City of Quesnel Economic Transition Strategy

Baseline Report

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Presented to:

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1 INTRODUCTION

1.1 PURPOSE

The City of Quesnel has been proactively pursuing several strategic projects to support the quality of life and community well-being in the City. Now, after the 2017 BC Wildfire season that had very dramatic impacts on the entire Cariboo, the City of Quesnel is moving forward to create a comprehensive economic transition strategy. The City of Quesnel Economic Transition Strategy, serves as the key economic development direction for growing and diversifying the local economy over the next five-year period.

As part of the Economic Transition Strategy, this Baseline Report has been produced. This report is the first of two to be delivered as part of this project, with the second being the Economic Transition Strategy itself. The baseline, or current situation assessment, references demographic, labour force, sector and other economic information. It also provides an insight to the socio-economic trends underlying the community of Quesnel over the past fifteen years.

1.2 METHODOLOGY

Data collection and literature review focused on documentation internal to the City, consisting of current and past plans and studies, as well as external agencies, including Statistics Canada and BC Stats. The baseline also draws on work recently completed by the provincial government's Sector Diversification by Data Design to Support Economic Development research. The Baseline is designed to inform the City and its partners in preparation for the second report, the Strategy.

1.3 REPORT STRUCTURE

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

2 DEMOGRAPHY

2.1 POPULATION

Current and Historical Age Characteristics

Table 1 outlines the age characteristics in the Quesnel Census Agglomeration (CA) for 2001 and 2016. The Census Agglomeration is made up of the City of Quesnel and surrounding area and is used as it best reflects the local economic base in which the City and surrounding areas depends and interaction.[1]

Table 1: Quesnel CA Population by Age Group Shares Compared to BC, 2001 and 2016

	Quesnel CA				BC	
	2001		2016		2001	2016
Age 0 - 19	7,060	29.2%	4,990	21.7%	25.0%	20.4%
Age 20 - 44	8,245	34.1%	6,170	26.8%	36.3%	32.1%
Age 45 - 64	6,330	26.2%	7,465	32.5%	25.1%	29.2%
Age 65+	2,540	10.5%	4,355	19.0%	13.6%	18.3%
Total	24,175	100.0%	22,980	100.0%	100.0%	100.0%

Source: Statistics Canada (2001) (2017a)

As illustrated, the population in the Quesnel CA has declined slightly over the past fifteen years and seen its population age noticeably. While the population has declined slightly, the number of residents in the Age 45 to 64 age group has increased by over 1,000 and the Age group 65 years and over has increased by 1,815.

Median Age

The shift towards an older demographic is further illustrated by the median age over time. Table 2 outlines the change in median age between 2001 and 2016. Over the period the median age has risen in the Quesnel CA from 37.4 years to 45.9 years. Though this trend is consistent

[1] The Quesnel Census Agglomeration includes: Cariboo Electoral Area A; Cariboo Electoral Area B; Cariboo Electoral Area C; Cariboo Electoral Area I; City of Quesnel; Quesnel 1 (Indian reserve); and, District Municipality of Wells.

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

Table 2: Median Age In Years, 2001 to 2016

	2001	2006	2011	2016
Quesnel CA	37.4	42.0	43.5	45.9
British Columbia	38.4	40.8	41.9	43.0

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

2.2 EDUCATION

Table 3 outlines the educational attainment for the Quesnel CA in 2016 and compares the shares by educational category with British Columbia. The educational attainment is based on the highest certificate; diploma or degree for residents aged between 25 to 64 years of age. As illustrated, Quesnel CA has a significantly higher percentage of residents who have not graduated from high school when compared to the provincial average. In addition, the share of residents with university certificates, diploma or degree at bachelor level is well below the rate seen at the provincial level. This is not uncommon in rural British Columbia and is countered by a higher share of population in the trades, as is the case locally.

Table 3: Quesnel CA Education Attainment (25-64 Years of Age), Compared to BC, 2016

	Quesnel CA		BC
No certificate; diploma or degree	2,415	19.4%	8.4%
High school diploma or equivalency certificate	4,230	33.9%	26.0%
Apprenticeship or trades certificate or diploma	1,645	13.2%	4.5%
College; CEGEP or other non-university certificate or diploma	2,470	19.8%	24.4%
University certificate or diploma below bachelor level	270	2.2%	4.6%
Univ. certificate; diploma or degree at bachelor level or above	1,450	11.6%	32.1%
Total	12,480	100.0%	100.0%

Source: Statistics Canada (2017a)

2.3 INCOME

Median Individual Personal Incomes

As outlined in Table 4, the median personal income for men in the Quesnel CA was noticeably higher than the provincial level in 2015. Conversely, median personal income for women was noticeably lower than the provincial level in 2015. However, women in the Quesnel CA have been slowly gaining on women at the provincial level over the past 20 years.

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

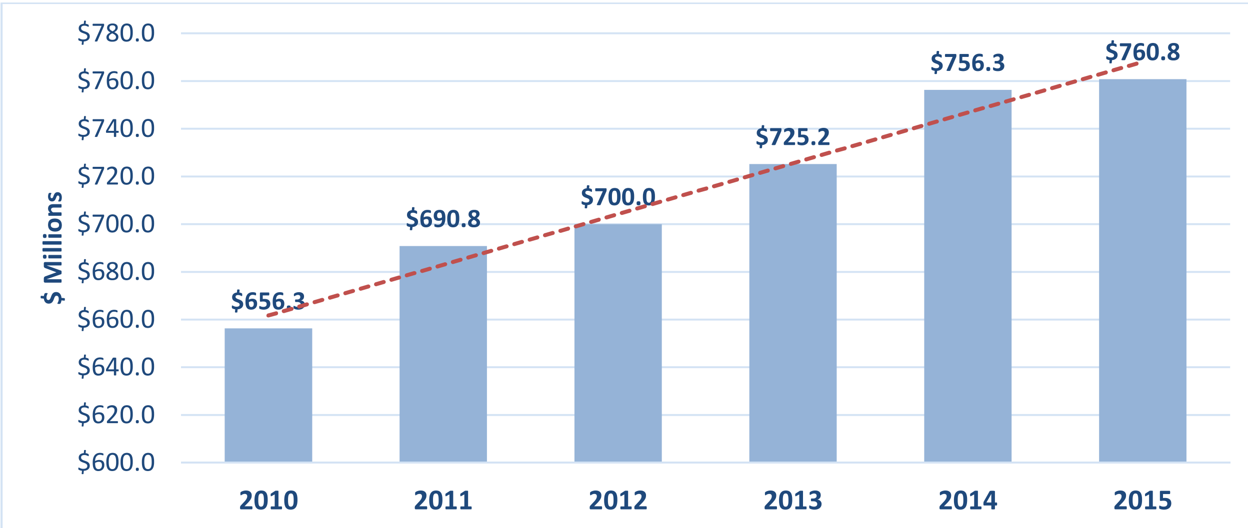
	1995	2010	2015	Change 1995 - 2015
Quesnel CA				
Male	$29,370	$39,655	$45,285	154%
Female	$12,080	$19,590	$23,485	194%
Total	$17,495	$26,785	$31,415	179%
British Columbia				
Male	$26,425	$35,625	$40,370	153%
Female	$15,235	$23,625	$27,545	181%
Total	$19,980	$28,765	$33,010	165%

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

Total Personal Income

Total personal income in the Quesnel CA has grown noticeably since the economic downturn in 2009. As outlined in Figure 1, personal income has increased from $656.3 million in 2010 and has increased each year to the current level where it is now at $760.8 million in 2015. Overall, the personal income in the CA represents an increase of 15.9% over the 2010 to 2015 period. Meanwhile, at the provincial level the increase in total personal income has been 25.8% over the same period.

Figure 1: Quesnel CA Total Personal Income, 2010-2015



Source: Government of Canada (2018)

3 ECONOMIC BASE

3.1 LABOUR FORCE

Table 5 compares the Quesnel CA goods-producing and service-producing labour forces and British Columbia for three census periods, 2001, 2011 and 2016. Over this fifteen-year period the Quesnel CA has seen its labour force remain relatively flat. Its goods producing sector has increased by 1.2% while the services producing sector has grown by 2.5% over 15-years.

Conversely, the BC labour force has experienced overall growth of 32.6%, with the service producing sector leading growth with an increase of 35.9% while goods-producing sector has grown by 20.8%.

Table 5: Allocation of Employment to Goods and Services Production, 2001 and 2016

	Quesnel CA				BC
Industry Class	2001	2011	2016	% Change	% Change
Goods producing	4,770	4,920	4,825	+1.2%	+20.8%
Services producing	7,725	8,040	7,985	+3.4%	+35.9%
Total	12,495	12,960	12,810	+2.5%	+32.6%

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

3.2 LABOUR FORCE INCOME

Table 6 outlines the Quesnel CA employment income by detailed industry. The table ranks the industries from largest to smaller contributors to employment income. As outlined, the forestry sector (manufacturing and forestry) occupied three of the top four spots in the Quesnel CA in 2016. The government services sector also makes a noticeable contribution with education and health care represented in three of the top eight contributors.

Table 6: Quesnel CA Employment Income by Detailed Industry, 2011 and 2016

	2011	2016	Change
321 Wood product manufacturing	$85,819,545	$86,401,446	0.7%
322 Paper manufacturing	$42,815,340	$39,768,223	-7.1%
611 Educational services	$37,184,540	$38,572,379	3.7%
113 Forestry and logging	$37,020,200	$37,441,005	1.1%
541 Professional, scientific and technical services	$17,614,170	$24,520,635	39.2%
622 Hospitals	$19,348,650	$22,405,249	15.8%
238 Specialty trade contractors	$16,516,170	$20,185,265	22.2%
621 Ambulatory health care services	$16,894,995	$16,299,771	-3.5%
212 Mining and quarrying (except oil and gas)	$5,893,420	$16,286,769	176.4%
811 Repair and maintenance	$9,693,580	$13,985,281	44.3%
484 Truck transportation	$17,081,830	$13,647,221	-20.1%
237 Heavy and civil engineering construction	$7,594,920	$12,706,547	67.3%
722 Food services and drinking places	$13,385,540	$12,562,557	-6.1%
561 Administrative and support services	$8,547,010	$11,653,181	36.3%
445 Food and beverage stores	$7,594,805	$11,577,144	52.4%
913 Local, municipal and regional public administration	$5,385,455	$11,081,601	105.8%
236 Construction of buildings	$10,443,000	$10,813,924	3.6%
912 Provincial and territorial public administration	$10,961,670	$9,449,021	-13.8%
441 Motor vehicle and part dealers	$6,563,280	$9,087,376	38.5%
721 Accommodations services	$6,895,605	$8,061,388	16.9%
624 Social assistance	$8,395,380	$8,026,138	-4.4%
911 Federal government public administration	$7,393,750	$7,812,621	5.7%
452 General merchandise stores	$7,691,310	$7,388,216	-3.9%
115 Support activities for agriculture and forestry	$7,027,000	$7,053,839	0.4%
524 Insurance carriers and related activities	$1,135,720	$6,900,350	507.6%
623 Nursing and residential care facilities	$7,495,620	$6,761,199	-9.8%
111-112 Farms (111 to 112) [12]	$7,515,000	$6,564,345	-12.7%
213 Support activities for mining and oil and gas	$11,195,400	$6,407,723	-42.8%
488 Support activities for transportation	$2,206,360	$5,536,967	151.0%
522 Credit intermediation and related activities	$6,030,970	$5,503,641	-8.7%
531 Real estate	$5,301,780	$5,347,494	0.9%

Source: Statistics Canada (2011a) (2018)

3.3 EMPLOYMENT CONCENTRATION

Industries in the Quesnel CA that have a higher percentage of employment than British Columbia are identified in Table 7.

Table 7: Quesnel CA, Location Quotients (Employment) >1, 2001, 2011 and 2016

	2001	2011	2016	Trend
321 Wood product manufacturing	5.7	14.3	12.2	↑↔
322 Paper manufacturing	6.7	12.4	11.7	↑↔
113 Forestry and logging	4.8	9.0	7.6	↓
115 Support activities for agriculture and forestry	4.5	5.4	5.1	↓
412 Petroleum and petroleum products merchant wholesalers	4.1	0.0	4.9	↑
212 Mining and quarrying (except oil and gas)	0.6	1.1	3.2	↑
712 Heritage institutions	0.5	0.0	3.0	↑
811 Repair and maintenance	1.1	1.5	2.1	↑
452 General merchandise stores	0.8	2.0	1.9	↑↔
484 Truck transportation	1.9	2.8	1.8	↓
314 Textile product mills	0.8	0.0	1.8	↑
211 Oil and gas extraction	0.9	0.0	1.6	↑
324 Petroleum and coal products manufacturing	0.0	0.0	1.6	↑
447 Gasoline stations	1.4	2.4	1.5	↓
111 - 112 Farms (111 and 112)	2.1	2.0	1.5	↓
562 Waste management and remediation services	0.7	1.0	1.5	↑
327 Non-metallic mineral product manufacturing	0.9	0.0	1.3	↑
721 Accommodation services	1.1	1.3	1.3	↔
914 Aboriginal public administration	1.0	0.6	1.3	↑
213 Support activities for mining and oil and gas extraction	1.5	2.2	1.2	↓
444 Building material & garden equip and supplies dealers	1.3	1.0	1.2	↔
441 Motor vehicle and parts dealers	1.6	1.1	1.2	↓↔
415 Motor vehicle, vehicle parts & accessories wholesalers	0.8	1.0	1.2	↑
445 Food and beverage stores	0.8	0.8	1.2	↑
624 Social assistance	0.9	1.3	1.0	↔
622 Hospitals	0.6	1.0	1.0	↑↔
912 Provincial and territorial public administration	0.8	1.0	1.0	↔

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

A location quotient of greater than “1” is said to signify the presence of some form of competitive advantage that underlies the economic base. Forest-related industries dominate the top of the list. Other sectors such mining and quarrying, heritage institution, and repair and maintenance also make it in to the top of the list. While petroleum and petroleum products and merchant wholesalers are also included in the top of the list, the small labour force in these sectors suggests caution when viewing these results.

The labour force data used in Table 7 is modelled differently to illustrate the shifting structure of the economy in Table 8. The location quotient analysis has already demonstrated that comparative advantages may still exist whether or not an industry is actually growing. Between 2001 and 2016, the Quesnel CA created 315 jobs—the shift-share analysis attempts to shed some light on the causal nature of that decline by breaking down the change in employment by industry group into three components:

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

The provincial effects are all positive because overall provincial employment increased between 2001 and 2016. The industry effects differ substantially by industry and it can be seen that industries important to Quesnel CA, namely forestry and manufacturing, have seen large declines.

The local competitive effects, the area where Quesnel CA has the greatest ability to influence as a community, is the residual employment. In this component, the City was positive in mining and quarrying, wood products manufacturing, and several smaller manufacturing employment categories. It was also negative for most other industries as well over this period.

Table 8: Quesnel CA, Shift-Share Analysis, 2001 and 2016

	Provincial	Industry	Local	Total
	Growth	Mix	Competitiveness	
111 - 112 Farms (111 and 112)	161	69	-415	-185
113 Forestry and logging	230	-159	-105	-35
115 Support activities for agriculture and forestry	104	-103	-131	-130
211 Oil and gas extraction	3	26	11	40
212 Mining and quarrying (except oil and gas)	8	13	124	145
213 Support activities for mining and oil and gas extraction	13	63	-51	25
221 Utilities	11	5	-6	10
311 Food manufacturing	11	8	-30	-10
312 Beverage and tobacco product manufacturing	0	0	10	10
313 Textile mills	0	0	0	0
314 Textile product mills	3	-4	1	0
315 Clothing manufacturing	3	-6	-7	-10
316 Leather and allied product manufacturing	0	0	0	0
321 Wood product manufacturing	528	-647	114	-5
322 Paper manufacturing	220	-276	-74	-130
323 Printing and related support activities	0	0	10	10
324 Petroleum and coal products manufacturing	0	0	10	10
325 Chemical manufacturing	0	0	0	0
326 Plastics and rubber products manufacturing	0	0	10	10
327 Non-metallic mineral product manufacturing	13	1	-9	5
331 Primary metal manufacturing	3	-1	-3	0
332 Fabricated metal product manufacturing	8	2	10	20
333 Machinery manufacturing	18	0	-48	-30
334 Computer and electronic product manufacturing	0	0	0	0
335 Electrical equipment, appliance and component man.	0	0	0	0
336 Transportation equipment manufacturing	3	0	-13	-10
337 Furniture and related product manufacturing	8	3	-26	-15
339 Miscellaneous manufacturing	7	0	-17	-10
411 Farm product merchant wholesalers	0	0	0	0
412 Petroleum and petroleum products merchant wholesalers	11	-14	-13	-15
413 Food, beverage and tobacco merchant wholesalers	3	4	-18	-10
414 Personal and household goods merchant wholesalers	3	2	-5	0

Source: Statistics Canada (2001) (2018)

4 TRENDS AND SECTORS ANALYSIS

4.1 MACROECONOMIC TRENDS

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

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

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

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

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

Environmental and sustainability issues have become a prominent component of future economic development. Preliminary estimates suggest that the level of global energy-related CO^2 emissions increased in 2017 after remaining flat for three consecutive years (CarbonBrief.2017). The frequency of weather-related shocks continues to increase, also highlighting the urgent need to build resilience against climate change and prioritize environmental protection. The existence of interlinkages among social, economic and environmental dimensions is perhaps the most fundamental tenet of the concept of sustainable development (UN 2018).

Policymakers across the world face a number of challenges if they are to achieve sustainable long-term economic development. Structural developments, such as ageing populations and climate change, require a forward-thinking policy which equips the workforce to continue to make societal contributions later on in life and promotes low carbon technologies. Overall, as the environmental crisis deepens, leaders must embed sustainable cultures as critical natural resources run out (Koren Ferry HayGroup 2017).

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

Manufacturing is on the decline. The economies of industrialized, western nations continue to experience a transition from goods production to service production due to globalization, competition from developing and emerging markets, and the increasing adoption of technology, particularly computer systems and the Internet. Manufacturing capacity has shifted overseas to lower cost jurisdictions, with less onerous environmental regimes and proximity to emerging markets. In Canada, manufacturing currently directly accounts for about 10% of Canadian GDP, down from close to 20% in the year 2000 and as high as 30% in the early 1950s

(RBC 2017). However, this trend is not necessarily universal, homogenous or uni-directional; as capacity becomes more globally balanced, some developed regions will inevitably experience new areas of growth.

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

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

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

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

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

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

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

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

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

4.2 KEY SECTORS

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

Forestry

Immediate forest area around Quesnel includes the Quesnel Timber Supply Area (TSA) and West Fraser’s Tree Farm License (TFL) 52. Harvests in these two key areas have increased significantly in recent years to address the mountain pine beetle epidemic. In 2004, the Quesnel TSA was increased to 5,280,000 m^3, about 63% greater than the previous Allowable Annual Cut (AAC). However, by 2011, the AAC was decreased by about 24% to 4,000,000 m3 (FLRNORD. 2018). Again in 2017, the AAC for the Quesnel TSA was set at 2,607,000 m^3. As for TFL 52, the AAC was 1,000,000 m^3, which represents an increase of about 15% from the previous AAC (BCMOF. 2009). Upon the next review, TFL 52 will also likely see a step down associated with the completion of harvest of the area’s mountain pine beetle killed forest.

Wood processing is a major employer in Quesnel and is well recognized across the province as having a strategic wood processing cluster. Overall, Quesnel has several major wood processing facilities that are dependent on the Quesnel TSA and TFL 52 along with forest resource further afield. The key wood processing facilities include three lumber mills (Tolko Industries Ltd., West Fraser Mills Ltd., C&C Wood Products Ltd), two pulp mills (Cariboo Pulp and Paper Co. Ltd., Quesnel River Pulp Company), a pellet mill (Meadowbank Pinnacle Pellet), a veneer/plywood and panel plants (West Fraser), and log home manufacturers (FLRNORD. 2012). Collectively, the mills operate as an integrated network with approximately 60% of the wood chips required by the 2 sawmills provided by the other primary processing facilities.

In 2014, Canadian Forest Products closed its sawmill in Quesnel, eliminating 209 sawmill jobs locally. In addition, the company exchanged licenses with West Fraser who closed a mill in Houston (FLNRORD. 2013). In 2016, the Kersley Pinnacle Pellet plant closed in Quesnel eliminating a further 19 mill jobs (250 News. 2016). Moving forward, timber supply will remain a concern for on-going operations of the remaining processing facilities. Table 9 outlines the forest sector and wood processing labour force in Quesnel CA. As highlighted, the total labour force was just over 3,000 in 2016 and was down roughly 200 positions since 2011. However, based on other rural communities in the province, Quesnel has continued to be a strong employer in the forest sector.

Table 9: Quesnel CA Forest Sector Labour Force, 2001 to 2016

	2001	**2011**	**2016**
113 Forestry and logging	705	700	670
1153 Support activities for forestry	290	195	180
321 Wood product manufacturing	1,620	1,695	1,615
322 Paper manufacturing	675	620	545
Total	3,290	3,210	3,010

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

Public Services

Public services, made up of health and social services, education, and public administration, is an important economic sector in the City of Quesnel and surrounding area. As illustrated in Table 10, the labour force for the three sectors in the Quesnel CA has increased slightly over the past 15 years. Despite a slight decline, between 2011 and 2016, the labour force of 2,505 in the three sectors represented 19.6% of the total local labour of 12,810.

Health services in the City of Quesnel is centred around GR Baker Memorial Hospital, the Health Unit and the Quesnel Primary Care Clinic. Health care labour force is also associated with Dunrovin Park Lodge Care facility and other assisted living and senior care centres. The health care and social service labour force has increased significantly over the 2001 to 2016 period.

Quesnel is located in School District 28 with the School District consisting of 17 schools, including 14 elementary schools providing kindergarten to grade 12, two high schools, and one alternative school (Quesnel School District. 2018). The student population in the School District 28 has seen enrollment decline in recent years, dropping from 3,450 in the 2012/13 year to 3,062 students in 2016/17 (BCME. 2018). Post secondary education is offered locally through UNBC's South-Central location and College of New Caledonia at the shared North Cariboo Community Campus. The labour force in the education sector has declined noticeably since 2001 but has been relatively flat between the 2011 and 2016 Census period.

The Provincial government has several ministries represented in the City, and along with the City of Quesnel and local First Nations governments, support a local public administration work force that has created stable employment over the past 15 years.

Table 10: Quesnel CA Public Service Labour Force, 2001 to 2016

	2001	2011	2016
61 Educational services	1,045	835	810
62 Health care and Social Services	870	1,275	1,215
91 Public administration	400	500	480
Total	2,315	2,610	2,505

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

Retail

City of Quesnel serves as the retail hub for the City and surrounding area. Among the numerous retailers are several large chain retailers such as Walmart and Canadian Tire. In addition, the community has several independent local businesses providing a unique character to the overall shopping experience. Besides servicing the local shoppers and travelling public, many of the retailers like Kal-Tire also benefit directly from spending by businesses in the forestry and mining sectors.

Overall, the labour force in the retail and wholesale sector have remained relatively stable over the past 15-years. While there has been some downward pressure in wholesale trade, this has been countered by modest increase in the retail trade labour force in recent years.

Table 11: Quesnel CA Retail Labour Force, 2001 to 2016

	2001	2011	2016
41 Wholesale trade	345	325	180
44-45 Retail trade	1,310	1,455	1,515
Total	1,655	1,780	1,695

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

Agriculture

Agriculture has played a key role in the history of the North Cariboo. Agriculture in the region developed closely with the start of the Gold Rush in the 1850s and developed in the region to support the influx of miners from around the world.

In 2016, the North Cariboo (Quesnel CA) reported 325 farms. This is down from 394 reported in 2011. Among the 325 farmers in 2016, 112 were active in cattle ranching, while hay farming was identified by 97, and a further 47 were classified as engaged in horse and other equine production. Other farming activities of note included 7 in poultry and egg production; 6 in greenhouse, nursery and floriculture farming; 5 in sheep and goat farming; and 5 in vegetable and melon farming (Statistics Canada. 2017c).

As illustrated in Table 12, farms ranged in size from under 10 acres to over 3,520 acres. When compared to 2011, the number of farms reporting 129 acres or less has declined noticeably (down 23%), while the number of farms over 3,520 acres has increased by 40% since 2011 (Statistics Canada. 2017d). The 325 farms in 2016 had a total capital value of $407.5 million, which represents a noticeable increase from 2011 when the 394 farms had a total capital value of $336.1 million (Statistics Canada. 2017e). The vast majority of the total capital value was in land and buildings.

Table 12: North Cariboo Farms by Size, 2016 (Acres)

	2011	2016
Farms under 10 acres	18	15
Farms 10 to 69 acres	73	55
Farms 70 to 129 acres	55	42
Farms 130 to 179 acres	49	43
Farms 180 to 239 acres	24	20
Farms 240 to 399 acres	40	31
Farms 400 to 559 acres	33	30
Farms 560 to 759 acres	18	23
Farms 760 to 1,119 acres	25	18
Farms 1,120 to 1,599 acres	16	10
Farms 1,600 to 2,239 acres	18	13
Farms 2,240 to 2,879 acres	9	7
Farms 2,880 to 3,519 acres	6	4
Farms 3,520 acres and over	10	14
Total	394	325

Source: Statistics Canada (2017d)

Farms generated $23.74 million in gross receipts in 2016, which was an increase of 12.5% from the $21.07 million in gross receipts generated in 2011 by the North Cariboo farming community. However, there is a noticeable range in the distribution of gross farm receipts, as illustrated in Table 13. While most of the farms reporting had gross farm receipts of less than $25,000 in 2016, there were a handful of farms at the other end of the scale that had income of $500,000 or more in 2016.

Overall, when compared to 2011, there was a growing number of farms that had gross farm receipts in the $100,000 to $500,000 range. Between 2011 to 2016 this category increased from 31 farms to 54 farms, an increase of 74%.

Table 13: North Cariboo farms classified by total gross farm receipts in the year prior to the census, 2010 and 2015

	2011	2016
Farms, under $10,000	171	112
Farms, $10,000 to $24,999	87	77
Farms, $25,000 to $49,999	59	50
Farms, $50,000 to $99,999	41	26
Farms, $100,000 to $249,999	28	40
Farms, $250,000 to $499,999	3	14
Farms, $500,000 to $999,999	2	2
Farms, $1,000,000 to $1,999,999	1	3
Farms, $2,000,000 and over	2	1

Source: Statistics Canada (2017f)

Table 14 outlines the change in agriculture labour force over the period between 2001 to 2016 for the North Cariboo. The agriculture labour force shows a trend of consolidation similar to that seen in the number of farms. Over the past 15-year period, the overall agriculture employment has been trending downward, declining across the period.

Table 14: North Cariboo Agriculture Labour Force, 2001 to 2016

	2001	2011	2016
111 - 112 Farms (111 and 112)	495	375	310
1150 Support activities for farms	35	0	10
Total	530	375	320

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

Tourism

In Quesnel, tourism has always lagged well behind forestry and transportation in terms of its contribution to the economic base, but it still represents a significant industry, coming in ahead of agriculture and mining (Horne 2009). Tourism creates employment across several sectors; however, three of these are primarily associated with tourism and travel spending, including accommodation and food services. Using these two sectors as a proxy for the trend in overall tourism, we see that the 2016 experienced labour force was 975, versus 1,165 in 2001 when the local labour force was at its peak. The 16% decline far exceeded the population decline of about 5%, but it is also noted that job loss was in the food and beverage service industry, and accommodation held even.

Table 15: Quesnel CA Tourism Labour Force, 2001 to 2016

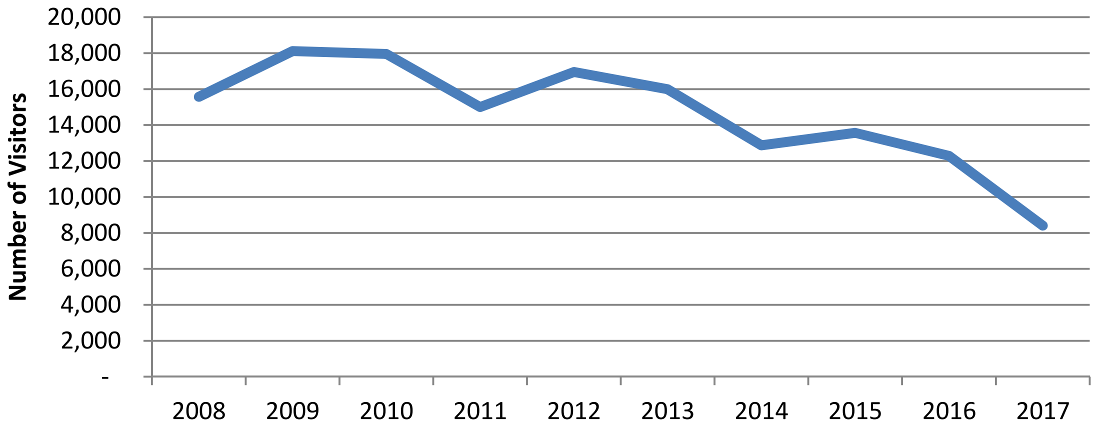
	2001	2011	2016
721 Accommodation services	260	235	260
722 Food services and drinking places	905	805	715
Total	1,165	1,040	975

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

The number of visitors coming through the region is unknown. Tourism indicators for the Cariboo Chilcotin Coast Tourism region have been positive in recent years. The Cariboo Chilcotin Coast received 528,000 overnight visits in 2014 and generated more than $168 million in related spending. Domestic overnight travellers accounted for 84% of visitation and 70% of related spending. International travellers accounted for 16% and 30%, respectively (Destination BC 2017). Close to three quarters (73%) of all visitors are BC residents, followed by Alberta, Washington, German, and California residents. The distribution of spending is dramatically different, with BC residents accounting for 61%, Washington residents 6%, and Californians 12%. In terms of trip activities, outdoor recreation dominates, with boating, wildlife viewing, fishing, hiking/backpacking and camping all popular. Interestingly, these activities are preferred by BC and Canadian visitors; US and international visitors do not tend to participate, instead preferring museums, art galleries and historic sites. They also seek out national/provincial parks.

The available tourism indicators in the North Cariboo generally reflect the positive performance at the regional level, although year to year fluctuations occur. Visitor Centre attendance has been on a long-term decline, attracting about half the visitors in 2017 than it did in 2008. The wildfires had a major adverse impact on 2017 attendance but even so, the average 2014-2016 attendance was 20% below that of 2011-2013. BC Parks camping attendance has been growing modestly in the region (BC Parks 2016), although close-in parks to Quesnel such as Pinnacles and Ten Mile saw explosive growth in use in 2016.

Figure 2: Quesnel Visitor Centre Attendance, 2008-2016



Source: Destination BC (2017)

Tourism experiences in the Quesnel area are primarily outdoor adventure recreation including hiking, backpacking, camping, mountain biking, fishing, hunting, canoeing, rafting, jetboating, snowmobiling, cross-country skiing, downhill and heli-skiing, bird watching, wildlife viewing and nature observation. Some of BC's most iconic parks, Tweedsmuir to the west and Bowron Lakes to the east, are accessible from Quesnel but actual attendance is modest in part because of their wilderness locations.

Agri-tourism is a growing experience in the North Cariboo, but it has always been anchored by the long-established dude and guest ranch sector. This has expanded more recently through farmers' markets, culinary offerings and agricultural tours.

Quesnel has some exceptional historical assets, from First Nations culture to early explorers like Mackenzie and Fraser, and the Gold Rush and settlement eras. It is also the gateway to Barkerville and Wells to the east along Highway 26. Barkerville is the largest heritage site in western North America & a National Historic Site of Canada. The 140+ historic buildings and displays are complemented by different interpretive opportunities and live performances. In Quesnel itself, self-guided historical tours and Heritage Corner give visitors an opportunity to experience interpretive and commemorative signage.

The roster of festivals and events that draw visitors to Quesnel includes the Billy Barker Days Festival and Quesnel Rodeo, Gold Rush Trail Sled Dog Mail Run, Festival of the Performing Arts, SkyFest, Agriculture Fair and Exhibition, and the Annual Pow Wow.

Mining and Mineral Exploration

There are two active metal mines and one industrial mineral mine within close proximity to the City of Quesnel including:

- Located approximately 84 kilometres from Quesnel is Taseko Mine's Gibraltar copper mine. This mine has a mine life of 22 years and a direct workforce of 660.
- On Quesnel Lake approximately 212 kilometres from the City of Quesnel is Mount Polley copper-gold mine operated by Imperial Metals Corporation. This mine employs 350 and has a mine life of 9 years or more. (Jago. nd)
- There is also a Pumice mine located near Quesnel.

In addition, the historical Cariboo gold belt has seen gold exploration expenditure increased by $19 million, or 70% between 2016 and 2017 (MEMPR. Nd). Potential mine development in the local area looks positive with the focus on three projects potentially moving forward in development including:

- Bonanza Ledge underground gold mine which is located near Wells is approximately 80 kilometres from Quesnel. This mine is in advanced exploration and has been doing bulk sampling currently employing 150 workers. If the project advances to full production upwards of 300 to 350 workers would be employed (Lodder. 2018. pers comm.).
- Near Likely and approximately 155 km from Quesnel is the proposed Spanish Mountain gold-silver open mine. This mine if developed would have a mine life of over 14 years.
- Blackwater operated by New Gold Inc. is a proposed open-pit gold and silver mine with a projected 17-year mine life and employing over 500 workers during operation. This project continues to be moved forward by New Gold Inc. and is potentially directly assessable from Quesnel through existing logging roads and future connection road. (Jago. Nd)

As illustrated in Table 16, mining employment has been associated with a relatively small labour force over the past fifteen years; however, the trend in this sector has been positive across the period. Employment has more than tripled between 2001 and 2016 with employment now standing at 235. With the potential of new projects coming on line in the region, there is a strong likelihood that mining and mine support employment in the Quesnel area will continue to show strong growth.

Table 16: Quesnel CA Mining and Support Services Labour Force, 2001 to 2016

	2001	2011	2016
212 Mining and quarrying	25	65	170
213 Support activities for mining and oil & gas	40	120	65
Total	65	185	235

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

4.3 MAJOR PROJECTS

Currently three major projects are proposed in the Quesnel area that will potentially create economic benefits. These projects are listed below and include:

- **College of New Caledonia (CNC) – Heavy Mechanical Trades Centre.** CNC new heavy-duty mechanic trades training facility is receiving a further $6.9 million in upgrades. The project is underway and anticipated to be finished in 2018.
- **Bonanza Ledge Mine** – This gold mine is anticipated to operate at 3,000 tonnes/day and is located 82 kilometres east of Quesnel near Wells. Bulk sampling has been conducted by Barkerville Gold Mine Ltd. receiving exploration drill permits for the Bonanza Ledge Zone on Barkerville Mountain. Site preparation is underway, including a gravel construction of a gravel road which is now in place (BCMAEST. 2018). An estimated 150 people are working in the initial milling, mining and exploration work and this smaller scale mining is anticipated to continue for the next two years while a determination is made on a larger scale mine project. To date approximately $120 million has been spent on this project development (Lodder. 2018. pers. comm.).
- **Spanish Mountain Copper-Gold Mine.** This proposed project is located 70 km northeast of Williams Lake and would be an open pit mine with an expected production rate of 14.6 million tonnes/year and a ten year mine life. The project is in the pre-application phase under the Environmental Assessment Act. It is currently estimated to have a total construction cost of $756 million if it goes ahead**.** (BCMAEST. 2018)

5 INTERNAL ASSESSMENT

The City of Quesnel has supported a formal economic development function for more than 20 years and before that was at the forefront of studying and exploring options for diversifying its economic base. The North Cariboo is one of the most forest-dependent regions of the province and with the growing impact of the mountain pine beetle epidemic and wildfire events, there is a recognition and desire to transition to the community to a new economy.

The City performs well when it comes to the Knowledge criteria, with land use regulations that have been crafted with consideration of future investment, explicit acknowledgement of economic development as a municipal responsibility and clear and flexible land use planning and development process. The 2007 OCP has been updated 10 times and a new long-term plan is in progress. The Economic Development chapter acknowledges forestry, tourism, agriculture, downtown revitalization and smart development. There is an underlying emphasis on diversification and transition in relation to the mountain pine beetle epidemic.

The City also scores well on Communications criteria due to its maintenance of an investment-friendly website and community profile information.

There is a minor gap in the Resources section due to the absence of an industrial land inventory, although the website does feature a Leasable space and land section using the www.spacelist.ca.

City of Quesnel
Investment Readiness Assessment Scorecard

Sections / Categories	Score	Target Score
Section A - Knowledge		
Contacts	5	4
Land Use Planning	15	15
Engaging Businesses	4	3
Information Sources	2	0
TOTAL	**26**	**22**
Section B – Resources		
Industrial Land Inventory	2	6
Joint Ventures	2	1
Economic Development Capacity	4	3
TOTAL	**8**	**10**
Section C – Communications		
Community and Sector Profiles	8	8
Website	4	4
Other Communications	1	0
TOTAL	**13**	**12**
GRAND TOTAL	**47**	**44**

6 STRENGTHS, CHALLENGES, OPPORTUNITIES

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

Strengths	Challenges	Opportunities
• Forest cluster • Natural resources (timber, minerals, water, land) • Outdoor adventure assets • Highway, rail, air access • Education and training facilities and expertise • Business climate • Quality of life • Affordable housing and land • Local hospital and good schools • High mineral potential	• Mountain pine beetle • Potential mill capacity reductions • Developing destination tourism • Achieving critical mass in agri-food production • Small local and regional markets • Building quality economic infrastructure • Small labour and entrepreneur pool	• Silviculture and woodlands management • Firefighting cluster • Secondary wood processing • Destination trails linked to heritage assets • Indigenous tourism • Mining services • Renewable/bio energy • Agri-food production • Technology and information • Education cluster

Quesnel's greatest strengths are its natural resources, the forestry cluster that has long supported the regional economic base, transportation services and the quality of life factors, including affordable housing, that are valued by residents and newcomers. The challenges due to the expected falldown in the crown timber harvest due to the mountain pine beetle epidemic and, secondarily, recent wildfires. Quesnel has not experienced the forestry decline like many other regions of the province have, but future harvest reductions are inevitable and transitioning strategies will be necessary. Investing in new economic infrastructure, for example transportation services, broadband and research and development capacity, will be needed to take advantage of new and emerging opportunities in the traditional resource sectors but in services, too. A nascent technology and information cluster could catalyze developing in areas like secondary wood processing and bio energy. Large areas of standing dead forest is a tremendous opportunity for woodlands management and services.

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