Antigonish Regional Economic Assessment

Final Report

Prepared For:

Municipality of the County of Antigonish

MUNICIPALITY OF THE COUNTY OF
ANTIGONISH

Town of Antigonish

THE TOWN OF
ANTIGONISH

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Table of Contents

1 INTRODUCTION

The Municipality of the County of Antigonish and the Town of Antigonish wished to explore initiatives to support and expand the economic base in the combined areas of the Municipality of the County of Antigonish and the Town of Antigonish, hereafter referred to as “the Antigonish area”.

The work plan for this assignment is shown in the table below. However, two major changes were made to the work plan.

First, despite two efforts we were unable to assemble sufficient participants for the group consultation work. This is most likely because the Municipality and the Town as well as ESREN had undertaken quite extensive community consultation before this study. The group consultation as replaced with a more extensive interview program and a web based survey.

Second, when the terms of reference were written and when the work began we anticipated that our work on the assessment would take some guidance from the current economic development strategy of the Eastern Strait Regional Enterprise Network (ESREN) of which the Antigonish area was a partner. However, as of April 1, 2019, the patterns in ESREN discontinued their support and the organization is no longer functioning. The ESREN strategy was due for updating in 2019 and this will now not take place. Therefore, we have adjusted our work plan to include discussion of how the Antigonish area can take on our recommendations for economic improvement as a standalone economic development operation.

Work Plan: Antigonish Regional Economic Assessment	
Phase 1: Project Planning and Management	Pre-Start Up Consultation Official Kickoff Meeting Prepare Detailed Work Plan and Critical Path
Phase 2: Research, Data Collection and Analysis	Primary Source Data Collection Conduct Interviews Conduct Online Survey of Business Community Background Research Using Secondary Sources Create Environmental Scan & Situation Assessment Demographic Environmental Scan Labour Force Environmental Scan Social and Community Environmental Scan Economic Sectors Environmental Scan Material Wellbeing Environmental Scan Top-line Summary of Interviews and Online Survey
Phase 3: Assessment of Opportunities and Recommendations	Assessment of Gaps, Opportunities and Targets Observations and Opportunities Recommendations Moving Forward – The New Agency Overall Structure of the New Community Economic Development Plan Projections Setting Goals and Measuring Progress

2 ENVIRONMENTAL SCAN & SITUATION ASSESSMENT

The environmental scan and situation assessment is composed of the following six elements:

- Demographic Environmental Scan
- Labour Force Environmental Scan
- Social and Community Environmental Scan
- Economic Sectors Environmental Scan
- Material Wellbeing Environmental Scan
- Top-line Summary of Interviews and Online Survey

2.1 DEMOGRAPHIC ENVIRONMENTAL SCAN

The Antigonish area makes up the Antigonish Census Division (CD) in the Canadian Census.

Population, 2006 - 2016											
	2006				2016						
	Antigonish CD		Rest of Nova Scotia		Antigonish CD			Rest of Nova Scotia			
	#	% of Total	#	% of Total	#	% of Total	Change 06-16	#	% of Total	Change 06-16
Total	18,835		889,170		19,300		2.4%	904,300		1.7%
0-4 years	960	5.1%	46,495	5.2%	945	4.9%	-1.6%	41,060	4.5%	-13.2%
5-14 years	2,360	12.5%	115,210	13.0%	2,140	11.1%	-10.3%	89,685	9.9%	-28.5%
15-19 years	1,585	8.4%	60,165	6.8%	1,155	6.0%	-37.2%	50,100	5.5%	-20.1%
20-24 years	1,350	7.2%	54,830	6.2%	1,290	6.7%	-4.7%	54,870	6.1%	0.1%
25-44 years	4,405	23.4%	263,235	29.6%	4,070	21.1%	-8.2%	210,445	23.3%	-25.1%
45-54 years	3,025	16.1%	135,255	15.2%	2,630	13.6%	-15.0%	134,935	14.9%	-0.2%
55-64 years	2,530	13.4%	90,035	10.1%	3,085	16.0%	18.0%	143,380	15.9%	37.2%
65-74 years	1,340	7.1%	65,310	7.3%	2,415	12.5%	44.5%	106,300	11.8%	38.6%
75-84 years	850	4.5%	43,560	4.9%	1,105	5.7%	23.1%	52,355	5.8%	16.8%
85+ years	435	2.3%	15,070	1.7%	460	2.4%	5.4%	21,185	2.3%	28.9%
Source: Census, 2006, 2016 and JME (Total may not add due to rounding.)										

The table above, **Population, 2006-2016**, shows the population and changes in population for the Antigonish CD and the Rest of Nova Scotia.

Between 2006 and 2016, population growth in the Antigonish CD exceeded that of the rest of Nova Scotia where the Antigonish CD's population grew by 2.4% versus 1.7% for the rest of Nova Scotia.

In the Antigonish CD all age group categories from zero years to 54 years declined from 2006 to 2016. All age groups from 55 years to 85+ years increase their share of the Antigonish CD population. The rest of Nova Scotia's decline in the age categories of zero years to 24 years and 25 to 44 years far exceeded that of the Antigonish CD.

In general, the Antigonish CD by 2016 has a greater proportion of its population from age 65 years to age 85+ years. However, the very oldest age cohort, 85+ years, makes up a substantially smaller share of the population of the Antigonish CD than in the rest of Nova Scotia. As they age, cohorts from 55 years to 84 years the Antigonish CD will eventually see the same pressures associated with an aging population, as is currently the case in the rest of Nova Scotia. Therefore, the Antigonish CD has some time to learn from the rest of Nova Scotia's experience in serving an older population so that it can prepare itself to better deal with the coming major expansion in the proportion of its population that is in its senior years.

Population Mobility, 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total - 1 Yr Ago	18,830		881,620	
Non-movers	16,785	89.1%	775,315	87.9%
Same prov. - changed address	1,690	9.0%	84,955	9.6%
Non-migrants (same CD)	1,105	5.9%	67,060	7.6%
Intraprovincial migrants	585	3.1%	17,895	2.0%
Different prov./territory/country	355	1.9%	21,355	2.4%
Interprovincial migrants	260	1.4%	14,980	1.7%
External migrants	95	0.5%	6,375	0.7%
Total - 5 Yrs Ago	18,035		848,390	
Non-movers	12,870	71.3%	569,835	67.2%
Same prov. - changed address	4,135	22.9%	215,765	25.4%
Non-migrants	2,660	14.7%	166,910	19.7%
Intraprovincial migrants	1,475	8.2%	48,855	5.8%
Different prov./territory/country	1,035	5.7%	62,790	7.4%
Interprovincial migrants	775	4.3%	43,780	5.2%
External migrants	260	1.4%	19,010	2.2%
Source: Census and JME (Totals may not add due to rounding.)				

The table above, **Population Mobility 2016**, compares the mobility of the population in the Antigonish CD with the rest of Nova Scotia.

From 2015 to 2016 the Antigonish CD’s population had a higher percentage of intra-provincial migrants then did the rest of Nova Scotia. Similarly, from 2011 to 2016 the Antigonish CD continued to show a higher proportion of intra-provincial migrants among its population then did the rest of Nova Scotia.

However, when it comes to the proportion of intra-provincial migrants and external migrants in its population the Antigonish CD shows less of a concentration than the rest of Nova Scotia.

Therefore, the Antigonish CD outperforms the rest of Nova Scotia in terms of attracting intra-provincial migrants but lags the rest of Nova Scotia in terms of attracting intra-provincial migrants and external migrants. If the Antigonish CD is to continue to outperform the rest of Nova Scotia in terms of population growth it will need to pay special attention to the attraction of interprovincial and external migrants.

2.2 LABOUR FORCE ENVIRONMENTAL SCAN

The following tables provide an overview of labour force activities and occupations among the experienced labour force[1].

Work Activity (Pop. 15+), 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total, 15+ years, work activity in 2016	15,930		758,820	
Did not work	5,170	32.5%	269,205	35.5%
Worked	10,755	67.5%	489,615	64.5%
Worked full year; full time	4,830	30.3%	247,990	32.7%
Worked part year and/or part time	5,925	37.2%	241,625	31.8%
Average weeks worked	39.7		41.6	
Source: Census, 2016 and JME (Totals may not add due to rouinding.)				

The table above, **Work Activity (Pop. 15+), 2016**, shows that the Antigonish CD has an experienced labour force of 10,755 persons who in the previous 12 months worked an average of 39.7 weeks. This is about 5% less than the average weeks worked of 41.6 weeks in the rest of Nova Scotia. The lower number of average weeks worked in the Antigonish CD is primarily because a greater portion of work in the Antigonish CD is seasonal in nature than in the rest of Nova Scotia.

Labour Force Status (Pop. 15+), 2016		
	Antigonish CD	Rest of Nova Scotia
Population 15+ years	15,930	758,820
In the labour force	10,080	464,515
Employed	8,915	418,395
Unemployed	1,170	46,110
Not in labour force	5,850	294,305
Participation rate	63.3%	61.2%
Employment rate	56.0%	55.1%
Unemployment rate	11.6%	9.9%
Source: Census and JME (Total may not add due to rounding.)		

The table above, **Labour Force Status (Pop 15+), 2016**, shows that on the date of the 2016 census 10,080 Antigonish CD residents were in the active labour force. Of those, 11.6% were unemployed at the time of the 2016 census. However, the 9.9% unemployment rate for the rest of Nova Scotia is lower than that of the Antigonish CD because the participation rate in the rest of Nova Scotia is 2.1 percentage points lower than that in the Antigonish CD. The more indicative measure of well-being in terms of employment availability is the employment rate of the labour force age group (Population 15+ years). The employment rate in the Antigonish CD is 0.9 percentage points higher than in the rest of Nova Scotia.

[1] The "experienced labour force" is composed of persons 15 years old and older who have worked sometime during the previous 12 months.

Experienced Labour Force by Occupation								
	2016				2006			
	Antigonish CD		Rest of Nova Scotia		Antigonish CD		Rest of Nova Scotia	
Occupations		% of Total		% of Total		% of Total		% of Total
Employed labour force, aged 15+ years	10,085		464,510		10,146		467,779	
Occupation - not applicable	140	1.4%	9,125	2.0%	141	1.4%	9,189	2.0%
All occupations	9,945	98.6%	455,385	98.0%	10,005	98.6%	458,590	98.0%
Management	885	**8.8%**	44,645	9.6%	735	7.2%	40,965	8.8%
Business; finance and administration	1,275	12.6%	66,219	**14.3%**	1,366	13.5%	78,075	16.7%
Natural and applied sciences & related	435	**4.3%**	27,015	5.8%	510	5.0%	24,515	5.2%
Health	990	**9.8%**	36,610	**7.9%**	735	7.2%	30,385	6.5%
Education, law, social; community & govt. services	1,245	12.3%	56,919	**12.3%**	1,201	11.8%	38,150	8.2%
Art; culture; recreation & sport	260	2.6%	12,230	2.6%	245	2.4%	12,495	2.7%
Sales and service occupations	2,280	22.6%	110,854	23.9%	2,326	22.9%	120,545	25.8%
Trades; transport and equipment operators & related	1,640	16.3%	65,984	14.2%	1,606	15.8%	68,360	14.6%
Natural resources; agriculture & related production	650	**6.4%**	17,730	**3.8%**	985	9.7%	23,505	5.0%
Manufacturing and utilities	280	2.8%	17,180	**3.7%**	295	2.9%	21,595	4.6%
Source: Census and JME (Totals may not add due to rounding.)								

The table above, **Experienced Labour Force by Occupation**, shows the experienced labour force in 2016 and 2006 for the Antigonish CD and the rest of Nova Scotia.

The table shows that in 2016 the Antigonish CD has a greater proportion of its experienced labour force in

- health occupations;
- trades, transport and equipment operations and related occupations; and
- natural resources, agriculture and related production operations;

than in the rest of Nova Scotia.

The Antigonish CD's proportion of experienced labour force in education, law and social and government services, as one might expect, equals that of the rest of Nova Scotia.

The Antigonish CD has a lower share of its experienced labour force in all other occupation categories than in the rest of Nova Scotia.

From 2006 to 2016 in the Antigonish CD the percentage of the experienced labour force grew for the following occupations:

- management;
- health;
- education, law, social, community & govt. services;
- art, culture recreation & sport; and
- trades, transport and equipment operators & related.

The percentage growth in the number of persons in management and health occupations was particularly large.

From 2006 to 2016 in the Antigonish CD the percentage of the experienced labour force declined for the following occupations:

- business, finance and administration;
- natural and applied sciences & related;
- sales and service;
- natural resources, agriculture and related production; and

- manufacturing and utilities.

The percentage decrease in the number of persons in natural and applied sciences & related occupations and natural resources, agriculture & related productions was particularly large.

From 2006 to 2016 in the rest of Nova Scotia the percentage of the experienced labour force grew for the following occupations:

- management;
- natural and applied sciences and related;
- health; and
- education, law, social, community & govt. services.

The percentage growth in the number of persons in health occupations and education, law, social, community & govt. services was particularly large.

From 2006 to 2016 in the rest of Nova Scotia the percentage of the experienced labour force declined for the following occupations:

- business, finance and administration;
- art, culture, recreation and sport;
- sales and service;
- trades, transport and equipment operators & related;
- natural resources, agriculture and related production; and
- manufacturing and utilities.

The percentage decrease in the number of persons in business, finance and administration occupations, agriculture & related productions and manufacturing and utilities occupations was particularly large.

Employment by Place of Residence and Place of Work, 2001 - 2016											
Place of Residence	Place of Work	% of Employed Antigonish CD Residents				Place of Residence	Place of Work	% of Person Employed in Antigonish CD			
		2016	2011	2006	2001			2016	2011	2006	2001
						Nefoundland & Labrado	Antigonish County				0.2%
Antigonish County	Yarmouth County				0.2%						
						Lunenburg County	Antigonish County	0.3%			0.1%
Antigonish County	Hants County				0.1%	Hants County	Antigonish County				0.2%
						Kings County	Antigonish County				0.2%
Antigonish County	Halifax County	2.2%	0.9%	1.1%	1.4%	Halifax County	Antigonish County	1.2%	1.4%	1.0%	1.0%
Antigonish County	Colchester County	0.3%		0.7%		Colchester County	Antigonish County	0.6%			0.5%
Antigonish County	Pictou County	3.2%	1.1%	1.9%	3.5%	Pictou County	Antigonish County	4.7%	5.4%	1.9%	2.1%
Antigonish County	Guysborough County	4.0%	2.4%	3.1%	1.7%	Guysborough County	Antigonish County	3.9%	5.2%	5.1%	4.7%
Antigonish County	Antigonish County	82.9%	89.7%	87.2%	84.1%	Antigonish County	Antigonish County	86.5%	87.1%	91.0%	87.7%
Antigonish County	Inverness County	5.7%	5.1%	5.7%	6.8%	Inverness County	Antigonish County	1.5%	0.9%		2.0%
Antigonish County	Richmond County	0.8%	0.4%	0.4%	0.9%	Richmond County	Antigonish County	0.7%		0.9%	0.6%
Antigonish County	Cape Breton County				0.2%	Cape Breton County	Antigonish County	0.3%			0.6%
Antigonish County	New Brunswick				0.2%						
Antigonish County	Ontario				0.4%	Ontario	Antigonish County	0.3%			0.1%
Antigonish County	Alberta	0.8%	0.3%		0.3%	Alberta	Antigonish County				0.2%
Antigonish County	Britisch Columbia				0.2%						
Antigonish County	North West Territory				0.2%						
Total		100.0%	100.0%	100.0%	100.0%			100.0%	100.0%	100.0%	100.0%
Source: Census and JME											

The table above, **Employment by Place of Residence in Place of Work**, shows where employed residents of Antigonish County work and shows the proportion of workers in Antigonish County by their place of residence.

As one would expect the vast majority (82.9%) of employed persons in Antigonish County work in Antigonish County. This proportion has held relatively stable from 2001 to 2016. The next most likely place of work for employed residents of Antigonish County is Inverness County.

The data also show that residents of Antigonish County make up the vast majority of persons employed in the Antigonish County.

However, the data also suggest that:

- In 2001 there were more employed Antigonish County residents than there were jobs in Antigonish County. Roughly 4.2% of the jobs held by Antigonish County residents were imported from adjacent census divisions. Antigonish County was a net importer of jobs.
- In 2006 there were more employed Antigonish County residents than there were jobs in Antigonish County. Roughly 4.2% of the jobs held by Antigonish County residents were imported from adjacent census divisions. Antigonish County was a net importer of jobs.
- By 2011 the data suggest that there were more jobs in Antigonish County than there were employed residents of the County. There were roughly 3% more jobs in Antigonish County than there were employed residents of the County. Antigonish County appeared to be a net exporter of jobs. However, despite our efforts to reconcile the 2011 census with the other censuses changes in the 2011 Census methodology resulted in a journey to work data for 2011 that are not directly comparable to those in other censuses.
- In 2016 there were more employed Antigonish County residents than there were jobs in Antigonish County. Roughly 4.1% of the jobs held by Antigonish County residents were imported from adjacent census divisions. Antigonish County was a net importer of jobs.
- The preponderance of journey to work data show a consistent pattern of there being more Antigonish County residents employed than there were jobs in the county. The

county appears to be, consistently, a net importer of jobs. This indicates that Antigonish County may not be operating as a net generator of economic activity for the area but rather an area that depends on activities in its neighbouring areas for a portion of employment for Antigonish County residents. More vibrant economic areas, such as Halifax County, tend to be net exporters of jobs in that there are more jobs in Halifax County than there are employed Halifax County residents. Halifax County is operating as a form of a growth pole acting more as a sun that, on balance, generates more energy than it imports from its surrounding environment. The opposite appears to be the case for Antigonish County.

2.3 SOCIAL AND COMMUNITY ENVIRONMENTAL SCAN

The following tables provide the data for the social and community environmental scan in terms of the type and age of occupied dwellings, the condition of occupied dwellings and the composition of senses families and non-census family households.

Occupied Dwellings by Type, 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total - Occupied private dwellings by tenure	8,130		393,860	
Owner	6,120	75.3%	269,975	68.5%
Renter	1,905	23.4%	121,690	30.9%
Band housing	105	1.3%	2,195	0.6%
Dwelling more than 10 yrs	6,985	86.0%	351,235	89.2%
Dwellings 10 yrs. old or less	1,140	14.0%	42,625	10.8%
Total - Occupied private dwellings by type	8,130		393,860	
Single-detached house	5,630	69.2%	257,840	65.5%
Apartment in building, 5 or more storeys	20	0.2%	21,330	5.4%
Movable dwelling	1,160	14.3%	13,710	3.5%
Other attached dwelling	1,325	16.3%	100,975	25.6%
Semi-detached house	115	1.4%	20,350	5.2%
Row house	75	0.9%	10,140	2.6%
Apartment or flat in a duplex	365	4.5%	12,070	3.1%
Apartment in building, less than 5 storeys	760	9.3%	57,645	14.6%
Other single-attached house	10	0.1%	770	0.2%
Source: Census and JME (Some totals may not add due to rounding.)				

The table above, **Occupied Dwellings by Type, 2016**, describes the tenure of occupied dwellings, there age and the type of dwellings in the Antigonish CD and the rest of Nova Scotia.

The first noticeable difference between the Antigonish CD and the rest of Nova Scotia is at the proportion of occupied dwellings that are occupied by their owners is 7.2 percentage points higher than in the rest of Nova Scotia.

The second noticeable difference is that dwellings in the Antigonish CD tend to be newer than those in the rest of Nova Scotia.

The third noticeable difference is that occupied movable dwellings make up a much larger share of the Antigonish CD housing stock, by 10.8 percentage points, then in the rest of Nova Scotia.

Household Size and Occupied Dwellings by Condition and Value, 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total - Private households	8,130		393,860	
Number of persons in private households	19,301		904,297	
Average household size	2.4		2.3	
Average number of rooms per dwelling	6.5		6.5	
Dwellings with more than one person per room	30	0.37%	2,100	0.53%
Average value of dwellings ($)	$ 209,703		$ 230,869	
Median value of dwellings ($)	$ 185,071		$ 200,192	
Total - Condition of occupied private dwellings	8,130		393,860	
Regular maintenance only	5,135	63.2%	237,312	60.3%
Minor repairs	2,435	30.0%	121,733	30.9%
Major repairs	560	6.9%	34,815	8.8%
Source: Census and JME (Some totals may not add due to rounding.)				

The table above, **Household Size and Occupied Dwellings by Condition and Value, 2016**, compares size, value and conditions in the Antigonish CD to those in the rest of Nova Scotia.

In terms of average household size, average numbers of rooms per dwelling and dwellings with more than one person per room, the conditions in the Antigonish CD are very similar to those in the rest of Nova Scotia.

However, the average value of dwellings in the Antigonish CD is about 9.1% lower than that in the rest of Nova Scotia. Similarly, the median value of dwellings in the Antigonish CD is about 7.5% lower than in the rest of Nova Scotia. The lower average and median values of occupied dwelling units in the Antigonish CD are due primarily because the Antigonish CD has a much larger proportion of its housing stock in mobile dwellings than the rest of Nova Scotia.

We also note that the average value of dwellings in the Antigonish CD is skewed much less above the median than in the rest of Nova Scotia. This indicates that there are fewer high average value dwellings in the Antigonish CD than in the rest of Nova Scotia. Again, this is due to the relatively high concentration of mobile dwellings in the Antigonish CD.
As we show below in **Section 2.5 Material Wellbeing Environmental Scan**, after-tax household incomes in the Antigonish CD tend to be higher than those in the rest of Nova Scotia. Therefore, there seems to be the potential for the construction and sale of higher value dwellings in the Antigonish CD.

Family and Household Composition, 2016				
	Antigonish CD		Rest of Nova Scotia	
Family/Household Type	#	%	#	%
Total Households	8,135	100.0%	393,855	
1 person	2,415	29.7%	116,255	29.5%
2 persons	2,960	36.4%	153,865	39.1%
3 persons	1,195	14.7%	59,055	15.0%
4 persons	955	11.7%	44,015	11.2%
5 or more persons	610	7.5%	20,665	5.2%
Average household size	2.37		2.30	
Total Census Family Households	5,515	40.4%	265,450	40.3%
2 persons	2,970	53.9%	154,630	58.3%
3 persons	1,160	21.0%	55,465	20.9%
4 persons	885	16.0%	40,210	15.1%
5 or more persons	500	9.1%	15,145	5.7%
Average size of census families	2.89		2.76	
Total couple families	4,560	33.4%	219,505	33.3%
Couples without children	2,410	52.9%	125,715	57.3%
1 child	880	19.3%	42,930	19.6%
2 children	805	17.7%	36,790	16.8%
3 or more children	465	10.2%	14,070	6.4%
Total lone-parent families	950	7.0%	45,950	7.0%
1 child	560	58.9%	28,920	62.9%
2 children	275	28.9%	12,535	27.3%
3 or more children	115	12.1%	4,495	9.8%
Multiple-census-family households	90	0.7%	5,195	0.8%
Non-census-family households	2,535	18.6%	123,210	18.7%
Persons in non-census family hlds.	3,370		172,205	
Average size of non- census family h	1.33		1.40	
Source: Census and JME (Totals may not add due to rounding.)				

The table above, **Family and Household Composition, 2016**, compares family and household compositions in the Antigonish CD with those in the rest of Nova Scotia. The differences, combined with the relatively higher household incomes in the Antigonish CD compared to the rest of Nova Scotia provides additional evidence that there may be room for economic growth in the Antigonish CD associated with the construction, sale and operations of higher value dwellings.

Census family households led by couples with two or more children make up a larger share of couple families in the Antigonish CD than in the rest of Nova Scotia. This suggests that there may be benefits to the local economy if childcare support services are expanded thus helping to increase the participation rate of parents in census family headed by couples.

The Antigonish CD, compared to the rest of Nova Scotia, has a higher percentage of lone parent families with two or more children than the rest of Nova Scotia. This suggests there may be some need for enhanced family care support for lone parent families in order to make it easier and more economically advantageous for lone parents to enter the labour force.

Education by Highest Level, 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total - Highest certificate; diploma, degree, **Pop. 15+**	15,930		758,815	
No certificate; diploma or degree	2,755	17.3%	150,950	19.9%
Secondary school diploma or equiv.	3,530	22.2%	192,370	25.4%
Postsecondary certificate; diploma or degree	9,640	60.5%	415,500	54.8%
Apprenticeship or trades certificate or diploma	1,925	12.1%	74,885	9.9%
College; CEGEP or non-university certificate or diploma	3,500	22.0%	165,305	21.8%
University certificate or diploma below bachelor level	420	2.6%	17,960	2.4%
University certificate; diploma or degree, bachelor or above	3,795	23.8%	157,355	20.7%
Total - Highest certificate; diploma, degree, **Pop. 25-64**	9,740		484,765	
No certificate; diploma or degree	835	5.2%	59,445	7.8%
Secondary school diploma or equiv.	1,865	11.7%	114,415	15.1%
Postsecondary certificate; diploma or degree	7,035	44.2%	310,915	41.0%
Apprenticeship or trades certificate or diploma	1,290	8.1%	51,080	6.7%
College; CEGEP or non-university certificate or diploma	2,605	16.4%	125,405	16.5%
University certificate or diploma below bachelor level	250	1.6%	11,345	1.5%
University certificate; diploma or degree, bachelor or above	2,885	18.1%	123,085	16.2%
Source: 2016 Census and JME (Totals may not add due to rounding.)				

The table above, **Education by Highest Level, 2016**, clearly shows that the population aged 25 to 64 in the Antigonish CD is in general, better educated than the same age cohort in the rest of Nova Scotia. The difference compared to the rest of Nova Scotia is particularly significant with respect to persons with apprenticeship or trades certificates or related diplomas. The impact of the relatively high proportion of the Antigonish CD labour force with apprenticeship or trades certificates are related diplomas is reflected in the summary of the findings of the personal interviews and on-line surveys, shown below. Very few of the interviewees and respondents to the online survey indicated that they had difficulty sourcing labour with high levels of education and certifications in skilled trades.

The significantly higher education levels among the Antigonish CD labour force age group, as compared to the rest of Nova Scotia, indicates that attempts to attract new investment to the Antigonish CD should highlight its well educated and trained labour force age group.

Education by Field of Study, 2016				
	Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total
Total, Major Field of Study, Pop 15+	15,930		758,820	
No postsecondary certificate	6,290	39.5%	343,315	45.2%
Education	905	5.7%	30,490	4.0%
Visual arts, performing arts, communications	110	0.7%	10,590	1.4%
Humanities	435	2.7%	18,395	2.4%
Social and behavioural sciences and law	820	5.1%	39,335	5.2%
Business; management & public admin.	1,765	11.1%	91,310	12.0%
Physical & life sciences and technologies	375	2.4%	14,965	2.0%
Mathematics; computer & infor. sciences	280	1.8%	15,465	2.0%
Architecture; engineering; & related tech.	2,310	14.5%	90,610	11.9%
Agriculture; natural resources & conservation	295	1.9%	7,335	1.0%
Health & related fields	1,630	10.2%	65,140	8.6%
Personal; protective & transportation services	705	4.4%	31,830	4.2%
Other	10	0.1%	35	0.0%
Total, Major Field of Study, Pop 25-64	9,740		484,765	
No postsecondary certificate	2,705	27.7%	173,855	35.9%
Education	655	6.7%	19,935	4.1%
Visual arts, performing arts, communications	80	0.8%	8,065	1.7%
Humanities	315	3.2%	13,430	2.8%
Social and behavioural sciences and law	665	6.8%	31,985	6.6%
Business; management & public admin.	1,305	13.4%	67,950	14.0%
Physical & life sciences and technologies	245	2.5%	10,830	2.2%
Mathematics; computer & infor. sciences	235	2.4%	13,390	2.8%
Architecture; engineering; & related tech.	1,585	16.2%	66,345	13.7%
Agriculture; natural resources & conservation	235	2.4%	5,760	1.2%
Health & related fields	1,155	11.8%	49,065	10.1%
Personal; protective & transportation services	565	5.8%	24,120	5.0%
Other	10	0.1%	35	0.0%
Source: Census, 2016 and JME (totals may not add due to rounding.)				

The table above, **Education by Field of Study, 2016**, shows that the Antigonish CD, compared to the rest of Nova Scotia, has higher proportions of its core labour force age group whose fields of study include:

- education;
- humanities;
- social and behavioural sciences and law;
- physical and life sciences and technologies;
- architecture, engineering and related technologies;
- agriculture, natural resources and conservation;
- health and related fields; and
- personal, protective and transportation services.

Investment attraction and programs supporting business expansion should focus on those elements of the economy that placed particular value in the fields of study noted above.

2.4 ECONOMIC SECTORS ENVIRONMENTAL SCAN

The following tables describe the economic sectors that are most likely to employ the residents of the Antigonish CD and the extent to which those concentrations compared to the rest of Nova Scotia. The tables also provide insight into the relative competitiveness of each of the economic sectors in which Antigonish CD residents participate compared to the rest of Canada and to the rest of Nova Scotia.

Experienced Labour Force by Industry; 2016, 2006

Industry	2016				2006			
	Antigonish CD		Rest of Nova Scotia		Antigonish CD		Rest of Nova Scotia	
		% of Total		% of Total		% of Total		% of Total
Total Experienced Labour Force	10,080	-	464,515	-	10,120	-	466,000	-
Agriculture; forestry; fishing and hunting	705	**7.0%**	17,070	**3.7%**	950	9.4%	20,745	4.5%
Mining; quarrying; and oil and gas extraction	125	**1.2%**	3,900	**0.8%**	150	1.5%	3,080	0.7%
Utilities	70	0.7%	2,810	**0.6%**	70	0.7%	2,405	0.5%
Construction	985	**9.8%**	32,570	7.0%	810	8.0%	29,155	6.3%
Manufacturing	465	**4.6%**	31,910	**6.9%**	660	6.5%	41,055	8.8%
Wholesale trade	160	**1.6%**	13,185	**2.8%**	245	2.4%	16,195	3.5%
Retail trade	1,225	12.1%	58,345	12.6%	1,315	13.0%	57,250	12.3%
Transportation and warehousing	280	2.8%	19,380	4.2%	280	2.8%	20,325	4.4%
Information and cultural industries	145	**1.4%**	9,165	**2.0%**	120	1.2%	10,820	2.3%
Finance and insurance	265	**2.6%**	14,975	3.2%	165	1.6%	14,175	3.0%
Real estate and rental and leasing	75	**0.7%**	6,795	1.5%	90	0.9%	6,925	1.5%
Professional; scientific and technical services	365	3.6%	25,700	5.5%	355	3.5%	22,660	4.9%
Management of companies and enterprises	15	0.1%	610	0.1%	-	0.0%	520	0.1%
Administrative & support; waste management & remediation	295	2.9%	21,945	4.7%	285	2.8%	25,555	5.5%
Educational services	1,355	13.4%	34,125	7.3%	1,415	14.0%	33,275	7.1%
Health care and social assistance	1,590	**15.8%**	62,800	**13.5%**	1,245	12.3%	53,450	11.5%
Arts; entertainment and recreation	155	**1.5%**	9,230	2.0%	105	1.0%	8,990	1.9%
Accommodation and food services	900	8.9%	32,215	6.9%	810	8.0%	31,440	6.7%
Other services (except public administration)	375	**3.7%**	18,820	4.1%	485	4.8%	21,665	4.6%
Public administration	405	4.0%	39,820	8.6%	435	4.3%	38,915	8.4%
Industry N/A	135	**1.3%**	9,130	**2.0%**	115	1.1%	7,415	1.6%
	-	100.0%	-	100.0%	-	1	-	100.0%

Source: Censuses and JME (Totals may not add due to rounding.)

The table above, **Experienced Labour Force by Industry; 2016, 2006**, show the economic sectors in which the Antigonish CD's experienced labour force is concentrated. It also compares the Antigonish CD's concentrations to those in the rest of Nova Scotia.

In 2016, 67.0% of the experienced labour force in the Antigonish CD was in the following six economic sectors:

- health care and social assistance (15.8%);
- educational services (13.4%);
- retail trade (12.1%);
- construction (9.8%);
- accommodation and food services (8.9%); and
- agriculture; forestry; fishing and hunting (7.0%).

In 2016, 68.3% of the experienced labour force in the rest of Nova Scotia was in the following eight economic sectors:

- health care and social assistance (13.5%);
- retail trade (12.6%);
- public administration (8.6%);
- educational services (7.3%);
- construction (7.0%);
- accommodation and food services (6.9%);
- manufacturing (6.9%); and
- professional; scientific and technical services (5.5%).

As one would expect the smaller economy of the Antigonish CD has a less diversified economic base than the rest of Nova Scotia.

In 2016 the Antigonish CD showed higher concentrations of its experienced labour force, compared to the rest of Nova Scotia, in the following economic sectors:

- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction;
- utilities;
- construction;
- education services;
- health care and social assistance; and
- accommodation and food services.

Ten years previous the Antigonish CD showed higher concentrations compared to the rest of Nova Scotia in the following economic sectors:

- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction;
- utilities;
- construction;
- retail;
- education services;
- health care and social assistance;
- accommodation and food services; and
- other services (except public administration).

From 2006 to 2016 the proportion of the experienced labour force in the Antigonish CD increased in the following sectors as a share of the total experienced labour force:

- construction;
- information and cultural industries;
- finance and insurance;
- professional; scientific and technical services;
- management of companies and enterprises;
- administrative & support; waste management & remediation;
- health care and social assistance;
- arts; entertainment and recreation;
- accommodation and food services; and
- industry n/a.

The percentage growth in the number of persons in the construction sector, information and cultural industries, finance and insurance, health care and social assistance sectors and the arts, entertainment and recreation sector was particularly large.

From 2006 to 2016 the proportion of the experienced labour force in the Antigonish CD decreased in the following sectors as a share of the total experienced labour:

- agriculture; forestry; fishing and hunting;
- mining; quarrying; and oil and gas extraction;
- manufacturing;
- wholesale trade;
- retail trade;
- real estate and rental and leasing;
- education services;
- other services (except public administration); and
- public administration.

The percentage decrease in the number of persons working in:

- agriculture; forestry; fishing and hunting;
- mining; quarrying; and oil and gas extraction;
- manufacturing;
- wholesale trade;
- real estate and rental and leasing; and
- other services (except public administration)

was particularly large.

2.4.1 LOCATION QUOTIENTS

Location Quotients measure the relative specialization of sectors in the Antigonish CD compared to the rest of Canada and the rest of Nova Scotia. **Appendix 2: Location Quotients and Shift Share Analyses; Technical Details** provides details on the calculation and interpretation of Location Quotients.

Measures of Relative Concentration (Location Quotient) by Industry, 2001 - 2016

	Antigonish CD LQ wrt Rest of Canada				Antigonish CD LQ wrt Rest of NS			
Industry	2001	2006	2011	2016	2001	2006	2011	2016
Agriculture; forestry; fishing and hunting	2.37	3.06	3.39	2.91	2.29	2.10	2.41	1.89
Mining; quarrying; and oil and gas extraction	1.53	1.06	0.90	0.85	2.35	2.24	1.89	1.47
Utilities	0.27	0.89	0.58	0.94	0.31	1.34	0.79	1.14
Construction	1.06	1.28	1.33	1.32	1.10	1.27	1.43	1.38
Manufacturing	0.33	0.56	0.43	0.53	0.46	0.74	0.55	0.67
Wholesale trade	0.61	0.56	0.32	0.44	0.72	0.69	0.41	0.56
Retail trade	1.30	1.16	1.42	1.07	1.15	1.05	1.27	0.96
Transportation and warehousing	0.42	0.58	0.48	0.59	0.48	0.63	0.55	0.66
Information and cultural industries	0.55	0.49	0.55	0.63	0.60	0.51	0.62	0.72
Finance and insurance	0.62	0.40	0.42	0.61	0.75	0.53	0.54	0.81
Real estate and rental and leasing	0.65	0.50	0.33	0.41	0.71	0.60	0.39	0.50
Professional; scientific and technical services	0.44	0.53	0.48	0.50	0.62	0.72	0.66	0.65
Management of companies and enterprises	0.67	0.25	0.20	0.96	0.88	0.27	0.30	1.12
Administrative & support; waste mgt. & remediation	0.43	0.67	0.56	0.67	0.33	0.51	0.47	0.61
Educational services	2.54	2.08	2.21	1.85	2.30	1.95	2.01	1.82
Health care and social assistance	1.37	1.22	1.28	1.36	1.14	1.07	1.11	1.16
Arts; entertainment and recreation	0.84	0.51	0.65	0.75	0.90	0.54	0.70	0.77
Accommodation and food services	1.24	1.21	0.97	1.29	1.17	1.18	0.94	1.28
Other services (except public administration)	1.28	1.00	0.86	0.84	1.23	1.03	0.92	0.91
Public administration	0.57	0.75	0.70	0.66	0.38	0.51	0.49	0.47
Cells highlightd in red = Antigonish CD concentration is 25% or greater than in the comparative economy.								
Cells highlightd in blue = Antigonish CD concentration is 25% or more below that in the comparative economy.								
Source: Census and JME								

The table above, **Measures of Relative Concentration (Location Quotient) by Industry, 2001-2016**, describe the relative industry concentrations in the Antigonish CD with respect to (wrt) the rest of Canada[2] and with respect to (wrt) the rest of Nova Scotia.

2.4.1.1 CONCENTRATIONS IN THE ANTIGONISH CD WITH RESPECT TO THE REST OF CANADA

In 2001 the Antigonish CD's concentrations in the following sectors were 25% or greater than that in the rest of Canada (RoC) economy:

- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction;
- retail trade;
- education services;

[2] The location quotients can be interpreted as follows. In 2001 the agriculture, forestry, fishing and hunting sector in the Antigonish CD had a location quotient with respect to the rest of Canada of 2.37. This means that its concentration was 2.37 times that of the rest of Canada concentration. The location quotient of 1.00 would mean that the concentration was the same as in the rest of Canada concentration.

- health care and social assistance; and
- other services (except public administration).

By 2016 the Antigonish CDs concentrations in the following sectors were 25% or greater than in the rest of Canada economy:
- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction;
- construction;
- educational services; and
- health care and social assistance; and
- accommodation and food services.

The Antigonish CD maintained its relatively high concentrations in agriculture, forestry, fishing and hunting; mining, quarrying and oil and gas extraction; education services; and health care and social services.

The Antigonish CD lost its relatively high concentration in mining, quarrying and oil and gas extraction; retail trade; and other services (except public administration).

The Antigonish CD gained relatively high concentrations in construction, and accommodation and food services.

These changes suggest that the construction sector and the accommodation and food sector in the Antigonish CD underwent major growth spurts from 2001 to 2016, compared to the rest of Canada.

2.4.1.2 CONCENTRATIONS IN THE ANTIGONISH CD WITH RESPECT TO THE REST OF NOVA SCOTIA

In 2001 the Antigonish CD's concentrations in the following sectors were 25% or greater than that in the rest of Nova Scotia economy:
- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction; and
- education services.

By 2016 the Antigonish CD's concentrations in the following sectors were 25% or greater than in the rest of Nova Scotia economy:
- agriculture, forestry, fishing and hunting;
- mining, quarrying and oil and gas extraction;
- construction;
- educational services; and
- accommodation and food services.

The Antigonish CD maintained its relatively high concentrations in agriculture, forestry, fishing and hunting; mining, quarrying and oil and gas extraction; and education services.

The Antigonish CD achieved relatively high concentrations in construction, and accommodation and food services.

These changes suggest that the construction sector and the accommodation and food sector in the Antigonish CD underwent major growth spurts from 2001 to 2016, compared to the rest of Nova Scotia.

2.4.2 Shift-Share

Shift-Share it is used to measure the portion of each sector's growth in the Antigonish CD that is attributable to the growth of the national (provincial) economy, to the industry mix of sectors in the Antigonish CD and to factors that are unique in the Antigonish CD (regional shift) relative to RoC and the rest of Nova Scotia economies. **Appendix 2: Location Quotients and Shift Share Analyses; Technical Details** provides details on the calculation and interpretation of Shift-Share analyses.

2.4.2.1 Shift Share Analysis of Antigonish CD Economic Sectors with Respect to the Rest of Canada

Shift-Share Analysis of Antigonish Industries wrt Rest of Canada, 2006-2016

Industry	Location Quotient wrt RoC 2006	Change in Expereienced Labour Force	National Growth Share	Industry Mix	Regional Shift	Location Quotient wrt RoC 2016
Total Industries		(56)	834	130	(1,020)	
Agriculture; forestry; fishing and hunting	3.06	(246)	79	(223)	(103)	2.91
Mining; quarrying; and oil and gas extraction	1.06	(25)	13	8	(46)	0.85
Utilities	0.89	(0)	6	(4)	(2)	0.94
Construction	1.28	173	68	157	(51)	1.32
Manufacturing	0.56	(196)	55	(190)	(61)	0.53
Wholesale trade	0.56	(85)	20	(45)	(61)	0.44
Retail trade	1.16	(92)	110	23	(225)	1.07
Transportation and warehousing	0.58	(0)	23	(4)	(20)	0.59
Information and cultural industries	0.49	25	10	(9)	24	0.63
Finance and insurance	0.40	100	14	10	75	0.61
Real estate and rental and leasing	0.50	(15)	8	1	(24)	0.41
Professional; scientific and technical services	0.53	9	30	38	(58)	0.50
Management of companies and enterprises	0.25	12	0	1	11	0.96
Administrative & support; waste mgt. & remediation	0.67	9	24	8	(22)	0.67
Educational services	2.08	(62)	118	123	(304)	1.85
Health care and social assistance	1.22	342	104	202	36	1.36
Arts; entertainment and recreation	0.51	50	9	1	40	0.75
Accommodation and food services	1.21	88	68	45	(24)	1.29
Other services (except public administration)	1.00	(111)	40	(44)	(108)	0.84
Public administration	0.75	(31)	36	31	(98)	0.66

<u>Location Quotient</u>: Greater than 1.00 if sector in Antigonish CD has greater share of overall employment than in the RoC.

Cells highlightd in red = Antigonish CD concentration is 25% or greater than in the comparative economy.

Cells highlightd in blue = Antigonish CD concentration is 25% or more below that in the comparative economy.

<u>National Growth Share:</u> If the Antigonish area's sectors grew at the overall Canadian growth rate, what would be the result? (Note: RoC growth 2006-16 = 8.3%. Antigonish CD growth = -0.5%)

<u>Industry Mix:</u> How many jobs were created/not created in each sector due to differences in Canadian sector and overall Canadian growth rates? (Positive if Canadian Sector is performing better than the overall Canadian economy.)

<u>Regional Shift</u>: What are the area's leading and lagging sectors? (Positive if Antigonish sector is performing better than RoC sector.)

Source: Censuses and JME (Totals may not add due to rounding.)

The table above, **Shift-Share Analysis of Antigonish Industries wrt Rest of Canada, 2006 – 2016**, describes the portion of each economic sector's growth in the Antigonish CD is attributable to the growth in the rest of Canada economy, to the competitive mix of sectors in the Antigonish CD and to factors that are unique to the Antigonish CD with respect to the rest of Canada economy.

National Growth Share. If the economic sectors in the Antigonish CD economy had followed the national growth rate for the overall economy they would have in total added 834 jobs to the Antigonish CD's economy.

Industry Mix. The overall number of jobs that would have been added to industry mix effects is about 130. Sectors that show a decrease in the number of jobs due to the industry mix effect on the sectors in the rest of Canada economy that are growing more slowly than the overall growth in the rest of Canada economy. It is important to note that many of the sectors showing a negative industry mix effect are also the sectors for which the Antigonish CD has a very high concentration with respect to the rest of Canada. This suggests that future planning needs to focus on expanding the sectors in the Antigonish CD economy that are growing faster than the overall Canadian economy.

Regional Shift. The regional shift effect on a sector in the Antigonish CD economy will be positive if the Antigonish CD sector is performing better than the same sector in the rest of the Canadian economy. However, relatively few sectors in the Antigonish CD economy are performing better than their sister sectors in the rest of Canada economy. Moreover, the Antigonish CD sectors that are performing poorly with respect to the same sectors in the rest of Canada economy are also sectors that have a high concentration of employment with respect to the rest of Canada economy. This suggests that future planning needs to focus on expanding the sectors in the Antigonish economy that are already growing faster than the same sectors in the rest of Canada economy.

The Shift-Share results are interpreted as follows.

Take for example the agriculture, forestry, fishing and hunting sector with respect to the rest of Canada (RoC):

- The National Growth Share indicates that if this sector grew at the rate of the overall economy in the RoC, it would have added 79 jobs from 2006 to 2016.
- The Industry Mix is negative 223 jobs. A negative Industry Mix means that the agriculture, forestry, fishing and hunting sector in the RoC is growing more slowly than the overall economy in the RoC. It is a lagging sector in the overall economy of the RoC.
- The Regional Shift is negative 103 jobs. A negative Regional Shift means that the agriculture, forestry, fishing and hunting sector in the Antigonish CD is lagging behind its sister sector in the RoC.

The Location Quotient of agriculture, forestry, fishing and hunting with respect to the RoC is 2.91, i.e. almost three times higher than in the RoC.

The agriculture, forestry, fishing and hunting sector:

- has the highest concentration with respect to the RoC;
- is a lagging sector in the RoC; and
- in the Antigonish CD it is lagging behind its sister sector in the RoC.

Hence, this sector, as it stands, is not likely an engine for growth. The questions for planners are:

- what elements of this sector are lagging and why; and
- what, if anything, can be done to change their trajectory.

Take for example the education services sector:

- The National Growth Share indicates that if this sector grew at the rate of the overall economy in the RoC, it would have added 118 jobs from 2006 to 2016.
- The Industry Mix is positive at 123 jobs. A positive Industry Mix means that the education services sector in the RoC is growing more quickly than the overall economy in the RoC. It is a leading sector in the overall economy of the RoC.
- The Regional Shift is negative 304 jobs. A negative Regional Shift means that the education services sector in the Antigonish CD is lagging behind its sister in the RoC.

The Location Quotient of education services with respect to the RoC is 1.85, i.e. almost two times higher than in the RoC.

The education services sector:

- has the second highest concentration with respect to the RoC;
- is a leading sector in the RoC;
- but the sector in the Antigonish CD is lagging behind its sister sector in the RoC.

Hence, this sector could be an engine for growth. The questions for planners are:

- what elements of this sector are lagging in the Antigonish CD and why; and
- what, if anything, can be done to change their trajectory in the Antigonish CD.

2.4.2.2 Shift Share Analysis of Antigonish CD Economic Sectors with Respect to the Rest of Nova Scotia

Industry	Location Quotient wrt RoNS 2006	Change in Expereienced Labour Force	Provincial Growth Share	Industry Mix	Regional Shift	Location Quotient wrt RoNS 2016
Total Industries		(55)	(70)	89	(74)	
Agriculture; forestry; fishing and hunting	2.10	(246)	(7)	(162)	(78)	1.89
Mining; quarrying; and oil and gas extraction	2.24	(25)	(1)	41	(65)	1.47
Utilities	1.34	(0)	(0)	12	(12)	1.14
Construction	1.27	173	(6)	101	78	1.38
Manufacturing	0.74	(196)	(5)	(142)	(49)	0.67
Wholesale trade	0.69	(85)	(2)	(44)	(40)	0.56
Retail trade	1.05	(92)	(9)	34	(117)	0.96
Transportation and warehousing	0.63	(0)	(2)	(11)	13	0.66
Information and cultural industries	0.51	25	(1)	(18)	43	0.72
Finance and insurance	0.53	100	(1)	10	90	0.81
Real estate and rental and leasing	0.60	(15)	(1)	(1)	(13)	0.50
Professional; scientific and technical services	0.72	9	(2)	50	(38)	0.65
Management of companies and enterprises	0.27	12	(0)	1	11	1.12
Administrative & support; waste mgt. & remediation	0.51	10	(2)	(38)	50	0.61
Educational services	1.95	(62)	(10)	46	(99)	1.82
Health care and social assistance	1.07	343	(9)	227	125	1.16
Arts; entertainment and recreation	0.54	50	(1)	4	47	0.77
Accommodation and food services	1.18	89	(6)	26	69	1.28
Other services (except public administration)	1.03	(111)	(3)	(60)	(47)	0.91
Public administration	0.51	(31)	(3)	13	(41)	0.47

Shift-Share Analysis of Antigonish Industries wrt Rest of Nova Scotia, 2006-2016

Location Quotient: Greater than 1.00 if sector in Antigonish CD has greater share of overall employment than in the RoNS.

Cells highlightd in red = Antigonish CD concentration is 25% or greater than in the comparative economy.

Cells highlightd in blue = Antigonish CD concentration is 25% or more below that in the comparative economy.

Provincial Growth Share: If the Antigonish area's sectors grew at the overall Canadian growth rate, what would be the result? (Note: RoNS growth 2006-16 = -0.7%. Antigonish CD growth = -0.5%)

Industry Mix: How many jobs were created/not created in each sector due to differences in Rest of NS sector and overall RoNS growth rates? (Positive if RoNS Sector is performing better than the overall RoNS economy.)

Regional Shift: What are the area's leading and lagging sectors? (Positive if Antigonish sector is performing better than RoNS sector.)

Source: Censuses and JME

The table above, **Shift-Share Analysis of Antigonish Industries wrt Rest of Nova Scotia, 2006 – 2016**, describes the portion of each economic sector's growth in the Antigonish CD is attributable to the growth in the rest of Nova Scotia economy, to the industry mix of sectors in the Antigonish CD and to factors that are unique to the Antigonish CD (regional shift) with respect to the rest of Nova Scotia economy.

Provincial Growth Share. If the economic sectors in the Antigonish CD economy had followed the rest of Nova Scotia growth rate for the overall economy they would have in total eliminated 70 jobs in the Antigonish CD's economy. This is the case because although the rest of Nova Scotia and Antigonish CD growth rates were both negative from 2006 to 2016 the rest of Nova Scotia growth rate was more negative than that of the Antigonish CD.

Industry Mix. The overall number of jobs that would have been added to industry mix effects is about 89. Sectors that show a decrease in the number of jobs due to the industry mix effect our sectors in the rest of Nova Scotia economy that are growing more slowly than the overall growth in the rest of Nova Scotia economy. It is important to note that many of the sectors showing a negative industry mix effect are also the sectors for which the Antigonish CD has a very high concentration with respect to the rest of Nova Scotia. This suggests that future planning needs to focus on expanding the sectors in the Antigonish economy that are growing faster than the overall Nova Scotia economy.

Regional Shift. The regional shift effect on a sector in the Antigonish CD economy will be positive if the Antigonish CD sector is performing better than the same sector in the rest of the Nova Scotia economy. However, relatively few sectors in the Antigonish CD economy are performing better than their sister sectors in the rest of Nova Scotia economy. Moreover, the Antigonish CD sectors that are performing poorly with respect to the same sectors in the rest of Nova Scotia economy are also sectors that have a high concentration of employment with respect to the rest of Nova Scotia economy. This suggests that future planning needs to focus on expanding the sectors in the Antigonish economy that are already growing faster than the same sectors in the rest of Nova Scotia economy.

2.5 MATERIAL WELLBEING ENVIRONMENTAL SCAN

The following tables provide an overview of the after-tax household income of households in the Antigonish CD compared to households in the rest of Nova Scotia in the prevalence of low income households in the Antigonish CD compared to the rest of Nova Scotia.

Household Income; Antigonish CD and Rest of Nova Scotioa (2015)					
	Antigonish CD		Rest of Nova Scotia		
Measure of Household Income	$	% Diff. Ave. Vs. Median	$	% Diff. Ave. Vs. Median	Antigonish Hld. Inc. as % of RoNS
Median total income of hlds	$ 64,558	19.6%	$ 60,686	20.9%	106.4%
Average total income of hlds	$ 80,334		$ 76,724		104.7%
Median after-tax income of hlds	$ 56,192	14.7%	$ 53,066	16.1%	105.9%
Average after-tax income of hlds	$ 65,898		$ 63,245		104.2%
Median total income of one-person hlds	$ 30,733	28.9%	$ 30,370	23.2%	101.2%
Average total income of one-person hlds	$ 43,250		$ 39,525		109.4%
Median total income of two-or-more-person hlds	$ 82,793	13.8%	$ 77,019	16.6%	107.5%
Average total income of two-or-more-person hlds	$ 96,041		$ 92,308		104.0%
Median after-tax income, two-or-more-person hlds	$ 70,643	10.4%	$ 66,453	12.5%	106.3%
Average after-tax income, two-or-more-person hlds	$ 78,847		$ 75,953		103.8%
Source: Census and JME (Totals may not add due to rounding.)					

The table above, **Household Income; Antigonish CD and the Rest of Nova Scotia (2015)**, describes the before and after tax incomes of households in the Antigonish CD compared to households in the rest of Nova Scotia. It clearly shows that over a wide range of measures for a wide range of household types household incomes in the Antigonish CD are greater than those in the rest of Nova Scotia. The table also shows that differences between the average household incomes and median household incomes tend to be less significant among Antigonish CD households than of those in the rest of Nova Scotia. This suggests that income disparity between households in the Antigonish CD is less than that experienced between households in the rest of Nova Scotia and at the same time average and median household incomes in the Antigonish CD are higher than those in the rest of Nova Scotia.

This suggests that there may be room for higher end personal consumption services in the Antigonish CD.

After-Tax Household Income Groups, 2015		
Income Croup	% of Households	
	Antigonish CD	Rest of NS
Up to $29;999	21.9%	23.5%
$30,000 to $49,999	22.4%	23.3%
$50,000 to $69,999	18.1%	19.1%
$70,000 to $99,999	18.9%	18.2%
$100,000 and higher	18.7%	15.9%
	100.0%	100.0%
Source: Census and JME (Totals may not add due to rounding.)		

The table above, **After-Tax Household Income Groups, 2015**, describes the distribution of household income levels in the Antigonish CD and the rest of Nova Scotia. The table clearly shows that on a percentage basis the Antigonish CD has a lower percentage of households in the bottom two income groups than is the case in the rest of Nova Scotia. Conversely, the Antigonish CD has a higher percentage of households in the top two income groups than is the case in the rest of Nova Scotia. This is more evidence that there may be room for higher and personal consumption services in the Antigonish CD, at least compared to the rest of Nova Scotia.

Prevalence of Low After Tax Income, 2015				
Low After Tax Income Persons	Antigonish CD		Rest of Nova Scotia	
	#	% of Total Pop.	#	% of Total Pop.
Total Low After Tax Income Persons	2,625	13.6%	152,330	16.9%
0 to 17 years	575	3.0%	34,950	3.9%
18 to 64 years	1,415	7.3%	86,940	9.6%
65 years and over	635	3.3%	30,440	3.4%
Source: Census and JME (Totals may not add due to rounding.)				

The table above, **Prevalence of Low After-Tax Income[3], 2015**, shows low-income persons as a percentage of the total population. The table clearly shows that the prevalence of low-income persons in the Antigonish CD is substantially less than that in the rest of Nova Scotia. This bodes well for the maintenance of community harmony. Future planning for the Antigonish CD should focus on policies, plans and programs that will help to identify low-income persons and households and provide them with the type of support needed to raise them out of low income conditions. This will not only expand the demand for personal consumption services in the Antigonish CD but will also help to improve community harmony within the Antigonish CD.

[3] Low-income measure, after tax (LIM-AT) - The Low-income measure, after tax, refers to a fixed percentage (50%) of (Canadian) median adjusted after-tax income of private households. The household after-tax income is adjusted by an equivalence scale to take economies of scale into account. This adjustment for different household sizes reflects the fact that a household's needs increase, but at a decreasing rate, as the number of members increases. (https://www12.statcan.gc.ca/census-recensement/2016/dp-pd/hlt-fst/inc-rev/Table.cfm?Lang=Eng&T=304&S=87&O=A&RPP=25)

2.6 INTERVIEWS AND ONLINE SURVEY HIGHLIGHTS

As described earlier in this report despite two efforts we were unable to assemble sufficient participants for the group consultation work. This was most likely because the Municipality and the Town as well as ESREN had undertaken quite extensive community consultation before this study. The group consultation was replaced with a more extensive personal interview program and a web based survey. Eleven personal interviews were completed and 34 persons completed the online survey. The data from the personal interviews were incorporated into the online survey results thus providing a sample of 45 persons.[4]

What follows is a top line summary of the findings of the personal interviews and online surveys. **Appendix 1 Online Survey** provides a copy of the survey. The personal interviews followed the questions in the online survey and as time allowed notes on topics brought up by the interviewees were taken.

1. Where is the business or organization head office located?
- Total answering: 45
    - Town of Antigonish: 28 (62%)
    - Municipality of the County of Antigonish: 12 (27%)
    - Elsewhere: 5 (11%)

2. Does this business/organization have multiple locations?
- Total answering: 45
    - Yes: 22 (49%)
    - No: 23 (51%)

3. Please identify the number of locations in each of the following areas:
- Total answering: 45
    - Town of Antigonish: 37 (52%)
    - Municipality of the County of Antigonish: 19 (28%)
    - Elsewhere: 14 (20%)

4. Intentionally omitted.

5. Why was the business or organization established in the Antigonish Area?
- Total answering: 30
    - To serve the local market: 16 (53%)
    - Family lived in the area: 17 (57%)
    - Best location to serve Northern Nova Scotia: 9 (30%)
    - Cost to set up and run business is very favourable: 8 (27%)
    - Location near University is very important: 6 (20%)
    - Immigrated to the area and needed to create my own job: 5 (17%)
    - Thought the area was a good place to live and raise a family: 10 (33%)
    - Intended to open more locations and it was a good base from which to work: 2 (7%)
    - Other (please specify): 7 (23%)

[4] Raw data, minus information that could identify the respondents, were provided to the client as separate Excel files and a Word document.

6. How many people does the business or organization employ?

- Total answering: 42
  - in Town of Antigonish: 21 answered, 988 employed
  - in Municipality of the County of Antigonish: 14 answered 144 employed
  - in Elsewhere: 7 answered 279 employed

7. How many people has the business or organization hired in the last 18 months?

- Total answering: 21
- Total hires: 163
- Average hires per firm: 8

8. How many people has the business or organization laid off or let go in the last 18 months?

- Total answering: 11
- Total layoffs: 21
- Average layoffs per firm: 2

9. What is your main line of business or service provided by the business or organization?

- Total answering: 32
  - Forestry, fishing, mining, quarrying, oil and gas: 3 (9%)
  - Construction: 1 (3%)
  - Manufacturing: 5 (16%)
  - Trade: 5 (16%)
  - Professional, scientific and technical services: 5 (16%)
  - Primarily services to businesses and properties: 1 (3%)
  - Primarily tourism related: 2 (6%)
  - Primarily personal services: 1 (3%)
  - Educational services: 2 (6%)
  - Health care and social assistance: 1 (3%):
  - Accommodation and food services: 6 (19%)

10. Where, in percentage terms, are the markets or service areas for the business organization?

- Total answering 27
  - Within the Town and County: 27 (48% of total sales (ave.))
  - Municipalities of Guysborough & St. Mary's, Mulgrave & Port Hawkesbury: 24 (18% of total sales (ave.))
  - In the rest of Nova Scotia: 22 (25% of total sales (ave.))
  - In the rest of Atlantic Canada: 15 (20% of total sales (ave.))
  - In the rest of Canada 13 (11% of total sales (ave.))
  - Exports outside of Canada: 12 (15% of total sales (ave.))

11. Intentionally omitted.

12. Can your customers or clients place orders and pay on-line?

- Total answering: 29
  - Yes: 15 (52%)
  - No: 14 (48%)

13. Do you believe that, in general, the business climate in the Antigonish Area (the Town and the County) favours the expansion of existing businesses or organizations?

- Total answering: 29
  - Yes: 12 (41%)
  - No: 12 (41%)
  - Don't Know/No Opinion: 5 (17%)

14. Do you believe that, in general, the business climate in the Antigonish Area (the Town and the County) favours the attraction of new businesses or organizations?

- Total answering: 25
  - Yes: 10 (40%)
  - No: 10 (40%)
  - Don't Know/No Opinion: 5 (20%)

15. Thinking specifically about the business or organization you represent, do you believe that conditions favour expansion?

- Total answering: 24
  - Yes: 13 (54%)
  - No: 8 (33%)
  - Don't Know/No Opinion: 3 (13%)

15b. Is your business or organization considering expanding in the next one to three years?

- Total answering: 22
  - Yes: 8 (36%)
  - No: 13 (59%)
  - Don't Know/No Opinion: 1 (5%)

16. Has the business or organization tried to purchase land in the Town or County in the last five years to expand or start a venture?

- Total answering: 24
  - Yes: 3 (13%)
  - No: 21 (88%)

16a. What type of business did you intend to locate on the land?

- Total answering:3
  - Transportation and warehousing: 1 (33%)
  - Trade: 2 (67%)

16b. What local location factors or attributes most influenced the site selection?

- Total answering 3
  - size: 1 (33%)
  - price 3 (100%)
  - walk-by traffic: 1 (33%)
  - close to other business properties: 1 (33%)

16c. Was the land purchase successful?

- Total answering: 3
  - Yes: 2 (67%)
  - No: 1 (33%)

16d. Whether or not the purchase was successful, what if any challenges were faced in the purchasing process?

- Total answering: 2
  - No suitable land available: 2 (100%)
  - Land prices were high: 1 (50%)

16e. Whether or not the land purchase was successful would a location in a new, fully serviced, commercial or industrial park have been preferable?

- Total answering: 3
  - Yes: 0 (0%)
  - No: 3 (100%)

17. If the business or organization has not tried to buy land in the Antigonish area in the last five years would the availability of a new, fully serviced, commercial or industrial park made it more likely to buy land in the Antigonish area?

- Total answering: 22
  - Yes: 2 (9%)
  - No: 20 (91%)

18. Has the business or organization tried to rent space in the Town or the County in the last five years?

- Total answering: 25
  - Yes: 7 (28%)
  - No: 18 (77%)

18a. While trying to rent space what type of business or organization was meant for the rental space?

- Total answering: 7
  - Trade: 3 (43%)
  - Finance, insurance, real estate and leasing: 1 (14%)
  - Professional, scientific and technical services: 2 (29%)
  - Educational services: 1 (14%)

18b. What local location factors/attributes most influenced the rental site selection?
- Total answering: 7
  - size: 7 (100%)
  - lease rate: 6 (86%)
  - street-level location: 4 (57%)
  - ability to sublet: 1 (14%)
  - flexibility in lease conditions: 2 (29%)
  - amount of renovation required to meet needs: 6 (86%)
  - walk-by traffic: 3 (43%)
  - parking availability: 5 (71%)
  - quality of the business neighbourhood: 4 (57%)
  - access to highways: 1 (14%)
  - access to central water service: 2 (29%)
  - access to central sewer services: 2 (29%)
  - availability of fire hydrant service: 1 (14%)
  - access to high-speed internet: 5 (71%)
  - access to cell phone service: 3 (43%)
  - other (please specify): 1 (14%)

18c. Were you successful in your attempts renting?
- Total answering: 7
  - Yes: 5 (71%)
  - No: 2 (29%)

18d. What (if any) challenges did you face trying to rent space?
- Total answering: 2
  - No suitable rental space available: 2 (100%)
  - Rental prices were too high: 1 (50%)
  - Did not have access to information needed to make an informed decision: 1 (50%)

19. Does the business or organization have challenges in finding General Labour?
- Total answering: 24
  - Yes: 11 (36%)
  - No: 10 (59%)
  - No Opinion: 3 (13%)

19a. Are your challenges in finding General Labour because:
- Total answering: 17
  - There are simply no persons available: 5 (29%)
  - Applicants were not 'job ready' for even general labour work: 4 (24%)
  - Applicants would not work for the wages offered: 2 (12%)
  - Applicants wanted only full-time work: 1 (6%)
  - Other (please specify): 5 (29%)
    - location, expensive to drive there for employment
    - hard work, cold, physical work ethic
    - work ethic, leave after university
    - seasonal work
    - not talented enough. not good with hands

20. Does the business or organization have challenges in finding Managerial, Professional and Technical labour (e.g. accountant, engineers, data managers and processors)?

- Total answering: 23
  - Yes: 10 (43%)
  - No: 11 (48%)
  - No Opinion: 2 (10%)

20a. Were your problems in finding Managerial, Professional and Technical labour because:

- Total answering: 11
  - There are simply no skilled persons available: 6 (55%)
  - Applicants were not "job ready" for Managerial, Professional and Technical work: 3 (27%)
  - Applicants would not work for the wages offered 1 (9%)
  - Applicants wanted only full-time work: 1 (9%)
  - Something else: 3 (27%)
    - very limited supply: 2
    - location: 1

21. Does the business or organization have challenges in finding Skilled Trades labour (e.g. electricians, pipe fitters, carpenters, welders etc)?

- Total answering: 24
  - Yes: 8 (33%)
  - No: 12 (50%)
  - No Opinion: 4 (17%)

21a. Were your troubles in finding Skilled Trades labour because:

- Total answering: 8
  - There are simply no skilled persons available: 3 (38%)
  - Applicants were not "job ready" for skilled trades jobs: 2 (25%)
  - Applicants would now work for the wages offered: 1 (13%)
  - Applicants wanted only full-time work: 1 (13%)
  - Something else: 3 (38%)
    - very limited supply 2
    - Did not respond to inquiries 1

22. Do you now have challenges in finding skilled Marketing sales and communications related labour?

- Total answering: 25
  - Yes: 3 (8%)
  - No: 13 (56%)
  - No Opinion: 9 (36%)

22a. Were your problems in finding Marketing Sales and Communications related labour because:

- Total answering: 3
  - There are simply no skilled persons available: 2 (67%)
  - Applicants were not "job ready" for Marketing Sales and Communications jobs: 1 (33%)
  - Applicants would not work for the wages offered: 0
  - Applicants wanted only full-time work: 0
  - Something else: 0

23. Is the business or organization able to quickly and efficiently acquire the consumables or goods and services you need for the day to day operations (i.e. not depreciable for income tax purposes)?

- Total answering: 22
  - Yes: 16 (73%)
  - No: 6 (27%)
    - fishing supplies 1
    - spare parts 2
    - small equipment welding and repair 1
    - refrigeration repair and maintenance 1
    - large equipment repair and maintenance 1
  - No Opinion: 0

24. Is the business or organization able to quickly and efficiently acquire the capital items (i.e. - depreciable for income tax purposes) you need to purchase only infrequently (e.g. capital goods such as furniture, office equipment, computers and communication equipment, etc)?

- Total answering: 23
  - Yes: 20 (87%)
  - No : 3 (13%)
    - retail store specialty equipment/furnishings
    - boats
  - No Opinion: 0 (0%)

25. In the next one to five years, is there a possibility that the business or organization will be sold or closed due to the retirement of its principals?

- Total answering: 25
  - Yes: 6 (24%)
  - No: 14 (56%)
  - I'm Not Certain: 5 (20%)

25a. Is there a succession plan for the sale of the business or organization?

- Total answering: 12
  - Yes: 4 (33%)
  - No: 7 (58%)
  - Prefer not to answer: 1 (8%)

26. Where should there be a greater focus on economic development efforts (Please identify up to three options.)

- Total answering: 26
  - Tourism Development: 17 (65%)
  - Retention and expansion of existing businesses: 14 (54%)
  - Attract primary sector businesses (agr., forestry, quarries & mining & other extractive industries: 11 (42%)
  - Attraction of new manufacturing businesses: 9 (35%)
  - Attraction of new trade (wholesale, retail) businesses: 4 (15%)
  - Attraction of new business and personal service businesses: 5 (19%)
  - Attraction of new accommodation and tourist service related businesses: 6 (23%)
  - Attraction of new transportation and warehousing businesses: 3 (12%)
  - Attraction of new culture and recreation related businesses: 6 (23%)
  - Connectivity Infrastructure and Innovation: 9 (35%)
  - Streetscape or beautification development: 4 (15%)
  - Something else: 12 (46%)
    - start working as a town and county together
    - Focus on events that bring the people together in town
    - more people
    - federally certified cold storage
    - university should play bigger role 2
    - marketing for the region
    - province does not focus on area
    - cross-marketing between sectors
    - improve timeliness of permitting process
    - more support for innovation
    - more business training in school and outside of school
    - develop our natural resources
    - save Northern Pulp jobs - Allow Paper Excellence time to set up new system
    - Improve downtown parking
    - Industrial park development around town
    - Tie in university programs with new development and infrastructure improvements

3 ASSESSMENT OF OPPORTUNITIES AND RECOMMENDATIONS

3.1 BACKGROUND

Our assessment of unique, sustainable and realistic growth opportunities for the Antigonish area and the recommendations that follow from the opportunities are based on our:

- assessment of historic and current economic and community assets in the Antigonish area;
- review of previous studies and related documentation and accumulated data;
- previous and current socio-economic research;
- stakeholder consultations via personal interviews and an on-line survey targeted to members of the Chamber of Commerce;
- environmental scans;
- application of Location Quotients and the Shift-Share Analysis to provide measures:
  - of the current economic sector specialisations in the Antigonish area's economy;
  - of change in specialisations over time;
  - to account for the competitiveness of the Antigonish area's economic sectors, and
  - to describe the change in the competitiveness of the sectors over time;
- assessment of the potential growth of current economic sectors; and
- consideration of global and regional economic growth trends.

Economic plans, studies and related reports focusing on Antigonish Town and County from over the last decade have been reviewed as background for this report. In part, this has been to help measure progress, or not, in achieving economic development goals and objectives for the region and to identify, if possible, the reason for success or failure.

Some of the reports, while interesting from a historical perspective, were outdate and not particularly helpful for the current analysis. Others offered a platform for consideration of the numerous elements in our review and to help focus on a strategic path forward. Generally, the perspective taken in consideration of these reports and studies is one focused on economic and business development.

Some notes of interest from the reports include the following.

<u>Integrated Community Sustainability Plan (Feb. 2010).</u> Although almost a decade old, this document provides an excellent overview of most of the relevant issues. It was written to run to 2025. The approach integrates the requirements and concerns of both the Town and the County in addressing the issues.

<u>Investment Attraction Study (Feb. 2013).</u> This report considered various opportunities to attract new business. The financial services sector was considered very competitive and likely not worth the effort as no special incentive could be offered. It was noted that the renewable energy sector is fast growing and worth targeting as is the related sector of Clean/Green technologies. It was noted that many companies in these sectors start as research projects.

<u>Antigonish Town Climate Change Action Plan (March 2013) and Municipality of the County of Antigonish - Municipal Climate Change Action Plan (Dec. 2013).</u> These plans identify some business / economic development opportunities associated with preparing for climate change

such as renewable energy, soil management research, tourism/active living, forestry management, emergency communication, and coastal mapping. It is not clear if these opportunities have been promoted or solutions encouraged within the local business community.

Strategic Plan 2011 – 2016 and County Strategic Priorities 2018. These plans were comprehensive but raised the question of how Town and County objectives/priorities/activities overlap and lessons to be learned from experience.

3.2 Observations & Opportunities

Based on the review and assessment of community economic activities some basic but important observations have been noted.

3.2.1 Antigonish, the Town and the County

These municipalities combined, constitute a scenic, historic community with deep roots and an economy originally based on natural resources and related activities. In recent years the educational, health, tourism and service sectors have developed and expanded. Antigonish citizens are educated, industrious and committed to the land and the community

3.2.2 Some Key Community Assets

Antigonish is blessed with many natural and manmade assets. Community assets can be natural such as resources and location, institutional, heritage or cultural, festivals and events and even active community groups or individual citizens. Unique, one of a kind, community assets can be especially valuable. Antigonish can leverage its special assets to build the economy and long-term sustainability for the community.

Some of the most important community assets include the following.

3.2.2.1 St. Frances Xavier University

St. FX has made the Town of Antigonish its home for over 160 years. The two names are almost synonymous. The University is a true asset of iconic proportion in the community.

3.2.2.2 St. Martha's Regional Hospital

This center for health care serves the community and the region and employs many of Antigonish citizens in direct and indirect activities.

3.2.2.3 Trans Canada Highway Key Location

Antigonish's location on a divided 100 series highway provides a vital transportation link to major regional centers and beyond.

3.2.2.4 Tourism

Antigonish has many beautiful natural and historic venues and events with major tourism potential. Festivals and local events with a regional and beyond draw are proven economic generators. Examples include the historic Antigonish Highland Games and the newest event, the Keppoch Mountain, Nova Scotia Summer Fest. There is room for growth and development in this sector.

3.2.2.5 PAQTNKEK FIRST NATION COMMUNITY

This proactive First Nation Community is a worthy partner for current and future business collaboration and development.

3.2.2.6 ANTIGONISH BUSINESS COMMUNITY

The Antigonish CD has an experienced, established business community that provides a sound base to support existing enterprises and attract and grow new ventures. Some recent new entrepreneurs have started businesses and gained national recognition.

3.2.2.7 THE PEOPLE

At the heart of any community of course are the people that choose to live there. Their spirit and attachment to the land and community is a meaningful and tangible asset. The citizens of Antigonish have a pride of place that reflects a strong community with good core values.

Community Assets provide the basic elements to stimulate and support community economic development. Community Assets define the character of the community and identify for a visitor or potential new resident or business owner why they would want to settle and build their future here. The 'value proposition' is derived from the community assets that can be developed and incorporated into the marketing strategy for investment and business attraction.

3.2.2.7.1 WHAT PEOPLE ARE SAYING

Some common themes flowing from the business interviews, survey and environmental scan results included the following.

Many responses indicated that the business community generally feels it is not recognized, appreciated or supported to the degree it should be.

A majority of those responding felt the business climate was not conducive for growth. This could be due to local and/or external conditions. It was also felt that the current business climate did not favour the attraction of new businesses.

Many felt that the Town and the County should start working together on business attraction and business development. There was a sense that there was no or not enough, effort in general and, in some areas, a duplication of effort.

Several responses identified a disconnect between the University and the Town/County (including the business community), which was having a direct impact on their businesses that was not helpful. The University tends to create events and provides services on its own and thereby competes with community businesses (sometimes with a perceived unfair advantage). This was highlighted for food services and accommodation (in the summer season) and some retail. It was felt that the University aggressively markets its services and undercuts local businesses because it is not subject to the same regulatory and tax requirements. In addition, the University is competing during the tourism season, which is the most critical time for the private sector. There are indications that some expansion and possibly new development of private business in this sector is being stalled because of this competition. Generally, the businesses recognized the benefit of having the University community but believe it should work in collaboration with the greater community and find ways to collaborate and support local business rather than compete with them.

Respondents indicated that the Town and County should join forces and have a more aggressive marketing strategy with promotion of the Town, the County, special places and special events. It was noted that provincial tourism strategies were focused on other areas and over looked the Antigonish CD.

While the majority of respondents noted that the Town and the County did not appear to be working together, it was noted by one business owner that it is better now that it was 4-5 years ago. It was expressed that there should be a focus on events to “bring people together and put aside differences”.

From one respondent there was a specific plea to “look after retail”.

Some respondents were involved, or contemplating becoming involved, in exporting product. It was noted that local businesses needed to be more competitive. One respondent expressed the need for a cold storage warehouse facility. Another felt there should be incentives for businesses innovation.

Respondents noted that internet connectivity was important to all but critical for those in remote and underserved areas. No service or poor service was seen as a definite barrier to growth and future development.

In summary the interview responses revealed that the business community felt:

- it was in need of some attention at the grass roots level;
- that the Town and County should join forces to aggressively market the region and target investment and new businesses;
- that the University and the Hospital should play a bigger role in supporting the local business community;
- that local tourism development and promotion should be stepped up jointly by the Town and County; and
- that in all areas of development the two municipalities should “come together and work together” to implement, with the community, a comprehensive economic development strategy.

The environmental scans revealed some interesting data that may be used in developing investment attraction or business development strategies. These are highlighted in other sections of this report. Some of the more relevant information for further consideration includes the following. The region’s population is growing (albeit slightly) faster than the provincial average. The population in general is getting older. The region is above the average in attracting migrants from other areas of Canada but this is not the case for international migrants. The region has an above average experienced labour force in certain sectors such as health, trades, transport and natural resources. In 2016 more Antigonish CD residents were employed than there were jobs in the Antigonish CD. This means that Antigonish is a net importer of jobs, that is, residents leave the region for work. The region has a higher percentage of home ownership than the provincial average however a large portion of these are mobile homes. A significant portion of households are solo parent, which has childcare and work force availability implications. The region’s population aged 25-64 is better educated than the same group in the rest of the province. This applies especially to apprenticeships and skilled trades. In general, the data indicates that the education and chosen occupation for the general labour forces do not match the global and regional growth sectors but are in declining sectors. This helps identify where the focus should be for investment attraction and development activities.

3.2.3 Global Trends

Globally, the fastest growing economic sectors include big data, digital innovation technology and businesses focused on renewable energy and the green economy. In addition, climate change is driving innovation in many areas. Another active sector is transportation and logistics focused on the global supply chain specifically growth in food distribution including the cold food chain. This has resulted in a current and growing demand for climate-controlled warehousing. This demand could grow even more as the potential for the export of cannabis products develops. Growth of the Port of Halifax and the Halifax Stanfield International Airport creates business opportunities including access to export markets and international partnerships

Many young entrepreneurs and business start-ups active in the sectors noted above especially technology, renewable energy and the Green Economy tend to be globally mobile and looking for a welcoming community to establish and grow their business and provide a safe and rewarding community experience for their family. The addition of a University and good educational facilities in the mix adds to the attraction.

Global tourism of the Gaelic variety is experiencing significant growth because of “The Outlander Effect”. This phenomenon has been created by the overwhelming success of the TV/ book series based on Scotland and the Gaels. Global tourists across North America, Europe and especially the Chinese are fascinated by the story and anything closely related represents a potential draw. Antigonish became the home to many Scots in the post Culloden period and many of the communities in the county are named after the settlers’ home villages in Scotland (the same that are referenced in “The Outlander” story.). The global interest in the story of Culloden and the Scots provides an opportunity to develop a historic global tourist attraction in Antigonish county, incorporating rural development along the shore and elements of Scottish heritage across the county.

3.2.4 Concluding Observations

Antigonish has inherited a strong mixed economic base. A variety of anchor community assets and businesses have sustained the economy to date. Some of these businesses are in decline as the sectors are maturing and others are threatened by an ever evolving regional and global economy beyond the community’s control. Change is inevitable and unavoidable if growth and sustainability are to be realized going forward.

Based on feedback from the business community and consideration of past economic development initiatives and other factors there would appear to be a disconnect at several key points in the process which is affecting the path to economic growth and long-term sustainability. These would include, in part:

- a somewhat disengaged business community that tends to feel it is not appropriately appreciated or supported;
- a perception that the County and the Town are not coordinating their development efforts;
- that little or no focused marketing of the region is being undertaken;

- the belief that 'The University' and 'The Hospital' should be more engaged with the business community and become partners for local economic growth; and
- the University should be less of a competitor with the private sector for the provision of accommodation and food services to non-students.

A new approach and an economic "reboot" are proposed to move the local economy forward to meet challenges and new opportunities for growth and sustainability in an evolving regional and global economy.

Entrepreneurship and innovation are driving growth in many centres. Strategies to attract, encourage, support and grow new businesses in specific growing sectors are required. Also support and innovation strategies for existing traditional productive companies will be required, to secure the economic base, as we prepare for growth going forward.

Fortunately, Antigonish is in a good position to "reboot" and build a new economy for the future.

This will involve building a culture of innovation and diversification in the business sector, which will help provide survival security for the longer term. Initiatives to encourage and support this culture change will support existing businesses but also attract new entrepreneurs to the community.

New businesses in the growing technology and renewable energy sectors will be identified and courted.

Drawing on the existing base of experienced and talented business leaders and entrepreneurs to help lead this initiative will be a good start. This valuable resource coupled with local educational resources and active business and community groups could help build clusters of new innovative companies, which will grow the economy.

The University is a key economic engine in this initiative. This resource is currently underutilized and needs to be promoted, leveraged and exploited.

Sustainability involves good planning, innovation and a culture change. Long-term sustainability will be the result of combined action by the municipality, the town, key institutions, the business community and all citizens.

3.3 Recommendations

The objective is to build one energized community supported by a vibrant and innovative business sector and providing a healthy, safe, stimulating, sustainable, environment for all.

3.3.1 One Community

Establish and empower one agency to implement an action plan to collaboratively develop and implement real initiatives designed to stimulate and move the economy forward.

Coordinate and combine marketing and business attraction functions.

Go forward as one cohesive region with a consistent message.

Create one economic plan supporting all of ANTIGONISH.

3.3.2 Build Strong Relationships with Community Partners

Continue collaborative initiatives and build more with meaningful interaction between key players, Town, County, University, Hospital, Business Community, First Nation Community and citizens.

3.3.3 Leverage Community Assets

Become more effective at leveraging existing and potential community assets to positively affect the local economy and grow the community.

3.3.3.1 Some Examples

St. Francis Xavier University and St. Martha's Regional Hospital could proactively collaborate with local business by sourcing more products and services from the community that has been their neighbour and supporter for many years.

Encourage, support and promote the University as a partner and innovator for business start-ups. The opportunity to collaborate with a university is attractive to new entrepreneurs (regional and international) that are looking for a welcoming community base for their business.

Develop and promote Antigonish's Tourism visitor experiences. The community has many natural, historic and cultural attractions and events. These are economic generators.

3.3.4 Support and Encourage local Businesses

The existing business base is a key asset, which needs to be supported and celebrated. Get businesses involved. Listen to them. Tell them what is being done to improve the business climate and support them. Initiate a campaign of opportunity awareness for the "grass roots business community". Rekindle their entrepreneurial enthusiasm.

3.3.5 Focus on Immigration and Attracting Entrepreneurs and Their Families

Studies indicate that most local populations are declining and a workforce shortage is inevitable. This will negatively affect the competitiveness of local communities and economies. Strategies to attract, immigrant entrepreneurs and their families are important. Communities can build "business clusters" by attracting entrepreneurs with start-up companies and young families (or potential families) who wish to build their businesses and grow their families in a welcoming "small town" environment with some history, culture, a university, a hospital and basic amenities all in a beautiful setting. This is Antigonish.

To reach and inform this target market, Antigonish should be promoted at designated international events (trade shows for those interested in immigrating) to attract new emigrants and entrepreneurs. Another strategy would be to facilitate partnering local companies with UK, European or Asian companies that want to address the North American market from a safe, easily accessible, location. This is currently happening in Nova Scotia with some success. It can create new markets and opportunities for both companies.

3.3.6 Build the Antigonish Community Brand

Brand development initiatives in the Antigonish CD as "Community Development – the

Antigonish Way and Community Pride". A program to identify and profile community values, culture and pride can become a powerful marketing tool to promote the community. The “brand” will help empower local businesses and citizens and help attract investment, newcomers, immigrants and families. To help build the brand, tell the local story and celebrate the successes (Peace by Chocolate, the Historic Antigonish, Highland Games, etc.).

3.3.7 Develop, Expand and Promote Antigonish’s Tourism Assets and Visitor Experiences

Antigonish has many tourist attractions and the potential for even more. The community “Agency” should take responsibility for promoting Antigonish attractions and events. Develop strategies to attract investors and operators to build the sector. Expand events such as the Highland Games and develop more product, festivals and special events. Such events are proven to have a positive economic impact. Develop and promote “a History Trail” along the coastline to highlight and promote the area’s Scottish heritage. Exploit the current global interest in Scottish history stimulated by the “The Outlander Effect”.

3.3.8 Paqtnkek First Nation Partnership

The Paqtnkek First Nation Community represents an economic engine providing development opportunities for their partners and neighbours. Antigonish should continue current collaboration and move to the next level of Partnership with the First Nation Community. They should be invited as partners to participate in the Antigonish Community Economic Development Plan.

3.3.9 Special Incentives to Attract Investment and Stimulate Growth

In attracting new investors and entrepreneurs, Antigonish will be in a very competitive arena.

The community has a lot to offer but it would be good to offer some special incentives to attract new businesses. Some creative and bold ideas should be considered that would make the Antigonish opportunity especially attractive. These could involve free land, facilities or services for a period for the business. As families are important to the new entrepreneur, something special for children like school scholarships or complimentary dance, music, painting lessons etc. could be of interest. Providing an expense paid visit to the area for qualified business prospects to explore the community and the opportunity first hand could be considered.

As providing such incentives may beyond the legislated ability of the Municipality, it is suggested that a community or private sector organization oversee this aspect of the strategy.

Clearly, the concept of incentives will require some innovating thinking to come up with ideas that will make Antigonish stand out and be a winner by attracting new businesses. The ROI could be significant in the long-run.

3.4 Moving Forward – The New Agency

Leadership for the team designated to develop and oversee a new Community Economic Development Plan will be drawn from the Municipality of the County of Antigonish and the Town of Antigonish.

It will be supported by empowered representatives of key stakeholders including but not limited to, St. Francis Xavier University, St. Martha's Hospital, the business community, (retail, tourism, industry including at least one exporter), the Paqtnkek First Nation and two citizen community representatives. The representatives will act as a volunteer advisory board for the municipal staff.

Leaders should move quickly to establish a working organization from the community representatives with a commitment to develop a plan with focused strategies in each of the recommended sectors within six months of the first meeting.

3.4.1 Overall Structure of the New Community Economic Development Plan

3.4.1.1 Getting The Big Picture

With respect to the Vision, Strategies and Goals the plan will focus on:

- current and future needs;
- high level priorities that will guide the overall plan; and
- strategic level approaches that will be used to realize each of the recommendations.

<u>Vision</u>: This is a detailed statement of where the area needs to head and what, specifically, will its governance, social and economic landscape look like when the plan comes to fruition. It needs to be logically linked to the opportunities that stem from the recommendation described above.

<u>Strategies</u>: This section describes the key approaches that the area needs to take to achieve its vision. Each strategy will have one or more goals.

<u>Goals</u>: Goals describe, in measurable terms, what each of the strategies is to achieve. Goal setting helps ensure that effort and resources remain focussed and progress can be measured and evaluated. Once a goal is achieved the associated actions are suspended.

Proposed Structure: Antigonish Area Community Economic Development Plan
Vision: Antigonish Area As It Will Be: Detailed Statement of: Where the Area Needs to Head & What, Specifically, Will Its Governance, Social and Economic Landscape Look Like
Strategies: These Are the Key Approaches That Will Be Taken to Reach the Plan's Goals
Goals: Provide Specifics on What Each of the Strategic Directions Is to Achieve
Actions: Major Undertakings or Projects That Will Be Implemented to Reach Each Goal
Objectives: Measurable Targets for Each Action
Activities: Detailed List of Tasks, Timing, Resource Requirements, Responsibilities for the Implementation of Each Action

3.4.1.2 Getting At The Details

<u>Actions, Objectives and Activities</u>: They address the specifics of economic development strategies.

As a group Actions, Objectives and Activities describe what must be done so that each strategy can achieve its stated goal or goals.

Actions (major undertakings or projects) describe that will be implemented to reach each goal.

Each action has one or more measurable objectives to be achieved (e.g., an action to promote tourism in the area might include a task whose objective is to produce a YouTube video promoting the area.). Objectives are measurable indicators to monitor progress. Achieving an objective is not a measure of goal achievement but is a measure of work being undertaken.[5]

Actions (major undertakings or projects) are composed of one or more activities that include detailed tasks, timing for completion, resource requirements and responsibilities for their implementation.

3.4.2 A Special Note on Setting Goals and Measuring Progress

3.4.2.1 Accountability

Plans and the people who implement them can be held accountable only for those things over which they have some reasonable control. Therefore, the goals, actions and objectives must only be set for things over which the implementers of the plan have reasonable control.

For example, a sub-provincial region could reasonably set a goal to increase the employability of its residents because it can control many of the forces that affect employability and it could measure changes in employability. Improved employability is logically linked as a contributor to lower unemployment rates. However, it should not set a goal to reduce the local employment rate because most of the major forces driving unemployment rates are out of the control of local areas. For example, the plan might succeed in improving the employability of the local labour force but a national or worldwide recession could nullify the positive effects of improved employability.

3.4.2.2 Resources Needed to Collect Measures of Plan Success

One of the greatest threats to successfully implementing a plan is starving it of resources. Data collection needed to track the progress of the plan needs to be kept to the data that are essential to determining if progress is being made, are things moving, <u>in general</u>, in the right direction or the wrong direction.

Excessive data collection can easily starve a plan of the resources needed to implement a plan. Therefore, in general, we target to hold the effort needed to collect progress-tracking data as low as practical, in the order of 5% of the resources available for implementation. This data tracking budget is achievable when goals, actions and objectives relate only to things over which the implementers of the plan have reasonable control.

[5] For example, an objective of undertaking a selling task is to make sales calls but the goal (measurement of success) is the number of sales made.

APPENDIX 1: TEXT OF ONLINE SURVEY

The personal interviews followed the same format and structure of the on-line survey. Hence, the consultants were able to integrate the quantitative results of the personal interviews with the results of the on-line survey.

1 THE PURPOSE OF THIS SURVEY

Jozsa Management & Economics and JDM Associates have been hired by the Municipality of the County of Antigonish (the 'County') and the Town of Antigonish (the `Town`), in cooperation with the Eastern Strait Regional Enterprise Network[1] (ESREN) to prepare an economic assessment for the Antigonish Area, which is composed of the County and the Town.

The economic assessment is needed to help in:

- exploring initiatives to support and expand the economic base in the Antigonish area; and
- supporting decision making that stems from the identification and pursuit of opportunities for growth.

The purposes of this survey are to measure the current opinions of business and public organization stakeholders in the Antigonish Area regarding:

- economic conditions and prospects in the Antigonish area; and
- economic growth related needs that should be addressed in an economic strategy for the Antigonish Area.

As a thank you for completing this survey we will include your business/organization in a draw for a $200.00 Staples gift card. To be included please provide your contact pints at the end of this survey.

1.1 THE SURVEY QUESTIONS

1. Where is the business'/organization's head office located?
    a. Town of Antigonish? _____
    b. Municipality of the County of Antigonish? _____
    c. Elsewhere _____

2. Does this business/organization have multiple locations?
    a. Yes _____
    b. No _____ If no, go to question 4.

3. If yes, please <u>identify the number of locations</u> in each of the following areas.
    a. Town of Antigonish? # _____
    b. Municipality of the County of Antigonish? # _____
    c. Elsewhere # _____

[1] The Eastern Strait Regional Enterprise Network includes the Town of Antigonish, the Municipality of the County of Antigonish, the Municipality of the District of Guysborough, the Municipality of the District of Saint Mary's, the Town of Mulgrave and the Town of Port Hawkesbury.

4. In what year was the business/organization established? __ __ __ __

5. Why was the business/organization established in the Antigonish Area? (Select all that apply.)
   a. To serve the local market. _____
   b. Family lived in the area. _____
   c. Best location to serve Northern Nova Scotia. _____
   d. Cost to set up and run business is very favourable. _____
   e. Location near highway is very important. _____
   f. Location near University is very important._____
   g. Immigrated to the area and needed to create my own job. _____
   h. Thought the area was a good place to live and raise a family. _____
   i. Intended to open more locations and it was a good base from which to work. _____
   j. Other. ____
   k. Other. ____

6. How many people does the business/organization employ:
   a. Town of Antigonish? # _____
   b. Municipality of the County of Antigonish? # _____
   c. Elsewhere # _____

7. How many people has the business/organization hired in the last 18 months? # _____

8. How many people has the business/organization laid off/fired in the last 18 months? #_____

9. What is your main line of business/service of the business/organization?
   a. Agriculture _____
   b. Forestry, fishing, mining, quarrying, oil and gas _____
   c. Utilities _____
   d. Construction _____
   e. Manufacturing _____
   f. Trade _____
   g. Transportation and warehousing _____
   h. Finance, insurance, real estate and leasing _____
   i. Professional, scientific and technical services _____
   j. Primarily services to businesses and properties _____
   k. Primarily personal services _____
   l. Primarily tourism related _____
   m. Educational services _____
   n. Health care and social assistance _____
   o. Media, publishing, culture and recreation ______
   p. Accommodation and food services _____
   q. Public administration _____
   r. Other (please specify) _____________________

10. Where, in percentage terms, are the markets/service areas for the business/organization? (State in percentages, adding to 100%.)
   a. Within the Town and Municipality. ____%
   b. Within the Municipality of the District of Guysborough, the Municipality of the District of Saint Mary's, the Town of Mulgrave or the Town of Port Hawkesbury. ___%
   c. In the rest of Nova Scotia. ____%
   d. In the rest of Atlantic Canada. _____%
   e. In the rest of Canada. _____%
   f. Exports outside of Canada. _____?

11. If the business/organization does not export outside of Nova Scotia, why not?
   a. ____
   b. ____
   c. ____

12. Can your customers/clients place orders and pay on-line?

a. Yes _____

b. No _____

c. N/A _____

13. Do you believe that, in general, the business climate in the Antigonish Area (the Town and the County) favours the expansion of existing businesses/organizations?

a. Yes _____ If yes, go to question 13a.

b. No _____ If no, go to question 13b.

c. Don't Know/No Opinion _____ If don't know, go to question 16.

13a. If you said yes, what are the (up to three) main reasons you said yes?

a. ______________________________

b. ______________________________

c. ______________________________

13b. If you said no, what are the (up to three) main reasons you said no?

a. ______________________________

b. ______________________________

c. ______________________________

14. Do you believe that, in general, the business climate in the Antigonish Area (the Town and the County) favours the attraction of new businesses/organizations?

a. Yes _____ If yes, go to question 14a.

b. No _____ If no, go to question 14b.

c. Don't Know/No Opinion _____ If don't know, go to question 17.

14a. If you said yes, are you able to identify the (up to three) reasons you said yes?

a. ______________________________

b. ______________________________

c. ______________________________

14b. If you said no, are you able to identify the (up to three) reasons you said no?

a. ______________________________

b. ______________________________

c. ______________________________

15. Thinking specifically about the business/organization you represent, do you believe that conditions favour expansion?

a. Yes _____ If yes, go to question 15a.

b. No _____ If no, go to question 15c.

c. Not Sure/Don't Know/No Opinion _____ If not sure, go to question 16.

15a. If you said yes why do you believe conditions favour expansion?

a. ___________________________

b. ___________________________

c. ___________________________

15b. <u>If you said yes</u> that conditions favour expansion, is the business/organization considering expanding in the next one to three years?

a. Yes _____

b. No _____

c. Not Sure/Don't Know/No Opinion _____

15c. If the business/organization is not considering expanding in the next one to three years, why not?

a. ___________________________

b. ___________________________

c. ___________________________

16. Has the business/organization tried to purchase land in the Town or County in the last five years to expand or start a venture?

a. Yes _____, if yes go to question 16a.

b. No _____, if no, go to question 17.

16a. If you said yes, what type of business did you intend to locate on the land?

a. Agriculture _____

b. Forestry, fishing, mining, quarrying, oil and gas _____

c. Utilities _____

d. Construction _____

e. Manufacturing _____

f. Trade _____

g. Transportation and warehousing _____

h. Finance, insurance, real estate and leasing _____

i. Professional, scientific and technical services _____

j. Primarily services to businesses and properties _____

k. Primarily personal services _____

l. Primarily tourism related _____

m. Educational services _____

n. Health care and social assistance _____

o. Media, publishing, culture and recreation ______

p. Accommodation and food services _____

q. Public administration _____

r. Other (please specify) _____________________

16b. If you said yes that the business/organization tried to purchase land in the last five years what local location factors/attributes most influenced the site selection? (Select all that apply.)

a. size _____
b. price _____
c. access to highways _____
d. access to central water service _____
e. access to central sewer service _____
f. availability of fire hydrant service _____
g. cost to build basic infrastructure (e.g. access road, run power line, run water and sewer lines, etc.) _____
h. Access to high-speed Internet _____
i. access to cell phone service _____
j. walk-by traffic _____
k. quality of the business neighbourhood _____
l. other ____
m. other ____

16c If you answered yes to trying to buy land was the purchase successful?

16d. Whether or not the purchase was successful, what if any challenges were faced in the purchasing process?

a. No suitable land available _____
b. Land prices were too high _____
c. Did not have access to information needed to make an informed decision _____
d. Something else: ____
e. Something else: ____
f. Something else: ____

16e. Whether or not the land purchase was successful would a location in a new, fully serviced, commercial/industrial park have been preferable?

a. Yes _____
b. No _____

17. If the business/organization has not tried to buy land in the Antigonish area in the last five years would the availability of a new, fully serviced, commercial/industrial park made it more likely to buy land in the Antigonish area?

a. Yes _____

b. No _____

18. Has the business/organization tried to rent space in the Town or the County in the last five years?

a. Yes _____. if yes, go to question 18a.

b. No _____, if no, go to question 19.

18a. If you said yes to trying to rent space what type of business/organization was meant for the rental space?

a. Agriculture _____

b. Forestry, fishing, mining, quarrying, oil and gas _____

c. Utilities _____

d. Construction _____

e. Manufacturing _____

f. Trade _____

g. Transportation and warehousing _____

h. Finance, insurance, real estate and leasing _____

i. Professional, scientific and technical services _____

j. Primarily services to businesses and properties _____

k. Primarily personal services _____

l. Primarily tourism related _____

m. Educational services _____

n. Health care and social assistance _____

o. Media, publishing, culture and recreation ______

p. Accommodation and food services _____

q. Public administration _____

r. Other (please specify) ______________________

18b. If you said yes to trying to rent space for a business/organization what local location factors/attributes most influenced the site selection? (Select all that apply.)

a. size _____
b. lease rate _____
c. street-level location _____
d. ability to sublet _____
e. flexibility in lease conditions _____
f. amount of renovation required to meet needs
g. walk-by traffic _____
h. parking availability _____
i. quality of the business neighbourhood _____
j. availability of a loading dock _____
k. access to highways _____
l. access to central water service _____
m. access to central sewer service _____
n. availability of fire hydrant service _____
o. Access to high-speed Internet _____
p. access to cell phone service _____
q. other ____
r. other ____
s. other ____

18c. If you said yes to trying to rent space, was the rental attempt successful?

a. Yes _____ If yes, go to question 18d.
b. No _____ If no, go to question 19.

18d. If you answered yes to trying to rent space, whether or not you were successful in finding rental space, what if any challenges did you face? (Select all that apply.)

a. No suitable rental space available _____
b. Rental prices were too high _____
c. Did not have access to information needed to make an informed decision _____
d. Other: ____
e. Other: ____

19. Does the business/organization have challenges in finding **<u>General Labour</u>**?

a. Yes _____ If yes, go to question 19a.
b. No _____, if no, got to question 20.
c. No Opinion _____ If no opinion, go to question 20.

19a. If you said yes is it because:

a. There are simply no persons available? _____
b. Applicants were not 'job ready' for even general labour work. _____
c. Applicants would not work for the wages offered. _____
d. Applicants wanted only full-time work. _____
e. Something else: ______________________________
f. Something else: ______________________________

20. Does the business/organization have challenges in finding **<u>Managerial, Professional and Technical</u>** labour (e.g. accountants, engineers, data managers and processors, etc.)?

a. Yes _____ If yes, go to question 20a.
b. No _____ If no, go to question 21.
c. No Opinion _____ If no opinion, go to question 21.

20a. If you said yes is it because:

a. There are simply no skilled persons available. _____
b. Applicants were not job ready. _____
c. Applicants would not work for the wages offered. _____
d. Applicants wanted only full-time work. _____
e. Something else: ______________________________
f. Something else: ______________________________

21. Does the business/organization have challenges in finding **<u>Skilled Trades</u>** <u>labour (e.g. electricians, pipe fitters, carpenters, welders, etc.)</u>?

a. Yes _____ If yes, go to question 21a.
b. No _____ If no, go to question 22.
c. No Opinion _____ If no opinion, go to question 22.

21a. If you said yes was it because:

a. There are simply no skilled persons available? _____
b. Applicants were not job ready. _____
c. Applicants would not work for the wages offered. _____
d. Applicants wanted only full-time work. _____
e. Something else: ______________________________
f. Something else: ______________________________

22. Do you now have challenges in finding skilled **Marketing, Sales and Communications** related labour?

a. Yes _____ If yes, go to question 22a.

b. No _____ If no, go to question 23.

c. No Opinion _____ If no opinion, go to question 26.

22a. If you said yes was it because:

a. There are simply no skilled persons available? _____

b. Applicants were not job ready. _____

c. Applicants would not work for the wages offered. _____

d. Applicants wanted only full-time work. _____

e. Something else: ______________________________

f. Something else: ______________________________

23. Is the business/organization able to quickly and efficiently acquire the consumables / goods and services you need for the day to day operations (i.e. not depreciable for income tax purposes)?

a. Yes _____ If yes, go to question 24.

b. No _____ If no, go to question 23a.

c. No Opinion ____ If no opinion, go to question 24.

23a. If you said no, what goods and services cannot be obtained quickly and efficiently?

a. ____

b. ____

c. ____

d. ____

24. Is the business/organization able to quickly and efficiently acquire the capital items (i.e. depreciable for income tax purposes) you need to purchase only infrequently (e.g. capital goods such as furniture, office equipment, computers and communication equipment, etc.)?

a. Yes _____ If yes, go to question 25.

b. No _____ If no, go to question 24a.

c. No Opinion ____ if no opinion, go to question 25.

24a. If you said no, what capital goods and services cannot be obtained quickly and efficiently?

a. ____

b. ____

c. ____

d. ____

25. In the next one to five years is there a possibility that the business/organization will be sold or closed due to the retirement of its principals?

a. Yes _____ If yes, go to question 25a.

b. No _____ If no, go to question 26.

c. Don't know _____ If don't know, go to question 26.

25a. If you said yes, is there a succession plan for the sale of the business/organization?

a. Yes _____

b. No _____

c. Prefer not to answer _____

26. Where should there be a greater focus on economic development efforts (Please identify up to three options.):

a. Tourism Development _____
b. Retention and expansion of existing businesses _____
c. Attraction of new primary sector businesses (agriculture, forestry, quarries and mining and other extractive industries _____
d. Attraction of new manufacturing businesses _____
e. Attraction of new trade (wholesale, retail) businesses _____
f. Attraction of new business and personal service businesses _____
g. Attraction of new accommodation and tourist service related businesses
h. Attraction of new transportation and warehousing businesses _____
i. Attraction of new culture and recreation related businesses _____
j. Connectivity Infrastructure and Innovation
k. Streetscape or beautification development _____
l. Something else? ___________________________________
m. Something else: ___________________________________

<u>Some Concluding Questions</u>

27. Are you willing to participate in a follow-up interview?

a. Yes _____

b. No _____

28. Are you willing to participate in a half-day workshop with other business persons to help identify options for business growth in the Antigonish area?

a. Yes _____ If yes, go to question 28a.

b. No _____

28a. If you answered yes to participating in a one-day workshop, what time is best for you?

a. Weekday _____
b. Weeknight _____
c. Weekend _____

29. If you do not receive ESREN's newsletter and would like to receive it?

a. Yes _____

b. No _____

30. If you:

- answered yes to being willing to participate in a follow-up interview, and/or willing to participate in a one-day workshop and/or wishing to receive the ESREN newsletter; and/or
- wish to be included in the draw for a $200.00 Staples gift card please provide your contact points.

30a. Name ______________________________________

30b. Business Name ____

30c. Address ____

____

____

30d. Telephone (land) _ _ _ - _ _ _ - _ _ _ _

30e. Cell Phone _ _ _ - _ _ _ - _ _ _ _

30f. E- Mail ________________________

Thank you very much for your help. This information is critical to creating a practical and evidence based economic development plan for the Town and County of Antigonish.

APPENDIX 2: LOCATION QUOTIENTS AND SHIFT SHARE ANALYSES; TECHNICAL DETAILS

MEASURING SPECIALISATION AND ACCOUNTING FOR SECTOR COMPETITIVENESS

The Location Quotients technique and the Shift-Share Analysis will provide measures:

- of the current specialisations in the Antigonish area's economy;
- of change in specialisation over time;
- to account for the competitiveness of the Antigonish area's economic sectors, and
- to describe the change in the competitiveness of the sectors over time.

MEASURING SPECIALIZATION

We will use the Location Quotient (LQ) technique to compare the Antigonish area's sectors to the same sectors in the Nova Scotia and Canadian economies to identify specializations and changes in specialisations. The LQ analysis will be completed for each sector profiled in the environmental scan.

The formula for the LQ is as follows:

LQ = (Antigonish area's Employment in Sector "A" in Year_T/Total Antigonish area Employment in Year_T) / (Canada Employment in Sector "A" in Year_T/Total Canada Employment in Year_T)

(Note: For comparison to Nova Scotia we replace the Canada data with Nova Scotia data.)

ACCOUNTING FOR THE SOURCES OF COMPETITIVENESS

We will use Shift-Share analysis to provide an account of portion of each sector's growth that is attributable to the:

- growth of the national economy (share change);
- mix of sectors in the Antigonish area (industry mix effect); and
- unique factors of the Antigonish area (regional shift).

We will conduct a Shift-Share analysis using the Canadian and Nova Scotia economies as the base economy for comparison.

Shift-Share says that change in employment in the Antigonish area's ith sector from time t to time t+n can be measured as:

$$e_i^{t+n} - e_i^t = share\ change + mix\ change + shift\ change$$

Shift-Share analysis breaks the change in local sector employment into three components:

- National (or Provincial) Growth Share - The share of an economic sector's growth in the Antigonish area that can be attributed to growth of the overall Canadian (or NS) economy). This answers the question "If the Antigonish area's sector grew at the overall Canadian growth rate, what would be the result?"
- Industry Mix – The portion of an economic sector's growth in the Antigonish area that can be attributed to the area's mix of sectors (i.e., the extent to which the Antigonish area's economic base is composed of faster or slower growing sectors nationally (or provincially). This answers the questions "How much growth can be attributed to the Antigonish area's mix of industries?" and "How many jobs were created/not created in

each sector due to differences in sector and overall Canadian (or NS) growth rates?"

- Regional Shift - Describes the extent to which factors unique to the Antigonish area have caused growth or decline in a sector. This answers the questions "How many jobs are created/not created as a result of the Antigonish area's competitiveness?" and "What are the area's leading and lagging sectors?"

The Shift-Share model is specified as follows:

$$e_i^{t+n} - e_i^t = e_i^t\left[\frac{E^{t+n}}{E^t} - 1\right] + e_i^t\left[\frac{E_i^{t+n}}{E_i^t} - \frac{E^{t+n}}{E^t}\right] + e_i^t\left[\frac{e_i^{t+n}}{e_i^t} - \frac{E_i^{t+n}}{E_i^t}\right]$$

where:

- *e* is the total employment in the Antigonish area
- e_i is the employment in sector "*i*"
- *E* is the total employment in Canada (or NS when it is used as the comparison economy)
- E_i is the employment in sector "*i*" in Canada (or NS)