Village of McBride Economic Development Action Plan Baseline Report

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Presented to:

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1 INTRODUCTION

1.1 PURPOSE

The Village of McBride Economic Development Action Plan, serves as an update to the previous plan for 2010-2015. There has been significant change in the area economy since 2010, and the Village is working to align economic development with broader community priorities and direction. As part of the Action Planning process, this Baseline Report has been produced. This report is the first of two to be delivered as part of this project. The baseline, or current situation assessment, references demographic, labour force, sector and other economic information. It also provides an insight to the socio-economic trends underlying the community of McBride over the past fifteen years.

1.2 METHODOLOGY

Data collection and literature review focused on documentation internal to the Village, consisting of current and past plans and studies, as well as external agencies, including Statistics Canada and BC Stats. The Baseline is designed to inform the Village and its partners in preparation for the second report, the Plan itself.

1.3 REPORT STRUCTURE

There are five chapters in addition to the Introduction. **Chapter 2** presents comparative demographic data for the municipality and province, while **Chapter 3** examines the economic base. **Chapter 4** discusses provides sector profiles and trends, while **Chapter 5 undertakes** an internal assessment of the **Chapter 6** provides a strengths, challenges and opportunities (SCO) analysis. Reference materials are noted in **Chapter 7**.

2 DEMOGRAPHY

2.1 POPULATION

Historical Change

Table 1 outlines the historical population for the Village of McBride and Fraser-Fort George Electoral Area H and compares this to British Columbia for the period between 1991 and 2016. Over the past 25-year period, the population in the area has generally trended down between 1996 and 2011 and appears to have stabilized over the past five years. The Village's largest recorded population during the period was in 1996 at 740 while the lowest population was in 2011 when it fell to 585.

Table 1: Population and Population Change, 1991 to 2016 (1991=100%)

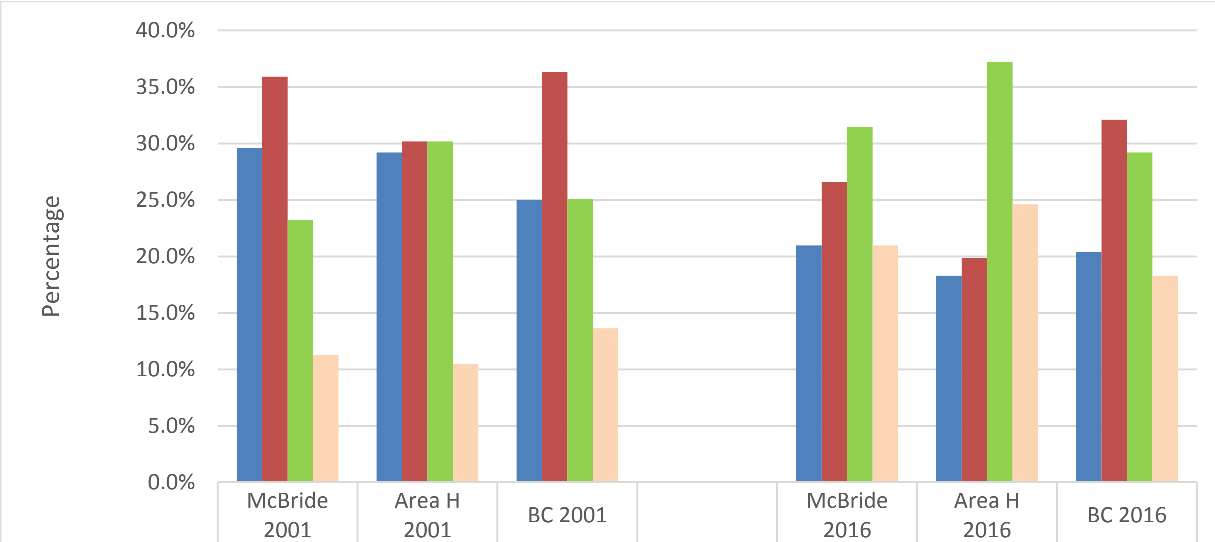
	Population		Percentage Change	
	McBride	Electoral Area H	McBride	BC
1991	600	n/a	100%	100%
1996	740	2,040	124%	115%
2001	710	2,010	119%	120%
2006	660	1,875	110%	126%
2011	585	1,665	97%	134%
2016	615	1,585	103%	141%

Source: Statistics Canada (1996) (2001) (2007) (2012) (2017a)
Note: Statistics Canada did not report data by Electoral Areas prior to 1996; therefore, data for 1991 does not exist for Fraser-Fort George Electoral Area H in 1991.

Age Characteristics

In the Village of McBride and the Fraser Fort George, Electoral Area H, age characteristics have changed over the past fifteen years. As illustrated in Figure 1, the population under the age of 19 years has declined from almost 30% in 2001 to 21% in 2016 in McBride. Meanwhile the working population, ages 20 to 64 years, has declined slightly, moving from 59.1% in 2001 to 58.1% in 2016. However, in this group, there has been a significant move towards the older end of this demographic with 31.5% of residents now aged between 45 and 64, compared to only 23.2% in 2001.

Figure 1: Population Change in McBride, Area H and BC, 2001 and 2016



	McBride 2001	Area H 2001	BC 2001		McBride 2016	Area H 2016	BC 2016
0 to 19 years	29.6%	29.2%	25.0%		21.0%	18.3%	20.4%
20 to 44 years	35.9%	30.2%	36.3%		26.6%	19.9%	32.1%
45 to 64 years	23.2%	30.2%	25.1%		31.5%	37.2%	29.2%
65+ years	11.3%	10.5%	13.6%		21.0%	24.6%	18.3%

Source: Statistics Canada (2001) (2017a)

In addition, the population 65 years and over has increased significantly, growing in share from 11.3% in 2001 to 21.0% in 2016; this is now noticeably higher than the provincial level where 18.3% of BC residents were 65 years of age or older in 2016.

Median Age

The shift towards an older demographic is further illustrated by the median age over time. Table 2 outlines the change in median age between 2001 and 2016. Over the period the median age has risen in the Village of McBride from 36.1 years to 46.5 years while the Fraser Fort George Electoral Area H has increased from 40.1 years in 2001 to 53.5 years in 2016.

Table 2: Median Age In Years, 2001 to 2016

	2001	2006	2011	2016
Village of McBride	36.1	37.1	44.3	46.5
Fraser Fort George Area H	40.1	44.4	49.6	53.5
British Columbia	38.4	40.8	41.9	43.0

Source: Statistics Canada (2001) (2007) (2012) (2017a).

Though this trend is consistent with provincial demographic changes, when compared to the province, McBride has gone from having a population that was younger than the provincial level in 2001 to one that is now higher than the province median in 2016.

2.2 EDUCATION

Table 3 outlines the educational attainment for the Village and Electoral Area H in 2016 and compares the Village and Electoral Area shares by educational category with British Columbia. The educational attainment is based on the highest certificate; diploma or degree for residents aged 15 years and over. As illustrated, McBride has a significantly higher percentage of residents who have not graduated from high school when compared to the provincial average. In addition, the share of residents with university certificates, diploma or degree at bachelor level in both the Village and Electoral Area H is well below the rate seen at the provincial level. This is not uncommon in rural British Columbia and is countered by a higher share of population in the trades, as is the case locally.

Table 3: Educational Attainment, 2016

	McBride	Area H	McBride	Area H	BC
No certificate; diploma or degree	115	275	25.3%	20.2%	15.5%
Secondary (high) school diploma or equivalency certificate	130	390	28.6%	28.7%	29.4%
Trades cert. or diploma other than Cert. of Apprenticeship or Cert.	35	85	7.7%	6.3%	3.7%
Certificate of Apprenticeship or Certificate of Qualification	30	115	6.6%	8.5%	5.1%
College; CEGEP or other non-university certificate or diploma	75	225	16.5%	16.5%	18.1%
University certificate or diploma below bachelor level	10	75	2.2%	5.5%	3.6%
University certificate; diploma or degree at bachelor level or above	60	195	13.2%	14.3%	24.6%
Total	455	1,360	100.0%	100.0%	100.0%

Source: Statistics Canada(2017a)

2.3 INCOME

Median Individual Personal Incomes

As outlined in Table 4, the median personal income for men and women in the Village of McBride was noticeably below the provincial level in 2015. In addition, both men and women have lagged the pace of change when compared to the provincial change over the period. However, the 2015 median income for women in McBride is 78% the share of the male personal income locally, this is a much higher share than at the Fraser-Fort George Electoral Area H level (58%) or the provincial level (68%).

Table 4: Median Individual Personal Income and Change,1995 - 2015

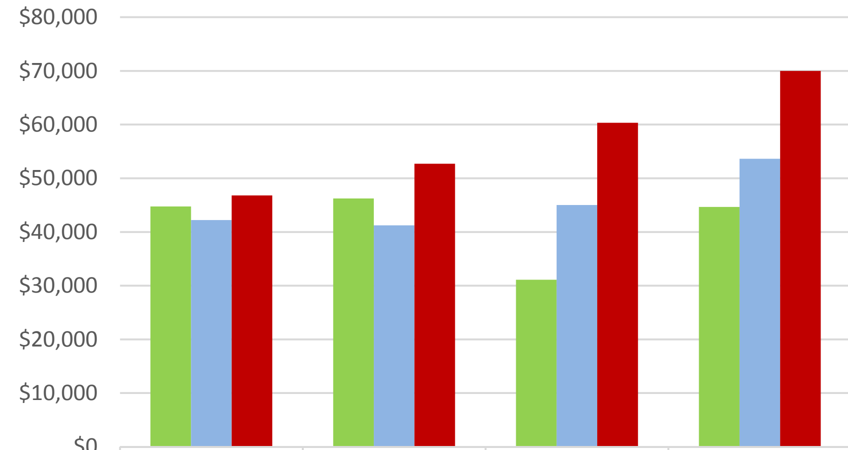
	1995	2010	2015	Change 1995 - 2015
Village of McBride				
Male	$22,130	$24,525	$29,630	134%
Female	$12,980	$17,165	$22,975	177%
Total	$16,295	$18,850	$25,300	155%
Fraser-Fort George Electoral Area H				
Male	n/a	$25,535	$33,920	--
Female	n/a	$18,465	$19,585	--
Total	n/a	$23,820	$26,165	--
British Columbia				
Male	$26,425	$35,625	$40,370	153%
Female	$15,235	$23,625	$27,545	181%
Total	$19,980	$28,765	$33,010	165%

Source: Statistics Canada (1996) (2013) (2017a)

Median Household Incomes

Figure 2 outlines the median household incomes for the Village of McBride, Fraser-Fort George Regional District Electoral Area H, and British Columbia for the period between 2000 and 2015. In 2000, median household income in McBride stood at $44,770 or 4% below the provincial income which was $46,800. Unfortunately, between 2006 and 2010, household incomes in McBride actually decline. While household incomes have increased since 2010 they still lag the provincial levels by a significant amount. In 2015 the Village of McBride households had median income of $44,670, this was $100 less than the value reported in 2000 and a full 36% below the provincial median household income of $69,995 in 2015.

Figure 2: Median Household Income,2000 -2015



	2000	2005	2010	2015
Village of McBride	$44,770	$46,240	$31,120	$44,670
Fraser-Ft. George Area H	$42,225	$41,230	$45,035	$53,630
British Columbia	$46,800	$52,710	$60,335	$69,995

Source: Statistics Canada (1996) (2001) (2007) (2013) (2017a)

Personal Income by Source

Table 5 provides a closer look at personal income sources for 2015 in the Village of McBride and British Columbia. For the Village, employment income dominates as an income source as 485 or 98.0% of all personal income earners had some employment income in 2015. This group typically had median personal income of $24,021 from earned income. In addition, government transfers are received by 360 of those in McBride, or 72.7% of all those who earned personal income in 2015. With this group receiving median income of $7,824 in 2015.

When compared to British Columbia, the employment income amount from employment income is comparable with McBride at 68.0% while the provincial share was 71.7% in 2015. Conversely, government transfers are marginally higher in McBride at 72.7% compared to 67.9% at the proviant level. The primary reason for the marginally higher share of residents in McBride receiving government transfers is the larger share of the population in McBride over 65 when compared to the province. In McBride 23.2% of residents reported earned income from Old Age Security while 18.4% at the prevail level and 33.0% in McBride received some income from Canada Pension Plan compared to 23.8% at the proviant level.

Table 5:Detailed Personal Income By Source, 2015

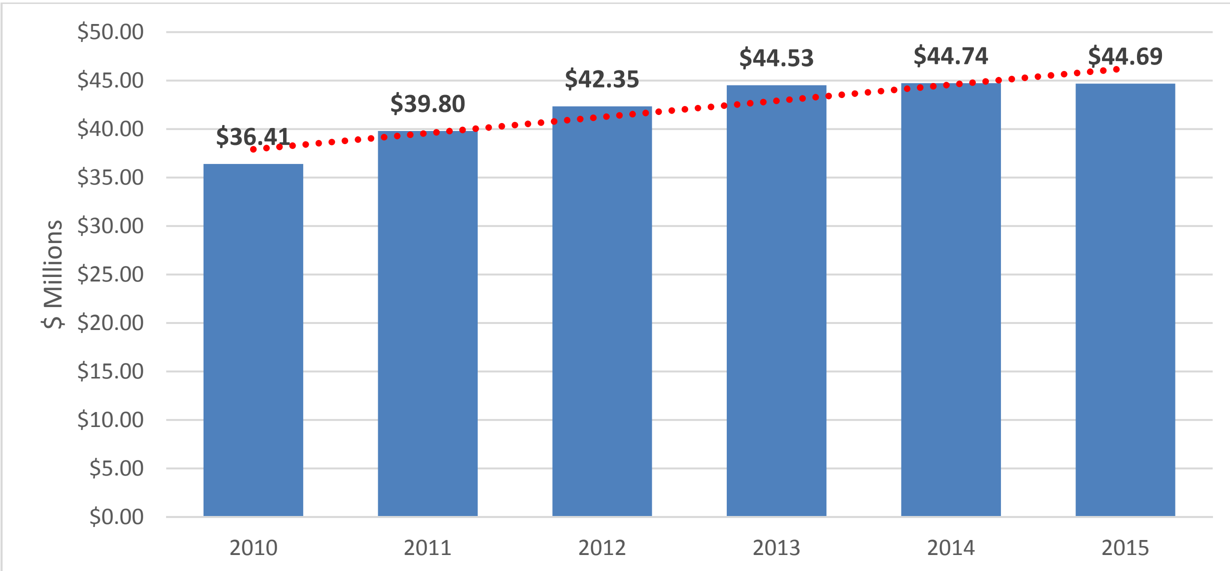
	Village of McBride			British Columbia		
	With an amount	Percentage with an amount (%)	Median amount ($)	With an amount	Percentage with an amount (%)	Median amount ($)
Total Income	485	98.0%	$25,300	3,727,360	96.3%	$33,012
Market income	405	81.8%	$24,021	3,363,310	86.9%	$31,585
Employment income	340	68.0%	$24,128	2,775,010	71.7%	$31,713
Investment income	145	29.3%	$526	1,351,485	34.9%	$1,038
Private retirement income	85	17.0%	$11,136	593,465	15.3%	$15,281
Market income not incl. elsewhere	95	19.0%	$1,074	615,650	15.9%	$1,203
Government transfers	360	72.7%	$7,824	2,628,215	67.9%	$4,592
Old Age Security pension & GIS	115	23.2%	$6,812	711,590	18.4%	$6,805
Canada Pension Plan & QPP benefits	165	33.0%	$6,864	921,645	23.8%	$7,504
Employment Insurance benefits	45	9.1%	$6,496	275,260	7.1%	$5,169
Child benefits	55	11.0%	$4,432	474,605	12.3%	$3,406
Other government transfers	260	52.5%	$530	1,753,640	45.3%	$471

Source: Statistics Canada (2017b)

Total Personal Income

Total personal income in the McBride and Fraser-Fort George Electoral Area H has grown noticeably since the economic downturn in 2009. As outlined in Figure 3, personal income has increased from $36.4 million in 2010 and has risen each year to 2014 before slipping back slightly in 2015 and is now at $44.7 million. Overall, the personal income in McBride and Electoral Area H has seen growth of 22.7% over the 2010 to 2015 period and this is only slightly behind the overall provincial total personal income increase of 25.8% over the same period.

Figure 3: McBride and Fraser-Fort George Electoral Area H Total Personal Income, 2010-2015



Source: Government of Canada (2018)

2.4 HOUSING

Private Households by Age of Primary Household Maintainer

The first person in the household identified as someone who pays the rent or the mortgage, or the taxes, or the electricity bill, and so on, for the dwelling is considered the primary household maintainer. In the case of a household where two or more people are listed as household maintainers, the first person listed is chosen as the primary household maintainer.[1]

Table 6 outlines the private households by age of primary household maintainer in 2016. As highlighted both a larger share of the population under 25 years of age and over 85 years of age in McBride are listed as the primary household maintainers than general seen in the province. This suggests that younger and older families in McBride are likely to be living on their own in their own residents than general seen in the province.

[1] The order of the persons in a household is determined by the order in which the respondent lists the persons on the questionnaire. Generally, an adult is listed first followed, if applicable, by that person's spouse or common-law partner and by their children. The order does not necessarily correspond to the proportion of household payments made by the person.

Table 6: Private Households By Age of Primary Household Maintainer, 2016

	McBride		Area H		British Columbia	
15 to 24 years	30	10.7%	25	3.6%	58,620	3.1%
25 to 34 years	30	10.7%	35	5.1%	253,950	13.5%
35 to 44 years	35	12.5%	85	12.4%	304,185	16.2%
45 to 54 years	35	12.5%	125	18.2%	378,555	20.1%
55 to 64 years	65	23.2%	195	28.5%	390,185	20.7%
65 to 74 years	35	12.5%	145	21.2%	288,165	15.3%
75 to 84 years	25	8.9%	65	9.5%	152,225	8.1%
85 years and over	25	8.9%	10	1.5%	56,085	3.0%
Total	280	100.0%	685	100.0%	1,881,970	100.0%

Source: Statistics Canada (2017a)

Owner Households Shelter Costs and Dwelling Values

Table 7 provides an overview of the share of households in non-farm, private dwellings with mortgages and share spending 30% or more of total income on shelter costs. As illustrated, of the 160 owner households 56.2% have mortgages, only slightly below the provincial average. However, only 15.6% in McBride are spending 30% or more of total income on shelter costs a share below the 20.7% level observed at the provincial level.

Table 7: Household Share with Mortgages and Owners Spending 30% or more on shelter, 2016

	McBride	Area H	BC
Total Owned Homes	160	525	1,242,600
% of owner households with a mortgage	56.2%	40.0%	58.6
% of owner shields spending 30% or more of income on shelter costs	15.6%	15.2%	20.7%

Source: Statistics Canada (2017a)

Table 8 provides additional insight on housing costs with details on median and average shelter costs and median and average dwelling values in 2016 for owner households. As illustrated, in both McBride and Fraser-Fort George Electoral Area H the median and average monthly shelter costs is much lower than in the rest of British Columbia. In addition, the median and average dwelling values are significantly below the rest of British Columbia.

Table 8: Owner Household Median and Average Shelter Costs and Dwelling Values, 2016

	McBride	Area H	BC
Median monthly shelter costs for owned dwellings ($)	$676	$417	$1,149
Average monthly shelter costs for owned dwellings ($)	$816	$805	$1,387
Median value of dwellings ($)	$149,929	$300,021	$500,874
Average value of dwellings ($)	$210,289	$359,971	$720,689

Source: Statistics Canada (2017a)

Tenant Households Subsidized Housing and Shelter Costs

Table 9 outlines tenant households in subsidized housing and their shelter costs for McBride, Fraser-Fort George Electoral Area H and the province. As illustrated, 29.2% of tenant housing in McBride is in the form of subsidized housing compared to 12.5% in British Columbia in general. Overall, 50.0% of tenant households spend 30% or more of their income on shelter costs compared to 43.3% at the provincial level. This is despite the lower overall median rental rate in McBride than at the provincial level in 2016.

Table 9: Tenant Household in Subsidized Housing and Shelter Costs, 2016

	McBride	Area H	BC
	120	70	592825
% of tenant households in subsidized housing	29.2%	0%	12.5%
% of tenant households spending 30% or more of income on shelter costs	50%	28.6%	43.3%
Median monthly shelter costs for rented dwellings ($)	$620	$651	$1,036
Average monthly shelter costs for rented dwellings ($)	$587	$657	$1,149

Source: Statistics Canada (2017a)

3 ECONOMIC BASE

3.1 LABOUR FORCE

Table 10 compares the goods-producing and service-producing labour forces of the Village of McBride, Fraser-Fort George Electoral Area H and British Columbia for two census periods, 2006 and 2016. Over this ten-year period the local area has experienced a sharp decline in its labour force experiencing a 32% decline in McBride and over 20% decline in the surrounding Electoral Area H. Much of this decline has been concentrated in the goods producing sector where decline in Forestry and forest processing have been the primary driver in the 56% drop in McBride and 30% fall in the surrounding area.

Conversely, the BC labour force has experienced overall growth of 11.3%, with the service producing sector being the driver over the period provincially.

Table 10: Allocation of Employment to Goods and Services Production, 2006 and 2016

	Village of McBride			Electoral Area H			BC
Industry Class	2006	2016	% Change	2006	2016	% Change	% Change
Goods producing	160	70	-56.3%	460	320	-30.4%	-0.4%
Services producing	215	185	-13.9%	640	555	-13.3%	+14.4%
Total	375	255	-32.0%	1,100	875	-20.5%	+11.3%

Source: Statistics Canada (2007) (2017a)

3.2 EMPLOYMENT CONCENTRATION

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

Table 11 shows how McBride and Fraser-Fort George Electoral Area H employment concentration by industry has changed between 2006 and 2016. The goods-producing industries in McBride have historically had higher concentrations than the province with agriculture and forestry, manufacturing (primarily forest processing) leading the way. However, by 2016, this has all but disappeared while the McBride now lags the province in these two key sectors.

Table 11: Location Quotients for Major Industry in McBride and Fraser-Fort George Area H, 2006 and 2016

	2006		2016	
	McBride	Area H	McBride	Area H
11 Agriculture; forestry; fishing and hunting	3.06	7.49	0.67	9.20
21 Mining; quarrying; and oil and gas extraction	0.00	0.99	0.00	2.10
22 Utilities	0.00	0.00	0.00	2.19
23 Construction	0.70	1.13	0.69	0.41
31-33 Manufacturing	3.25	0.78	0.65	1.13
41 Wholesale trade	0.00	0.86	0.00	0.33
44-45 Retail trade	1.53	0.63	0.83	0.58
48-49 Transportation and warehousing	0.51	1.20	0.88	1.70
51 Information and cultural industries	0.00	0.34	0.00	0.61
52 Finance and insurance	0.00	0.00	0.97	0.44
53 Real estate and rental and leasing	1.15	1.36	0.00	0.99
54 Professional; scientific and technical services	0.00	0.55	2.03	0.49
55 Management of companies and enterprises	0.00	0.00	0.00	0.00
56 Admin & support; waste manag. & remediation services	0.00	0.81	1.12	0.63
61 Educational services	0.77	1.42	1.19	0.39
62 Health care and social assistance	0.96	0.51	0.62	0.81
71 Arts; entertainment and recreation	1.71	0.96	0.00	0.47
72 Accommodation and food services	1.14	0.71	1.42	1.58
81 Other services (except public administration)	0.00	0.72	0.77	0.85
91 Public administration	1.06	0.45	0.86	0.33

Source: Statistics Canada (2007) (2017a)

The labour force data used in Table 11 is modelled differently to illustrate the shifting structure of the economy in Table 12. The location quotient analysis has already demonstrated that comparative advantages may still exist whether or not an industry is actually growing. Between 2001 and 2016, the Village of McBride and Fraser Fort George Electoral Area H lost 365 jobs—the shift-share analysis attempts to shed some light on the causal nature of that decline by breaking down the change in employment by industry group into three components:

1. ***Growth or decline arising from general employment growth in the local area***
   If provincial employment is growing then it is reasonable to expect regional and industry growth to be increasing as well. This provincial growth effect is determined by multiplying 2001 base employment by the percentage change in total BC employment between 2001 and 2016.
2. ***Growth or decline arising from the nature of industry in the local area***
   The industry mix is calculated by multiplying 2001 base employment by the percentage change in overall employment between 2001 and 2016 in BC, for that industry.
3. ***Growth or decline attributable to the specific conditions of the local area***
   This third component is the residual remaining. This local competitive effect is arrived at by multiplying the 2001 base employment by the percentage change in that industry's employment between 2001 and 2016 in the McBride and Fraser-Fort George Electoral Area H area, less the percentage change in the industry for BC as a whole.

The provincial effects are all positive because overall provincial employment increased between 2001 and 2016. The industry effects differ substantially by industry and it can be seen that industries important to the McBride and Fraser-Fort George Electoral Area H, namely forestry and manufacturing, took the biggest hits.

The local competitive effects, the area where McBride has the greatest ability to influence as a community, is the residual employment. In this component, the Village and Area H were positive in information and cultural industries, real estate and rental and leasing, financial and insurance, and health and social assistance, but negative for all other industries. Large local effects, such as manufacturing, accommodation and food services, and construction indicate that the change in local employment is not easily explained by overall provincial or industry employment changes. In fact, it is well known that closures and downsizings in wood processing capacity and forestry activates has hit the region hard, which might also explain the poor local performance in accommodate, education and construction employment as they are both highly sensitive to the loss of population precipitated by declining forestry activity.

Table 12: Shift-Share Analysis of Major Industry in McBride and Fraser-Fort George H, 2001-2016

	Provincial Growth	Industrial Mix	Local Competitive	Total
11 Agriculture; forestry; fishing and hunting	42	-35	18	25
21 Mining; quarrying; and oil and gas extraction	0	0	20	20
22 Utilities	2	1	-3	0
23 Construction	23	75	-148	-50
31-33 Manufacturing	53	-49	-174	-170
41 Wholesale trade	3	0	-8	-5
44-45 Retail trade	25	26	-75	-25
48-49 Transportation and warehousing	19	12	-31	0
51 Information and cultural industries	0	0	15	15
52 Finance and insurance	3	2	4	10
53 Real estate and rental and leasing	0	0	20	20
54 Professional; scientific and technical services	12	26	-53	-15
55 Management of companies and enterprises	0	0	0	0
56 Admin & support; waste manag. & remed. services	7	12	-19	0
61 Educational services	25	29	-134	-80
62 Health care and social assistance	21	35	-36	20
71 Arts; entertainment and recreation	12	15	-78	-50
72 Accommodation and food services	40	47	-152	-65
81 Other services (except public administration)	11	8	-24	-5
91 Public administration	8	4	-23	-10
Total	307	209	-881	-365

Source: Statistics Canada (2001) (2017)

3.3 ESTABLISHMENT SIZE AND TRENDS

Table 13 outlines the number of establishments by location and with employees in the Village of McBride, Fraser-Fort George Electoral Area H and British Columbia between 2010 and 2016. As illustrated, the number of establishments with employees has remained relatively stable over the period for McBride and Fraser-Fort George Electoral Area H between 2010 and 2016. Over the same period the province has experienced an increase of 11.1% in the number of establishment locations with employees.

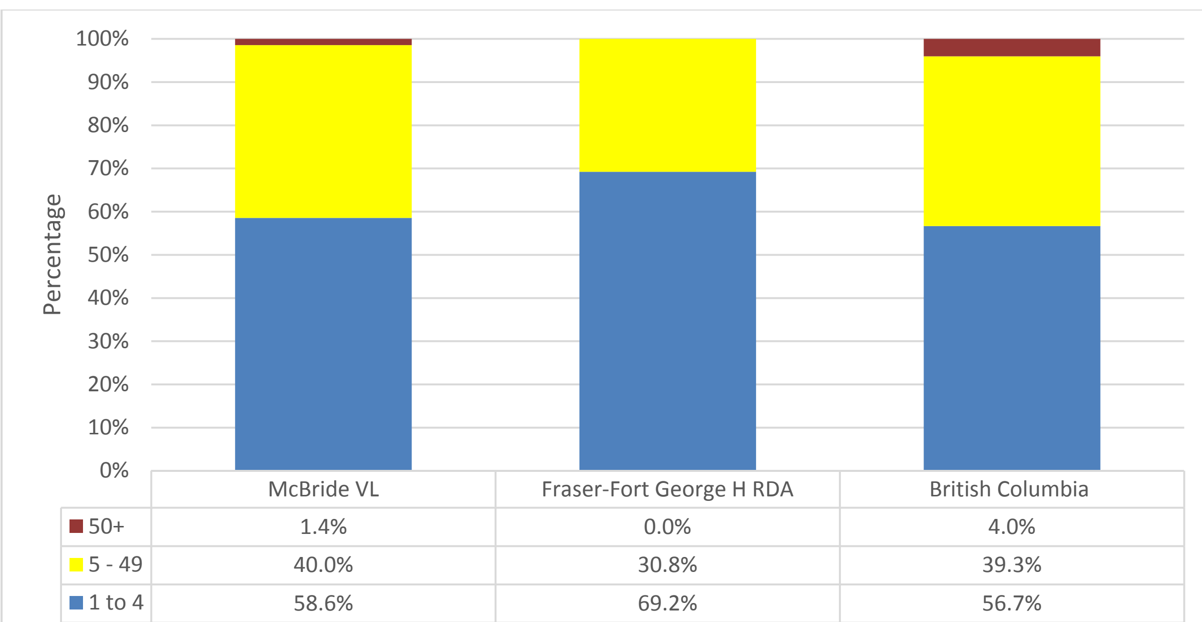
Table 13: Number of Establishment Locations in the Village of McBride, Fraser-Fort George Electoral Area H and BC, 2010-2016

	2010	2011	2012	2013	2014	2015	2016
Village of McBride	69	69	67	73	66	72	70
Fraser-Fort George Area H	10	11	11	9	11	11	13
British Columbia	175,913	175,589	175,950	183,667	190,384	192,260	195,980

Source: BC Stats (2017)

Figure 4 highlights the number of establishment locations based on the range of employees employed. As illustrated, and as expected, establishments with one to four employees making up the largest number of establishments in both McBride and Fraser-Fort George Electoral Area H. Most of the remaining businesses fall in the 5 to 49 employee level. The Village of McBride closely follows the business share observed at the provincial level and overall, highlights the importance of small business in the province and locally.

Figure 4: Distribution of Establishment Locations by Number of Employees, 2016



Source: BC Stats (2017)

4 TRENDS AND SECTORS ANALYSIS

4.1 MACROECONOMIC TRENDS

Economic Development is influenced by both internal conditions and macro-economic events and trends. The following paragraphs identify some prominent developments that are reshaping the strengths and challenges that a community like McBride should consider moving forward.

Trade and financial markets have become globalized International. Trade has increased dramatically over the last two decades. Global exports as a share of global GDP increased from just below 20% in the early 1990s to over 30% at the peak of the financial crisis in 2007-08. Despite recent setbacks to trading activities such as BREXIT and emerging challenges around renegotiations with NAFTA, trade relations are clearly emerging as a key wealth generator and will continue to expand as companies and countries see the values of integrated trade. Domestically, the recent free trade agreement with the European Union, and potential agreement with Pacific Rim countries and other jurisdictions will amplify the effects of globalization.

Fragile globalization in a multipolar world. Fears about weakening enthusiasm for globalisation have, seemingly, been realised in the past few years. However, there are numerous variables that will shape whether the purported antitrade environment of 2016 lasts to 2035. In the most likely scenario, globalisation patterns will be shaped less by politics and more by structural factors. Global trade is steady as a percentage of global growth, likely due to China's reorientation towards domestic consumption and the maturing of trade in goods. A more services-oriented economy will have different requirements for global trade governance, but Beijing, Brussels, and Washington will remain the key decision points for global economic affairs. (CEPS. 2017)

Industrial and technological revolution. By 2035, technological advances will have a major impact on the social and economic foundations of society, potentially more far-reaching than the initial phase of computerisation from the 1980s onwards. Technologies involving automation and machine learning have the potential to disrupt job markets, making millions of jobs obsolete. As technologies like self driving cars begins to proliferate, governments at all levels will be faced with questions of adaptation, governance, and human development. Countries will be forced to consider how much of their core information infrastructure they will permit to be run by companies domiciled in other countries. (CEPS. 2017)

Global population growth and urbanization continues to grow. The world's population is currently 7.6 billion and is expected to grow to 9.8 billion by 2050, with most of this growth in Asia (UN 2017a). The global population is expected to continue growing, but at a slower rate. It will also get gradually older as life expectancies rise. An expanding middle class living in urban areas will stimulate business and significantly increase demand for physical and soft infrastructure (Martin 2014).

Environmental and sustainability issues have become a prominent component of future economic development. Preliminary estimates suggest that the level of global energy-related CO^2 emissions increased in 2017 after remaining flat for three consecutive years. The frequency of weather-related shocks continues to increase, also highlighting the urgent need to build resilience against climate change and prioritize environmental protection (UN 2017b). Policymakers across the world face a number of challenges if they are to achieve sustainable long-term economic development. Structural developments, such as ageing populations and climate change, require a forward-thinking policy which equips the workforce to continue to make societal contributions later on in life and promotes low carbon technologies. Overall, as the environmental crisis deepens, leaders must embed sustainable cultures as critical natural resources run out (Koren Ferry HayGroup 2017).

The Canadian economy is undergoing profound structural change. The Canadian economy was built on the exploitation of extractive resources whose economic rents allowed companies to prosper, gave workers relatively high wages and helped grow communities and regions. However, increased worldwide production, increased business costs, substitution effects and other competitive drivers eventually eliminated those rents and the competitive advantage producers used to benefit from. Primary and other manufacturing industries have all experienced this transition and are no longer able to provide the tax, employment, income and other economic benefits that they once did.

Manufacturing is on the decline. The economies of industrialized, western nations continue to experience a transition from goods production to service production due to globalization, competition from developing and emerging markets and the increasing adoption of technology, particularly computer systems and the Internet. Manufacturing capacity has shifted overseas to lower cost jurisdictions, with less onerous environmental regimes and proximity to emerging markets. In Canada, manufacturing currently directly accounts for about 10% of Canadian GDP, down from close to 20% in the year 2000 and as high as 30% in the early 1950s (RBC 2017). However, this trend is not necessarily universal, homogenous or uni-directional; as capacity becomes more globally balanced some developed regions will inevitably experience new areas of growth.

Technology is on the ascendency. Manufacturing is increasingly technology-led with integrated software systems, flexible and innovative manufacturing concepts, virtual production through computer modelling, sophisticated supply chain management and the like. Production centres that are not considered a competitive advantage, including many routine business functions (such as basic manufacturing and customer service desks) are being outsourced, with technology as the enabling mechanism.

Competition for human capital is intense. Throughout the World there is approximately 201 million workers unemployed, or 5.8% of the labour force (International Labour Organization 2017). Yet many employers are saying they cannot find the workers with the skills they need. There is a growing skills gaps with youth unemployment, which is a specific area of concern. In addition, skilled labour is increasingly becoming more mobile with workers now moving around the globe in search of work.

Food, water and energy are the most valued commodities. Global population growth will increase demand for food, water and energy resources worldwide (National Intelligence Council 2012). Canada has these commodities in abundance and is well positioned to increase trade in related products and services.

Globalization has changed the ground rules for economic development. Globalization has created a new playing field for economic development practitioners that places increasing emphasis on the need for locally-driven and measurable programs. First, it has forced them to evaluate, justify and articulate their competitive advantages in a global context. Second, it has highlighted the inherent advantages of focusing on existing firms as centres of growth or development. Third, it has put more emphasis on the potential of young companies and entrepreneurs that represent the new jobs in the future. And finally, it has shifted brand recognition to a global and not simply a regional or even national setting (Morfessis and Malachuk 2011).

In the context of global and national socio-economic trends, there is a growing level of participation in regional economic development collaboratives. Cooperation and active collaboration is supplanting competition, particularly in terms of place marketing where regions are much more likely to build leveraged programs that can connect with decision-makers than individual communities (Berzina 2014).

Regions then become attractive, not by selling their physical space but by selling themselves as a community with the right combination of business and social attributes that fit the new economy.

Raising the bar on the skilled, experienced, and educated labour pool through increasing education attainment levels, continuing education and training opportunities (especially for in-demand technical and professional skills) and greater involvement of the private sector in human development programs is an emerging trend. Local education, workforce training, and talent attraction and retention issues has become more prominent among practitioners.

Enhancing 'quality of life' features that serve the recruitment and retention of technologists, technicians, skilled trades and professionals is also becoming a key economic development focus. Quality of life is determined by reasonable housing costs, strong basic education achievement, access to colleges and universities, low crime rate, accessible health services, diverse retail, personal and business service capacity, cultural vibrancy, healthy tourism sector, efficient transportation systems and an attractive, clean environment.

Creating a positive and actively supportive business climate with a reliable, efficient development process, cohesive land use and zoning that encourages appropriate business expansion and retention and the deployment of infrastructure that will catalyze private investment is allowing leading edge communities to change their economic direction in a positive fashion.

4.2 KEY SECTORS

There are several key sectors that create the Village of McBride's economic base. The following snapshots focus on sectors that represent potential targets for future development because of their employment and income impacts.

Forestry

The Village of McBride is located in the northern portion of the Robson Valley Timber Supply Area (TSA). In 2014, the annual allowable cut (AAC) of the Robson Valley TSA was set at 400,000 m^3. This is down from the AAC of 536,000 m^3 set in 2006 and represents a further reduction from the AAC of 602,377 m^3 set in 1996 and 2001 timber supply reviews. (BCFLNRO. 2014)

Historically, the Robson Valley TSA supported a vibrant forest industry, with the former Zeidler Forest Industries sawmill and veneer mill, TRC Cedar mill and Castle Creek Forest Products mill in McBride area, while Slocan Forest Products Ltd, Hauer Brothers and Bell Pole had processing facilities in Valemount (Deloitte & Touche Management Consultants. 1995). However, as these mills closed and logging employment declined with increased mechanization, local employment declined significantly.

Today, since there are no major processing facilities in the Robson Valley TSA, much of the harvested volume is hauled long distances to mills outside the TSA, such as to Prince George and Quesnel. Consequently, licensees sometimes only remove the better wood, and may not always transport all the wood that meets accepted utilization standards. However, licensees are billed under the 'take or pay' policy for wood that meets utilization standards but is left in the harvested area and not utilized. (BCFLNRO. 2014) This has further reduced the potential value from the local forest sector to the local forest sector.

The decline in local processing, local logging, and loss of local support services is highlighted in Table 14 which highlights forest sector employment for the Village of McBride and Fraser-Fort George Electoral Area H between 2001 and 2016. As illustrated between 2006 and 2011 approximately 240 or 71% of local forest sector employment was lost. In addition, while forestry employment appears to have stabilized between 2011 and 2016, what is not included in the numbers is the recent uncertainty associated with the fire that destroyed the BKB Cedar Manufacturing facility resulting in the lay off of the 35 local full-time jobs at the mill (MyPrinceGeorgeNow. 2017). While some workers have been rehired as the mill rebuilds a significant remain out of work. Besides BKB Cedar, there are also four other small wood producers locally including Cedar 3 Products, Midget Mills, Syncra Wood Products and Gibbs Creek Sawmill. In addition, the forest sector employs a number of loggers, trucker drivers, road builders, and supportive services to forestry.

Table 14: Village of McBride and Fraser-Fort George Area H Forest Sector Labour Force, 2001 to 2016

	2001	2006	2011	2016
113 - Forestry and Logging	120	125	45	45
1153 - Supportive Activities for Forestry	15	55	0	40
321 - Wood Products Manufacturing	200	160	55	40
Total	335	340	100	125

Source: Statistics Canada (2001) (2006) (2011) (2018)

In recent years, McBride has moved in a similar direction as many smaller rural BC communities in acquiring a community forest. In 2007 the McBride Community Forest Corporation signed a 25-year community forest agreement (MCFC. 2017). The AAC associated with the McBride community forest was set at 30,000 m^3 with the long-term vision of the McBride Community Forest Corporation being to serve the social, environmental, and economic needs of the community. In addition, neighbouring Dunster has a community forest with an additional AAC of 15,000 m^3 (MCFC. 2016).

Public Services

Public services, made up of health and social services, education, and public administration, is an important economic sector in the Village of McBride and surrounding area. As illustrated in Table 15, the labour force for the three sectors in the Village and Fraser-Fort George Electoral Area H has been trending downward in the most recent census period. Despite the decline, in 2016, the labour force of 220 in the three sectors represented 17.4% of the total local and regional labour of 1,265.

Health services in the Village of McBride is centred out of the McBride and District Hospital and Health Centre. This facility is home to emergency services, lab and diagnostic imaging, physiotherapy, acute and long-term care services, and public health services (Village of McBride. 2017a). The health care and social service labour force has remained stable over the 2001 to 2016 period.

The Village of McBride is located in School District 57 and has four schools, including two public schools providing kindergarten to grade 12 at McBride Centennial Elementary School and McBride Secondary School. The student population at the two public schools has been declining in recent years dropping from 210 in the 2012/13 year to 158 students in 2016/17 (BCME.2017a, 2017b). In addition, the community has two charter schools in McBride Christian Day School and Robson Valley Junior Academy (Village of McBride, 2017b). In 2016/17 Robson Valley Junior Academy had enrollment of 19 students. The labour force in the education sector has been steadily declining over the past ten years.

There are a variety of public services in the local and regional area including local, regional, provincial and federal government public services. Several provincial government ministries maintain a presence out of the provincial government office located in McBride. Unfortunately, between 2011 and 2016 there has been a sharp decline in local and regional public administration employment, with much of this decline being in the provincial and federal governments which supported a labour force of 100 in 2011 and have now contracted noticeably.

Table 15: Village of McBride and Fraser-Fort George Area H Public Service Labour Force, 2001 to 2016

	2001	2006	2011	2016
61 – Education Services	120	130	100	45
62 – Health Care and Social Services	100	90	110	135
91 – Public Administration	40	45	115	40
Total	260	265	325	220

Source: Statistics Canada (2001) (2006) (2011) (2018)

Retail

McBride has a collection of retail businesses that service the community, surrounding area and travelling public. Among the several retailers are businesses such as Robson Valley Home Hardware, Robson Valley IDA Pharmacy, AG Foods Store, and Petrocan. However, as illustrated in Table 16, the Village of McBride and surrounding Fraser-Fort George Electoral Area H have seen their retail labour force decline in recent years. After showing strong growth between 2001 and 2006, the sector has seen steady decline between 2006 and 2016. The larger sub-sectors in the retail sector locally are food and beverage stores and gas stations. These two-key retailing sub-sectors provide services that are not only focused on residential population but also depend on the travelling public.

Table 16: Village of McBride and Fraser-Fort George Area H Retail Labour Force, 2001 to 2016

	2001	2006	2011	2016
41 – Wholesale Trade	15	40	20	10
44-45 - Retail Trade	120	145	140	120
Total	135	185	160	130

Source: Statistics Canada (2001) (2006) (2011) (2018)

Agriculture

Agriculture has played a key role in the history of the Robson Valley and in 2015 the McBride Farmers' Institute celebrated its 100th anniversary (BCMOA. 2015). In earlier years the Institute lobbied for a road to connect the community with Kamloops and Prince George (Rocky Mountain Goat. 2015).

In 2016, the Fraser-Fort George Electoral Area H reported 111 farms. This is down from 121 reported in 2011. Among the 111 farmers in 2016, 33 were active in cattle ranching, while hay farming was identified by 25, and a further 16 were classified as engaged in horse and other equine production. Other farming activities of note included 5 farms in dairy cattle and milk production, and 8 farms in vegetable (except potatoes) and melon farming (Statistics Canada. 2017c).

As illustrated in Table 17, farms ranged in size from under 10 acres to over 3,520 acres. When compared to 2011, the number of farms reporting 10 acres or less has tripled, while the number of farms between 240 acres to 3,519 acres has declined. There were two farms over 3,520 acres in 2016, up from zero in 2011 (Statistics Canada. 2017d). The 111 farms in 2016 had a total capital value of $119.3 million, which represents a slight decline from

2011 when the 121 farms had a total capital value of $124.0 million (Statistics Canada. 2017e). The vast majority of the total capital value was in landings and buildings.

Table 17: Fraser-Fort George Area H Farms by Size, 2016 (Acres)

	2011	2016
Farms under 10 acres	2	6
Farms 10 to 129 acres	28	24
Farms 130 to 239 acres	27	28
Farms 240 to 559 acres	34	25
Farms 560 to 1,119 acres	17	16
Farms 1,120 to 1,599 acres	5	3
Farms 1,600 to 3,519 acres	8	7
Farms 3,520 acres and over	0	2
Total	121	111

Source: Statistics Canada (2017d)

Overall, farms generated $8.54 million in gross receipts in 2016, which was almost double the $4.65 million in gross receipts generated in 2011 by the local farming community. However, there is a noticeable range in the distribution of gross farm receipts and as illustrated in

Table 18. Much of the revenue was generated by the six largest farms in the valley.

Table 18: Fraser-Fort George Area H farms classified by total gross farm receipts in the year prior to the census, 2010 and 2015

	2010	2015
Farms, under $10,000	55	51
Farms, $10,000 to $24,999	26	20
Farms, $25,000 to $49,999	22	15
Farms, $50,000 to $99,999	9	10
Farms, $100,000 to $249,999	6	9
Farms, $250,000 to $499,999	0	2
Farms, $500,000 to $999,999	3	1
Farms, $1,000,000 to $1,999,999	0	3

Source: Statistics Canada (2017f)

Table 19 outlines the change in agriculture labour force over the period between 2001 to 2016 for the Village and Fraser-Fort George Area H. The agriculture labour force is concentrated in Fraser-Fort George Area H, but this labour force made an important contribution to the McBride economy. Over the past 15-year period, employment had been building over the first ten years, with the period between 2011 and 2016 representing the first declines in the period.

Table 19: Village of McBride and Fraser-Fort George Area H Agriculture Labour Force, 2001 to 2016

	2001	2006	2011	2016
111 – Farms	85	155	175	140
1150 – Support Services for Farms	0	0	0	0
Total	85	155	175	145

Source: Statistics Canada (2001) (2006) (2011) (2018)

Tourism

In the Robson Valley, tourism has always been the second most important private sector contributor to the economic base, after forestry, but ahead of transportation and construction (Horne 2009). However, the industry has declined over the last two decades mainly due to a drop off in business travel associated with crew work, but leisure travel is believed to have plateaued as well. Tourism creates employment across several sectors; however, three of these are primarily associated with tourism and travel spending including arts, accommodation, and food services. Using these three sectors as a proxy for the trend in tourism, we see that in 2016 collectively they employed a labour force of 165, versus 140 in 2001 when the local labour force was at its peak.

Table 20: Village of McBride and Fraser-Fort George Area H Tourism Labour Force, 2001 to 2016

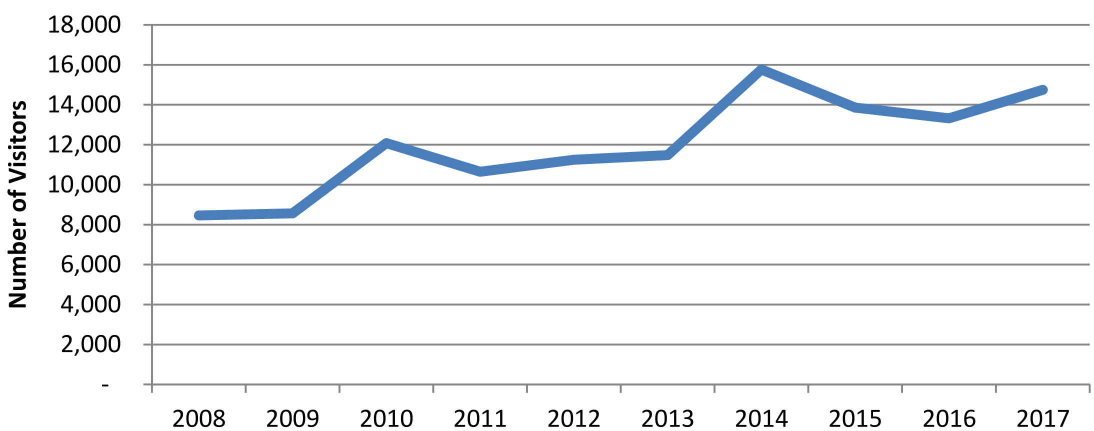
	2001	2006	2011	2016
71 – Arts, Entertainment and Recreation	60	40	45	10
721 – Accommodation Services	140	20	35	100
722 – Food Services and Drinking Places	60	80	80	55
Total	260	140	160	165

Source: Statistics Canada (2001) (2006) (2011) (2018)

The number of visitors coming through the region is unknown. Tourism indicators for the Northern BC Tourism region have been positive in recent years, with close to one million overnight visits generating close to $500 million in related spending. Domestic overnight travellers accounted for 80% of visitation and 64% of related spending. International travellers accounted for 20% and 36%, respectively (Destination BC 2017). More than 60% of all visitors are BC residents, followed by US residents, then other Canadian, and finally other international visitors. In terms of trip activities, outdoor recreation still dominates, with boating, wildlife viewing, visiting national/provincial parks, fishing, hiking and camping all popular. Some cultural activities, including visiting historic sites and museums/art galleries, also ranked as top trip activities among international travellers.

The available tourism indicators in the Robson Valley generally reflect the positive performance at the regional level, although year to year fluctuations occur. Visitor Centre attendance has been on a long-term increase, almost doubling since 2008, although 2014 saw the most recent peak of 16,000 visitors. The McBride Visitor Centre is open year-round and therefore captures the important winter snowmobile market. BC Parks camping attendance has also been growing in the region (BC Parks 2016), as has summer traffic volumes on Highway 16 (Ministry of Transportation and Infrastructure 2017), which is an indicator of leisure visitor volumes.

Figure 5: McBride Visitor Centre Attendance, 2008-2016



Source: Destination BC (2017)

Tourism experiences in the region are primarily of the nature-based variety, including mountain climbing, hiking, camping, mountain biking, fishing, hunting, canoeing, jetboating, snowmobiling, cross-country skiing, bird watching and nature observation. There are also two heli-skiing businesses operating in the area including Crescent Spur Heli-Skiing and Canadian Mountain Holidays; however, most of these visitors have little interaction with the community. The roster of festivals and events that draw visitors to McBride includes the Robson Valley Music Festival, Fraser Heritage Festival, Pioneer Days, curling bonspiels, snowmobile events, and hockey tournaments.

There are some major projects planned that could affect the demand and supply-side tourism in McBride. The proposed “soft-open” of the Valemount Glacier Resort is now scheduled for 2019-20. If and when that project proceeds, it would have a significant economic and tourism development impact on the Robson Valley and potentially open up new investment activity for McBride.

In addition, closer to McBride, the Robson Valley Mountain Bike Association (RVMBA) has recently completed THE BLUFF TRAIL, a multi-use trail built for hiking, trail running, horseback riding, mountain biking, dog walking, snow shoeing, and ungroomed cross-country skiing. Approximately five kilometres in length, the Bluff Trail is named for the stunning rock bluffs situated on it. The trail is part of the McBride and Teare Mountain Bike Trail Network, a trail system planned for the community of McBride by professional trail builder Joel Pirnke (VOC. 2018). Additional funding has been received and this outdoor asset will continue to be expanded over the coming year.

Finally, British Columbia's most recent Provincial Park is near McBride and provides stunning hiking opportunities to view the most northerly inland temperate rainforests in the world (VOC 2018). The Ancient Forest/Chun T’oh Whudujut Park and Protected Area has some Western Red Cedar trees that are over 1000 years old. The Park is 11,190 hectares in size while the protected area adds an additional 685 hectares and collectively is quickly becoming a priority visitor stop (BC Parks. 2018). Moving forward it is envision that this spectacular forest will become a critical tourism asset locally.

4.3 MAJOR PROJECTS

Current two major projects are proposed in the Robson Valley that will potentially create economic benefits for the McBride area. These projects are listed below and include:

- **Canadian Mountain Holidays (CMH) Backcountry Lodge Development** - CMH has operated a heli-ski business out of McBride since the winter of 1989-90. In August of 2016, CMH applied to the province for approval to build a new heli-ski lodge in its tenure, in the upper reaches of Castle Creek in the Cariboo Mountains west of McBride. This project would put the lodge in the heart of the tenure and significantly reduce the number of flights to and from the valley. CMH estimates that initial project investment will be approximately $14 million. Much of this (more than $10 million) would accrue directly to the Robson Valley in the way of contracts, purchasing and employment, as would on-going long-term operational spending

(approximately $200,000 per year) and employment (estimated at 11 new full-time equivalents locally).
Since submitting the proposal, CMH has worked closely with Ministry of Forests, Lands and Natural Resource Operations staff to resolve issues from the referral process. To date, CMH has completed civil and geotechnical assessments on the access road to the proposed lodge. (CMH. 2017)

- **Glacier Destination Resort** - Valemount Glacier Destinations Ltd. (VGD) and the Province of British Columbia have completed a Master Development Agreement (MDA) approving a major year-round glacier sightseeing and skiing destination near Valemount, British Columbia. The resort base will be located on the bench to the West of the Village of Valemount, at an average elevation of approximately 1,300 metres. The resort will offer numerous outdoor opportunities including sightseeing and skiing. In addition, the resort will be integrated with many of the existing recreational activities of the region including snowmobiling, Nordic skiing, heli-skiing, hiking, and mountain biking. Opening investment for the resort will be approximately $100 million. At full build-out the resort and its associated activities are anticipated to create approximately 800 direct and indirect jobs. (Valemount Glaciers. 2018)

5 INTERNAL ASSESSMENT

The Village of McBride has been engaged in economic development for several decades as it works to stabilize the local economy and assist a transition into new areas of wealth creation. Whether as a member of the Fraser-Fort George Regional District or on its own, it has actively participated in economic development studies and programs beyond what other communities of its size would normally do.

Land Use regulations have been crafted with consideration of future investment, particularly in the forestry and agricultural sectors. The Official Community Plan and associated bylaws have been regularly updated to ensure investment, economic development and responsible natural resource development are sufficiently enabled. The 2011 OCP contains General Objectives and Policies to prioritize tourism, forestry and agriculture as sector targets; in addition to downtown revitalization, local trail development, and the continued evolution of the vibrant arts/culture climate. The recent Business Walks event did not indicate any significant "local red tape" issues, suggesting a favourable local business climate.

This history, as well as other services, are reflected in the "Investment Attraction Readiness Scorecard" shown opposite. The check list is a subjective view of McBride's readiness, and while the community appears well positioned in the Knowledge and Resource categories, there is further work to do in raising communication activity to a level that enhances transition measures.

Village of McBride
Investment Readiness Assessment Scorecard

Sections / Categories	Score	Target Score
Section A - Knowledge		
Contacts	3	4
Land Use Planning	13	15
Engaging Businesses	2	3
Information Sources	0.5	0
TOTAL	**17.5**	**22**
Section B – Resources		
Industrial Land Inventory	3	6
Joint Ventures	0.5	1
Economic Development Capacity	3	3
TOTAL	**6.5**	**10**
Section C – Communications		
Community and Sector Profiles	4	8
Website	1.5	4
Other Communications	0	0
TOTAL	**5.5**	**12**
GRAND TOTAL	**29.5**	**44**

6 STRENGTHS, CHALLENGES, OPPORTUNITIES

Strengths, Challenges and Opportunities (SCO) analysis is a tool that helps communities identify areas of productive economic activity and wealth creation. SCO is meant to address strategically relevant issues of comparative advantage or disadvantage, which become targets for sustaining or enhancing (in the case of strengths), mitigating and converting (in the case of challenges) or developing and diversifying (in the case of opportunities).

Strengths	Challenges	Opportunities
• Highway and rail access • Business climate • Availability of land • Quality of life • Affordable housing and land • Close proximity to wilderness and outdoor recreation • Healthy environment (clean air, clean water, unspoiled viewscapes) • Local hospital and good schools	• Resource industry decline • Outflow of wood resource • Population decline • Unemployment rate • Small labour force • Limited skills inventory • Limited infrastructure • Poor internet service in rural areas • Lack of zoned land • Location, remoteness • Lack of people farming their farm land	• New ancient rain forest Park drawing visitors • Small scale processing (timber, food, other) • Training opportunities utlizing existing infrastructure (i.e., hospital) • Renewable energy • Trail products • Lodges • Amenity migrants • Agriculture. new products

The strengths of McBride are in three broad areas, transportation infrastructure, local business climate and the lifestyle and amenities associated with rural living, including lower living and business costs. Challenges can be grouped into fall into three general areas, the decline of traditional resource sectors such as forestry (and associated outflow of wealth and population), the small size of the community, especially a limited labour market, limited infrastructure and perhaps most importantly the remote location, which has implications for getting local production to market and linking local businesses into the regional supply chain. The dependence on forestry has fallen away, replacing one challenge (lack of diversity) with another (population loss). The transition to a new economic setting will take some time, but there are still opportunities linked to the area’s natural resources. However, they are of different types that in the past, with more potential in small scale developments that do not require large amounts of outside investment capital.

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