers to diversity their operations or try value added production	ACOA, Nova Scotia Federation of Agriculture, ERDT, Nova Scotia Department of Agriculture	Medium	High
2. Ensure water, natural gas and electricity infrastructure are in place to service value-added agricultural developments.	All Municipalities	Medium	Medium
3. Continue to develop relevant research including the current climate monitoring program as well as soil testing projects to understand potential non-traditional agricultural products.	Three Community Business Development Corporations, ACOA, Nova Scotia Community College, Nova Scotia Department of Agriculture	Medium	Medium
4. Develop policies and programming, on a regional scale, to support farm-gate sales and small value-added operations. Examples, include farm gate trails or "Grown in South West Nova" produce labeling.	Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, Farmers' Markets of Nova Scotia, ERDT	High	High

5. Coordinate meetings across the South West Nova region with planning staff, economic development officers and agri-tourism operators to explore the agri-tourism industry consumer demands and build support for further development of this industry.	Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, Farmer's Markets of Nova Scotia	High	Medium
6. Explore the opportunity for holding a special event to promote local product and celebrate the South West Nova region's agricultural heritage.	Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, ERDT	Medium	Medium
7. Promote local farmer's markets within the region through potentially developing a website that can act as a one-stop-shop for local food in Southwest Nova	ERDT, Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, Farmer's Markets of Nova Scotia	High	High

Performance Measures:

- Creation of a comprehensive soil study and literature to provide to potential agricultural investors
- Development of value-added agricultural production pilot projects related to high-value products including mink, tender fruit and berries.
- Increase in the number of industrial acres available for value-added agricultural development
- Creation of regional agri-tourism initiatives including festivals and events and growth of visitors to these events and festivals year over year.
- Development of a local food website.
- Increase in the number of visitors the local food website attracts month-over-month.

Objective 4: Southwest Nova is a leader in exploring sustainable and value-added fisheries

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Provide for entrepreneurship training and support to small-scale niche processing and additional value-added businesses in the region.	Three Community Business Development Corporations, ACOA, Nova Scotia Community College, ERDT	Medium	Medium
2. Work with fishery industry organizations to develop educational and training programming targeted at quality	Lobster Council, Aquaculture Association of Nova Scotia	Medium	High

assurance and sustainability.			
3. Work with fishery industry organizations and local researchers/ education institutions to explore the viability to non-traditional fisheries and aquaculture production	Aquaculture Association of Nova Scotia, Nova Scotia Community College, Université Saint-Anne, Nova Scotia Fisheries and Aquaculture, Fisheries and Oceans Canada, ERDT	High	High
4. Work with the local population to explore the risks and benefits associated with aquaculture and to promote small-scale business success stories.	Aquaculture Association of Nova Scotia, Nova Scotia Fisheries and Aquaculture	High	High
5. Explore the opportunity for holding a special event to promote fishing and celebrate the South West Nova region's fishing heritage.	ERDT, Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, Lobster Council	Low	Medium
6. Explore the concept of fish hatcheries as a tool for both conservation and economic development within the region.	Local fisheries and environmental organizations, ERDT, Nova Scotia Fisheries and Aquaculture	Medium	Medium

Performance Measures:

- Development and delivery of niche entrepreneurship training geared specifically for value-added processing entrepreneurs in the fisheries sector
- Creation and delivery of educational programming in the fisheries industries on a number of relevant topics including quality assurance and sustainability
- Development of non-traditional fisheries catch and aquaculture research projects and pilot projects
- Development and delivery of a marketing and educational campaign about aquaculture

Objective 5: Southwest Nova has reversed the trend of declining tourism and has sustained their tourism industry.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Collaborate with the private sector engaged in the tourism industry, local municipalities and provincial government to reinstate the Yarmouth Ferry service under a different funding model.	Three Community Business Development Corporations, ACOA, Yarmouth and Acadian Shores, Destination Southwest Nova, ERDT	High	High

2. Advocate for strategic and collaborative tourism marketing efforts with the regional tourism organizations.	Yarmouth and Acadian Shores, Destination Southwest Nova, Shelburne County Tourism, Local municipalities, ERDT	Medium	Medium
3. Develop and promote the harbours and lighthouses as key tourism destinations and focal points for festivals and events in the South West Nova region.	Yarmouth and Acadian Shores, Destination Southwest Nova, Shelburne County Tourism, Local municipalities, ERDT	Medium	High
4. Support the development and promotion of culinary tourism.	Destination Southwest Nova, Shelburne County Tourism, Yarmouth and Acadian Shores, Farmers' Markets of Nova Scotia, ERDT	Medium	Low
5. Facilitate a regular collaborative evaluation of the South West Nova region's tourism promotional activities to ensure the delivery of a progressive marketing message.	Yarmouth and Acadian Shores, Destination Southwest Nova, Shelburne County Tourism, ERDT	High	Medium

Performance Measures:

- The reinstatement of Yarmouth ferry service to New England
- Preservation of the region's lighthouses and harbours and the development of events and festivals related to their preservation.
- Increase in tourists and locals who attend new and old festivals within the region
- Development of an evaluation of the region's tourism promotional activities

6.1.3 Goal: Attract and retain the population base by embracing the view of South West Nova being a location of choice to live, work, and raise a family.

Objective 1: South West Nova is a location of choice for people because of local employment prospects.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Promote innovative businesses in South West Nova that have wide market reach and have found local talented people.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, ACOA	Medium	Medium

2. Showcase local businesses that support continued learning and innovative compensation programs.	Chambers of Commerce	Medium	Medium
3. Create an awareness campaign that educates people in the labour force about local career opportunities and gaps.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse	Medium	High
4. Support efforts to attract, retain and integrate immigrants to the South West Nova region through the use of the Nova Scotia Nominee Program.	Nova Scotia Office of Immigration, Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse	High	High
5. Remove accessibility and cost barriers to English as a Second Language courses, and leverage their presence to attract immigrants	Regional Enterprise Network, ESL providers	High	Medium
6. Attract immigrants and foreign temporary workers to local agricultural opportunities.	Nova Scotia Office of Immigration, Regional Enterprise Network	High	Medium
7. Prepare digital media marketing materials that highlight local employment opportunities and business success stories directed to students at the Yarmouth and Shelburne campuses of Nova Scotia Community College.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, Nova Scotia Community College	Medium	High
8. Create a single local resource database that can match spousal skills/competencies with potential local employers.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse	Medium	High

Performance Measures:

- Number of South West Nova businesses that have clients outside of Nova Scotia
- Sector awareness campaign created
- Number of new immigrants by classification (e.g. business immigrant, temporary foreign worker) to South West Nova over the previous five years
- Digital media marketing materials created

- Number of people who have used the spousal resource database and were placed with local employers

Objective 2: South West Nova's youth and young population is remaining in the region because of local employment and business opportunities.

Recommended Actions	Potential Partners and Collaborators	Anticipated Results	Level of Effort
1. Create forums for engagement with specialized professionals and young student populations where they can interact about hiring demands, skills in need and labour force gaps in the South West Nova community.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, local entrepreneurs and business owners, ERDT – Workforce Development	Medium	Low
2. Disseminate local labour market information and gaps to youth groups at the Yarmouth and Shelburne campuses.	Three Community Business Development Corporations, Le Conseil de développement économique de la Nouvelle-Écosse, ERDT – Workforce Development	Medium	Low
3. Encourage local businesses to participate in work-college apprenticeship programs offered through Nova Scotia Community College.	Nova Scotia Community College, local business community, ERDT – Workforce Development	Medium	Low
4. Create interactive career planning presentations for local occupational opportunities that are directed to local secondary school students.	Local school boards	High	High
5. Create a social media campaign to communicate local occupational opportunities and training programs that are directed to youth.	Local school boards, ERDT – Workforce Development	Medium	High
6. Encourage local businesses to provide scholarships and bursaries to local secondary school students who remain in the South West Nova region and attend the Nova Scotia Community College's	Local school boards, local businesses	Medium	High

Yarmouth or Shelburne Campus.

Performance Measures:

- Number of forums created that are directed to specialized professionals and young student populations
- Number of local businesses participating in work-college apprenticeship programs offered through Nova Scotia Community College
- Number of career planning presentations directed to local secondary school students
- A social media campaign created and directed to youth
- Number of youth under the age of 25 in the South West Nova communities
- Number and dollar value of scholarships and bursaries available to local secondary school students who attend college at either the Yarmouth or Shelburne Campus

6.2 Prioritization

The associated actions are prioritized on a scale from 1 to 5, where actions designated as '1' are the lowest priority (long-term) and actions designated as '5' are the highest priority (short-term). A double scoring (weight-scoring) method is used to incorporate the level of community priority and the selection of public projects so that objectivity is maintained. Evaluation and ranking among projects is accomplished through assignment of weights for each action. It is recognized that there are limited resources in South West Nova to implement the actions. It is also recognized that the Economic Development Council South West Nova will disband in March 2013 so this organization has no authority to implement the actions. In EDCSWN's place, new Regional Enterprise Networks (RENs) will guide, navigate and connect economic development partners in rural Nova Scotia. The final structure, geography and orientation of these RENs is still unknown, but the actions outlined in this document provide a sound starting point for them or for other successor structures that may emerge.

For each of the actions, the level of effort and impact of results is categorized accordingly. An efforts-results grid is presented below that highlights the nine classifications. Clear priorities will be assigned to ventures located in the low effort – high results quadrant as they provide the highest economic efficiency.

FIGURE 6.1: EFFORTS-RESULTS GRID FRAMEWORK

Efforts			
H	High Effort, Low Results	High Effort, Medium Results	High Effort, High Results
M	Medium Effort, Low Results	Medium Effort, Medium Results	Medium Effort, High Results
L	Low Effort, Low Results	Low Effort, Medium Results	Low Effort, High Results
	L	M	H
		Results	

The following figure presents the prioritization results from this categorization exercise. It is important to note that none of the actions require a low amount of effort to get high results. As the figure indicates, there is a direct correlation to the level of effort and results. It is very common for high result actions to require a high level of effort.

FIGURE 6.2: SOUTH WEST NOVA ECONOMIC DEVELOPMENT ACTION PLAN PRIORITIES MATRIX

Goal 1: Engage with the entire business community in the South West Nova communities to improve the message of economic opportunities in rural areas.

Efforts			
		Objective 1, Action 8	
M	Objective 1, Action 1		Objective 1, Action 9
		Objective 1, Action 2; Objective 1, Action 3	Objective 1, Action 4; Objective 1, Action 5; Objective 1, Action 6; Objective 1, Action 7
	Results		

Goal 2: Facilitate economic development opportunities in South West Nova for five key sectors: alternative energy; shipbuilding and drone technologies (sea, air and land); niche agriculture; value added fisheries; and tourism

Efforts			
H		Objective 1, Action 5; Objective 3, Action 1; Objective 4, Action 2; Objective 5, Action 3	Objective 1, Action 4; Objective 1, Action 8; Objective 2, Action 5; Objective 3, Action 4; Objective 3, Action 7; Objective 4, Action 3; Objective 4, Action 4; Objective 5, Action 1
M	Objective 4, Action 5	Objective 1, Action 1; Objective 1, Action 6; Objective 1, Action 7; Objective 2, Action 2; Objective 3, Action 2; Objective 3, Action 3; Objective 3, Action 6; Objective 4, Action 1; Objective 5, Action 2	Objective 2, Action 1; Objective 3, Action 5; Objective 5, Action 5
L	Objective 1, Action 2; Objective 1, Action 3; Objective 5, Action 4	Objective 1, Action 9; Objective 2, Action 3; Objective 2, Action 4	
	L	M	H
		Results	

Goal 3: Attract and retain the population base by embracing the view of South West Nova being a location of choice to live, work, and raise a family.

Efforts			
H		Objective 1, Action 3; Objective 1, Action 7; Objective 1, Action 8; Objective 2, Action 5; Objective 2, Action 6	Objective 1, Action 4; Objective 2, Action 4
M		Objective 1, Action 1; Objective 1, Action 2	Objective 1, Action 5; Objective 1, Action 6
L		Objective 2, Action 1; Objective 2, Action 2; Objective 2, Action 3	
	Results		

Appendix A: Economic Base Analysis

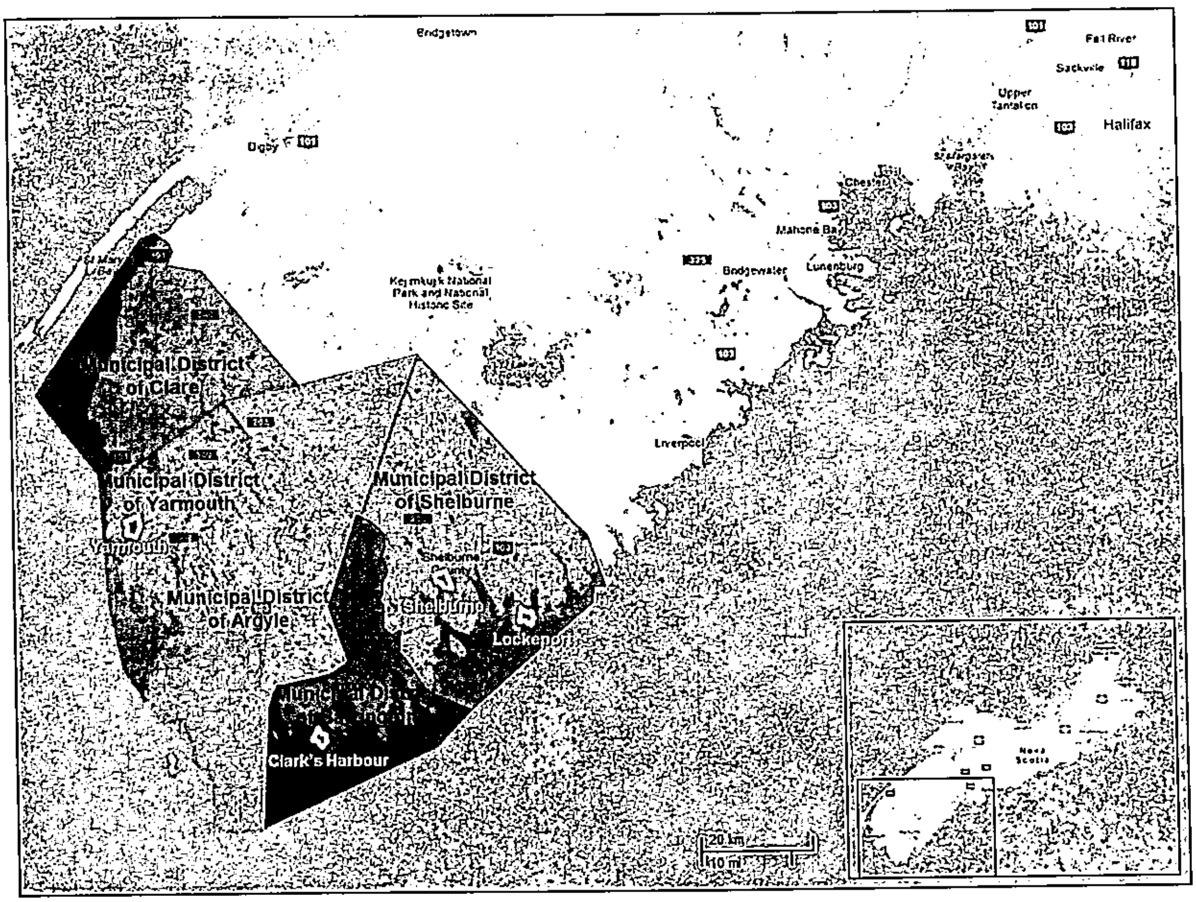
Appendix A: Economic Base Analysis

Location

There are nine communities that the Economic Development Council South West Nova serves. (Figure A.1). They are:

- Municipal District of Clare
- Municipal District of Shelburne
- Town of Shelburne
- Municipal District of Barrington
- Town of Clark's Harbour
- Town of Lockeport
- Town of Yarmouth
- Municipal District of Yarmouth
- Municipal District of Argyle

FIGURE A.1: SOUTH WEST NOVA COMMUNITIES



Source: Derived from using Google Maps, 2012.

These communities are a unique area of Nova Scotia and Canada. Located at the south west tip of Nova Scotia, the area is surrounded by three water bodies: the Bay of Fundy, the Gulf of Maine and the Atlantic Ocean. The immediate proximity to the sea makes for a very large shoreline that connects the area to an international shipping system. The main provincial highways that pass through the geographic area are provincial highways 101 and 103. Collector roads 203 and 340 make the inland communities accessible. South West Nova is largely rural, but urban centres such as Yarmouth and Shelburne serve as regional commercial centres.

Demographic Characteristics

Overall, the South West Nova region has experienced negative population growth over the previous ten years, but Atlantic Canadian provinces such as Nova Scotia have experienced very low growth over the past years. To that end, the demographic characteristics have been examined using Statistics Canada data from 2001 to 2011 for each of the nine constituent municipalities and the Province of Nova Scotia. In addition, additional material has been gathered from relevant sources to allow for the inclusion of population forecasts.

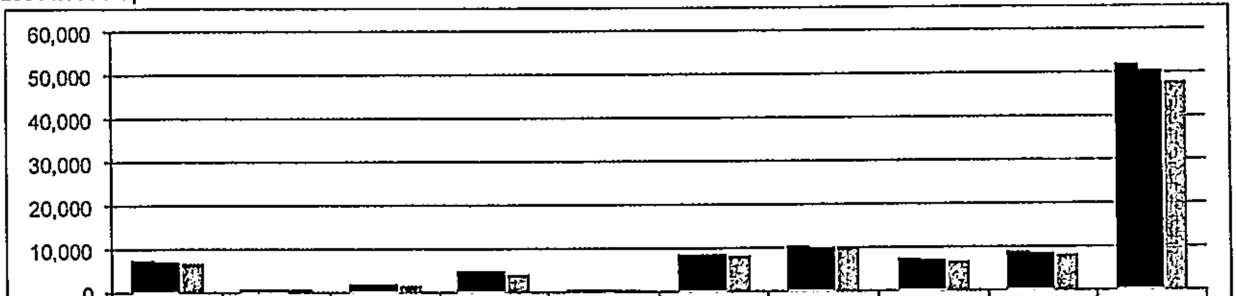
Population Change

The South West Nova communities have experienced negative population growth over the last decade. As shown in the following figure, the region has gone from a population of 52,023 in 2001 to 47,933 in 2011, a net decrease of 4,090 residents. Population decline has been most pronounced in the towns of Yarmouth (-800 residents, -11% growth from 2001), Shelburne (-327 residents, -16%), Lockeport (-113 residents, -16%), Clark's Harbour (-124 residents, -13%) and the municipal district of Barrington (-654 residents, -9%).

Over the same time period the Province of Nova Scotia's population increased from 908,007 in 2001 to 921,727 by 2011, a net increase of 13,720 residents (or 2% growth). At an average annual growth rate of a fraction of a percentage on a yearly basis, Nova Scotia's population growth is very slow in comparison to other Canadian provinces such as Alberta, British Columbia and Ontario.

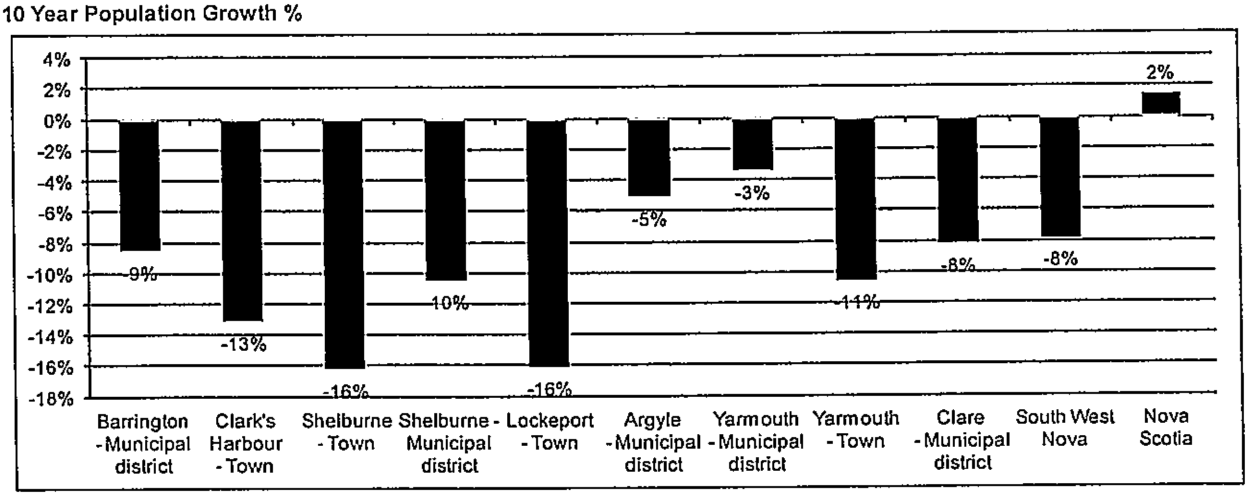
FIGURE A.2 - HISTORIC AND CURRENT POPULATION GROWTH, SOUTH WEST NOVA, 2001-2011

2001-2011 Population



	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova
2001	7,648	944	2,013	4,925	701	8,698	10,466	7,561	9,067	52,023
2006	7,331	860	1,879	4,828	646	8,656	10,304	7,162	8,813	50,479
2011	6,994	820	1,686	4,408	588	8,252	10,105	6,761	8,319	47,933

10 Year Population Growth %



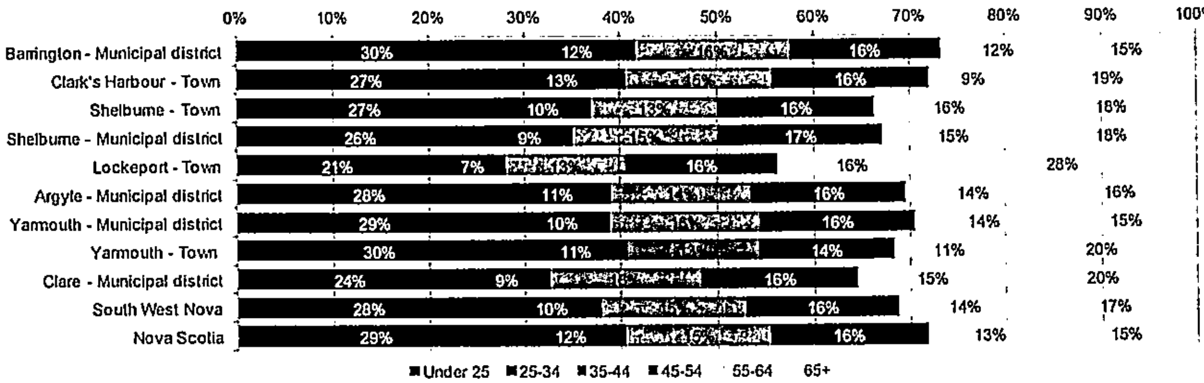
Source: Derived from Statistics Canada (Census of Population, 2001, 2006, 2011) by Millier Dickinson Blais Inc.

Population by Age

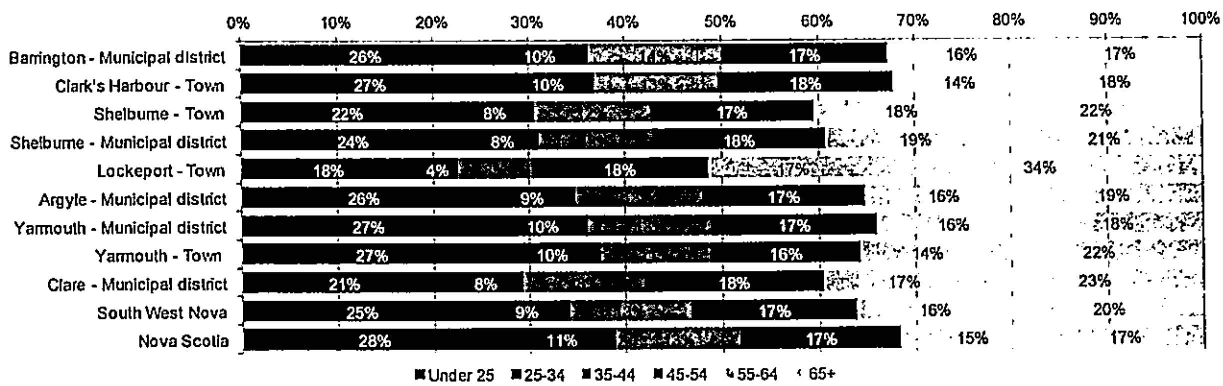
The following figures highlight the age distribution of the population for South West Nova and the constituent communities. Taken together these findings reveal that the region, much like the rest of Nova Scotia, is confronted with an aging population. The proportion of the population over the age of 55 increased from 31 percent (14% for those aged 55-64 years and 17% for those aged 65+) in 2006 to 36 percent (16% for those aged 55-64 years and 20% for those aged 65+) in 2011. The aging trend held true for each of the communities. The Province of Nova Scotia's young population was 28 percent under the age of 25 and 11 percent 25-34 years of age in 2011. In South West Nova there was no single community with a higher proportion of young people (under 25 or 25-34) than the Province. These findings reveal a more pronounced older population in South West Nova than the rest of the Province.

FIGURE A.3: POPULATION BY AGE 2006 AND 2011

2006



2011

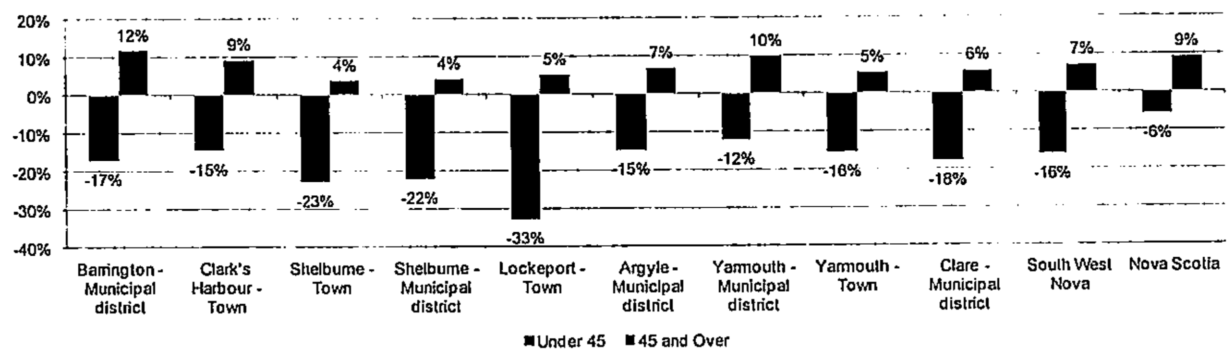


Source: Derived from Statistics Canada (Census of Population, 2006, 2011) by Millier Dickinson Blais Inc.

The following figure examines the demographic shift occurring in Nova Scotia. By examining population change between 2006 and 2011 for the age groups, it is clear that the aging of the larger 'boomer' cohort is having a significant effect on the region's demographic composition. In every community the population under the age of 45 was in decline and the population 45 years of age and over was increasing. Communities indicating that they were aging faster than others included the Municipal District of Barrington (12% growth in the 45 years and over group) and Municipal District of Yarmouth (10% growth in the 45 years and over group).

These aging trends have important implications for the region. Though this growing 'boomer' generation often has a higher level of disposable income, their continuing transition out of the labour force will create a need for people to fill employment positions. Without a focused strategy to retain and best use this segment of the population, there is a risk of losing more of the local employment base. Furthermore, the aging of the population concentrated in the municipal districts may begin to raise concerns about the level and nature of services that the region provides, including health care and emergency services, transportation, recreation and leisure. The constituent municipalities will need to be proactive in planning for both labour force replacement and enhanced social service delivery.

FIGURE A.4: POPULATION GROWTH BY AGE GROUP, 2006 TO 2011



Source: Derived from Statistics Canada (Census of Population, 2006 and 2011) by Millier Dickinson Blais Inc.

Immigrant Population

Immigration is becoming an increasingly important consideration for provinces across Canada, as immigrants are becoming a driver of population and labour force growth. The Canadian fertility rate is at 1.7, which is well below the 2.1 needed to sustain current levels of population through natural increase. The Conference Board forecasts suggest that Canadian immigration rates will increase gradually, from 250,000 annually in 2011 to a peak of 350,000 annually. Immigration will account for 80 percent of all population growth by 2030.[50] These trends are of paramount importance for communities across Canada if the labour force is to grow and remain vibrant. The Province of Nova Scotia has not attracted large numbers of immigrants. In 2011, there were 2,138 new immigrants to the Province. Over the course of the previous ten years, the province has averaged approximately 2,130 new immigrants each year. Approximately 1,630 (75%) immigrants settle in Halifax and the remaining 500 immigrants settle in communities across the province.[51] Two-thirds are classified in the economic class and the others are either classified as family class or refugees.[52]

The following figure highlights the proportion of the population that is classified as part of the immigrant population as a share of the total population. As of 2006, there was only 3 percent (1,420 residents) of the South West Nova population classified as part of the immigrant population. This share is lower than the 5 percent average for the province of Nova Scotia. In comparison, the Province of Ontario's immigrant population was 28 percent in 2006. Ontario continues to attract the largest number of immigrants each year; however, the proportion of immigrants that the province attracts has declined over the previous seven years. Provinces such as Alberta, Saskatchewan and Manitoba have experienced increasing numbers of immigrants during this time.

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[50] Hodgson, G. 2010. Canada's Future Labour Market: Immigrants to the Rescue? Policy Options, July-August 2010.

[51] Citizen and Immigration Canada, Facts and Figures 2011 – Immigration Overview: Permanent and Temporary Workers, http://www.cic.gc.ca/english/resources/statistics/facts2011/permanent/11.asp, , last modified on October 16th, 2012, viewed on November 5th, 2012.

[52] Citizen and Immigration Canada, Facts and Figures 2011 – Immigration Overview: Permanent and Temporary Workers, http://www.cic.gc.ca/english/resources/statistics/facts2011/permanent/12.asp, last modified on October 16th, 2012, viewed on November 5th, 2012

FIGURE A.5: POPULATION BY IMMIGRANT STATUS, 2006

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia (Province)
Total Immigrants	145	20	75	160	50	160	390	205	215	1,420	45,195
Share of the Population	2%	2%	4%	3%	8%	2%	4%	3%	2%	3%	5%

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

Immigration is a significant driver of labour force growth for regions and provinces. This strategy should consider the attraction of immigrants to the South West Nova region. The importance of integration and settlement services must be considered as part of an immigration attraction and retention effort.

Ethnic Diversity

The ethnic diversity of a region can have implications for the delivery of language, training and settlement services. In addition to the impacts of diversity that derive from new cultural experiences that may be introduced to a community, residents from different cultural backgrounds can often forge connections to international or intra-provincial markets that had been previously unexplored. As shown in the following figure, only 2 percent of the region's population were visible minorities, compared to 4 percent of the provincial population. Much like the immigration trends, the visible minority proportion of the population is low in the region and very low compared to the province of Ontario, which was 23 percent in 2006.

FIGURE A.6: POPULATION BY VISIBLE MINORITY STATUS, 2006

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia (Province)
Total visible minority population	85	0	185	95	15	85	140	425	100	1,130	37,685
Share of the Population	1%	0%	10%	2%	3%	1%	1%	6%	1%	2%	4%

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

The following figure highlights the minority group composition for South West Nova. The figure highlights that the visible minority population is largely composed of the Black (800 residents as of 2006) visible minority group, largely driven by the Black populations in the towns of Yarmouth and Shelburne. There were considerably fewer concentrations of other visible minority groups (e.g. Chinese) than the Black visible minority group.

FIGURE A.7: VISIBLE MINORITY POPULATIONS BY GROUP, SOUTH WEST NOVA, 2006

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia (Province)
Total visible minority population	85	0	185	95	15	85	140	425	100	1,130	37,685
Black	45	0	160	65	0	60	90	295	85	800	19,230
Chinese	20	0	10	20	0	10	0	15	0	75	4,305
South Asian	10	0	0	0	10	10	20	15	0	65	3,810
Southeast Asian	0	0	0	0	0	0	0	60	0	60	815
Multiple visible minority	0	0	0	10	0	0	15	15	0	40	1,035
Latin American	0	0	0	0	0	15	0	0	10	25	955
Arab	0	0	0	0	0	0	0	20	0	20	4,505
Korean	0	0	0	0	0	0	10	0	0	10	795
Japanese	10	0	0	0	0	0	0	0	0	10	500
Filipino	0	0	0	0	0	0	0	0	0	0	700
West Asian	0	0	0	0	0	0	0	0	0	0	775
Visible minority; n.i.e.	0	0	0	0	0	0	0	0	0	0	260

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

Linguistic Diversity

The South West Nova region is largely composed of English speaking people (75% of the population); however, there is a large French speaking population in the municipal districts of Clare (66% of the total population) and Argyle (47% of the total population). The large French speaking population in these two communities was unique to the Province as a whole, which only has a French speaking population composed of 4 percent of the total population. This unique linguistic and cultural feature of the population could be promoted to external French speaking tourism markets.

FIGURE A.8: MOTHER TONGUE, SOUTH WEST NOVA, 2006

Mother Tongue	Barrington - Municipal district No.	Barrington - Municipal district % of Total	Clark's Harbour - Town No.	Clark's Harbour - Town % of Total	Shelburne - Town No.	Shelburne - Town % of Total	Shelburne - Municipal district No.	Shelburne - Municipal district % of Total	Lockeport - Town No.	Lockeport - Town % of Total	Argyle - Municipal district No.	Argyle - Municipal district % of Total	Yarmouth - Municipal district No.	Yarmouth - Municipal district % of Total	Yarmouth - Town No.	Yarmouth - Town % of Total	Clare - Municipal district No.	Clare - Municipal district % of Total	South West Nova No.	South West Nova % of Total	Nova Scotia (Province) No.	Nova Scotia (Province) % of Total
English only	7,100	97%	855	99%	1,805	97%	4,630	97%	570	95%	4,445	52%	9,155	90%	6,045	87%	2,745	32%	37,350	75%	832,105	92%
French only	90	1%	10	1%	15	1%	50	1%	0	0%	4,005	47%	845	8%	700	10%	5,690	66%	11,405	23%	32,540	4%
English and French	0	0%	0	0%	0	0%	0	0%	0	0%	95	1%	50	0%	40	1%	130	2%	315	1%	2,100	0%
Other language(s)	105	1%	0	0%	50	3%	85	2%	30	5%	50	1%	135	1%	145	2%	85	1%	685	1%	36,345	4%

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

Aboriginal Identity Population

Across Canada, one of the fastest growing populations is the aboriginal population. In 2006, the proportion of the population that identified themselves as aboriginal in South West Nova was 9 percent of the total population, which was higher than the Province of Nova Scotia at 3 percent. Aboriginal populations were proportionately higher in the municipal district of Argyle (15%) and town of Yarmouth (10%). The area is also the home to Yarmouth Indian Reserve, which is reported to have a population of 157 residents. It is important to recognize the growth of this segment of the population in the region and the culture and heritage the aboriginal community offers and can promote for the region.

FIGURE A 9. ABORIGINAL IDENTITY POPULATION PERCENTAGE, SOUTH WEST NOVA, 2006

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia (Province)
Aboriginal identity population	9%	8%	1%	3%	0%	15%	9%	10%	7%	9%	3%
Non-Aboriginal identity population	91%	92%	99%	97%	100%	85%	91%	90%	94%	91%	97%

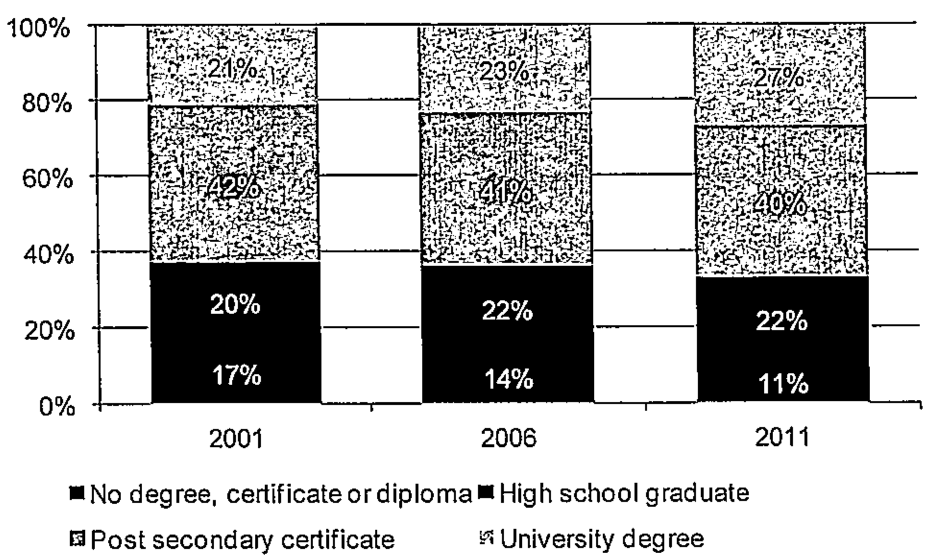
Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

Educational Attainment

Education is becoming a key priority in the economic and work force development efforts of many communities across Canada. It is clear that the economy has for many years been slowly shifting away from goods and export-based industries and towards a knowledge-based economy, which rewards higher-order analytical and problem solving skills to drive innovation and further add value to industries. Naturally, these trends mean communities need to retain and attract highly educated people to sustain their livelihood and quality of life.

The following figure highlights the share of the working-age population (aged 25-64) with a university degree, post-secondary certificate, high school certificate or no high school diploma from 2001 to 2011. Across the province of Nova Scotia, there has been an increasing proportion of the population with a university degree and decreasing proportion of the population without a high school diploma. This finding indicates that the population sees the value in post-secondary education and is investing in formal education. An encouraging finding since industry will demand more formally trained people to lead their organizations.

FIGURE A.10: NOVA SCOTIA EDUCATIONAL ATTAINMENT FOR THE POPULATION AGED 25-64, 2001-2011

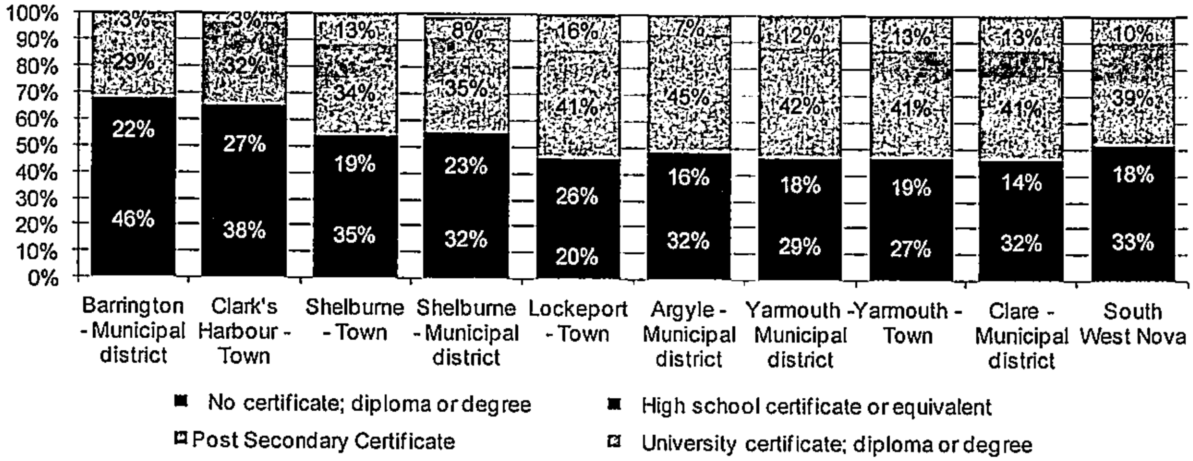


Source: Statistics Canada, CANSIM Table 282-0209 Labour Force survey estimates, 2012

The following figure provides a detailed breakdown of educational attainment across the South West Nova communities. Using 2006 Census data, approximately half (51%) of the working age population for South West Nova had a high school diploma as their highest educational attainment or no high school diploma. Communities with higher proportions of the population with either a high school diploma as their highest educational attainment or no high school diploma are Barrington (68%) and Clark's Harbour (65%). With the exception of a few communities, the most common educational attainment was a post secondary certificate. All of the communities have lower proportions of the population with university degrees than the province of Nova Scotia.

The lower educational attainment levels in South West Nova communities is concerning. People who earn post-secondary education credentials generally have higher incomes and can better respond to changing industrial demands in the economy. Efforts should be made by South West Nova communities to increase the high school and post-secondary education and training levels to bring the region's human capital to a level where it can be competitive with the province, Atlantic Canada and the country as a whole.

FIGURE A.11: POPULATION AGED 25 TO 64 BY EDUCATIONAL ATTAINMENT 2006



Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

Household Income

The income levels of South West Nova residents can provide an indication of the overall economic health of the region, as well as the purchasing power available to drive local consumption for retail and commercial services. The following figure highlights the median family (household) income for Nova Scotia and the South West Nova communities. The median family income in each of the South West Nova communities is lower than the Province of Nova Scotia's median family income of $55,412 in 2005 and an estimated $56,401 in 2011. Indexed to the province, the municipal district of Argyle has the highest median income in South West Nova followed by the municipal district of Yarmouth. The towns of Yarmouth and Shelburne have much lower median family incomes at around 70 percent of the provincial median. The lower degree of wealth in the region will need to be considered as part of the strategy since this will influence living costs and employment compensation.

FIGURE A.12: MEDIAN INCOME, 2005 & 2011

	2005	2011*	Community indexed to the Province
Barrington - Municipal district	$48,450	$49,315	87
Clark's Harbour - Town	$49,977	$50,869	90
Shelburne - Town	$40,063	$40,778	72
Shelburne - Municipal district	$43,237	$44,009	78
Lockeport - Town	$47,485	$48,333	86
Argyle - Municipal district	$54,978	$55,959	99
Yarmouth - Municipal district	$50,995	$51,905	92
Yarmouth - Town	$38,500	$39,187	69
Clare - Municipal district	$47,808	$48,661	86
Nova Scotia	$55,412	$56,401	100

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc. and using CANSIM Table 202-0202.

Note: 2011 is an estimate using CANSIM Table 202-0202 Average market Income, by economic family type

Labour Force Profile

An important consideration in evaluating the overall economy of South West Nova is the state of the local labour force. This evaluation includes a high level overview of employment trends and the composition of the labour force by both industry and occupations.

The following figure provides an up-to-date overview of the region's labour force, broken down by region. According to the 2012 estimates provided from Manifold Data Mining, the region has a total labour force of 26,377 persons. The region's unemployment rate of 15.2 percent is higher than the province of Nova Scotia's unemployment rate estimate of 11.9 percent, which is higher than the Province of Nova Scotia's estimate of 7.2 percent by the end of 2012 and the latest Statistics Canada Labour Force Survey estimate of 9.2 percent for October 2012.[53]

Unemployment levels have traditionally been high in Atlantic Canada compared to other provinces and Canada as a whole. Of additional concern is the higher unemployment rate experienced by young workers, aged 15 to 24, which is estimated to be 24.1 percent for South West Nova. While it is expected that youth will have lower levels of employment as many continue their education, low rates of youth employment suggest that there are limited employment opportunities in the region.

FIGURE A.13: SOUTH WEST NOVA LABOUR FORCE PROFILE, 2012

	Total population 15 years and over by labour force activity	In the labour force	Employed	Unemployed	Not in the labour force	Participation rate %)	Employment rate (%)	Unemployment rate (%)
Barrington - Municipal district	6,166	3,919	3,169	750	2,247	63.6	51.4	19.1
Clark's Harbour - Town	720	470	335	135	251	65.2	46.5	28.8
Shelburne - Town	1,498	903	791	112	596	60.2	52.8	12.4
Shelburne - Municipal district	3,898	2,385	1,931	453	1,513	61.2	49.6	19.0
Lockeport - Town	531	313	265	48	218	58.9	49.9	15.3
Argyle - Municipal district	7,213	4,540	3,973	567	2,673	62.9	55.1	12.5
Yarmouth - Municipal district	8,842	5,796	5,029	768	3,046	65.6	56.9	13.2
Yarmouth - Town	5,931	3,462	2,958	504	2,469	58.4	49.9	14.6
Clare - Municipal district	7,521	4,589	3,921	669	2,932	61.0	52.1	14.6
South West Nova	42,320	26,377	22,372	4,006	15,945	62.3	52.9	15.2
Nova Scotia	813,925	521,302	459,267	62,035	292,623	64.1	56.4	11.9

Source: Derived from Manifold Data Mining, 2010 by Millier Dickinson Blais Inc.

According to the estimates, the size of the labour force in the region has increased slightly (4%) since 2006. This estimate is a positive indication that the region has not yet become vulnerable to labour force contraction that is threatened by an aging workforce (especially the baby boomer generation retiring) and a low level of immigration to the area.

[53] Statistics Canada, Labour Force Survey, October 2012, http://www.statcan.gc.ca/daily-quotidien/121102/t121102a003-eng.htm, last modified on November 2nd, 2012, viewed on November 8th, 2012.

FIGURE A.14: SOUTH WEST NOVA LABOUR FORCE 2006 AND 2012

	2006	2012	% Change 2006-2012
Barrington - Municipal district	3,730	3,919	5%
Clark's Harbour - Town	470	470	0%
Shelburne - Town	940	903	-4%
Shelburne - Municipal district	2,420	2,385	-1%
Lockeport - Town	290	313	8%
Argyle - Municipal district	4,450	4,540	2%
Yarmouth - Municipal district	5,430	5,796	7%
Yarmouth - Town	3,225	3,462	7%
Clare - Municipal district	4,445	4,589	3%
South West Nova	25,400	26,377	4%
Nova Scotia	468,590	521,302	11%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining, 2012 by Millier Dickinson Blais Inc.

Labour Force by Industry

The following section provides information on labour force concentration across a range of industries throughout the South West Region. Industries are divided into twenty major groups according to the North American Industrial Classification System (NAICS). Of the nearly 26,377 persons in the region's labour force in 2012, nearly 26,000 are employed in a classified industry sector. It is important to note that these and other figures for the region's labour force reflect those workers who reside in the region, but may commute to communities outside the region.

The following figure indicates total labour force and share of the labour force by industry for South West Nova for 2006 and 2012. Labour force profiles for each of the nine local municipalities are provided in Appendix B. The industries with the highest concentration of the region's labour force in 2012 are:

- Agriculture, forestry, fishing and hunting (5,002 workers or 19% of the labour force)
- Manufacturing (3,785 workers or 15% of the labour force)
- Retail trade (3,531 workers of 14% of the labour force)
- Health care and social assistance (2,883 workers of 11% of the labour force).

These four industries have collectively increased their share of the labour force since 2006. This indicates a continued importance and reliance of agriculture, fishing and manufacturing employment to sustain the regional economy. Little change occurred in other industries. The subsequent figure gives further context to where the net and percentage change in labour force by industry in South West Nova. The industries with the largest concentration increases were:

- Health care and social assistance (+268 workers, a 10% increase in the labour force)
- Retail trade (+256 workers, an 8% increase in the labour force)
- Agriculture, forestry, fishing and hunting (+217 workers, a 5% increase in the labour force).

Health care and social assistance emerged both as an industry with a high concentration of workers and an industry with a sizable increase in the labour force, which indicates that there are employment opportunities in this industry. The continued aging of the regional population will support future local employment opportunities.

FIGURE A.15: SOUTH WEST NOVA LABOUR FORCE BY INDUSTRY, 2006 AND 2012

	2006		2012	
South West Nova	**Number**	**% Share**	**Number**	**% Share**
All industries	25,005	100%	25,995	100%
11 Agriculture, forestry, fishing and hunting	4,785	19%	5,002	19%
21 Mining and oil and gas extraction	90	0%	118	0%
22 Utilities	25	0%	42	0%
23 Construction	1,310	5%	1,281	5%
31-33 Manufacturing	3,615	14%	3,785	15%
41 Wholesale trade	755	3%	738	3%
44-45 Retail trade	3,275	13%	3,531	14%
48-49 Transportation and warehousing	720	3%	712	3%
51 Information and cultural industries	380	2%	409	2%
52 Finance and insurance	455	2%	403	2%
53 Real estate and rental and leasing	280	1%	278	1%
54 Professional, scientific and technical services	580	2%	500	2%
55 Management of companies and enterprises	0	0%	0	0%
56 Administrative and support, waste management and remediation services	575	2%	532	2%
61 Educational services	1,630	7%	1,809	7%
62 Health care and social assistance	2,615	10%	2,883	11%
71 Arts, entertainment and recreation	315	1%	316	1%
72 Accommodation and food services	1,410	6%	1,499	6%
81 Other services (except public administration)	1,265	5%	1,291	5%
91 Public administration	860	3%	868	3%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining, 2012 by Millier Dickinson Blais Inc.

FIGURE A.16: SOUTH WEST NOVA LABOUR FORCE GROWTH BY INDUSTRY, 2006 AND 2012

South West Nova	2006-2012 Number	% Share
All industries	990	4%
11 Agriculture, forestry, fishing and hunting	217	5%
21 Mining and oil and gas extraction	28	31%
22 Utilities	17	68%
23 Construction	-29	-2%
31-33 Manufacturing	170	5%
41 Wholesale trade	-17	-2%
44-45 Retail trade	256	8%
48-49 Transportation and warehousing	-8	-1%
51 Information and cultural industries	29	8%
52 Finance and insurance	-52	-11%
53 Real estate and rental and leasing	-2	-1%
54 Professional, scientific and technical services	-80	-14%
55 Management of companies and enterprises	0	0%
56 Administrative and support, waste management and remediation services	-43	-7%
61 Educational services	179	11%
62 Health care and social assistance	268	10%
71 Arts, entertainment and recreation	1	0%
72 Accommodation and food services	89	6%
81 Other services (except public administration)	26	2%
91 Public administration	8	1%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining, 2012 by Millier Dickinson Blais Inc.

Labour Force by Occupations

Examining the labour force by occupation serves as a useful approach to better understand the type of jobs held, and thus the actual skills that exist, in communities. The following figure captures the number and share of workers within ten major occupational categories, defined according to the National Occupational Classification (NOC) system. Further details by NOC and community are provided in Appendix B. The 2012 estimates revealed that the occupations that employ the highest share of South West Nova's resident labour force are:

- Sales and service occupations (6,387 workers or 25% of the labour force)
- Occupations unique to primary industry (4,553 workers or 18% of the labour force)
- Trades, transport and equipment operators and related occupations (3,429 workers or 13% of the labour force) and
- Business, finance and administrative occupations (3,126 workers or 12% of the labour force).

The dominance of sales and primary industry based occupations, which together account for 43 percent of the region's labour force, may become a growing economic development concern for the region. Earlier findings revealed that the region has a lower share of university educated workers than the province. Productivity enhancements have led to declining employment in primary and manufacturing industries in the province, across Canada and for many advanced economies around the world. A slow growth economy also makes for limited employment opportunities in retail and commercial services, which typically employ people in sales and service occupations. The tourism industry also employs many people in sales and service occupations. Tourism has become a very competitive industry across Canada and requires community stakeholders and influencers to collaborate with each other and make regions more attractive for visitors and tourists.

FIGURE A.17: SOUTH WEST NOVA LABOUR FORCE BY OCCUPATION, 2006 AND 2012

	2006		2012	
South West Nova	**Number**	**% Share**	**Number**	**% Share**
All occupations	25,025	100%	25,968	100%
A Management occupations	1,605	6%	1,681	6%
B Business, finance and administrative occupations	2,940	12%	3,126	12%
C Natural and applied sciences and related occupations	730	3%	745	3%
D Health occupations	1,415	6%	1,510	6%
E Occupations in social science, education, government service and religion	1,685	7%	1,772	7%
F Occupations in art, culture, recreation and sport	315	1%	302	1%
G Sales and service occupations	5,980	24%	6,387	25%
H Trades, transport and equipment operators and related occupations	3,290	13%	3,429	13%
I Occupations unique to primary industry	4,530	18%	4,553	18%
J Occupations unique to processing, manufacturing and utilities	2,505	10%	2,466	9%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining, 2012 by Millier Dickinson Blais Inc.

The following figure furthers this analysis by showing the growth trends by occupation in the region from 2006 to 2012. During this six year time period, occupations that have shown the strongest growth were:

- Sales and service occupations (407 workers or a 7% change)
- Business, finance and administrative occupations (186 workers or a 6% change)
- Trades, transport and equipment operators and related occupations (139 workers or a 4% change).

Overall, labour force growth has been low at 4 percent over the six year period. Much of the labour force growth is in service-based occupations, which are typically found in retail and commercial services. Labour force growth is estimated to be lower among occupations unique to primary industry and in decline among occupations unique to processing, manufacturing and utilities. This finding suggests that there are fewer new employment opportunities in the primary, processing and manufacturing industries across the region.

FIGURE A.18: SOUTH WEST NOVA LABOUR FORCE GROWTH BY OCCUPATION. 2006-2012

South West Nova	2006-2012 Number	2006-2012 % Change
All occupations	943	4%
A Management occupations	76	5%
B Business, finance and administrative occupations	186	6%
C Natural and applied sciences and related occupations	15	2%
D Health occupations	95	7%
E Occupations in social science, education, government service and religion	87	5%
F Occupations in art, culture, recreation and sport	-13	-4%
G Sales and service occupations	407	7%
H Trades, transport and equipment operators and related occupations	139	4%
I Occupations unique to primary industry	23	1%
J Occupations unique to processing, manufacturing and utilities	-39	-2%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining, 2012 by Millier Dickinson Blais Inc.

Commuting Flows by Place of Work

Commuting flows by place of work can reveal geographic trends in employment concentrations throughout the South West Nova region and identify economic linkages between municipalities as represented by the flow of labour. This analysis provides further context with respect to where resident labour is commuting to for employment. The following figure breaks down commuting flows by each of South West Nova's communities, indicating the top destinations of commuters as well as the number and share of commuters who stay at home. Many of the jobs in each community are filled by the local residential labour force or by residents in neighbouring communities. This trend is true for each of the communities, indicating short commute times and a favourable live-work balance. Yarmouth accounts for a large share of jobs held by the region's labour force accounting for 6,180 jobs filled by residents in the region. This finding indicates that the town serves as a regional employment centre. There is also a sizable representation of people who work at home (1,430, or 8% of the labour force). Economic development and planning policies for the local communities will need to encourage home-based business locations.

Other commuter destinations for communities outside of the region include Digby, Hantsport and Halifax, but these communities account for less than 5 percent of the residential labour force.

FIGURE A.19: COMMUTING FLOWS. PLACE OF RESIDENCE (POR) BY COMMUNITY. 2006[54]

POR	Barrington - Municipal District	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Yarmouth (T)	50	2%
	Shelburne (T)	50	2%
	Shelburne (MD)	65	3%
	Halifax (RGM)	30	1%
	Clark's Harbour (T)	275	12%
	Barrington (MD)	1,400	63%
	Argyle (MD)	80	4%
	Work at Home	280	13%
	Total Labour Force	2,230	100%

POR	Clark's Harbour - Town	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Clark's Harbour (T)	165	66%
	Barrington (MD)	70	28%
	Work at Home	15	6%
	Total Labour Force	250	100%

POR	Shelburne - Town	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Shelburne (T)	565	77%
	Shelburne (MD)	40	5%
	Lockeport (T)	30	4%
	Barrington (MD)	35	5%
	Work at Home	65	9%
	Total Labour Force	735	100%

POR	Shelburne - Municipal District	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Shelburne (T)	535	35%
	Shelburne (MD)	260	17%
	Queens (RGM)	30	2%
	Lockeport (T)	275	18%
	Hantsport (T)	140	9%
	Halifax (RGM)	20	1%
	Digby (T)	20	1%
	Clark's Harbour (T)	20	1%
	Barrington (MD)	125	8%
	Work at Home	85	6%
	Total Labour Force	1,510	100%

POR	Lockeport - Town	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Shelburne (T)	35	19%
	Lockeport (T)	125	69%
	Work at Home	20	11%
	Total Labour Force	180	100%

POR	Argyle - Municipal District	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Yarmouth (T)	1,045	34%
	Yarmouth (MD)	200	7%
	Clare (MD)	45	1%
	Barrington (MD)	75	2%
	Argyle (MD)	1,425	47%
	Work at Home	270	9%
	Total Labour Force	3,060	100%

POR	Yarmouth - Municipal District	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Yarmouth (T)	2,710	69%
	Yarmouth (MD)	555	14%
	Halifax (RGM)	40	1%
	Digby (MD)	20	1%
	Clare (MD)	45	1%
	Barrington (MD)	25	1%
	Argyle (MD)	230	6%
	Work at Home	325	8%
	Total Labour Force	3,950	100%

POR	Yarmouth - Town	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Yarmouth (T)	2,060	84%
	Yarmouth (MD)	200	8%
	Halifax (RGM)	35	1%
	Argyle (MD)	70	3%
	Work at Home	85	3%
	Total Labour Force	2,450	100%

POR	Clare - Municipal District	No. Of Resident Labour Force	% of Total Labour Force
Place of Work	Yarmouth (T)	315	10%
	Yarmouth (MD)	110	4%
	Shelburne (T)	20	1%
	Digby (T)	35	1%
	Digby (MD)	345	11%
	Clare (MD)	1,965	63%
	Annapolis, Subd. A (SC)	40	1%
	Work at Home	285	9%
	Total Labour Force	3,115	100%

Source: Derived from Statistics Canada (Commuting Flow Tabulations, 2006) by Millier Dickinson Blais Inc.

Location Quotient Analysis

To complement the discussion of the labour force conducted in the previous section and place South West Nova's economic performance into broader context, it is useful to examine the level and degree of industrial concentration throughout the region as it compares to the rest of Nova Scotia. This assessment can lead to an understanding of the economic diversity in the region, and is measured for the constituent communities in Appendix B to provide an idea of the geographic distribution of industrial specialization across the region.

To conduct this analysis, location quotients (LQs) have been calculated. LQs are a commonly used tool in local/regional economic analysis, as they measure the degree to which employment or businesses are concentrated in a certain geographic area relative to a larger benchmark geography. For the purposes of this study we have calculated LQs that compare South West Nova's industry sector labour force concentration relative to the Province of Nova Scotia.

An LQ greater than 1.0 for a given sector indicates a local labour force concentration as compared to the Province of Nova Scotia, and may be an indication of competitive advantage with respect to the attraction of that industry sector. An LQ equal to 1.0 for a given sector suggests that the study area has the same concentration of economic activity as the overarching region. Finally, an LQ of less than 1.0 suggests that

[54] Total labour force reported in this figure includes those who work from home, but excludes destinations where the total number of commuters is less than 20, which are suppressed by Statistics Canada.

the community has a low relative employment concentration, and thus does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching provincial average may also represent the export base of the participating municipality (both in terms of products or services). Workers (and businesses) in these industry sectors may have chosen to locate in the community due to certain local or regional competitive advantages. These competitive advantages are important to identify as they can provide a basis for subsequent attraction of investment in those industries.

Based on this analysis, the industries in South West Nova that show the highest labour force concentrations relative to Nova Scotia are:

- Agriculture, forestry, fishing and hunting (3.31) and
- Manufacturing (1.54).

FIGURE A.20: SOUTH WEST NOVA LOCATION QUOTIENTS, 2006 AND 2012

LQ	2006	2012
High (≥1.25)	Agriculture, forestry, fishing and hunting (4.13)	Agriculture, forestry, fishing and hunting (3.31)
	Manufacturing (1.62)	Manufacturing (1.54)
Average (0.75 - 1.25)	Other services (except public administration) (1.07)	Retail trade (1.11)
	Retail trade (1.05)	Other services (except public administration) (1.08)
	Health care and social assistance (0.90)	Health care and social assistance (0.97)
	Educational services (0.88)	Educational services (0.92)
	Wholesale trade (0.86)	Accommodation and food services (0.87)
	Construction (0.82)	Real estate and rental and leasing (0.83)
	Accommodation and food services (0.82)	Wholesale trade (0.79)
		Construction (0.78)
Low (≤0.75)	Real estate and rental and leasing (0.75)	Arts, entertainment and recreation (0.70)
	Transportation and warehousing (0.65)	Mining and oil and gas extraction (0.69)
	Information and cultural industries (0.65)	Information and cultural industries (0.66)
	Arts, entertainment and recreation (0.65)	Transportation and warehousing (0.59)
	Finance and insurance (0.59)	Finance and insurance (0.52)
	Mining and oil and gas extraction (0.52)	Professional, scientific and technical services (0.43)
	Professional, scientific and technical services (0.47)	Public administration (0.41)
	Administrative and support, waste management and remediation services (0.42)	Administrative and support, waste management and remediation services (0.40)
	Public administration (0.41)	Utilities (0.33)
	Utilities (0.19)	

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (2012 Labour force estimates) by Millier Dickinson Blais Inc.

These two industries were the only two industries that had high labour force concentrations for 2006 and 2012. These two industries are also two of the largest industry concentrations, as discussed earlier. Given their strong local concentration, they represent growth opportunities to generate higher value added products and services. This region is in a unique position to pursue opportunities in value added agriculture, fishing, and food production. In addition, the region is in a unique position for tourism offerings and could integrate agriculture, fishing and seafood production as part of the regional tourism experience. All of the other industries suggest that they are largely population-centred and local serving. However, the region may be able to leverage the local construction industry's labour force to drive new export growth in new industry segments such as green building construction, green energy and ship construction.

In 2012, nine industries had low labour force location quotients in the region (as identified in the previous figure). This finding is concerning for the region since some of the industries produce higher-order services and jobs that pay high wages and require higher levels of skill and education. The low labour force concentration in these industries (e.g. finance and insurance, professional services) is related to the higher presence of jobs and businesses in these industries that are located in larger centres like Halifax or Montreal. The low LQs in these industries suggest that these types of businesses are not accommodating local needs and a source of consumption leakage especially in trade or service industries. This finding suggests that there may be gaps in the local economy. Appendix B provides detailed LQs for each of the nine communities. The results by community indicate a strong concentration of agriculture, forestry, fishing and hunting for several communities. Labour force concentrations in health care, social assistance, retail trade and other population supporting industries are high in the towns, which indicate they are serving as centres of commerce.

Shift-Share Analysis

A shift-share analysis is used to account for the competitiveness of a region or local community's industries. The analysis deconstructs labour force changes within an economy over a time period into three components:

1. Growth that is attributed to **regional economic growth**. Specifically, if the region is experiencing employment growth in general, it is reasonable to expect that growth will influence the local area.
2. Growth that is attributed to the mix of faster or slower than averaging growing industries. Some industries add jobs more rapidly than others. The **industrial mix share** reflects the difference in industry 'mix' between local and national levels. This mix-factor examines how regional growth or decline of a particular industry translates into local growth of decline of that industry.
3. Growth that is attributable to the competitive nature of the local industries. Growth is uneven across industries. The **local share** describes the extent to which unique local factors relate to regional industrial employment growth or decline.[55]

Based on the results from this analysis, the regional (i.e. Province of Nova Scotia) labour force growth shares would have increased by approximately 10 percent from 2006 to 2012. This would have led to a net increase of over 2,430 people in the labour force and driven by growth in the municipal districts of Yarmouth (a 520 net increase), Argyle (a 428 net increase) and Clare (a 428 net increase). (Refer to Appendix B for specific community results). Growth would have been most pronounced in the following industries:

- Agriculture, forestry, fishing and hunting
- Manufacturing
- Retail trade.

[55] Shields, Martin, Using Employment Data to Better Understand Your Local Economy: Tool 4. Shift-Share Analysis Helps Identify Local Growth Engines. Pennsylvania State University, College of Agricultural Sciences, 2003

The industrial mix share indicates that growth in the region's industries would have led to nearly 1,250 more people in the labour force. Communities that would have experienced higher growth would be the municipal districts of Barrington (a 411 net increase), Argyle (a 311 net increase) and Clare (a 213 net increase). The key drivers of economic growth in the region would be:

- Agriculture, forestry, fishing and hunting (a net increase of nearly 1,350 people in the labour force)
- Manufacturing (a net increase of over 250 people in the labour force)

The local shares indicate that each local community within South West Nova is dragging labour force growth downward. Again, the municipal districts of Barrington, Argyle and Clare are the larger driver communities of labour force decline. The agriculture, forestry, fishing, hunting and manufacturing industries are driving much of the labour force decline. One industry that is driving local growth is the health care and social assistance industry, which is driven in large part by the communities of Yarmouth and Clare.

Business Profile

A detailed review of the business patterns data for the period between 2008 and 2012 for the region provides an understanding of the growth or decline of businesses over the four-year period and the key characteristics that define the region's business community. When combined with the broader industry sector analysis discussed previously, the business patterns information will assist in understanding the key industry opportunities for the region.

Understanding the trends in business growth in the region's constituent municipal districts and towns provides valuable insight into the shape that future growth and investment in the region might take in future years. It also provides an indication of where the priorities of the region should lie, especially with regards to economic development program delivery.

In June 2012, there were a total of 3,885 businesses in the region[56]. In terms of concentration, the following sectors exhibit the highest proportion of business establishments:

- Agriculture, forestry, fishing and hunting (1,286 businesses, 33% of total. It is notable that approximately 90% of these businesses are classified as 'salt water fishing operations')
- Retail trade (375 businesses, 10% of total)
- Construction (285 businesses, 7% of total)
- Other services (except public administration) (271 businesses, 7% of total).
- Manufacturing (260 businesses, 7% of total)

When the indeterminate category (self-employed) is removed, the five sectors with the highest business establishment proportions remain consistent. The top five sectors include:

- Agriculture, forestry, fishing and hunting (944 businesses, 37% of all businesses with employees)
- Retail trade (296 businesses, 12% of all businesses)
- Other services (except public administration) (197 businesses, 8% of all businesses) and
- Manufacturing (190 businesses, 7% of all businesses).

[56] This figure excludes those businesses in the towns of Shelburne and Lockeport because the data was unavailable from Statistics Canada.

It is also valuable to examine the change in business concentration by industry, so as to better understand areas of emerging opportunity and importance to the regional economy. Figure A.21 provides an indication of the concentration of business establishments by two digit NAICS codes from 2008 and 2012. The two industries that have experienced the largest concentration increases were:

- Agriculture, forestry, fishing and hunting (+16 businesses, 1% increase) and
- Health care and social assistance (+11 businesses, 7% increase).

FIGURE A.21: NUMBER OF BUSINESS ESTABLISHMENTS BY INDUSTRY, SOUTH WEST NOVA, 2008 AND 2012

South West Nova	December 2008		June 2012	
	Number	% of Total	Number	% of Total
All Industries	4,007	100%	3,885	100%
11 Agriculture, Forestry, Fishing and Hunting	1,270	32%	1,286	33%
21 Mining, Quarrying, and Oil and Gas Extraction	5	0%	3	0%
22 Utilities	0	0%	1	0%
23 Construction	300	7%	285	7%
31-33 Manufacturing	299	7%	260	7%
41 Wholesale Trade	218	5%	189	5%
44-45 Retail Trade	392	10%	375	10%
48-49 Transportation and Warehousing	139	3%	123	3%
51 Information and Cultural Industries	25	1%	21	1%
52 Finance and Insurance	187	5%	189	5%
53 Real Estate and Rental and Leasing	168	4%	172	4%
54 Professional, Scientific and Technical Services	134	3%	124	3%
55 Management of Companies and Enterprises	155	4%	143	4%
56 Administrative and Support, Waste Management and Remediation Services	72	2%	69	2%
61 Educational Services	18	0%	18	0%
62 Health Care and Social Assistance	157	4%	168	4%
71 Arts, Entertainment and Recreation	49	1%	50	1%
72 Accommodation and Food Services	138	3%	123	3%
81 Other Services (except Public Administration)	268	7%	271	7%
91 Public Administration	13	0%	15	0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2008 & 2012) by Millier Dickinson Blais Inc.

Of the total 3,885 establishments, over one-half (2,090 or 54%) of them are located in Yarmouth County and over one-third (1,330 or 34%) are located in Shelburne County. The remainder are located in the Municipal District of Clare. The agriculture, forestry, fishing and hunting industry has the largest business concentration in each of these three regions across South West Nova. As previously noted, this industry is primarily composed of salt water fishing operations (approximately 90%). Construction and retail trade sectors are well represented in each of these regions while manufacturing is concentrated in Shelburne County.

Throughout the region, business concentration growth has been low or in decline across the economy from 2008 to 2012. Two industries that have been most resilient were the finance and insurance industry (+9 businesses with employees, 18% growth) and health care and social assistance (+5 businesses with employees, 4% growth). Business concentration growth varies within the region. In Shelburne County there were an additional five businesses in construction, four businesses in real estate and four in arts, entertainment and recreation. In Yarmouth County, business growth was strongest in agriculture, forestry, fishing and hunting (+14 businesses with employees, 3% growth) and health care and social assistance (+11 businesses with employees, 14%) industries.

FIGURE A.22: BUSINESS ESTABLISHMENT CHARACTERISTICS, GEOGRAPHIC AREAS OF SOUTH WEST NOVA

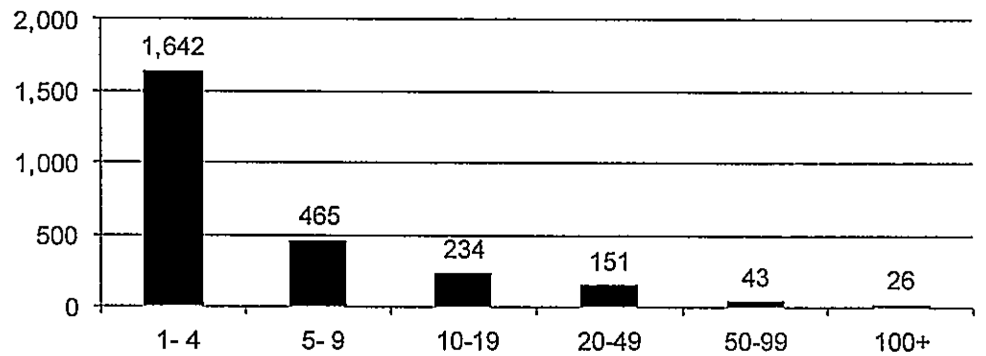
Shelburne* - includes the Municipal District of Barrington, Town of Clark's Harbour, Municipal District of Shelburne, Town of Shelburne, Town of Lockeport	Yarmouth* - includes the Municipal District of Argyle, Municipal District of Yarmouth and Town of Yarmouth.	Municipal District of Clare
Total Business Establishments (% of South West Nova), 2012*		
1,330 (34%)	2,090 (54%)	465 (12%)
Top 5 Total Industry Concentrations of Businesses (Industry, No. Of Businesses), 2010		
Agriculture, Forestry, Fishing and Hunting (593)	Agriculture, Forestry, Fishing and Hunting (626)	Agriculture, Forestry, Fishing and Hunting (99)
Manufacturing (124)	Retail Trade (212)	Construction (59)
Retail Trade (108)	Other Services (except Public Administration) (157)	Retail Trade (55)
Other Services (except Public Administration) (87)	Construction (147)	Manufacturing (34)
Construction (79)	Finance and Insurance (121)	Finance and Insurance (28)
Top 3 Growth Industry Concentrations for Businesses with Employees (Industry, Increase % in Concentration), 2008 to 2012		
Construction (+5, 10%)	Agriculture, forestry, fishing and hunting (+14, 3%)	Finance and insurance (+2, 25%)
Real estate and rental and leasing (+4, 40%)	Health care and social assistance (+11, 14%)	Accommodation and food services (+2, 10%)
Arts, entertainment and recreation (+4, 33%)	Other services (except public administration) (+8, 8%)	

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2008 & 2012) by Millier Dickinson Blais Inc

Overall, business establishments in South West Nova are overwhelmingly characterized by small companies and enterprises that employ less than 10 people. In 2012, excluding the businesses consisting of the self-employed – which themselves are small enterprises – there were 2,107 businesses that had under 10 employees (see the following figure). Of these businesses, 1,642 (64%) of them had 1-4 employees and 465 of them had 5-9 employees. The five industries with the highest number of establishments employing between 1 and 9 people were:

- Agriculture, Forestry, Fishing and Hunting (896 businesses)
- Retail trade (204 businesses)
- Other services (except public administration) (184 businesses).
- Construction (164 businesses)
- Manufacturing (126 businesses)

FIGURE A.23: BUSINESS ESTABLISHMENTS BY SIZE, SOUTH WEST NOVA, JUNE 2012



Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2012) by Millier Dickinson Blais Inc.

Given that small businesses comprise the bulk of those operating in South West Nova, it is not surprising that these five sectors are consistent with the region's largest sectors by business count.

In a similar fashion, the industries with the highest number of establishments employing between 10-49 employees are fairly consistent with the small businesses employing 1 to 9 people. However, agriculture, forestry, fishing and hunting operations fell behind retail trade for the most amounts of businesses. Health care and social assistance also emerged as a top sector while construction and other services dropped sharply. The top four sectors in this business employment category include:

- Retail trade (81 businesses)
- Agriculture, Forestry, Fishing and Hunting (46 businesses)
- Manufacturing (42 businesses)
- Health care and social assistance (40 businesses)

In supporting future growth and investment in the South West Nova, it is essential to understand and support the needs of these small businesses. This is particularly relevant in light of existing research and trends which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there.

FIGURE A 24: NUMBER OF BUSINESS ESTABLISHMENTS BY INDUSTRY AND SIZE. SOUTH WEST NOVA, JUNE 2012

	Subtotal	1-9	10-49	50+
All Industries	2,561	2,107	385	69
11 Agriculture, Forestry, Fishing and Hunting	944	896	46	2
21 Mining, Quarrying, and Oil and Gas Extraction	3	3	0	0
22 Utilities	0	0	0	0
23 Construction	182	164	16	2
31-33 Manufacturing	190	126	42	22
41 Wholesale Trade	138	97	37	4
44-45 Retail Trade	296	204	81	11
48-49 Transportation and Warehousing	63	55	6	2
51 Information and Cultural Industries	18	6	9	3
52 Finance and Insurance	58	38	20	0
53 Real Estate and Rental and Leasing	51	45	6	0
54 Professional, Scientific and Technical Services	67	58	9	0
55 Management of Companies and Enterprises	8	7	1	0
56 Administrative and Support, Waste Management and Remediation Services	36	31	5	0
61 Educational Services	13	8	0	5
62 Health Care and Social Assistance	141	90	40	11
71 Arts, Entertainment and Recreation	38	27	11	0
72 Accommodation and Food Services	105	67	36	2
81 Other Services (except Public Administration)	197	184	12	1
91 Public Administration	13	1	8	4

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2012) by Millier Dickinson Blais Inc.

Large companies in South West Nova or those that employ over 50 people have a much different sector composition than small business concentrations. Naturally, different strategies must be employed to support those sectors where a larger share of employment is concentrated in these larger firms. The industries with the highest number of establishments in this category are:

- Manufacturing (24 businesses)
- Health care and social assistance (12 businesses)
- Retail trade (11 businesses)
- Wholesale trade (5 businesses)
- Educational services (5 businesses)

Large scale manufacturing operations are responsible for a third of all businesses in the region that employ over 50 people. Manufacturing also accounts for a quarter of those businesses that employ over 100 people in the region. As reflected in this and other areas of the region's economic base analysis, the manufacturing sector is vital to this region's economic prosperity.

Appendix B: Community Profiles

Appendix B: Community Profiles

Labour Force Characteristics

FIGURE B.1: LABOUR FORCE BY INDUSTRY, 2006

2006	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All industries	3,650	470	925	2,380	285	4,420	5,350	3,120	4,405	25,005	468,590
11 Agriculture, forestry, fishing and hunting	1,355	150	60	580	30	1,070	695	90	755	4,785	21,690
21 Mining and oil and gas extraction	0	10	10	10	0	0	30	15	15	90	3,230
22 Utilities	10	0	0	0	0	0	15	0	0	25	2,475
23 Construction	130	10	30	75	10	245	340	130	340	1,310	29,965
31-33 Manufacturing	810	130	80	310	65	785	535	220	680	3,615	41,710
41 Wholesale trade	110	15	20	60	10	120	210	80	130	755	16,440
44-45 Retail trade	360	45	150	280	15	490	740	635	560	3,275	58,565
48-49 Transportation and warehousing	80	15	45	65	10	135	185	65	120	720	20,610
51 Information and cultural industries	20	0	20	75	0	50	130	70	15	380	10,935
52 Finance and insurance	30	15	35	25	0	85	85	75	105	455	14,335
53 Real estate and rental and leasing	15	0	10	25	0	20	70	125	15	280	7,015
54 Professional, scientific and technical services	75	15	40	65	10	115	120	75	65	580	23,020
55 Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	520
56 Administrative and support, waste management and remediation services	30	0	45	70	0	75	115	110	130	575	25,840
61 Educational services	145	0	55	125	10	290	370	170	465	1,630	34,690
62 Health care and social assistance	155	20	105	195	40	390	795	435	480	2,615	54,695
71 Arts, entertainment and recreation	10	0	10	55	15	35	80	75	35	315	9,090
72 Accommodation and food services	180	15	90	145	25	195	290	295	175	1,410	32,250
81 Other services (except public administration)	95	10	80	145	30	165	275	270	195	1,265	22,145
91 Public administration	30	15	45	80	10	130	260	180	110	860	39,350

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

FIGURE B.2: LABOUR FORCE BY INDUSTRY, 2012

2012	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All industries	3,826	470	894	2,369	301	4,507	5,716	3,341	4,571	25,995	514,258
11 Agriculture, forestry, fishing and hunting	1,447	168	54	582	28	1,125	752	78	768	5,002	29,905
21 Mining and oil and gas extraction	0	10	19	8	9	0	23	19	30	118	3,387
22 Utilities	11	0	0	0	0	10	0	10	11	42	2,506
23 Construction	91	0	29	83	9	229	383	141	316	1,281	32,612
31-33 Manufacturing	691	142	69	309	68	826	575	214	691	3,785	48,754
41 Wholesale trade	106	22	9	43	0	111	212	103	132	738	18,403
44-45 Retail trade	375	35	146	292	22	509	839	710	603	3,531	62,734
48-49 Transportation and warehousing	86	22	51	78	9	117	163	90	96	712	24,013
51 Information and cultural industries	34	0	31	77	0	50	134	72	11	409	12,211
52 Finance and insurance	32	10	30	29	0	55	51	64	132	403	15,465
53 Real estate and rental and leasing	10	0	9	16	0	21	67	135	20	278	6,646
54 Professional, scientific and technical services	93	0	30	48	0	110	105	68	46	500	23,153
55 Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	2,006
56 Administrative and support, waste management and remediation services	35	0	40	66	0	61	99	101	130	532	26,069
61 Educational services	164	0	62	123	9	329	395	185	542	1,809	38,998
62 Health care and social assistance	132	22	114	187	53	443	891	487	554	2,883	58,678
71 Arts, entertainment and recreation	14	0	0	74	14	29	104	51	30	316	8,942
72 Accommodation and food services	191	15	79	144	29	205	331	317	188	1,499	34,074
81 Other services (except public administration)	94	10	70	144	36	167	314	292	164	1,291	23,574
91 Public administration	21	15	51	64	14	109	277	211	106	868	42,332

Source: Derived from Manifold Data Mining (2012 labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.3: LABOUR FORCE BY INDUSTRY. 2006 AND 2012

2006-2012 Net Change	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All Industries	176	0	-31	-11	16	87	366	221	166	990	45,668
11 Agriculture, forestry, fishing and hunting	92	18	-6	2	-2	55	57	-12	13	217	8,215
21 Mining and oil and gas extraction	0	0	9	-2	9	0	-7	4	15	28	157
22 Utilities	1	0	0	0	0	-10	-15	10	11	17	31
23 Construction	-39	-10	-1	8	-1	-16	43	11	-24	-29	2,647
31-33 Manufacturing	81	12	-11	-1	3	-41	40	-6	11	170	7,044
41 Wholesale trade	-4	7	-11	-17	-10	-9	2	23	2	-17	1,963
44-45 Retail trade	15	-10	-4	12	7	19	99	75	43	256	4,169
48-49 Transportation and warehousing	6	7	6	13	-1	-18	-22	25	-24	-8	3,403
51 Information and cultural industries	14	0	11	2	0	0	4	2	-4	29	1,276
52 Finance and insurance	2	-5	-5	4	0	-30	-34	-11	27	-52	1,130
53 Real estate and rental and leasing	-5	0	-1	-9	0	1	-3	10	5	-2	-369
54 Professional, scientific and technical services	18	-15	-10	-17	-10	-5	-15	-7	-19	-80	133
55 Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	1,486
56 Administrative and support, waste management and remediation services	5	0	-5	-4	0	-14	-16	-9	0	-43	229
61 Educational services	19	0	7	-2	-1	39	25	15	77	179	4,308
62 Health care and social assistance	-23	2	9	-8	13	53	96	52	74	268	3,983
71 Arts, entertainment and recreation	4	0	-10	19	-1	-6	24	-24	-5	1	-148
72 Accommodation and food services	11	0	-11	-1	4	10	41	22	13	89	1,824
81 Other services (except public administration)	-1	0	-10	-1	6	2	39	22	-31	26	1,429
91 Public administration	-9	0	6	-16	4	-21	17	31	-4	8	2,982

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (Labour Force estimates, 2012) by Millier Dickinson Blais Inc.

FIGURE B.4: LABOUR FORCE BY INDUSTRY, 2006 AND 2012

2006-2012 % Change	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All Industries	5%	0%	-3%	0%	6%	2%	7%	7%	4%	4%	10%
11 Agriculture, forestry, fishing and hunting	7%	12%	-10%	0%	-7%	5%	8%	-13%	2%	5%	38%
21 Mining and oil and gas extraction	0%	0%	90%	-20%	0%	0%	-23%	27%	100%	31%	5%
22 Utilities	10%	0%	0%	0%	0%	0%	-100%	0%	0%	68%	1%
23 Construction	-30%	-100%	-3%	11%	-10%	-7%	13%	8%	-7%	-2%	9%
31-33 Manufacturing	10%	9%	-14%	0%	5%	5%	7%	3%	2%	5%	17%
41 Wholesale trade	-4%	47%	-55%	-28%	-100%	-8%	1%	29%	2%	-2%	12%
44-45 Retail trade	4%	22%	-3%	4%	47%	4%	13%	12%	8%	8%	7%
48-49 Transportation and warehousing	8%	47%	13%	20%	-10%	-13%	-12%	38%	-20%	-1%	17%
51 Information and cultural industries	70%	0%	55%	3%	0%	0%	13%	3%	-27%	8%	12%
52 Finance and insurance	7%	-33%	-14%	16%	0%	-35%	-40%	-15%	26%	-11%	8%
53 Real estate and rental and leasing	-33%	0%	-10%	-36%	0%	5%	4%	8%	33%	-1%	-5%
54 Professional, scientific and technical services	24%	-100%	-25%	-26%	-100%	-4%	-13%	-9%	-29%	-14%	1%
55 Management of companies and enterprises	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	286%
56 Administrative and support, waste management and remediation services	17%	0%	-11%	-6%	0%	-19%	-14%	-8%	0%	-7%	1%
61 Educational services	13%	0%	13%	-2%	-10%	13%	7%	-9%	17%	11%	12%
62 Health care and social assistance	-15%	10%	9%	-4%	33%	14%	12%	12%	15%	10%	7%
71 Arts, entertainment and recreation	40%	0%	-100%	35%	-7%	-17%	30%	-32%	-14%	0%	-2%
72 Accommodation and food services	6%	0%	-12%	-1%	16%	5%	14%	7%	7%	6%	6%
81 Other services (except public administration)	-1%	0%	-13%	-1%	20%	1%	14%	8%	-16%	2%	6%
91 Public administration	-30%	0%	13%	-20%	40%	-16%	7%	17%	-4%	1%	8%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (Labour Force estimates, 2012) by Millier Dickinson Blais Inc.

FIGURE B.5: LABOUR FORCE BY OCCUPATION. 2006

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All occupations	3,655	470	925	2,385	285	4,425	5,350	3,120	4,410	25,025	468,590
A Management occupations	190	10	80	145	0	265	380	215	320	1,605	41,700
A0 Senior management occupations	10	0	0	20	10	35	30	10	30	145	4,150
A1 Specialist managers	30	0	25	15	0	55	65	30	45	265	9,260
A2 Managers in retail trade, food and accommodation services	110	0	45	95	0	105	160	120	140	775	14,300
A3 Other managers, n.e.c.	45	0	0	20	0	70	120	50	100	405	13,985
B Business, finance and administrative occupations	380	55	150	205	20	570	610	445	505	2,940	79,440
B0 Professional occupations in business and finance	30	10	20	15	0	30	25	25	55	210	8,445
B1 Finance and insurance administrative occupations	115	10	0	15	0	135	60	15	40	390	5,420
B2 Secretaries	85	0	15	40	10	80	90	65	100	485	7,265
B3 Administrative and regulatory occupations	35	0	0	25	0	80	40	80	40	300	8,850
B4 Clerical supervisors	15	0	10	25	0	30	15	35	15	145	3,130
B5 Clerical occupations	100	30	100	75	15	210	370	225	250	1,375	46,310
C Natural and applied sciences and related occupations	30	15	25	50	0	160	235	125	90	730	25,025
C0 Professional occupations in natural and applied sciences	10	0	10	0	0	40	50	35	30	175	10,910
C1 Technical occupations related to natural and applied sciences	15	15	20	45	0	115	185	90	55	540	14,115
D Health occupations	95	0	20	75	10	275	460	215	265	1,415	31,120
D0 Professional occupations in health	10	0	0	10	0	15	60	50	35	180	5,865
D1 Nurse supervisors and registered nurses	10	0	10	15	0	80	175	45	65	400	9,790
D2 Technical and related occupations in health	20	10	0	0	0	135	155	50	50	420	7,550
D3 Assisting occupations in support of health services	60	0	0	45	0	50	75	65	115	410	7,910
E Occupations in social science, education, government service and religion	125	10	140	165	20	190	370	285	380	1,685	39,350
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	20	0	75	45	15	30	70	85	100	440	9,900
E1 Teachers and professors	65	0	25	55	0	120	195	140	210	810	19,855
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	40	10	40	65	10	35	100	60	65	425	9,590
F Occupations in art, culture, recreation and sport	15	0	10	35	0	45	105	65	40	315	12,740
F0 Professional occupations in art and culture	0	0	0	25	0	20	35	25	25	130	5,475
F1 Technical occupations in art, culture, recreation and sport	15	0	0	10	0	25	70	45	10	175	7,260
G Sales and service occupations	575	70	280	550	105	910	1,370	1,185	935	5,980	122,865
G0 Sales and service supervisors	10	0	20	25	10	25	70	60	30	250	4,810
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	15	0	0	15	0	55	130	110	80	405	8,455
G2 Retail salespersons and sales clerks	40	0	35	45	0	145	280	205	115	865	19,790
G3 Cashiers	60	0	20	65	10	130	135	155	140	715	11,995
G4 Chefs and cooks	40	10	0	25	25	40	65	75	70	350	6,810
G5 Occupations in food and beverage service	45	0	25	20	0	80	55	70	55	350	7,175
G6 Occupations in protective services	0	0	10	35	10	10	60	60	50	235	12,170
G7 Occupations in travel and accommodation, including attendants in recreation and sport	0	0	10	15	10	10	35	35	10	125	4,095
G8 Childcare and home support workers	85	0	15	65	0	100	75	40	85	465	8,790
G9 Sales and service occupations, n.e.c.	255	55	145	255	30	310	465	380	305	2,200	38,770

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

FIGURE B.5: LABOUR FORCE BY OCCUPATION, 2006 (CONTINUED)

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
H Trades, transport and equipment operators and related occupations	405	15	105	330	35	515	785	335	765	3,290	69,965
H0 Contractors and supervisors in trades and transportation	10	0	0	20	0	25	35	0	20	110	3,065
H1 Construction trades	70	0	30	80	0	125	100	60	195	660	13,505
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	25	0	0	45	0	40	45	25	40	220	5,510
H3 Machinists, metal forming, shaping and erecting occupations	10	0	10	35	10	10	20	20	45	160	4,725
H4 Mechanics	70	0	10	20	0	80	200	55	145	580	10,375
H5 Other trades, n.e.c.	15	0	10	10	0	10	15	15	0	75	2,675
H6 Heavy equipment and crane operators, including drillers	15	0	0	30	0	10	70	30	40	195	3,950
H7 Transportation equipment operators and related workers, excluding labourers	90	10	25	55	15	115	155	75	185	725	14,505
H8 Trades helpers, construction, and transportation labourers and related occupations	100	0	25	40	15	100	140	55	90	565	11,650
I Occupations unique to primary industry	1,185	145	85	600	40	985	710	100	680	4,530	24,495
I0 Occupations unique to agriculture, excluding labourers	10	0	0	30	0	20	145	20	305	530	7,095
I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	1,155	130	60	510	30	930	460	65	330	3,670	12,060
I2 Primary production labourers	20	10	25	60	10	35	100	15	40	305	5,335
J Occupations unique to processing, manufacturing and utilities	660	145	40	225	45	500	320	145	425	2,505	21,890
J0 Supervisors in manufacturing	30	0	0	20	10	20	35	0	30	145	1,570
J1 Machine operators in manufacturing	320	80	15	90	25	270	160	90	150	1,200	10,190
J2 Assemblers in manufacturing	60	30	10	20	10	85	25	10	35	285	3,305
J3 Labourers in processing, manufacturing and utilities	245	30	10	90	0	125	100	40	205	845	6,815

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

FIGURE B.6: LABOUR FORCE BY OCCUPATION, 2012

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All occupations	3,845	460	875	2,359	301	4,508	5,713	3,369	4,538	25,968	514,874
A Management occupations	219	0	92	144	0	250	390	276	310	1,681	44,181
A0 Senior management occupations	3	0	3	20	0	42	54	25	37	184	4,475
A1 Specialist managers	19	0	38	12	0	37	75	57	51	289	9,920
A2 Managers in retail trade, food and accommodation services	149	0	46	80	0	95	139	127	128	764	14,319
A3 Other managers, n.e.c.	49	0	6	32	0	76	122	68	94	447	15,467
B Business, finance and administration occupations	427	54	130	207	27	592	652	509	528	3,126	87,055
B0 Professional occupations in business and finance	53	2	23	10	2	13	29	20	33	185	8,837
B1 Finance and insurance administration occupations	130	13	1	32	1	157	68	2	23	427	6,287
B2 Secretaries	95	0	0	56	0	85	97	59	117	509	8,998
B3 Administrative and regulatory occupations	36	1	1	26	10	81	32	83	35	305	8,370
B4 Clerical supervisors	2	0	9	20	0	13	6	45	1	96	3,776
B5 Clerical occupations	111	37	95	62	14	244	420	301	318	1,602	50,788
C Natural and applied sciences and related occupations	41	10	20	44	0	153	253	140	84	745	26,995
C0 Professional occupations in natural and applied sciences	16	0	5	0	0	56	90	54	42	263	12,415
C1 Technical occupations related to natural and applied sciences	25	10	15	44	0	97	163	86	42	482	14,580
D Health occupations	96	10	18	64	12	291	507	213	299	1,510	32,666
D0 Professional occupations in health	7	0	5	1	0	19	48	47	56	183	5,864
D1 Nurse supervisors and registered nurses	16	10	4	18	12	89	218	40	69	476	10,021
D2 Technical and related occupations in health	26	0	4	2	0	146	180	56	30	444	8,476
D3 Assisting occupations in support of health services	47	0	4	42	0	37	60	70	144	404	8,305
E Occupations in social science, education, government service and religion	123	20	124	167	20	214	372	317	415	1,772	41,907
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	17	2	78	59	10	24	74	103	85	452	10,036
E1 Teachers and professors	64	4	20	70	10	166	222	120	248	924	22,401
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	42	13	26	38	0	24	76	94	82	395	9,470
F Occupations in art, culture, recreation and sport	10	0	0	25	12	11	123	79	42	302	13,521
F0 Professional occupations in art and culture	4	0	0	25	5	5	42	24	30	135	6,053
F1 Technical occupations in art, culture, recreation and sport	5	0	0	0	6	6	81	55	11	164	7,468
G Sales and service occupations	623	69	257	578	117	963	1,496	1,288	996	6,387	136,189
G0 Sales and service supervisors	30	0	0	18	0	43	89	60	43	283	4,519
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	11	5	1	14	0	56	129	136	62	414	9,548
G2 Retail salespersons and sales clerks	35	0	46	26	10	163	292	221	102	895	20,689
G3 Cashiers	67	0	23	65	12	137	154	190	150	798	13,100
G4 Chefs and cooks	58	0	1	46	20	38	77	62	103	405	6,405
G5 Occupations in food and beverage service	62	0	35	29	12	88	66	73	64	429	8,387
G6 Occupations in protective services	3	0	1	32	0	12	73	50	72	243	15,218
G7 Occupations in travel and accommodation, including attendants in recreation and sport	1	0	0	10	12	10	35	68	7	143	4,665
G8 Child care and home support workers	90	0	0	52	12	102	69	34	80	439	19,611
G9 Sales and service occupations, n.e.c.	266	64	148	285	37	314	511	394	312	2,331	44,047

Source: Derived from Manifold Data Mining (2012 labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.6: LABOUR FORCE BY OCCUPATION 2012 (CONTINUED)

	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
H Trades, transport and equipment operators and related occupations	408	15	103	346	36	529	858	348	786	3,429	78,093
H0 Contractors and supervisors in trades and transportation	10	0	11	2	0	22	42	1	23	111	3,095
H1 Construction trades	62	0	28	61	0	115	100	102	207	675	16,390
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	34	0	0	46	0	27	55	30	39	231	5,066
H3 Machinists, metal forming, shaping and erecting occupations	10	0	0	26	0	11	21	20	72	160	4,608
H4 Mechanics	62	0	8	44	0	93	224	44	145	620	10,266
H5 Other trades, n.e.c.	20	0	9	5	0	15	21	16	0	86	3,443
H6 Heavy equipment and crane operators, including drillers	15	0	0	28	0	20	78	43	42	226	4,739
H7 Transportation equipment operators and related workers, excluding labourers	100	15	30	66	21	121	155	54	179	741	17,168
H8 Trades helpers, construction and transportation labourers and related occupations	95	0	17	67	14	105	162	37	80	577	13,318
I Occupations unique to primary industry	1,212	139	87	590	38	988	767	64	672	4,553	30,999
I0 Occupations unique to agriculture, excluding labourers	11	0	0	25	0	26	147	8	294	511	10,919
I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers	1,177	124	65	519	36	914	507	47	319	3,708	14,916
I2 Primary production labourers	24	15	22	46	0	45	113	9	58	332	5,164
J Occupations unique to processing, manufacturing and utilities	686	143	43	194	42	520	296	136	406	2,466	23,269
J0 Supervisors in manufacturing	40	0	0	17	12	12	32	11	28	152	1,704
J1 Machine operators in manufacturing	350	69	28	81	17	290	136	68	152	1,231	10,297
J2 Assemblers in manufacturing	45	32	12	5	13	93	38	0	36	274	3,601
J3 Labourers in processing, manufacturing and utilities	251	23	3	91	0	124	91	37	191	811	7,467

Source: Derived from Manifold Data Mining (2012 labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.7: LABOUR FORCE BY OCCUPATION. NET CHANGE, 2006 AND 2012

2006 - 2012 Net Change	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All occupations	190	-10	-50	-26	16	83	363	249	128	943	46,284
A Management occupations	29	-10	12	-1	0	-15	10	61	10	76	2,481
A0 Senior management occupations	-7	0	3	0	-10	-7	24	15	7	39	325
A1 Specialist managers	-11	0	13	-3	0	-18	10	27	6	24	1660
A2 Managers in retail trade, food and accommodation services	39	0	1	-15	0	-10	-21	-7	-12	-11	19
A3 Other managers, n.e.c.	4	0	6	12	0	6	2	-18	-6	42	1,482
B Business, finance and administrative occupations	47	-1	-20	2	7	22	42	64	23	186	7,615
B0 Professional occupations in business and finance	23	-8	3	-5	2	-17	4	-5	-22	-25	392
B1 Finance and insurance administrative occupations	15	3	1	17	1	22	8	-13	-17	37	867
B2 Secretaries	10	0	-15	16	-10	5	7	-6	17	24	1,713
B3 Administrative and regulatory occupations	1	1	1	1	10	1	-8	3	-5	5	-480
B4 Clerical supervisors	-13	0	-1	-5	0	-17	-9	10	-14	-49	646
B5 Clerical occupations	11	7	-5	-13	-1	34	50	76	68	227	4,478
C Natural and applied sciences and related occupations	11	-5	-5	-6	0	-7	18	15	-6	15	1,970
C0 Professional occupations in natural and applied sciences	6	0	-5	10	0	16	40	19	12	68	1,505
C1 Technical occupations related to natural and applied sciences	10	-5	-5	-1	0	-18	-22	-4	-13	-58	465
D Health occupations	1	10	-2	-11	2	16	47	-2	34	95	1,546
D0 Professional occupations in health	-3	0	5	-9	0	4	-12	-3	21	3	-1
D1 Nurse supervisors and registered nurses	6	10	-6	3	12	9	43	-5	4	76	231
D2 Technical and related occupations in health	6	-10	4	2	0	11	25	6	-20	24	926
D3 Assisting occupations in support of health services	-13	0	4	-3	0	-13	-15	5	29	-6	395
E Occupations in social science, education, government service and religion	-2	10	-16	2	0	24	2	32	35	87	2,557
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	-3	2	3	14	-5	-6	4	18	15	12	136
E1 Teachers and professors	-1	4	-5	15	10	46	27	-20	38	114	2,546
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	2	3	-14	-27	-10	-11	-24	-34	17	-30	-120
F Occupations in art, culture, recreation and sport	-5	0	-10	-10	12	-34	18	14	2	-13	781
F0 Professional occupations in art and culture	4	0	0	0	5	-15	7	-1	5	5	578
F1 Technical occupations in art, culture, recreation and sport	-10	0	0	-10	6	-19	11	10	1	-11	208
G Sales and service occupations	48	-1	-23	28	12	53	126	103	61	407	13,324
G0 Sales and service supervisors	20	0	-20	-7	-10	18	19	0	13	33	291
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	-4	5	1	-1	0	1	-1	26	18	9	1,093
G2 Retail salespersons and sales clerks	-5	0	11	-19	10	18	12	16	-13	30	899
G3 Cashiers	7	0	3	0	2	7	19	35	10	83	1,105
G4 Chefs and cooks	18	-10	21	21	-5	-2	12	-13	33	55	405
G5 Occupations in food and beverage service	17	0	10	-9	12	8	11	3	9	79	1,212
G6 Occupations in protective services	3	0	9	-3	-10	2	13	10	22	8	3,048
G7 Occupations in travel and accommodation, including attendants in recreation and sport	1	0	-10	-5	2	0	0	33	-3	18	570
G8 Childcare and home support workers	5	0	-15	-13	12	2	-6	-6	-5	-26	821
G9 Sales and service occupations, n.e.c.	11	9	3	30	7	4	46	14	7	131	5,277

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (2012 Labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.7: LABOUR FORCE BY OCCUPATION, NET CHANGE, 2006 AND 2012 (CONTINUED)

2006 - 2012 Net Change	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
H Trades, transport and equipment operators and related occupations	3	0	-2	16	1	14	73	13	21	139	8,128
H0 Contractors and supervisors in trades and transportation	0	0	11	-18	0	-3	7	1	3	1	30
H1 Construction trades	-8	0	-2	-19	0	-10	0	42	12	15	2,885
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	9	0	0	1	0	-13	10	5	-1	11	-444
H3 Machinists, metal forming, shaping and erecting occupations	0	0	-10	-9	-10	1	1	0	27	0	-117
H4 Mechanics	-8	0	-2	24	0	13	24	-11	0	40	-109
H5 Other trades, n.e.c.	5	0	-1	-5	0	5	6	1	0	11	768
H6 Heavy equipment and crane operators, including drillers	0	0	0	-2	0	10	8	13	2	31	789
H7 Transportation equipment operators and related workers, excluding labourers	10	5	5	11	6	6	0	-21	-6	16	2,663
H8 Trades helpers, construction, and transportation labourers and related occupations	-5	0	-8	27	-1	5	22	-18	-10	12	1,668
I Occupations unique to primary industry	27	-6	2	-10	-4	1	57	-36	-8	23	6,504
I0 Occupations unique to agriculture, excluding labourers	1	0	0	-5	0	6	2	-12	-11	-19	3,824
I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	22	-6	5	-9	6	-16	47	-18	-11	38	2,856
I2 Primary production labourers	4	5	-3	-14	0	10	13	-6	18	27	-171
J Occupations unique to processing, manufacturing and utilities	26	-2	3	-31	-3	20	-24	-9	-19	-39	1,379
J0 Supervisors in manufacturing	10	0	0	-3	2	-8	-3	11	-2	7	134
J1 Machine operators in manufacturing	30	9	13	-9	-8	20	-24	-2	2	31	107
J2 Assemblers in manufacturing	-15	2	2	-15	3	8	13	-10	1	-11	495
J3 Labourers in processing, manufacturing and utilities	6	-7	-7	1	0	-1	-9	-3	-14	-34	652

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (2012 Labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.8: LABOUR FORCE BY OCCUPATION, NET CHANGE %, 2006 AND 2012

2006 - 2012 Net Change %	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All occupations	5%	-2%	-5%	-1%	6%	2%	7%	8%	3%	4%	10%
A Management occupations	15%	-100%	15%	-1%	0%	-6%	-3%	28%	-3%	5%	6%
A0 Senior management occupations	-70%	0%	10%	0%	-100%	20%	80%	150%	23%	27%	8%
A1 Specialist managers	-37%	0%	52%	-20%	0%	-33%	15%	90%	13%	9%	7%
A2 Managers in retail trade, food and accommodation services	35%	0%	2%	-16%	0%	-10%	-13%	6%	-9%	-1%	0%
A3 Other managers, n.e.c.	9%	0%	0%	60%	0%	9%	2%	36%	6%	10%	11%
B Business, finance and administrative occupations	12%	-2%	-13%	1%	35%	4%	7%	14%	5%	6%	10%
B0 Professional occupations in business and finance	77%	-80%	15%	-33%	0%	-57%	16%	-20%	-40%	-12%	5%
B1 Finance and insurance administrative occupations	13%	30%	0%	113%	0%	16%	13%	-87%	-43%	9%	16%
B2 Secretaries	12%	0%	-100%	40%	-100%	6%	8%	-9%	17%	5%	24%
B3 Administrative and regulatory occupations	3%	0%	0%	4%	0%	1%	-20%	4%	-13%	2%	-5%
B4 Clerical supervisors	-87%	0%	-10%	-20%	0%	-57%	-60%	29%	-93%	-34%	21%
B5 Clerical occupations	11%	23%	-5%	-17%	-7%	16%	14%	34%	27%	17%	10%
C Natural and applied sciences and related occupations	37%	-33%	-20%	-12%	0%	-4%	8%	12%	-7%	2%	8%
C0 Professional occupations in natural and applied sciences	60%	0%	-50%	0%	0%	40%	80%	54%	40%	50%	14%
C1 Technical occupations related to natural and applied sciences	67%	-33%	-25%	-2%	0%	-16%	12%	-4%	-24%	-11%	3%
D Health occupations	1%	0%	-10%	-15%	20%	6%	10%	-1%	13%	7%	5%
D0 Professional occupations in health	-30%	0%	0%	-90%	0%	27%	-20%	-6%	60%	2%	0%
D1 Nurse supervisors and registered nurses	60%	0%	-60%	20%	0%	11%	25%	-11%	6%	19%	2%
D2 Technical and related occupations in health	30%	-100%	0%	0%	0%	8%	16%	12%	-40%	6%	12%
D3 Assisting occupations in support of health services	-22%	0%	0%	-7%	0%	-26%	-20%	8%	25%	-1%	5%
E Occupations in social science, education, government service and religion	-2%	100%	-11%	1%	0%	13%	1%	11%	9%	5%	6%
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	-15%	0%	4%	31%	-33%	-20%	6%	21%	-15%	3%	1%
E1 Teachers and professors	-2%	0%	-20%	27%	0%	38%	14%	-14%	18%	14%	13%
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	5%	30%	-35%	42%	-100%	31%	-24%	57%	26%	-7%	-1%
F Occupations in art, culture, recreation and sport	-33%	0%	-100%	-29%	0%	-76%	17%	22%	5%	-4%	6%
F0 Professional occupations in art and culture	0%	0%	0%	0%	0%	-75%	20%	-4%	20%	4%	11%
F1 Technical occupations in art, culture, recreation and sport	-67%	0%	0%	-100%	0%	-76%	16%	22%	10%	-6%	3%
G Sales and service occupations	8%	-1%	-8%	5%	11%	6%	9%	9%	7%	7%	11%
G0 Sales and service supervisors	200%	0%	-100%	-28%	-100%	72%	27%	0%	43%	13%	-6%
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	-27%	0%	0%	-7%	0%	2%	-1%	24%	-23%	2%	13%
G2 Retail salespersons and sales clerks	-13%	0%	31%	-42%	0%	12%	-4%	8%	-11%	3%	5%
G3 Cashiers	12%	0%	15%	0%	20%	5%	14%	23%	7%	12%	9%
G4 Chefs and cooks	45%	-100%	0%	84%	-20%	-5%	18%	17%	47%	16%	6%
G5 Occupations in food and beverage service	38%	0%	40%	45%	0%	10%	20%	4%	16%	23%	17%
G6 Occupations in protective services	0%	0%	-90%	-9%	-100%	20%	22%	17%	44%	3%	25%
G7 Occupations in travel and accommodation, including attendants in recreation and sport	0%	0%	-100%	-33%	20%	0%	0%	94%	-30%	14%	14%
G8 Childcare and home support workers	6%	0%	-100%	-20%	0%	2%	-8%	15%	-6%	-6%	9%
G9 Sales and service occupations, n.e.c.	-4%	16%	2%	12%	23%	1%	10%	4%	2%	6%	14%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (2012 Labour force estimates) by Millier Dickinson Blais Inc.

FIGURE B.8: LABOUR FORCE BY OCCUPATION, NET CHANGE %, 2006 AND 2012 (CONTINUED)

2006 - 2012 Net Change %	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
H Trades, transport and equipment operators and related occupations	1%	0%	-2%	5%	3%	3%	9%	4%	3%	4%	12%
H0 Contractors and supervisors in trades and transportation	0%	0%	0%	-90%	0%	-12%	20%	0%	15%	1%	1%
H1 Construction trades	-11%	0%	-7%	-24%	0%	-8%	0%	70%	6%	2%	21%
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	36%	0%	0%	2%	0%	-33%	22%	20%	-3%	5%	-8%
H3 Machinists, metal forming, shaping and erecting occupations	0%	0%	-100%	-26%	-100%	10%	5%	0%	60%	0%	-2%
H4 Mechanics	-11%	0%	-20%	120%	0%	16%	12%	-20%	0%	7%	-1%
H5 Other trades, n.e.c.	33%	0%	-10%	-50%	0%	50%	40%	7%	0%	15%	29%
H6 Heavy equipment and crane operators, including drillers	0%	0%	0%	-7%	0%	100%	11%	43%	5%	16%	20%
H7 Transportation equipment operators and related workers, excluding labourers	11%	50%	20%	20%	40%	5%	0%	-28%	-3%	2%	18%
H8 Trades helpers, construction, and transportation labourers and related occupations	-5%	0%	-32%	68%	-7%	5%	16%	-33%	-11%	2%	14%
I Occupations unique to primary industry	2%	-4%	2%	-2%	-10%	0%	8%	-36%	-1%	1%	27%
I0 Occupations unique to agriculture, excluding labourers	10%	0%	0%	-17%	0%	30%	1%	-60%	-4%	-4%	54%
I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	-2%	-5%	8%	2%	20%	-2%	10%	-28%	-3%	-1%	24%
I2 Primary production labourers	20%	50%	-12%	23%	0%	29%	13%	-40%	45%	-9%	-3%
J Occupations unique to processing, manufacturing and utilities	4%	-1%	8%	-14%	-7%	4%	-8%	-6%	-4%	-2%	6%
J0 Supervisors in manufacturing	33%	0%	0%	-15%	20%	-40%	-9%	0%	-7%	5%	9%
J1 Machine operators in manufacturing	9%	11%	87%	-10%	-32%	7%	-15%	-2%	1%	3%	1%
J2 Assemblers in manufacturing	-25%	7%	20%	-75%	30%	9%	52%	-100%	3%	-4%	15%
J3 Labourers in processing, manufacturing and utilities	2%	-23%	-70%	1%	0%	-1%	-9%	-8%	-7%	-4%	10%

Source: Derived from Statistics Canada (Census of Population, 2006) and Manifold Data Mining (2012 Labour force estimates) by Millier Dickinson Blais Inc.

Industry Sector Analysis – Location Quotients

FIGURE B.9: LOCATION QUOTIENT ANALYSIS RESULTS, 2006 AND 2012, SOUTH WEST NOVA COMMUNITIES

2006	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All industries											
11 Agriculture, forestry, fishing and hunting	8.02	6.89	1.40	5.26	2.27	5.23	2.81	0.62	3.70	4.13	1.00
21 Mining and oil and gas extraction	0.00	3.09	1.57	0.61	0.00	0.00	0.81	0.70	0.49	0.52	1.00
22 Utilities	0.52	0.00	0.00	0.00	0.00	0.00	0.53	0.00	0.00	0.19	1.00
23 Construction	0.56	0.33	0.51	0.49	0.55	0.87	0.99	0.65	1.21	0.82	1.00
31-33 Manufacturing	2.49	3.11	0.97	1.46	2.56	2.00	1.12	0.79	1.73	1.62	1.00
41 Wholesale trade	0.86	0.91	0.62	0.72	1.00	0.77	1.12	0.73	0.84	0.86	1.00
44-45 Retail trade	0.79	0.77	1.30	0.94	0.42	0.89	1.11	1.63	1.02	1.05	1.00
48-49 Transportation and warehousing	0.50	0.73	1.11	0.62	0.80	0.69	0.79	0.47	0.62	0.65	1.00
51 Information and cultural industries	0.23	0.00	0.93	1.35	0.00	0.48	1.04	0.96	0.15	0.65	1.00
52 Finance and insurance	0.27	1.04	1.24	0.34	0.00	0.63	0.52	0.79	0.78	0.59	1.00
53 Real estate and rental and leasing	0.27	0.00	0.72	0.70	0.00	0.30	0.87	2.68	0.23	0.75	1.00
54 Professional, scientific and technical services	0.42	0.65	0.88	0.56	0.71	0.53	0.46	0.49	0.30	0.47	1.00
55 Management of companies and enterprises	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
56 Administrative and support, waste management and remediation services	0.15	0.00	0.88	0.53	0.00	0.31	0.39	0.64	0.54	0.42	1.00
61 Educational services	0.54	0.00	0.80	0.71	0.47	0.89	0.93	0.74	1.43	0.88	1.00
62 Health care and social assistance	0.36	0.36	0.97	0.70	1.20	0.76	1.27	1.19	0.93	0.90	1.00
71 Arts, entertainment and recreation	0.14	0.00	0.56	1.19	2.71	0.41	0.77	1.24	0.41	0.65	1.00
72 Accommodation and food services	0.72	0.46	1.41	0.89	1.27	0.64	0.79	1.37	0.58	0.82	1.00
81 Other services (except public administration)	0.55	0.45	1.83	1.29	2.23	0.79	1.09	1.83	0.94	1.07	1.00
91 Public administration	0.10	0.38	0.58	0.40	0.42	0.35	0.58	0.69	0.30	0.41	1.00

2012	Barrington - Municipal district	Clark's Harbour - Town	Shelburne - Town	Shelburne - Municipal district	Lockeport - Town	Argyle - Municipal district	Yarmouth - Municipal district	Yarmouth - Town	Clare - Municipal district	South West Nova	Nova Scotia
All industries											
11 Agriculture, forestry, fishing and hunting	6.50	6.15	1.04	4.22	1.60	4.29	2.26	0.40	2.89	3.31	1.00
21 Mining and oil and gas extraction	0.00	3.23	3.23	0.51	4.54	0.00	0.61	0.86	1.00	0.69	1.00
22 Utilities	0.59	0.00	0.00	0.00	0.00	0.46	0.00	0.61	0.49	0.33	1.00
23 Construction	0.38	0.00	0.51	0.55	0.47	0.80	1.06	0.67	1.09	0.78	1.00
31-33 Manufacturing	2.46	3.19	0.81	1.38	2.38	1.93	1.06	0.68	1.59	1.54	1.00
41 Wholesale trade	0.77	1.31	0.28	0.51	0.00	0.69	1.04	0.86	0.81	0.79	1.00
44-45 Retail trade	0.80	0.61	1.34	1.01	0.60	0.93	1.20	1.74	1.08	1.11	1.00
48-49 Transportation and warehousing	0.48	1.00	1.22	0.71	0.64	0.56	0.61	0.58	0.45	0.59	1.00
51 Information and cultural industries	0.37	0.00	1.46	1.37	0.00	0.47	0.99	0.91	0.10	0.66	1.00
52 Finance and insurance	0.28	0.71	1.12	0.41	0.00	0.41	0.30	0.64	0.96	0.52	1.00
53 Real estate and rental and leasing	0.20	0.00	0.78	0.52	0.00	0.36	0.91	3.13	0.34	0.83	1.00
54 Professional, scientific and technical services	0.54	0.00	0.75	0.45	0.00	0.54	0.41	0.45	0.22	0.43	1.00
55 Management of companies and enterprises	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	1.00
56 Administrative and support, waste management and remediation services	0.18	0.00	0.88	0.55	0.00	0.27	0.34	0.60	0.56	0.40	1.00
61 Educational services	0.57	0.00	0.91	0.68	0.39	0.96	0.91	0.73	1.56	0.92	1.00
62 Health care and social assistance	0.30	0.41	1.12	0.69	1.54	0.86	1.37	1.28	1.06	0.97	1.00
71 Arts, entertainment and recreation	0.21	0.00	0.00	1.80	2.67	0.37	1.05	0.88	0.38	0.70	1.00
72 Accommodation and food services	0.75	0.48	1.33	0.92	1.45	0.69	0.87	1.43	0.62	0.87	1.00
81 Other services (except public administration)	0.54	0.46	1.71	1.33	2.61	0.81	1.20	1.91	0.78	1.08	1.00
91 Public administration	0.07	0.39	0.69	0.33	0.57	0.29	0.59	0.77	0.28	0.41	1.00

Industry Sector Analysis – Shift-Share Analysis

FIGURE B.10: 2006-2012 NET CHANGE, SHIFT-SHARE ANALYSIS RESULTS

2006-2012 Net Change, Shift Share Analysis Results	Barrington - Municipal district Regional Share	Industrial Mix	Local Share	Total	Clark's Harbour - Town Regional Share	Industrial Mix	Local Share	Total
All industries	355	411	-579	187	45	48	-87	6
11 Agriculture, forestry, fishing and hunting	132	381	-421	92	15	42	-39	18
21 Mining and oil and gas extraction	0	0	0	0	1	0	0	0
22 Utilities	1	-1	1	1	0	0	0	0
23 Construction	13	-1	-50	-39	1	0	-11	-10
31-33 Manufacturing	79	58	-56	81	13	9	-10	12
41 Wholesale trade	11	2	-17	-4	1	0	5	7
44-45 Retail trade	35	-9	-11	15	4	-1	-13	-10
48-49 Transportation and warehousing	8	5	-7	6	1	1	5	7
51 Information and cultural industries	2	0	12	14	0	0	0	0
52 Finance and insurance	3	-1	0	2	1	0	-6	-5
53 Real estate and rental and leasing	1	-2	-4	-5	0	0	0	0
54 Professional, scientific and technical services	7	-7	18	18	1	-1	-15	-15
55 Management of companies and enterprises	0	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	3	-3	5	5	0	0	0	0
61 Educational services	14	4	1	19	0	0	0	0
62 Health care and social assistance	15	-4	-34	-23	2	0	1	2
71 Arts, entertainment and recreation	1	-1	4	4	0	0	0	0
72 Accommodation and food services	18	-7	1	11	1	-1	-1	0
81 Other services (except public administration)	9	-3	-7	-1	1	0	-1	0
91 Public administration	3	-1	-11	-9	1	0	-1	0

2006-2012 Net Change, Shift Share Analysis Results	Shelburne - Town Regional Share	Industrial Mix	Local Share	Total	Shelburne - Municipal district Regional Share	Industrial Mix	Local Share	Total
All industries	91	2	-130	-37	232	147	-398	-18
11 Agriculture, forestry, fishing and hunting	6	17	-29	-6	57	163	-218	2
21 Mining and oil and gas extraction	1	0	9	9	1	0	-2	-2
22 Utilities	0	0	0	0	0	0	0	0
23 Construction	3	0	-4	-1	7	-1	1	8
31-33 Manufacturing	8	6	-25	-11	30	22	-53	-1
41 Wholesale trade	2	0	-13	-11	6	1	-24	-17
44-45 Retail trade	15	-4	-15	-4	27	-7	-8	12
48-49 Transportation and warehousing	4	3	-1	6	6	4	2	13
51 Information and cultural industries	2	0	9	11	7	1	-7	2
52 Finance and insurance	3	-1	-8	-5	2	0	2	4
53 Real estate and rental and leasing	1	-2	0	-1	2	-4	-8	-9
54 Professional, scientific and technical services	4	-4	-10	-10	6	-6	-17	-17
55 Management of companies and enterprises	0	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	4	-4	-5	-5	7	-6	-5	-4
61 Educational services	5	1	0	7	12	3	-18	-2
62 Health care and social assistance	10	-3	1	9	19	-5	-22	-8
71 Arts, entertainment and recreation	1	-1	-10	-10	5	-6	20	19
72 Accommodation and food services	9	-4	-16	-11	14	-6	-9	-1
81 Other services (except public administration)	8	-3	-15	-10	14	-5	-10	-1
91 Public administration	4	-1	3	6	8	-2	-22	-16

Note: Industries may not sum up to the totals due to rounding.

FIGURE B.10: 2006-2012 NET CHANGE, SHIFT-SHARE ANALYSIS RESULTS (CONTINUED)

2006-2012 Net Change, Shift Share Analysis Results	Lockeport - Town Regional Share	Lockeport - Town Industrial Mix	Lockeport - Town Local Share	Lockeport - Town Total	Argyle - Municipal district Regional Share	Argyle - Municipal district Industrial Mix	Argyle - Municipal district Local Share	Argyle - Municipal district Total
All industries	27	8	-24	11	428	311	-638	101
11 Agriculture, forestry, fishing and hunting	3	8	-13	-2	104	301	-350	55
21 Mining and oil and gas extraction	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0
23 Construction	1	0	-2	-1	24	-2	-38	-16
31-33 Manufacturing	6	5	-8	3	77	56	-92	41
41 Wholesale trade	1	0	-11	-10	12	3	-23	-9
44-45 Retail trade	1	0	6	7	48	-13	-16	19
48-49 Transportation and warehousing	1	1	-3	-1	13	9	-40	-18
51 Information and cultural industries	0	0	0	0	5	1	-6	0
52 Finance and insurance	0	0	0	0	8	-2	-37	-30
53 Real estate and rental and leasing	0	0	0	0	2	-3	2	1
54 Professional, scientific and technical services	1	-1	-10	-10	11	-11	-6	-5
55 Management of companies and enterprises	0	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	0	0	0	0	7	-7	-15	-14
61 Educational services	1	0	-2	-1	28	8	3	39
62 Health care and social assistance	4	-1	10	13	38	-10	25	53
71 Arts, entertainment and recreation	1	-2	-1	-1	3	-4	-5	-6
72 Accommodation and food services	2	-1	3	4	19	-8	-1	10
81 Other services (except public administration)	3	1	4	6	16	-5	-9	2
91 Public administration	1	0	3	4	13	-3	-31	-21

2006-2012 Net Change, Shift Share Analysis Results	Yarmouth - Municipal district Regional Share	Yarmouth - Municipal district Industrial Mix	Yarmouth - Municipal district Local Share	Yarmouth - Municipal district Total	Yarmouth - Town Regional Share	Yarmouth - Town Industrial Mix	Yarmouth - Town Local Share	Yarmouth - Town Total
All industries	520	149	-295	375	304	-46	-34	223
11 Agriculture, forestry, fishing and hunting	68	195	-206	57	9	25	-46	-12
21 Mining and oil and gas extraction	3	-1	-8	-7	1	-1	3	4
22 Utilities	1	-1	-15	-15	0	0	0	0
23 Construction	33	-3	13	43	13	-1	0	11
31-33 Manufacturing	52	38	-50	40	21	16	-43	-6
41 Wholesale trade	20	5	-23	2	8	2	13	23
44-45 Retail trade	72	-19	46	99	62	-17	30	75
48-49 Transportation and warehousing	18	13	-53	-22	6	4	14	25
51 Information and cultural industries	13	3	-11	4	7	1	-6	2
52 Finance and insurance	8	-2	-41	-34	7	-1	-17	-11
53 Real estate and rental and leasing	7	-11	1	-3	12	-19	17	10
54 Professional, scientific and technical services	12	-11	-16	-15	7	-7	-7	-7
55 Management of companies and enterprises	0	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	11	-10	-17	-16	11	-10	-10	-9
61 Educational services	36	10	-21	25	17	5	-6	15
62 Health care and social assistance	77	-20	38	96	42	-11	20	52
71 Arts, entertainment and recreation	8	-9	25	24	7	-9	-23	-24
72 Accommodation and food services	28	-12	25	41	29	-12	5	22
81 Other services (except public administration)	27	-9	21	39	26	-9	5	22
91 Public administration	25	-6	-3	17	18	-4	17	31

Note: Industries may not sum up to the totals due to rounding.

FIGURE B.10: 2006-2012 NET CHANGE, SHIFT-SHARE ANALYSIS RESULTS (CONTINUED)

2006-2012 Net Change, Shift Share Analysis Results	Clare - Municipal district Regional Share	Industrial Mix	Local Share	Total	South West Nova Regional Share	Industrial Mix	Local Share	Total
All industries	428	213	-471	169	2,431	1,243	-2,617	1,057
11 Agriculture, forestry, fishing and hunting	74	212	-273	13	466	1,346	-1,595	217
21 Mining and oil and gas extraction	1	-1	14	15	9	-4	24	28
22 Utilities	0	0	0	0	2	-2	17	17
23 Construction	33	-3	-54	-24	128	-12	-145	-29
31-33 Manufacturing	66	49	-104	11	352	258	-441	170
41 Wholesale trade	13	3	-14	2	74	17	-107	-17
44-45 Retail trade	55	-15	3	43	319	-86	23	256
48-49 Transportation and warehousing	12	8	-44	-24	70	49	-127	-8
51 Information and cultural industries	1	0	-6	-4	37	7	-15	29
52 Finance and insurance	10	-2	19	27	44	-8	-88	-52
53 Real estate and rental and leasing	1	-2	6	5	27	-42	13	-2
54 Professional, scientific and technical services	6	-6	-19	-19	57	-53	-83	-80
55 Management of companies and enterprises	0	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	13	-12	-1	0	56	-51	-48	-43
61 Educational services	45	12	19	77	159	44	-23	179
62 Health care and social assistance	47	-12	39	74	255	-64	78	268
71 Arts, entertainment and recreation	3	-4	-4	-5	31	-36	6	1
72 Accommodation and food services	17	-7	3	13	137	-58	9	89
81 Other services (except public administration)	19	-6	-44	-31	123	-42	-56	26
91 Public administration	11	-2	-12	-4	84	-19	-57	8

Note: Industries may not sum up to the totals due to rounding.

Business Characteristics

FIGURE B.11: ESTABLISHMENT LOCATIONS, MUNICIPAL DISTRICT OF BARRINGTON, 2008 AND 2012

Municipal District of Barrington	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	641	195	446	320	74	31	15	5	1
11 Agriculture, Forestry, Fishing and Hunting	280	69	211	184	23	3	1	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	1	1	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	34	14	20	14	5	1	0	0	0
31-33 Manufacturing	77	19	58	37	10	5	4	2	0
41 Wholesale Trade	42	13	29	15	6	4	3	1	0
44-45 Retail Trade	48	10	38	17	12	4	2	2	1
48-49 Transportation and Warehousing	23	12	11	5	4	1	1	0	0
51 Information and Cultural Industries	1	1	0	0	0	0	0	0	0
52 Finance and Insurance	13	9	4	1	0	2	1	0	0
53 Real Estate and Rental and Leasing	17	15	2	2	0	0	0	0	0
54 Professional, Scientific and Technical Services	10	2	8	6	1	0	1	0	0
55 Management of Companies and Enterprises	23	22	1	0	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	6	1	5	3	1	1	0	0	0
61 Educational Services	1	0	1	1	0	0	0	0	0
62 Health Care and Social Assistance	13	1	12	7	4	0	1	0	0
71 Arts, Entertainment and Recreation	5	0	5	3	0	2	0	0	0
72 Accommodation and Food Services	9	1	8	2	1	5	0	0	0
81 Other Services (except Public Administration)	37	5	32	23	6	3	0	0	0
91 Public Administration	1	0	1	0	0	0	1	0	0

Municipal District of Barrington	June 2012								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	593	169	424	297	72	28	21	5	1
11 Agriculture, Forestry, Fishing and Hunting	276	63	213	189	19	4	1	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	35	12	23	14	7	2	0	0	0
31-33 Manufacturing	65	18	47	23	13	4	5	2	0
41 Wholesale Trade	40	13	27	10	6	5	6	0	0
44-45 Retail Trade	44	7	37	15	13	3	3	3	0
48-49 Transportation and Warehousing	16	8	8	3	4	1	0	0	0
51 Information and Cultural Industries	1	0	1	0	1	0	0	0	0
52 Finance and Insurance	11	6	5	1	1	2	1	0	0
53 Real Estate and Rental and Leasing	14	9	5	4	0	0	1	0	0
54 Professional, Scientific and Technical Services	7	3	4	3	0	0	1	0	0
55 Management of Companies and Enterprises	22	20	2	2	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	6	2	4	2	1	1	0	0	0
61 Educational Services	0	0	0	0	0	0	0	0	0
62 Health Care and Social Assistance	9	1	8	4	1	0	2	0	1
71 Arts, Entertainment and Recreation	7	1	6	4	0	2	0	0	0
72 Accommodation and Food Services	9	2	7	2	2	3	0	0	0
81 Other Services (except Public Administration)	30	4	26	21	4	1	0	0	0
91 Public Administration	1	0	1	0	0	0	1	0	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

FIGURE B.12: ESTABLISHMENT LOCATIONS. TOWN OF CLARK'S HARBOUR. 2008 AND 2012.

Town of Clark's Harbour	December 2008								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
All Industries	222	61	161	115	30	8	3	4	1
11 Agriculture, Forestry, Fishing and Hunting	121	20	101	81	18	1	1	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	5	1	4	2	2	0	0	0	0
31-33 Manufacturing	32	10	22	11	5	2	0	3	1
41 Wholesale Trade	15	2	13	7	1	3	1	1	0
44-45 Retail Trade	9	4	5	3	1	1	0	0	0
48-49 Transportation and Warehousing	6	4	2	2	0	0	0	0	0
51 Information and Cultural Industries	0	0	0	0	0	0	0	0	0
52 Finance and Insurance	7	6	1	0	0	0	1	0	0
53 Real Estate and Rental and Leasing	3	3	0	0	0	0	0	0	0
54 Professional, Scientific and Technical Services	3	3	0	0	0	0	0	0	0
55 Management of Companies and Enterprises	4	4	0	0	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	1	0	1	1	0	0	0	0	0
61 Educational Services	0	0	0	0	0	0	0	0	0
62 Health Care and Social Assistance	0	0	0	0	0	0	0	0	0
71 Arts, Entertainment and Recreation	3	2	1	0	1	0	0	0	0
72 Accommodation and Food Services	2	0	2	1	1	0	0	0	0
81 Other Services (except Public Administration)	10	2	8	7	1	0	0	0	0
91 Public Administration	1	0	1	0	0	1	0	0	0

Town of Clark's Harbour	June 2012								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
All Industries	211	59	152	115	13	15	6	3	0
11 Agriculture, Forestry, Fishing and Hunting	124	26	98	86	5	5	2	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	4	1	3	2	0	1	0	0	0
31-33 Manufacturing	22	7	15	6	1	3	2	3	0
41 Wholesale Trade	12	1	11	3	4	3	1	0	0
44-45 Retail Trade	6	2	4	3	0	1	0	0	0
48-49 Transportation and Warehousing	6	4	2	2	0	0	0	0	0
51 Information and Cultural Industries	0	0	0	0	0	0	0	0	0
52 Finance and Insurance	7	6	1	0	0	0	1	0	0
53 Real Estate and Rental and Leasing	3	1	2	1	1	0	0	0	0
54 Professional, Scientific and Technical Services	2	2	0	0	0	0	0	0	0
55 Management of Companies and Enterprises	5	5	0	0	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	2	0	2	2	0	0	0	0	0
61 Educational Services	0	0	0	0	0	0	0	0	0
62 Health Care and Social Assistance	0	0	0	0	0	0	0	0	0
71 Arts, Entertainment and Recreation	4	2	2	2	0	0	0	0	0
72 Accommodation and Food Services	2	0	2	0	1	1	0	0	0
81 Other Services (except Public Administration)	11	2	9	8	1	0	0	0	0
91 Public Administration	1	0	1	0	0	1	0	0	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

FIGURE B.13: ESTABLISHMENT LOCATIONS MUNICIPAL DISTRICT OF SHELBURNE, 2008 AND 2012

Municipal Distict of Shelburne	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	439	173	266	177	46	24	15	3	1
11 Agriculture, Forestry, Fishing and Hunting	130	63	67	52	10	4	1	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	1	0	1	0	0	1	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	33	12	21	18	3	0	0	0	0
31-33 Manufacturing	27	12	15	11	2	0	2	0	0
41 Wholesale Trade	17	4	13	3	3	4	3	0	0
44-45 Retail Trade	48	10	38	21	8	5	3	1	0
48-49 Transportation and Warehousing	12	5	7	4	2	1	0	0	0
51 Information and Cultural Industries	5	1	4	2	0	1	1	0	0
52 Finance and Insurance	18	12	6	3	2	0	1	0	0
53 Real Estate and Rental and Leasing	22	15	7	7	0	0	0	0	0
54 Professional, Scientific and Technical Services	24	10	14	11	2	1	0	0	0
55 Management of Companies and Enterprises	9	8	1	1	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	8	1	7	6	1	0	0	0	0
61 Educational Services	2	1	1	0	0	0	0	1	0
62 Health Care and Social Assistance	21	1	20	11	3	3	1	1	1
71 Arts, Entertainment and Recreation	9	3	6	4	1	0	1	0	0
72 Accommodation and Food Services	21	4	17	7	6	4	0	0	0
81 Other Services (except Public Administration)	29	10	19	16	3	0	0	0	0
91 Public Administration	3	1	2	0	0	0	2	0	0

Municipal Distict of Shelburne	June 2012								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	526	212	314	211	45	30	18	7	3
11 Agriculture, Forestry, Fishing and Hunting	161	80	81	66	9	3	3	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	40	11	29	25	3	1	0	0	0
31-33 Manufacturing	37	15	22	10	5	0	4	1	2
41 Wholesale Trade	17	5	12	3	5	3	0	1	0
44-45 Retail Trade	58	14	44	23	7	10	3	1	0
48-49 Transportation and Warehousing	18	12	6	3	3	0	0	0	0
51 Information and Cultural Industries	4	0	4	2	0	0	1	1	0
52 Finance and Insurance	22	14	8	4	2	1	1	0	0
53 Real Estate and Rental and Leasing	21	14	7	7	0	0	0	0	0
54 Professional, Scientific and Technical Services	23	10	13	10	2	0	1	0	0
55 Management of Companies and Enterprises	8	7	1	1	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	8	4	4	4	0	0	0	0	0
61 Educational Services	2	1	1	0	0	0	0	1	0
62 Health Care and Social Assistance	22	2	20	7	2	6	2	2	1
71 Arts, Entertainment and Recreation	10	2	8	6	0	2	0	0	0
72 Accommodation and Food Services	24	5	19	11	5	3	0	0	0
81 Other Services (except Public Administration)	46	14	32	29	2	1	0	0	0
91 Public Administration	5	2	3	0	0	0	3	0	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

Business patterns data for the Town of Shelburne is unavailable for 2008 and 2012.

FIGURE B 14: ESTABLISHMENT LOCATIONS TOWN OF LOCKEPORT. 2008

Town of Lockeport	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	105	37	68	55	1	6	2	3	1
11 Agriculture, Forestry, Fishing and Hunting	32	12	20	20	0	0	0	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	6	1	5	5	0	0	0	0	0
31-33 Manufacturing	10	3	7	4	0	0	1	1	1
41 Wholesale Trade	2	0	2	1	0	0	0	1	0
44-45 Retail Trade	12	4	8	4	1	3	0	0	0
48-49 Transportation and Warehousing	5	3	2	2	0	0	0	0	0
51 Information and Cultural Industries	1	1	0	0	0	0	0	0	0
52 Finance and Insurance	4	3	1	0	0	1	0	0	0
53 Real Estate and Rental and Leasing	5	4	1	1	0	0	0	0	0
54 Professional, Scientific and Technical Services	0	0	0	0	0	0	0	0	0
55 Management of Companies and Enterprises	2	2	0	0	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	1	0	1	1	0	0	0	0	0
61 Educational Services	0	0	0	0	0	0	0	0	0
62 Health Care and Social Assistance	4	1	3	2	0	0	0	1	0
71 Arts, Entertainment and Recreation	0	0	0	0	0	0	0	0	0
72 Accommodation and Food Services	5	0	5	4	0	1	0	0	0
81 Other Services (except Public Administration)	14	2	12	11	0	1	0	0	0
91 Public Administration	2	1	1	0	0	0	1	0	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008) by Millier Dickinson Blais Inc.

Statistics Canada does not have business location counts for the Town of Lockeport for June 2012.

FIGURE B.15. ESTABLISHMENT LOCATIONS MUNICIPAL DISTRICT OF ARGYLE 2008 AND 2012

Municipal District of Argyle	December 2008								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
All Industries	769	256	513	352	98	31	18	9	5
11 Agriculture, Forestry, Fishing and Hunting	370	81	289	233	44	5	5	2	0
21 Mining, Quarrying, and Oil and Gas Extraction	1	1	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	55	19	36	25	10	0	1	0	0
31-33 Manufacturing	50	10	40	16	9	5	4	4	2
41 Wholesale Trade	40	12	28	11	9	3	2	1	2
44-45 Retail Trade	40	11	29	13	9	4	2	1	0
48-49 Transportation and Warehousing	26	12	14	9	2	2	1	0	0
51 Information and Cultural Industries	1	1	0	0	0	0	0	0	0
52 Finance and Insurance	37	29	8	3	3	1	1	0	0
53 Real Estate and Rental and Leasing	22	14	8	6	1	1	0	0	0
54 Professional, Scientific and Technical Services	15	9	6	4	1	1	0	0	0
55 Management of Companies and Enterprises	41	40	1	0	0	0	0	0	1
56 Administrative and Support, Waste Management and Remediation Services	10	2	8	4	3	1	0	0	0
61 Educational Services	3	1	2	2	0	0	0	0	0
62 Health Care and Social Assistance	7	1	6	3	0	1	1	1	0
71 Arts, Entertainment and Recreation	7	2	5	1	2	2	0	0	0
72 Accommodation and Food Services	16	1	15	6	5	4	0	0	0
81 Other Services (except Public Administration)	27	10	17	16	0	1	0	0	0
91 Public Administration	1	0	1	0	0	0	1	0	0

Municipal District of Argyle	June 2012								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
All Industries	629	188	441	319	72	24	14	9	3
11 Agriculture, Forestry, Fishing and Hunting	331	56	275	237	28	8	2	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	32	9	23	15	8	0	0	0	0
31-33 Manufacturing	43	8	35	11	7	4	5	7	1
41 Wholesale Trade	31	5	26	13	4	4	2	1	2
44-45 Retail Trade	22	4	18	6	7	3	2	0	0
48-49 Transportation and Warehousing	16	6	10	6	2	1	1	0	0
51 Information and Cultural Industries	1	1	0	0	0	0	0	0	0
52 Finance and Insurance	37	30	7	2	3	1	1	0	0
53 Real Estate and Rental and Leasing	17	12	5	4	0	1	0	0	0
54 Professional, Scientific and Technical Services	12	9	3	2	1	0	0	0	0
55 Management of Companies and Enterprises	36	36	0	0	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	7	3	4	1	3	0	0	0	0
61 Educational Services	2	1	1	1	0	0	0	0	0
62 Health Care and Social Assistance	4	1	3	1	0	1	0	1	0
71 Arts, Entertainment and Recreation	7	2	5	1	3	0	1	0	0
72 Accommodation and Food Services	8	0	8	3	4	1	0	0	0
81 Other Services (except Public Administration)	23	5	18	16	2	0	0	0	0
91 Public Administration	0	0	0	0	0	0	0	0	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

FIGURE B.16: ESTABLISHMENT LOCATIONS, MUNICIPAL DISTRICT OF YARMOUTH 2008 AND 2012

Municipal District of Yarmouth	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	620	218	402	298	62	27	11	3	1
11 Agriculture, Forestry, Fishing and Hunting	196	38	158	132	18	4	3	1	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	68	30	38	28	6	2	2	0	0
31-33 Manufacturing	29	9	20	16	3	1	0	0	0
41 Wholesale Trade	39	10	29	14	9	4	2	0	0
44-45 Retail Trade	42	17	25	15	6	4	0	0	0
48-49 Transportation and Warehousing	33	15	18	12	1	4	0	0	1
51 Information and Cultural Industries	4	3	1	1	0	0	0	0	0
52 Finance and Insurance	18	18	0	0	0	0	0	0	0
53 Real Estate and Rental and Leasing	22	14	8	7	1	0	0	0	0
54 Professional, Scientific and Technical Services	26	13	13	11	2	0	0	0	0
55 Management of Companies and Enterprises	22	22	0	0	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	23	7	16	9	5	1	1	0	0
61 Educational Services	3	1	2	2	0	0	0	0	0
62 Health Care and Social Assistance	19	3	16	10	3	2	0	1	0
71 Arts, Entertainment and Recreation	7	3	4	0	1	2	1	0	0
72 Accommodation and Food Services	14	2	12	6	3	2	1	0	0
81 Other Services (except Public Administration)	54	13	41	35	4	1	1	0	0
91 Public Administration	1	0	1	0	0	0	0	1	0

Municipal District of Yarmouth	June 2012								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	777	299	478	352	73	30	16	6	1
11 Agriculture, Forestry, Fishing and Hunting	264	69	195	171	16	3	4	1	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	82	29	53	34	13	5	0	1	0
31-33 Manufacturing	32	10	22	17	3	1	1	0	0
41 Wholesale Trade	37	10	27	14	9	2	2	0	0
44-45 Retail Trade	56	22	34	17	5	9	2	1	0
48-49 Transportation and Warehousing	32	19	13	9	2	1	1	0	0
51 Information and Cultural Industries	3	2	1	1	0	0	0	0	0
52 Finance and Insurance	25	20	5	3	2	0	0	0	0
53 Real Estate and Rental and Leasing	46	34	12	10	2	0	0	0	0
54 Professional, Scientific and Technical Services	28	14	14	11	3	0	0	0	0
55 Management of Companies and Enterprises	26	25	1	0	0	0	1	0	0
56 Administrative and Support, Waste Management and Remediation Services	24	11	13	8	3	1	1	0	0
61 Educational Services	2	1	1	1	0	0	0	0	0
62 Health Care and Social Assistance	19	4	15	7	5	1	0	1	1
71 Arts, Entertainment and Recreation	8	3	5	2	0	2	1	0	0
72 Accommodation and Food Services	17	3	14	5	4	4	1	0	0
81 Other Services (except Public Administration)	72	23	49	42	5	1	1	0	0
91 Public Administration	4	0	4	0	1	0	1	2	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

FIGURE B.17: ESTABLISHMENT LOCATIONS TOWN OF YARMOUTH, 2008 AND 2012

Town of Yarmouth	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	721	231	490	209	152	65	32	18	14
11 Agriculture, Forestry, Fishing and Hunting	40	12	28	24	3	1	0	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	2	0	2	0	2	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	40	11	29	15	6	3	3	2	0
31-33 Manufacturing	32	8	24	7	6	6	2	2	1
41 Wholesale Trade	39	11	28	7	17	4	0	0	0
44-45 Retail Trade	129	18	111	31	52	15	7	1	5
48-49 Transportation and Warehousing	17	3	14	4	3	3	1	2	1
51 Information and Cultural Industries	9	1	8	1	0	3	3	1	0
52 Finance and Insurance	61	40	21	8	6	2	4	1	0
53 Real Estate and Rental and Leasing	61	37	24	13	8	2	1	0	0
54 Professional, Scientific and Technical Services	39	13	26	18	3	3	1	1	0
55 Management of Companies and Enterprises	40	35	5	3	1	0	1	0	0
56 Administrative and Support, Waste Management and Remediation Services	17	8	9	4	2	1	0	0	2
61 Educational Services	6	0	6	2	1	1	0	1	1
62 Health Care and Social Assistance	69	12	57	37	9	7	1	1	2
71 Arts, Entertainment and Recreation	10	1	9	3	5	1	0	0	0
72 Accommodation and Food Services	45	5	40	5	13	11	7	3	1
81 Other Services (except Public Administration)	63	16	47	27	15	2	1	2	0
91 Public Administration	2	0	2	0	0	0	0	1	1

Town of Yarmouth	June 2012								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	684	214	470	198	122	78	49	10	13
11 Agriculture, Forestry, Fishing and Hunting	31	12	19	15	1	2	1	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	2	0	2	0	2	0	0	0	0
22 Utilities	1	1	0	0	0	0	0	0	0
23 Construction	33	10	23	9	9	1	3	1	0
31-33 Manufacturing	27	6	21	8	3	4	3	2	1
41 Wholesale Trade	30	7	23	6	11	6	0	0	0
44-45 Retail Trade	134	16	118	35	45	21	11	1	5
48-49 Transportation and Warehousing	20	4	16	8	5	1	0	1	1
51 Information and Cultural Industries	8	0	8	1	0	1	4	2	0
52 Finance and Insurance	59	37	22	6	8	3	5	0	0
53 Real Estate and Rental and Leasing	55	35	20	10	6	4	0	0	0
54 Professional, Scientific and Technical Services	34	11	23	14	3	3	3	0	0
55 Management of Companies and Enterprises	31	29	2	1	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	14	8	6	1	3	2	0	0	0
61 Educational Services	9	2	7	3	2	0	0	1	1
62 Health Care and Social Assistance	88	16	72	40	9	16	4	0	3
71 Arts, Entertainment and Recreation	8	1	7	4	1	2	0	0	0
72 Accommodation and Food Services	35	3	32	5	5	8	12	1	1
81 Other Services (except Public Administration)	62	16	46	32	8	2	3	1	0
91 Public Administration	3	0	3	0	0	2	0	0	1

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

FIGURE B.18 ESTABLISHMENT LOCATIONS, MUNICIPAL DISTRICT OF CLARE, 2008 AND 2012

Municipal District of Clare	December 2008								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	490	177	313	171	79	32	23	3	5
11 Agriculture, Forestry, Fishing and Hunting	101	25	76	61	9	3	3	0	0
21 Mining, Quarrying, and Oil and Gas Extraction	0	0	0	0	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	59	30	29	16	10	2	1	0	0
31-33 Manufacturing	42	10	32	19	4	2	3	2	2
41 Wholesale Trade	24	13	11	4	5	2	0	0	0
44-45 Retail Trade	64	15	49	17	16	8	8	0	0
48-49 Transportation and Warehousing	17	7	10	8	2	0	0	0	0
51 Information and Cultural Industries	4	0	4	1	1	1	1	0	0
52 Finance and Insurance	29	21	8	2	2	1	3	0	0
53 Real Estate and Rental and Leasing	16	13	3	3	0	0	0	0	0
54 Professional, Scientific and Technical Services	17	5	12	7	4	1	0	0	0
55 Management of Companies and Enterprises	14	13	1	0	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	6	3	3	2	0	1	0	0	0
61 Educational Services	3	0	3	1	0	0	0	0	2
62 Health Care and Social Assistance	24	2	22	6	9	5	1	0	1
71 Arts, Entertainment and Recreation	8	2	6	3	2	0	1	0	0
72 Accommodation and Food Services	26	5	21	8	8	3	2	0	0
81 Other Services (except Public Administration)	34	13	21	13	5	3	0	0	0
91 Public Administration	2	0	2	0	1	0	0	1	0

Municipal District of Clare	June 2012								
	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100+
All Industries	465	183	282	150	68	29	27	3	5
11 Agriculture, Forestry, Fishing and Hunting	99	36	63	48	6	5	3	1	0
21 Mining, Quarrying, and Oil and Gas Extraction	1	0	1	1	0	0	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	59	31	28	17	8	2	1	0	0
31-33 Manufacturing	34	6	28	14	5	2	4	1	2
41 Wholesale Trade	22	10	12	5	4	1	2	0	0
44-45 Retail Trade	55	14	41	15	13	5	8	0	0
48-49 Transportation and Warehousing	15	7	8	5	3	0	0	0	0
51 Information and Cultural Industries	4	0	4	0	1	3	0	0	0
52 Finance and Insurance	28	18	10	3	3	1	3	0	0
53 Real Estate and Rental and Leasing	16	16	0	0	0	0	0	0	0
54 Professional, Scientific and Technical Services	18	8	10	5	4	1	0	0	0
55 Management of Companies and Enterprises	15	13	2	2	0	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	8	5	3	1	2	0	0	0	0
61 Educational Services	3	0	3	1	0	0	0	0	2
62 Health Care and Social Assistance	26	3	23	10	4	5	3	0	1
71 Arts, Entertainment and Recreation	6	1	5	2	2	0	1	0	0
72 Accommodation and Food Services	28	5	23	10	10	1	2	0	0
81 Other Services (except Public Administration)	27	10	17	11	3	3	0	0	0
91 Public Administration	1	0	1	0	0	0	0	1	0

Source: Derived from Statistics Canada (Canadian Business Patterns, 2008 & 2012) by Millier Dickinson Blais Inc.

Appendix C: Stakeholder Consultation Participants

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Stakeholders	Organizations
Bill Atwood	Lockeport
Suzy Atwood	Shelburne County Tourism Association
Calvin Butler	Nova Scotia Government
Stephane Cyr	ACOA
Clyde deViller	Conseil Acadien de Par-en-Bas
Lisa Francis	Acadia First Nation
Bruce Hancock	Aquaculture Association of Nova Scotia
Geoff Irvine	Lobster Council
Angelique LeBlanc	Equipe de Centre d'aide en affaires et en entrepreneuriat (CAAE)
Anne Marie LeBlanc	Yarmouth and Area Chamber of Commerce
Paul Emile LeBlanc	Chambre de commerce de Clare
Cyril Meagher	Allendale Electronics
Pat Melanson	The Piper's Guild, Vice President of Shelburne and Area Chamber of Commerce
Dixie Redmond	CBDC Shelburne
Natalie Smith	Farmers Market of NS
Peter Swin	EDCSWN Board, Owner of Town Market Ltd.
Mary Thompson	Nova Scotia Community College
Mark Townsend	ACOA
Julie Walters	Yarmouth and Acadian Shores Tourism Association