

Economic Base Analysis

Prepared for:
Town of Edson

Keri Mitchell, CLGM
Box 6300
605-50 Street
Edson, AB T7E 1N7

October 2014

FINAL REPORT

Prepared by:
Urbanics Consultants Ltd.
Suite 2000 - 355 Burrard Street,
Vancouver, B.C., V6C 2G8

(this page left blank for duplex printing)

Executive Summary

The purpose of this study is to conduct an economic base analysis and develop population and employment forecasts for the Town of Edson; as part of the Municipal Development Plan and Land Use Bylaw Review and Update. The study has two main sections; the first section, “**Demographic Analysis**”, examines historical demographic trends to project the Town’s population and its distribution (gender and age) over the study period (2011 -2041). The second section, “**Economic Base Analysis**”, examines historical employment trends, develops employment forecast for the period 2011-2021 and identifies the key growth sectors of the economy. The study also utilized a short **online survey** to corroborate some of the findings from the economic base analysis and to identify some concerns related to the local economy.

Demographic Analysis

This section examines the demographic trends, such as population size, growth rates and distribution, among major municipalities in the West Yellowhead Region. In addition, it used the Cohort-Component method to develop three population growth scenarios (high, medium and low) for the Town, based on several assumptions related to fertility rates, mortality rates and migration rates for the Town of Edson. Further, based on the most likely population growth scenario (medium growth scenario), the Town of Edson is expected to grow from a population of 8,475 in 2011 to about 11,400 in 2041; this represents an annual growth rate of 1.0%.

The seniors population in Edson is expected to increase significantly during the projection period and is likely to result in increased demand for various municipal services and amenities. The number of residents aged 65 years and over is expected to increase from 795 in 2011 to roughly 2,650 in 2041 (or an increase of 1,855 residents); this will increase the proportion of seniors in the population from 9% in 2011 to nearly 23% by 2041.

The proportion of the working-age (15-64 years) and the younger-age residents (15 years and younger) is expected to decline steadily from 2011 to 2041. The working-age cohort is expected to decline from 71% of the population to nearly 60% and the younger-age cohort from 19% of the population to only 17%. In spite of the overall declines in population shares in these age-cohorts, the Town will add roughly 750 residents aged 15 years to 64 years and 320 younger residents (15 years and younger), during 2011 - 2041.

Economic Base Analysis

This section examines both the historical economic trends and recent trends related to the provincial, regional and the Town's economy. This analysis include an overview of the historical employment levels and employment shares by industry at the provincial, regional and local level; unemployment and employment rates at the regional and local level; average hourly wage, by industry, at the regional level; and the projected growth by industry at the provincial level. This section also includes three sets of employment projections, based on the Extrapolation, Constant Share and Shift Share methods, for the Town of Edson over the period 2011- 2021. The reconciliation of findings from the above-mentioned methods, suggests that the Town of Edson is expected to add roughly 575 new jobs between 2011 and 2021, primarily in the following industries (major growth industries):

1. Mining and oil and gas extraction (152 jobs);
2. Construction (88 jobs);
3. Accommodation and food services (74 jobs);
4. Retail trade (63 jobs);
5. Health care and social assistance (65 jobs);
6. Professional, scientific and technical services (55 jobs); and,
7. Transportation and warehousing (51 jobs).

Further, based on the projected employment growth, the Town of Edson is expected to require over 40 acres of non-residential land to accommodate the projected growth in employment (575 employees) during 2011 -2021. The distribution of this projected non-residential land demand is:

- Commercial land: 6.6 acres;
- Industrial Land: 27.6 acres;
- Business Park: 4.9 acres; and,
- Other Land use (Public Services): 1.1 acres.

It should be noted that these projections are based solely on the most likely path of population and employment growth in the Town and do not account for any exogenous shocks (unpredictable) to the local economy, such as a large industrial development or a resource extraction project. These unpredictable economic activities can significantly alter some of the assumptions noted in this study and may necessitate the re-examination of the study's findings.

Table of Contents

Executive Summary	i
1 Introduction	1
1.1 Purpose.....	1
1.2 Approach.....	1
1.3 Limitations.....	2
2 Demographic Analysis	3
2.1 Population and Growth Rates.....	4
2.2 Population Distribution by Selected Age-Cohorts.....	6
2.3 Age- Cohort Shift in Population.....	8
2.4 Population Projections.....	10
2.5 Most Likely Growth Scenario.....	14
3 Economic Base Analysis	16
3.1 Alberta Economy.....	16
3.2 Regional Economic Trends in Alberta.....	20
3.3 Wages in Alberta.....	22
3.4 Employment Growth Projections for Alberta.....	24
3.5 Town of Edson Economy and Labour Force.....	26
3.6 Employment Distribution Trends.....	28
3.6.1 Location Quotient Analysis.....	30
3.6.2 Shift Share Analysis.....	32
3.7 Employment Growth Projections.....	34
3.7.1 Extrapolation Method.....	34
3.7.2 Constant Share Method.....	36
3.7.3 Shift Share Method.....	38
3.7.4 Reconciliation of the Three Methods.....	40
3.8 Non Residential Land Requirements.....	42
3.9 Major Growth Industries.....	44
3.9.1 Mining and Oil and Gas Extraction.....	44
3.9.2 Construction.....	46
3.9.3 Accommodation and Food Services.....	46
3.9.4 Retail Trade.....	48
3.9.5 Health Care and Social Assistance.....	48
3.9.6 Professional, Scientific and Technical Services.....	49
3.9.7 Transportation and Warehousing.....	49
3.9.8 Underrepresented Industries.....	50
4 Main Findings	52
Appendix 1: Survey Findings	54
Appendix 2: Cohort-Component Method and Assumptions	64
Appendix 3: High Growth Scenario	69
Appendix 4: Medium Growth Scenario	70
Appendix 5: Low Growth Scenario	71

Table of Figures

Figure 1: Major municipalities in West Yellowhead Region	3
Figure 2: Population growth rate among major municipalities in West Yellowhead Region	5
Figure 3: Population share of selected age cohorts, 2011 Census	7
Figure 4: Age cohort shift during 2006-2011	9
Figure 5: Edson population forecast – three scenarios – 2011-2041	13
Figure 6: Age cohort distribution (Medium Growth Scenario) – 2011-2041	15
Figure 7: Alberta share of goods producing vs service producing industries.....	17
Figure 8: Share of Gross GDP (basic prices) by industries for Alberta.....	18
Figure 9: Share of employment by industries for the Province of Alberta.....	19
Figure 10: Wages in Alberta and its economic regions, 2013.....	23
Figure 11: Wages by industry for the Banff- Jasper- Rocky Mountain House Economic Region.....	23
Figure 12: Alberta Employment Growth 2013 - 2017	25
Figure 13: Employment growth for select industries in Alberta, 2013 - 2017.....	25
Figure 14: Employment by industries for Edson, Census Division No. 14 and Alberta	27
Figure 15: Edson employment by industry, 2001-2011.....	29
Figure 16: Extrapolation Method: Employment Projections by Industry (2011 -2021).....	35
Figure 17: Constant Share Method: Employment Projections by Industry (2011 -2021).....	37
Figure 18: Shift Share Method: Employment Projections by Industry (2001 -2021).....	39
Figure 19: Employment Growth Projections by Industry, 2011 - 2021.....	41
Figure 20: Edson Employment Projections by Industry – Average Projection.....	41
Figure 21: Expected jobs growth rate (%) by industries for Alberta, 2013 – 2017.....	45
Figure 22: Distribution of survey respondents by industries	55
Figure 23: Overall rating as a place to do business	55
Figure 24: Rating Edson as a place to do business.....	57
Figure 25: Rating Edson's Quality of Life	57
Figure 26: Percentage of sales by geographic area	59
Figure 27: Percentage of purchases by geographic area	59
Figure 28: Changes in number of employees and gross sales during 2013-2014	61
Figure 29: Anticipated changes in number of employees and gross sales during 2014-2015	61
Figure 30: Town of Edson: Fertility rate assumptions	66
Figure 31: Historical net migration Census Division No. 14 & the Town of Edson	68

Table of Tables

Table 1: Population comparison of major municipalities in West Yellowhead Region.....	5
Table 2: Population distribution among major municipalities in West Yellowhead Region.....	7
Table 3: Age cohort shift during 2006-2011	9
Table 4: Historical population counts, Census Division No. 14 and the Town of Edson	11
Table 5: Edson population forecast (2011-2041)	11
Table 6: Components of population change, 2011 -2041	13
Table 7: Results from the Medium Growth Scenario (forecasts in yellow) – 2001-2041	15
Table 8: Alberta Economic Indicators.....	16
Table 9: Share of Gross GDP (basic prices) by industries for Alberta	18
Table 10: Share of employment by industries for the Province of Alberta	19
Table 11: Population and employment growth in Alberta and its economic regions	21
Table 12: Unemployment and employment rates for Alberta and its economic regions.....	21
Table 13: Employment by industries for Edson and its neighbouring municipalities	27
Table 14: Employment share by industries in Edson, Alberta and Canada (2001-2011).....	29
Table 15: Location Quotient – Edson & Province of Alberta – 2001, 2006 & 2011	31
Table 16: Shift Share Analysis: Town of Edson.....	33
Table 17: Extrapolation Method: Employment Projections by Industry (2001 -2041).....	35
Table 18: Constant Share Method: Employment Projections by Industry (2001 -2021).....	37
Table 19: Shift Share Method: Employment Projections by Industry (2001 -2021).....	39
Table 20: Non-Residential Land Use Demand Assumptions	43
Table 21: Non-Residential Land Use Demand Estimate.....	43
Table 22: Employment in Edson by Industry and Comparative Workforce Share 2011	45
Table 23: 2011 Employment count and projected employment for Alberta (2017).....	47
Table 24: 2011 Employment count and projected employment for Edson (2021).....	47
Table 25: Historical ASFR and TFR: Census Division No. 14, Alberta and Canada	65

1 Introduction

1.1 Purpose

Urbanics Consultants Ltd was retained by the Town of Edson for conducting an economic base analysis, including population and employment projections for the Town. An economic base analysis is an examination of the strengths of various industrial sectors in comparison to the Provincial economy. In addition, the analysis can be used to make employment growth projections in various industrial sectors of the economy; based on their historical growth trends and expectations related to the provincial economy.

The study includes an assessment of the current demographic characteristics of the population and uses it to project the future population over the next 27 years. The study also examines the Town's economy and the distribution of jobs in various industrial sectors of the economy to forecast employment levels by industrial sectors over the next decade. This is especially helpful in determining the importance of various sectors of the economy and in identifying potential growth industries. The findings from these analyses will provide some of the critical building blocks for updating the Town's Municipal Development Plan as well as a Land Use Bylaw Update. In addition, some of these findings can be used to create economic development policies for the Town of Edson. For example, to identify opportunities related to enhancing local employment, attracting investments and to improve the local economy.

1.2 Approach

The study uses a comprehensive analytical and public consultation framework for identifying and developing key strategies and performance measures for the Town of Edson. The study includes the following main sections:

1. **Demographic Analysis:** This section examines historical demographic trends, such as gender, age, life expectancy, death rates, fertility rates and migration rates, associated with the Town's population. This study uses the Cohort-Component method to project the Town's population and its distribution (gender and age) over the study period (2011 - 2041).
2. **Economic Base Analysis:** This section examines historical employment trends related to various industrial sectors in the Town's economy (NAIC categories such as agriculture, forestry, mining, manufacturing and other). In addition, it forecasts

employment (extrapolation, constant-share and shift-share method) levels for the period 2011-2021 and identifies the key growth sectors of the economy.

3. **Online Survey:** The final section in the study provides the findings from the online survey that was conducted in August 2014. The findings from the survey corroborate some of the findings from the economic bases analysis and identify some concerns related to the economy of the Town.

1.3 Limitations

Similar to economic base studies of this nature, this study has several limitations that might arise from the quality of background data. For example, the population and employment projections for the Town are based on Census counts (2001-2011), NHS (2011) and several assumptions related to the economy, employment and population characteristics (mortality rates, fertility rates, and migration rates), which might suffer from data quality issues. The consultants have tried to minimize such data quality issues by choosing the most recent and reliable datasets. Should these or any of the other assumptions noted in this study, be undermined by the course of future events, the consultant recommends that the study's findings be re-examined.

The reader is advised that the study is based on the assumption that the Town has adequate capacity for economic growth and its economic growth will only be as a result of exports from basic industries; and not from any exogenous shocks (unpredictable) to the local economy, such as any new public or private investments. This is especially important for the Town of Edson as even a modest investment in the local economy can have significant impact on the number and distribution of jobs.

In addition, the reader is advised that the high-level non-residential land demand estimate, provided in this study, is based solely on projected employment growth and assumptions related to rough space requirements, by industry, for the Town of Edson during the period 2011 to 2021. It is not based on a detailed commercial land use analysis, which would also have examined the existing land uses, environmental and topographical constraints, current inventory and capacity, construction activity and any other factors that might have an impact on demand for commercial lands in the Town. Thus, this land demand estimate should not be used for the creation of any future land use related policies; a more detailed land use analysis should be undertaken for such purposes.

2 Demographic Analysis

The Town of Edson is strategically located on Highway 16 - the Trans Canada Yellowhead Route; midway between Jasper and Edmonton, in the West Yellowhead Region (Figure 1). The West Yellowhead region is a sparsely populated region (87,200 in 2010) that covers an area of roughly 51,767 sq km (i.e. 8.1% of Alberta's land mass and for 2.3% of Alberta's population in 2010). Some of the major municipalities in the West Yellowhead Region, apart from the Town of Edson, are Yellowhead County, the Town of Hinton, the Town of Whitecourt, Brazeau County, the Town of Drayton Valley, Lac Ste. Anne County, Jasper, and the Town of Grande Cache. Among these municipalities, the Town of Edson benefits from an interactive relationship, in terms of employment, recreational, commercial and community amenities, with Yellowhead County and its hamlets (and to lesser extent with the Town of Hinton that is roughly 85 km from the Town). The Town of Edson also benefits from a significant amount of regional economic activity arising from private, commercial and industrial traffic flow along the Trans Canada Yellowhead Route.



Figure 1: Major municipalities in West Yellowhead Region
Source: Urbanics Consultants Ltd.

2.1 Population and Growth Rates

The West Yellowhead Region has historically displayed a lower population growth rate in comparison to the provincial average (.9% vs. 2.1% for the Province during 2001-2011). However, within the West Yellowhead Region, the Town of Edson has displayed higher average annual growth rates both during the last 5 years (2006-2011) as well as the last ten years (2001 – 2011) in comparison to the average annual growth rate for the other major municipalities in the Region (Table 1 and Figure 2). Edson's population grew at a .9% annual growth rate during 2006-2011 in comparison to a .7% growth rate for all the major municipalities and 1.1% annual growth rate during 2001-2011 in comparison to .9% growth rate for all the major municipalities during the same period (Table 1 and Figure 2). This suggests distinct location and economic advantages for the Town of Edson in comparison to other major municipalities in the West Yellowhead Region.

Even though Edson's population growth rate has historically exceeded that of the other major municipalities in the West Yellowhead Region, it has historically displayed a lower population growth rate in comparison to the Province of Alberta. The Town of Edson grew from just over 7,585 inhabitants in 2001 (Census 2001) to over 8,475 by 2011 (Census 2011), an average annual growth rate of 1.1% (Table 1 and Figure 2), which is roughly half of that of the Province of Alberta (2.1% per annum from 2001 to 2011). Also, Edson's population growth further slowed to .9% during the period 2006 – 2011 (Table 1 and Figure 2), while the Province continued to display strong population growth (2.1% from 2006 to 2011) during the same period.

It should also be noted that the Town of Whitecourt and the Town of Grande Cache have enjoyed higher population growth rates during this time period (2001-2011), and have outpaced Edson's growth rate (Table 1 and Figure 2). However, even these towns have displayed population growth rates that significantly lower than the Provincial averages over the last 10 years (2001- 2011); and it is only during the last 5 years (2006-2011) that the population growth rate for the Town of Grande Cache has exceeded that of the Province of Alberta (2.7% vs 2.1% for the Province of Alberta). The recent spurt of population growth in the Town of Grande Cache is a result of increased economic activity related to coal mining and tourism related activity (as well as a Corrections Canada Facility). Also, due to small base population of the Town of Grande Cache even small swings in population create large shifts in population growth rates.

	Major Municipalities in the West Yellowhead Region	Distance from Edson	2011 Census	2006 Census	2001 Census	Avg Annual % Change 2006-2011	Avg Annual % Change 2001-2011
1	Town of Edson		8,475	8,098	7,585	0.9%	1.1%
2	Yellowhead County (MD)	0 km	10,469	10,045	9,881	0.8%	0.6%
3	Town of Hinton	85 km	9,640	9,738	9,405	-0.2%	0.2%
4	Town of Whitecourt	105 km	9,605	8,971	8,334	1.4%	1.4%
5	Brazeau County (MD)	120 km	7,201	7,040	6,606	0.5%	0.9%
6	Town of Drayton Valley	140 km	7,049	6,893	6,090	0.4%	1.5%
7	Woodlands County (MD)	150 km	4,306	4,158	3,818	0.7%	1.2%
8	Lac Ste. Anne County (MD)	159 km	10,260*	9,880*	8,948	0.8%	1.4%
9	Jasper	164 km	4,051	4,265	4,180	-1.0%	-0.3%
10	Town Grande Cache	231 km	4,319	3,783	3,828	2.7%	1.2%

Table 1: Population comparison of major municipalities in West Yellowhead Region

Source: Urbanics Consultants Ltd. and Census 2001, 2006 & 2011

Note: *adjusted for boundary change, original 2006 population for Lac Ste. Anne County was 9.516

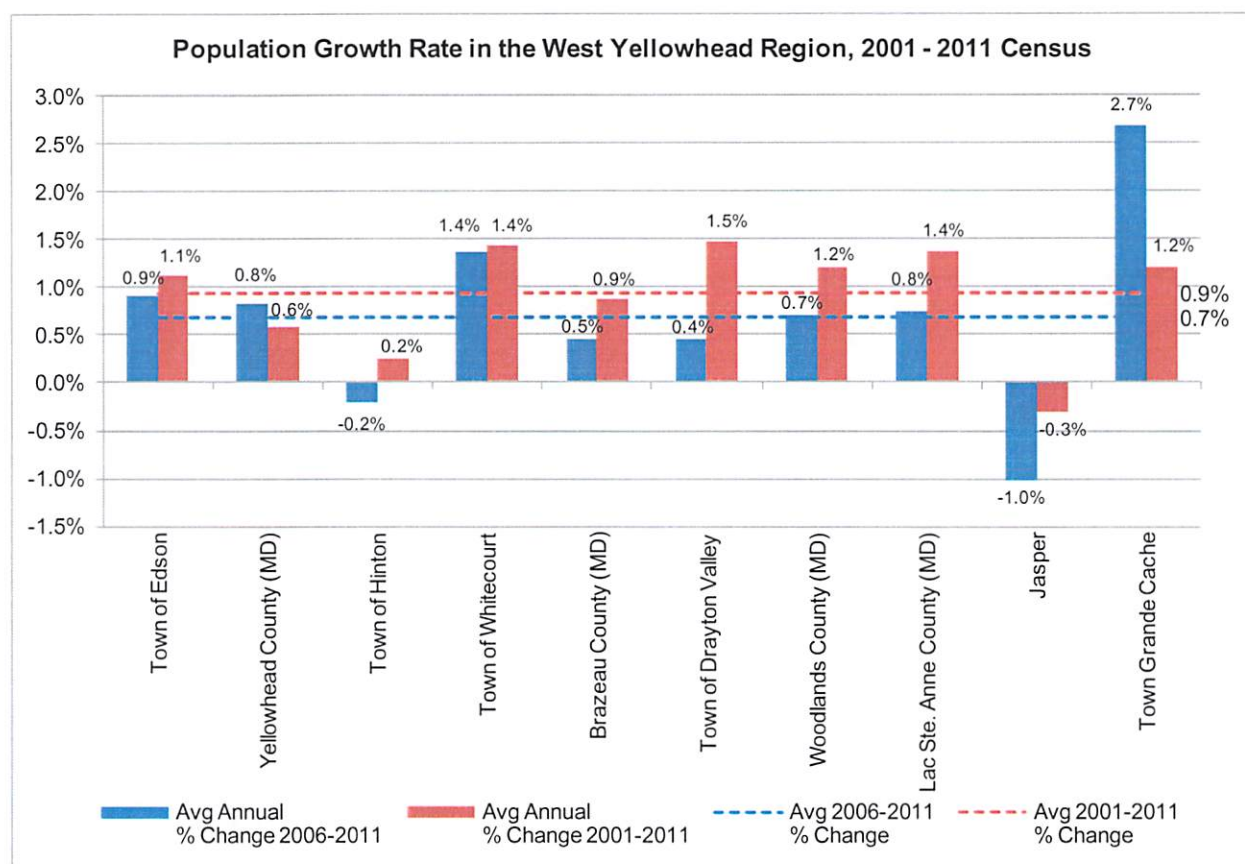


Figure 2: Population growth rate among major municipalities in West Yellowhead Region

Source: Urbanics Consultants Ltd. & Census 2001, 2006 & 2011

2.2 Population Distribution by Selected Age-Cohorts

Table 2 and Figure 3 provide the distribution of population, based on 2011 Census counts, in terms of five basic age -cohorts (0 -14 years, 15 - 24 years, 25 - 44 years, 45 – 64 years and 65 + years) as well as a working age group (15 – 64 years) category. The Table illustrates the differences in population distribution in each of the major municipalities in the West Yellowhead Region in comparison to the Province of Alberta. Some of the observations related to the Town of Edson, based on 2011 census, are:

- The Town has a higher proportion of younger aged population; i.e. in the 0 – 14 years, 15 - 24 years, 25 - 44 years age category, in comparison to the Province.
- The Town has a lower share of population aged 45 – 64 years and 65 + years, in comparison to the Province.
- The Town also has a higher share of working age population, i.e. in the 15 – 64 years age category in comparison to the Province.

It should be noted that, as of 2011, Edson had the third highest share of working-age residents (those between 15 and 64) among all the major municipalities in the West Yellowhead Region (Table 2). Also, among all the major municipalities in the West Yellowhead Region, only the Town of Whitecourt (72.6%), Woodlands County (71.3%) and Jasper (79%) displayed a similar or higher proportion of working age population (15 – 64 years). However, the Town of Edson (6,040 working-age residents) and the Town of Whitecourt (6,985 working-age residents) displayed distinct population size advantages as they had significantly larger working-age populations in comparison to those of Woodlands County (3,075 working-age residents) and Jasper (3,200 working-age residents).

Thus, the Town of Edson has a tremendous demographic advantage in terms of its younger working age population in comparison to the Province and the West Yellowhead Region. Even in comparison to Yellowhead County and the Town of Hinton, Edson enjoys a significantly higher proportion of working population; i.e. 71.3% in comparison to 67.6% for Yellowhead County and 70.9% for the Town of Hinton. In addition, the Town displays a significantly lower proportion of 65+ years population; i.e. 9.2% in comparison to 13.9% for Yellowhead County and 9.3% for the Town of Hinton.

	Municipalities	0 to 14 years	15 - 24 years	25 - 44 years	45 - 64 years	65 + years	15 - 64 years
1	Town of Edson	19.5%	13.9%	31.0%	26.4%	9.2%	71.3%
2	Yellowhead County (MD)	18.5%	11.0%	22.6%	34.0%	13.9%	67.6%
3	Town of Hinton	19.7%	13.4%	29.1%	28.5%	9.3%	70.9%
4	Town of Whitecourt	22.4%	15.4%	33.9%	23.3%	5.0%	72.6%
5	Brazeau County (MD)	19.7%	13.4%	25.2%	31.8%	9.9%	70.4%
6	Town of Drayton Valley	21.6%	14.5%	30.9%	22.6%	10.4%	68.0%
7	Woodlands County (MD)	19.4%	12.3%	24.0%	35.0%	9.4%	71.3%
8	Lac Ste. Anne County (MD)	17.6%	10.2%	22.3%	35.2%	14.7%	67.7%
9	Jasper	13.6%	15.1%	36.8%	27.2%	7.4%	79.0%
10	Town of Grande Cache	22.1%	14.3%	30.9%	24.7%	8.0%	70.0%
	Alberta Average	18.8%	13.6%	29.7%	26.8%	11.1%	70.1%

Table 2: Population distribution among major municipalities in West Yellowhead Region

Source: Urbanics Consultants Ltd. and Census 2011

Note: Highlighted cells identify municipalities with a higher share of age cohorts in comparison to the Province

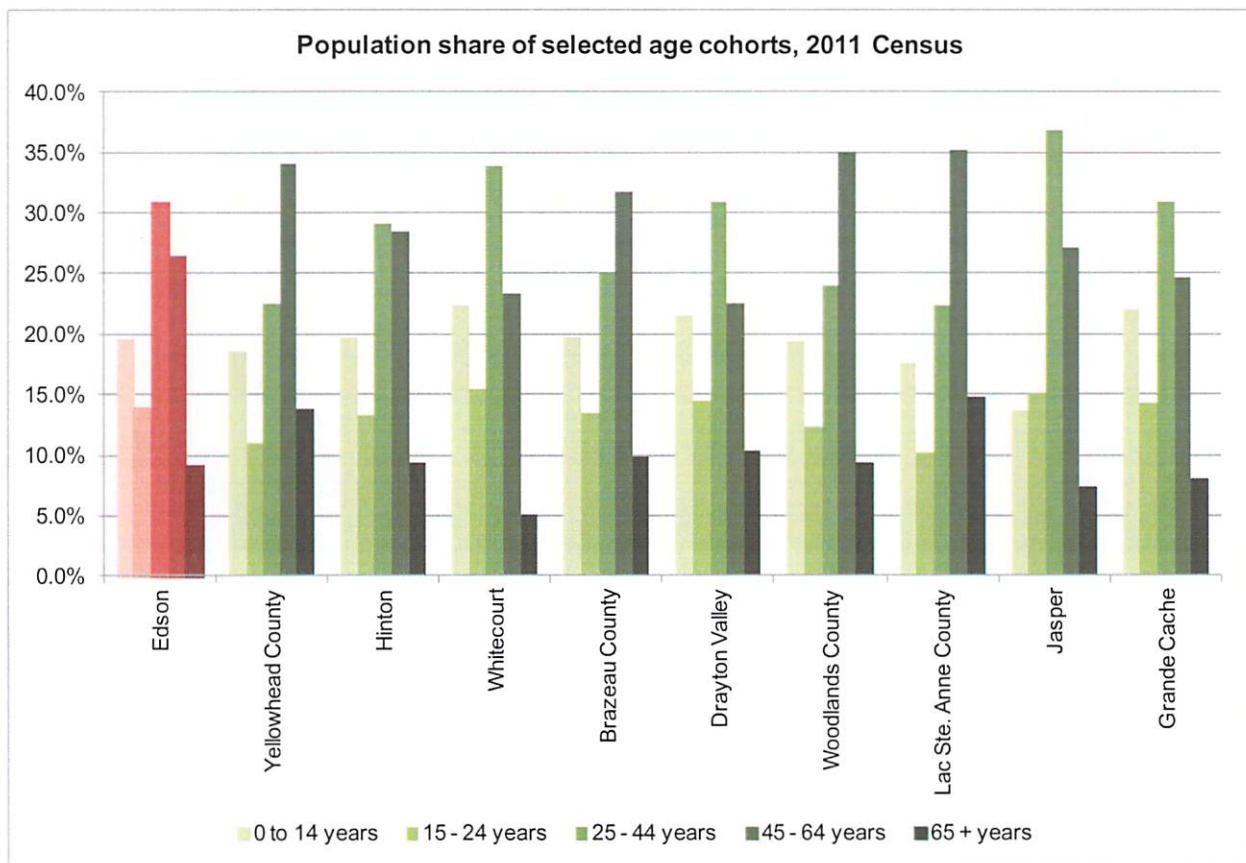


Figure 3: Population share of selected age cohorts, 2011 Census

Source: Urbanics Consultants Ltd. and Census 2011

2.3 Age- Cohort Shift in Population

Much like the rest of Canada, most of the major municipalities in the West Yellowhead Region witnessed significant growth in the population aged 65 years and over; only Jasper and the Town of Grande Cache displayed decline or no growth in this age-cohort during 2006 - 2011. Among the other major municipalities, only the Town of Edson and the Town of Drayton Valley had growth rates in the 65 + age-cohort below the Provincial average (14.8%). All the remaining municipalities displayed higher growth rates than the Provincial average during the period 2006 to 2011 (Table 3).

Even though less severe than the other major municipalities, the Town of Edson saw a significant graying of its population; i.e witnessed a larger growth in the proportion of its residents over the age of 45 during the period 2006 to 2011 (Table 3). The share of Edson's residents aged 45 years and above grew at the rate of 14.6% during 2006-2011, which is significant but still well below the other municipalities in the West Yellowhead Region as well as the provincial average of 16.3% (during the period 2006 – 2011). For example the Town of Whitecourt (24.7% among 45 + and 29.7% among 65 + age-cohort), Woodlands County (21.6% among 45 + and 19.1% among 65 + age-cohort) and the Lac Ste. Anne County (17.2% among 45 + and 22.8% among 65 + age-cohort) displayed higher growth rates amongst residents aged 45 years and over as well as 65 years and over. This suggests that these municipalities will need to provide specialized services and amenities that will be demanded by their growing senior's population.

Of particular note is the decline in the number of Edson's younger residents (0 -14 years) and younger working-age cohort (15 – 24 years age-cohort), during 2006 – 2011. The decline was - 3.2% for younger residents and -7.8% in the younger working-age cohort compared to a provincial growth of 8.4% and 1.5% for the respective age-cohorts. The declines in these age-cohorts during 2006 - 2011 was offset by increases in shares for all other age cohorts, including 5.8% growth among 25 – 44 years, 15.2% growth among 45 – 64 years and 13% growth among 65 + years age-cohorts. This trend is fairly consistent throughout the West Yellowhead Region. The only notable exception is the Town of Grande Cache which gained a considerable share in the 0 – 14, 15 – 24 and 25 – 44 age-cohorts, further suggesting an influx of young families into this municipality during 2006 -2011 (Figure 4).

	% Change 2006-2011	0 to 14 years	15 - 24 years	25 - 44 years	45 - 64 years	65 + years	15 - 64 years	45 + years	All ages
1	Town of Edson	-3.2%	-7.8%	5.8%	15.2%	13.0%	6.0%	14.6%	4.6%
2	Yellowhead County (MD)	-3.0%	-4.2%	-6.2%	16.2%	16.0%	4.3%	16.1%	4.3%
3	Town of Hinton	-8.4%	-8.8%	-5.2%	8.7%	20.8%	-0.9%	11.5%	-0.8%
4	Town of Whitecourt	0.7%	-2.6%	4.2%	23.7%	29.7%	8.0%	24.7%	7.2%
5	Brazeau County (MD)	-5.0%	-2.5%	-8.1%	14.2%	19.3%	2.0%	15.4%	2.0%
6	Town of Drayton Valley	5.2%	-17.0%	1.9%	11.9%	14.0%	0.0%	12.6%	2.4%
7	Woodlands County (MD)	-5.6%	-3.6%	-9.2%	22.3%	19.1%	5.1%	21.6%	4.0%
8	Lac Ste. Anne County (MD)	3.1%	-4.1%	-0.4%	15.0%	22.8%	6.4%	17.2%	7.9%
9	Jasper	-12.7%	-22.8%	-0.3%	5.8%	-1.6%	-3.8%	4.1%	-4.9%
10	Town of Grande Cache	14.4%	36.3%	22.4%	2.4%	0.0%	16.8%	1.8%	14.7%
	Alberta Average	8.4%	1.5%	10.3%	16.9%	14.8%	10.8%	16.3%	10.8%

Table 3: Age cohort shift during 2006-2011
 Source: Urbanics Consultants Ltd. and Census 2006 - 2011



Figure 4: Age cohort shift during 2006-2011
 Source: Urbanics Consultants Ltd. and Census 2006 - 2011

2.4 Population Projections

This section briefly presents the population growth projections for the Town of Edson using the Cohort Component method and the following assumptions (for additional information refer to the Appendix 2: Cohort-Component Method and Assumptions):

- **Base population**: The Town of Edson's Census 2011 population counts, disaggregated by sex and 5 year age cohorts from Statistics Canada (Catalogue Number 98-311-XCB2011018).
- **Fertility rates**: The population projections are based on historical fertility rates data from Canadian Vital Statistics, the Birth Database from Statistics Canada and the estimates of fertility rates for CD 14 from Alberta Vital Statistics, and the Alberta Treasury Board and Finance. The datasets provide the historical age-specific fertility rates (ASFR) as well as the total fertility rates (TFR) for the Census Division No. 14, the Province of Alberta and Canada. For additional information refer to the Appendix 2: Cohort-Component Method and Assumptions.
- **Mortality rates**: The Canadian Human Mortality Database is used for the historical trends associated with mortality in the Province of Alberta. These assumptions were developed by utilizing the age and sex specific death rates for Alberta during the period 1921-2009 and the age and sex specific life tables (5X5) for Alberta during the periods 2000-2004 and 2005-2009 from the Canadian Human Mortality data. In addition, the Lee Carter method was used to forecast mortality rates and the associated survival rates associated with various age-cohorts during the study period. For additional information refer to the Appendix 2: Cohort-Component Method and Assumptions.
- **Migration rates**: The migration assumptions for the population projections rely on Table 051-0063 of Statistics Canada for the Census Division No. 14 (which includes the Town of Edson, the Town of Hinton and Yellowhead County). This dataset provides the components of population growth by census division, sex and age cohort for the period 2001-2011. For additional information refer to the Appendix 2: Cohort-Component Method and Assumptions.

Further, based on the above-mentioned assumptions and the direct method for accounting for net migration, the study has estimated three population growth scenarios for the Town of Edson. The Table 4 provides the historical population trends in the region and the Table 5 provides the three population growth scenarios for the Town of Edson.

Geography	1991	1996	2001	2006	2011
Population counts					
Canada	27,296,859	28,846,761	30,007,094	31,612,897	33,476,688
Alberta	2,545,553	2,696,826	2,974,807	3,290,350	3,645,257
Division No. 14	26,671	27,452	26,871	27,881	28,584
Town of Edson	7,323	7,399	7,595	8,100	8,475
Town of Hinton	9,046	9,961	9,045	9,738	9,640
Yellowhead County	8,692	10,092	9,885	10,045	10,475
% Population of Div. No. 14					
Town of Edson	27.5%	27.0%	28.3%	29.1%	29.6%
Town of Hinton	33.9%	36.3%	33.7%	34.9%	33.7%
Yellowhead County	32.6%	36.8%	36.8%	36.0%	36.6%
Annual growth rate		1991-1996	1996-2001	2001-2006	2006-2011
Canada		1.1%	0.8%	1.0%	1.2%
Alberta		1.2%	2.0%	2.0%	2.1%
Division No. 14		0.6%	-0.4%	0.7%	0.5%
Town of Edson		0.2%	0.5%	1.3%	0.9%
Town of Hinton		1.9%	-1.9%	1.5%	-0.2%
Yellowhead County		3.0%	-0.4%	0.3%	0.8%

Table 4: Historical population counts, Census Division No. 14 and the Town of Edson
Source: Urbanics Consultants Ltd. & Statistics Canada, 1991- 2011 Census

Population Projections	2001	2006	2011	2016	2021	2026	2031	2036	2041	Annual % growth 2011-2014
Census Population Counts	7,595	8,100 (1.3%)	8,475 (0.9%)							
High Growth Scenario (annual growth rate)				9,040 (1.3%)	9,630 (1.3%)	10,230 (1.2%)	10,860 (1.2%)	11,540 (1.2%)	12,340 (1.3%)	(1.3%)
Medium Growth Scenario (annual growth rate)				9,020 (1.3%)	9,520 (1.1%)	10,000 (1.0%)	10,450 (0.9%)	10,900 (0.8%)	11,400 (0.9%)	(1.0%)
Low Growth Scenario (annual growth rate)				8,970 (1.1%)	9,410 (1.0%)	9,720 (0.7%)	9,970 (0.5%)	10,180 (0.4%)	10,370 (0.4%)	(0.7%)

Table 5: Edson population forecast (2011-2041)
Source: Urbanics Consultants Ltd.

High Growth Scenario: The high growth scenario assumes that fertility rates in Edson will increase from 1.987 in 2013 (Alberta Treasury Board and Finance) to 2.018 in 2021 and then remain constant during 2021 – 2041 and that the average life expectancy will gradually increase from 78.14 in 2009 to 82.1 years in 2041 for men and from 82.79 years in 2009 to 87.1 years in

2041 for women (based on projected survival rates for 2009 - 2041). In addition, the high growth scenario assumes the population inflow from migration will increase from 10 people during 2006-2011 to a net inflow of 468 people during 2036-2041. In the high growth scenario, the population of Edson is expected to grow from 8,475 in 2011 to about 12,340 in 2041 at an annual growth rate of 1.3%.

Medium Growth Scenario: The medium growth scenario is expected to be the most likely population growth scenario for the Town. This scenario is based on an assumption of constant fertility rate of 1.987 (at the 2013 level) during the entire study period (2011 -2041). This scenario also assumes that by 2041 the average life expectancy will gradually increase from 78.14 in 2009 to 82.1 years in 2041 for men and from 82.79 years in 2009 to 87.1 years in 2041 for women. In addition, the medium growth scenario assumes steady increases from about 10 people during 2006-2011 to an inflow of roughly 216 people during 2036-2041. In the medium growth scenario, the population of Edson is expected to grow from 8,475 in 2011 to about 11,400 in 2041; this represents an annual growth rate of 1.0%.

Low Growth Scenario: Even in the low growth scenario, the population of Edson is expected to increase: from 8,475 in 2011 to about 10,370 in 2041, an annual growth rate of .7% over the study period. The low growth scenario assumes that the Town's fertility rates will decline from 1.987 in 2013 to the 10-year Provincial average fertility rate (1.808) in 2021 and will remain constant during 2021 – 2041. This scenario also assumes that by 2041 the average life expectancy will gradually increase from 78.14 in 2009 to 82.1 years in 2041 for men and from 82.79 years in 2009 to 87.1 years in 2041 for women. In addition, it assumes a constant annual influx of about 10 people during any 5 year period throughout the study period.

Components of Change: Table 6 provides the components of growth, i.e. births, deaths and migration, associated with each of the growth scenarios during the study period. The table illustrates that the Town's population is expected to add roughly 300 (low scenario) to 380 (high scenario) people from natural increase (i.e. births and death) and roughly 10 (low scenario) to 260 (high scenario) during each 5 years projection period. Thus, the population of Edson is expected to grow in all three of the scenarios at a rate of .7% in the low growth scenario, 1% in the medium growth scenario and 1.3% in the high growth scenario. Figure 5 provides a graphical interpretation of the likely paths of population growth for the Town, under each of the scenarios and related assumptions.

Direct Method	Componenets	2011-2016	2016-2021	2021-2026	2026-2031	2031-2036	2036-2041	Average
High Growth Scenario	Births	650	630	630	600	630	700	640
	Deaths	160	200	240	270	310	370	260
	Natural Increase	490	430	390	330	320	330	380
	Migration	80	140	210	290	370	470	260
	Net Growth	570	570	600	620	690	800	640
Medium Growth Scenario	Births	650	630	610	570	580	630	610
	Deaths	160	200	240	270	310	360	260
	Natural Increase	490	430	370	300	270	270	360
	Migration	40	80	110	140	180	220	130
	Net Growth	530	510	480	440	450	490	480
Low Growth Scenario	Births	650	620	540	500	500	530	560
	Deaths	160	200	240	270	300	350	250
	Natural Increase	490	420	300	230	200	180	300
	Migration	10	10	10	10	10	10	10
	Net Growth	500	430	310	240	210	190	310

Table 6: Components of population change, 2011 -2041
Source: Urbanics Consultants

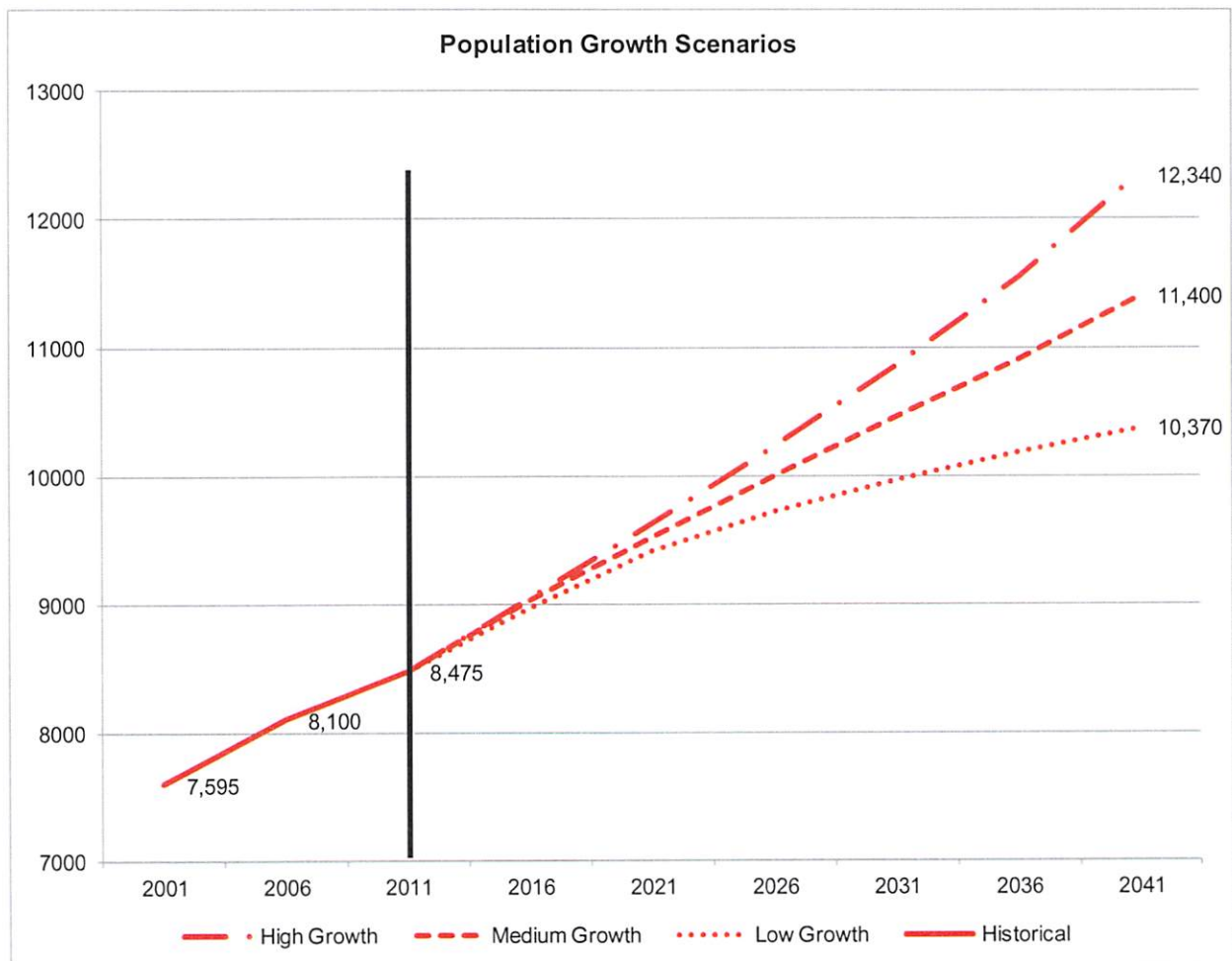


Figure 5: Edson population forecast – three scenarios – 2011-2041
Source: Urbanics Consultants Ltd.

2.5 Most Likely Growth Scenario

The medium growth scenario is expected to be the most likely of the three scenarios as the long term fertility rates are expected to be flat during the study period and the Town is expected to witness modest inflow of population due to positive economic characteristics. Therefore, the medium growth scenario has been used in all further analyses contained in the study, including the employment projections for the Town of Edson.

Table 7 and Figure 6 present the results of the most likely growth scenario (medium-growth scenario). These results reveal several important implications for the Town of Edson over the next 30 years. Most importantly, the proportion of the working age-cohort (15-64 years) will decline from 71% in 2011 to nearly 60% in 2041, even though nearly 750 people will be added to this age-cohort during 2011 -2041.

The proportion of seniors in the population is expected to grow from 9% to nearly 23% over that same period, which if applied to our growth scenario, suggests an increase of some 1,855 people over 65 years of age. Also, the proportion of younger residents below 15 years of age will decline from 19% in 2011 to 17% in 2041, which suggests an increase of some 320 residents in this age-cohort.

The declining share of working-age residents coupled with the increasing share of those over 65 suggests that Edson and its major employers will need to attract new younger age-cohort workers. Also the Town will need to address the long –term care and amenity choices desired by its increasingly aging population.

It should be noted that these population projections provide estimates that are statistically similar to the Municipal Census 2012, which had pegged the Town's population at 8,646 in 2012. Applying the 1.3% annual growth rate to the Town's Census 2011 population count of 8,475 in 2011 (May 2011), yields a population of 8,604 (July 2012) which is just 42 less (.5% difference) than the Municipal Census 2012 count. This is well within acceptable statistical limitations of population projections; as these projections cannot account for exogenous or otherwise unforeseen external factors, such as changes in the regional, provincial or international economy, which might have a large impact on the Town's migration rates.

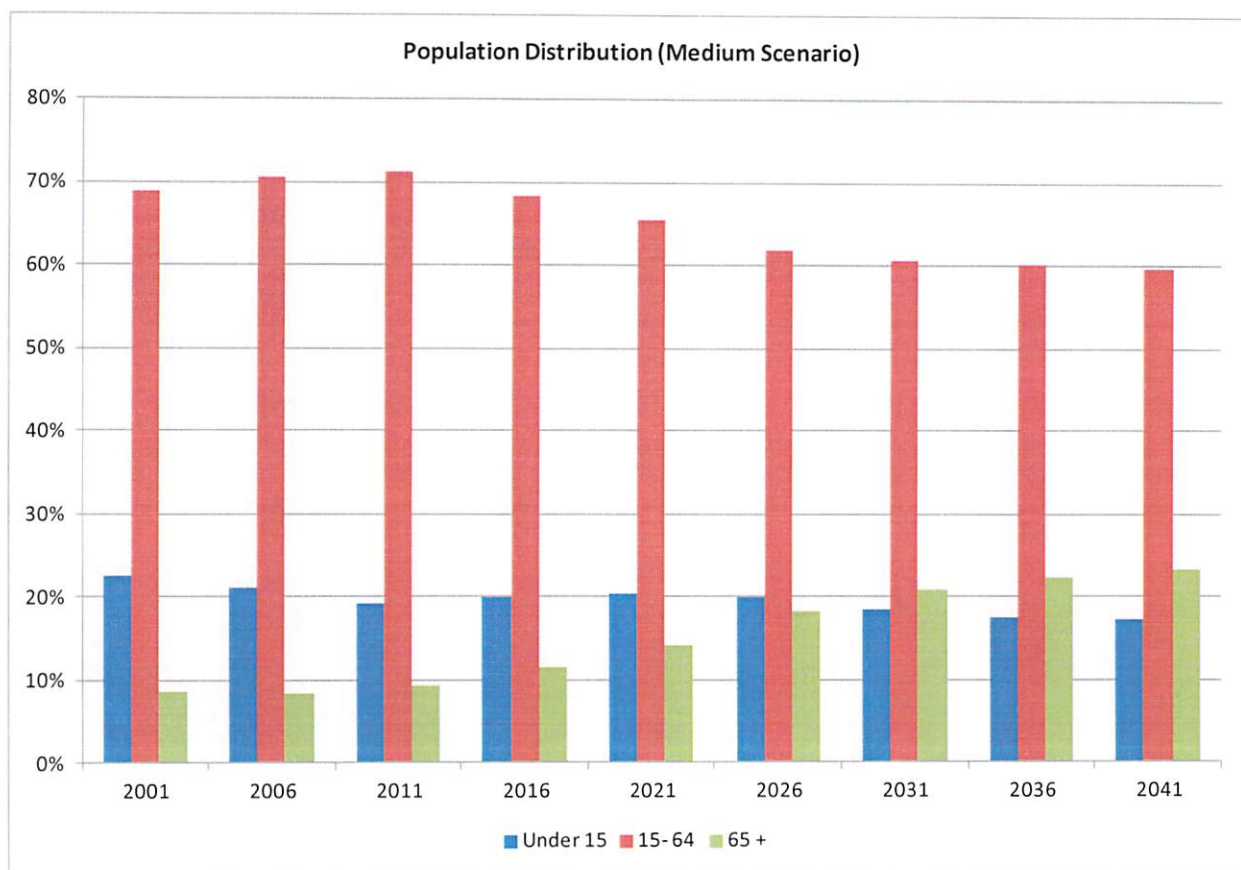


Figure 6: Age cohort distribution (Medium Growth Scenario) – 2011-2041
Sources: Urbanics Consultants Ltd.

Medium Growth Scenario		2001	2006	2011	2016	2021	2026	2031	2036	2041
Population Distribution	Under 15	1,715	1,705	1,640	1,810	1,950	2,000	1,940	1,910	1,960
	15- 64	5,220	5,715	6,040	6,170	6,220	6,180	6,330	6,560	6,790
	65 +	660	680	795	1,040	1,350	1,820	2,180	2,430	2,650
	Total	7,595	8,100	8,475	9,020	9,520	10,000	10,450	10,900	11,400
% Share	Under 15	23%	21%	19%	20%	20%	20%	19%	18%	17%
	15- 64	69%	71%	71%	68%	65%	62%	61%	60%	60%
	65 +	9%	8%	9%	12%	14%	18%	21%	22%	23%

Table 7: Results from the Medium Growth Scenario (forecasts in yellow) – 2001-2041
Sources: Urbanics Consultants

3 Economic Base Analysis

This section examines the provincial and local economic activities, providing an economic backdrop for the analysis of the future economic outlook of the Town of Edson.

3.1 Alberta Economy

The Province of Alberta displayed the third highest GDP in the country, in 2012; led primarily by its booming energy sector. The provincial GDP grew by an estimated 3.8% in 2012 and is projected to grow by 3.7% in 2013 and 2014 and 3.5% in 2015. This strong growth led to roughly an average of 65,000 new jobs per annum during 2011 - 2013 and is expected to translate into roughly 64,000 jobs in 2014 and 50,000 in 2015. This is expected to push unemployment levels down to 3.9% by 2015, which is expected to be the lowest level amongst all Canadian provinces. Strong employment growth can also be expected to translate to high levels of consumer confidence and exceptional growth in the retail sector, as consumer spending is expected to grow at 7.8% in 2014 and 5.1% in 2015. Similarly, the housing sector is expected to continue its recovery as new housing starts crossed the 36,000 mark in 2013 and are expected to increase to over 38,000 in 2014.

	2007	2008	2009	2010	2011	2012	2013	2014F	2015F
Real GDP									
chained \$2007 millions	259,087	263,515	252,811	264,164	277,940	288,548	299,224	310,415	321,416
% change	1.7	1.7	-4.1	4.5	5.2	3.8	3.7	3.7	3.5
Employment									
thousands	1,991	2,054	2,025	2,017	2,094	2,150	2,211	2,275	2,325
% change	3.9	3.1	-1.4	-0.4	3.8	2.6	2.9	2.9	2.2
Unemployment rate %	3.5	3.6	6.6	6.5	5.5	4.6	4.6	4.4	3.9
Retail sales									
\$ millions	61,490	61,620	56,489	59,849	63,945	68,408	73,109	78,821	82,807
% change	9.9	0.2	-8.3	5.9	6.8	7	6.9	7.8	5.1
Housing starts									
units	48,336	29,164	20,298	27,088	25,704	33,396	36,011	38,200	34,800
% change	-1.3	-39.7	-30.4	33.5	-5.1	29.9	7.8	6.1	-8.9
Consumer price index (2002 =100)	117.9	121.6	121.5	122.7	125.7	127.1	128.9	132	134.4
% change	4.9	3.2	-0.1	1	2.4	1.1	1.4	2.4	1.9

Table 8: Alberta Economic Indicators

Source: RBC Economics, Provincial Outlook (June 2014)

Note: Highlighted indicators are RBC Economics estimates

Alberta's economy is primarily dependent on the goods producing sector, with the energy sector and manufacturing as its primary industries. The goods producing industries of the Province accounted for roughly 28% of the provincial employment base but over 45% of the provincial GDP in 2013 (Figure 7). At the same time, the Province has a reasonable level of diversification, with the service sector accounting for roughly 72% of the total employment share and 54% of the provincial GDP in 2013 (Figure 7). Much of its service sector is driven by: finance and real estate; business and commercial services; construction; retail trade; wholesale trade; and transportation industries. Overall, the outlook for Alberta's energy sector going forward is strong, as price levels are expected to display positive movement over the next few years. As a result, its finance, transportation, and manufacturing industries, which derive much of their business from the energy sector, are also expected to have a positive outlook. However, it should be noted that the Albertan economy is extremely sensitive to oil prices and is particularly vulnerable to boom and bust cycles.

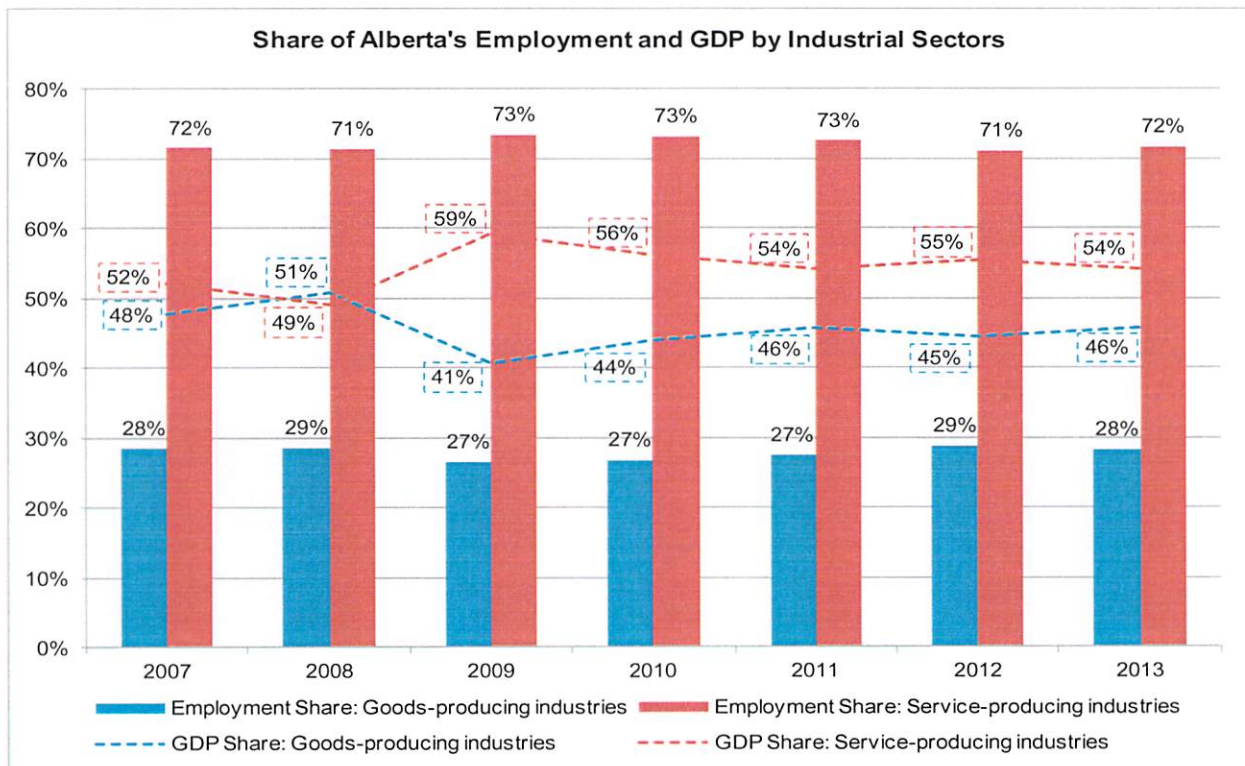


Figure 7: Alberta share of goods producing vs service producing industries
Source: Alberta Enterprise and Advanced Education

Industries: Share of GDP at basic prices	2007	2008	2009	2010	2011	2012	2013	Annual growth rate 2007- 2013
11 Agriculture, forestry, fishing and hunting	1.44%	1.80%	1.31%	1.43%	1.62%	1.61%	1.86%	4.36%
21 Mining and oil and gas extraction	28.16%	32.10%	21.88%	24.25%	25.35%	23.33%	24.55%	-2.26%
22 Utilities	1.76%	1.59%	1.85%	1.61%	1.78%	1.84%	1.82%	0.56%
23 Construction	9.06%	9.05%	9.20%	9.63%	9.84%	10.60%	10.68%	2.78%
31-33 Manufacturing	7.38%	6.41%	6.62%	7.01%	7.27%	7.20%	6.85%	-1.23%
41 Wholesale trade	4.56%	4.27%	4.73%	4.31%	4.58%	4.61%	4.40%	-0.59%
44-45 Retail trade	4.23%	3.86%	4.64%	4.49%	4.25%	4.39%	4.30%	0.27%
48-49 Transportation and warehousing	4.16%	3.73%	4.33%	4.17%	4.18%	4.26%	4.17%	0.04%
52 Finance and insurance	3.80%	3.51%	4.04%	4.11%	4.01%	4.09%	4.01%	0.90%
53 Real estate and rental and leasing	8.87%	8.44%	10.44%	9.78%	9.27%	9.50%	9.44%	1.04%
54 Professional, scientific and technical svcs	5.07%	4.86%	5.74%	5.46%	5.36%	5.59%	5.34%	0.87%
55-56 Business, building and other support services	3.03%	2.81%	3.18%	2.99%	2.86%	2.89%	2.91%	-0.67%
61 Educational services	3.40%	3.23%	4.10%	3.90%	3.61%	3.65%	3.58%	0.86%
62 Health care and social assistance	4.35%	4.23%	5.45%	5.18%	4.93%	5.08%	4.96%	2.21%
51-71 Information, culture and recreation	2.99%	2.78%	3.29%	3.07%	2.89%	2.87%	2.76%	-1.33%
72 Accommodation and food services	1.94%	1.79%	2.17%	1.98%	1.90%	2.04%	2.07%	1.09%
81 Other services (except public administration)	1.82%	1.71%	2.06%	1.95%	1.84%	1.94%	1.89%	0.63%
91 Public administration	3.99%	3.83%	4.97%	4.69%	4.47%	4.51%	4.42%	1.72%

Table 9: Share of Gross GDP (basic prices) by industries for Alberta
Source: Urbanics Consultants Ltd. and Statistics Canada

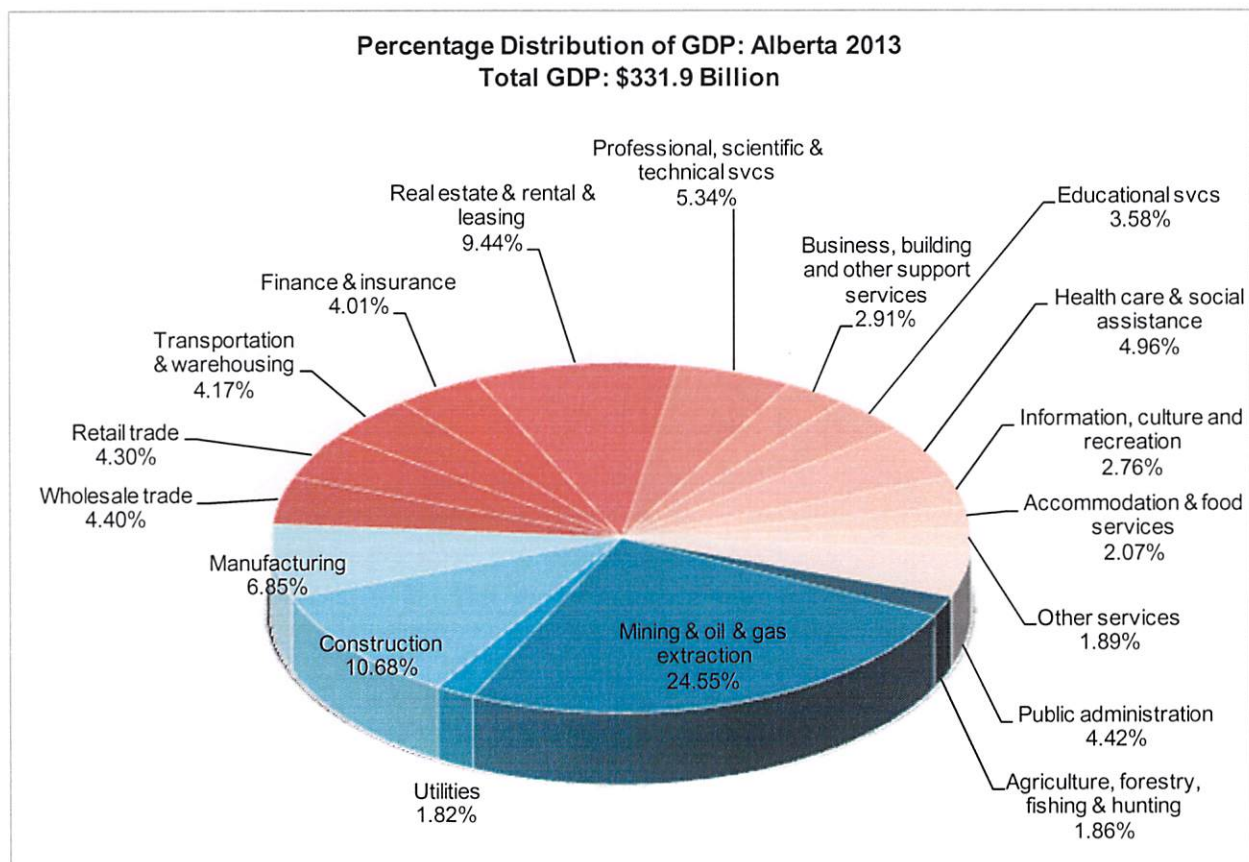


Figure 8: Share of Gross GDP (basic prices) by industries for Alberta
Source: Urbanics Consultants Ltd. and Statistics Canada

Industries: Employment Share	2007	2008	2009	2010	2011	2012	2013	Annual growth rate 2007- 2013
11 Agriculture, forestry, fishing and hunting	2.73%	3.04%	2.79%	2.50%	2.64%	2.79%	2.98%	1.44%
21 Mining and oil and gas extraction	7.54%	7.27%	6.85%	6.95%	7.22%	8.07%	7.74%	0.44%
22 Utilities	1.02%	0.89%	1.05%	0.91%	0.78%	0.96%	0.85%	-3.14%
23 Construction	9.92%	10.26%	9.67%	10.24%	10.07%	10.54%	10.46%	0.89%
31-33 Manufacturing	7.26%	7.14%	6.15%	6.18%	6.75%	6.44%	6.26%	-2.44%
41 Wholesale trade	4.03%	4.37%	3.83%	3.69%	4.38%	3.84%	3.81%	-0.91%
44-45 Retail trade	10.76%	11.48%	11.44%	11.48%	11.05%	11.16%	11.02%	0.41%
48-49 Transportation and warehousing	5.39%	5.10%	5.24%	5.20%	5.12%	5.41%	5.31%	-0.26%
52 Finance and insurance	3.21%	3.61%	3.45%	3.35%	2.98%	3.34%	3.21%	-0.01%
53 Real estate and rental and leasing	1.82%	1.96%	2.08%	1.87%	1.80%	1.48%	1.77%	-0.42%
54 Professional, scientific and technical svcs	7.52%	8.05%	7.58%	7.48%	7.81%	7.35%	8.03%	1.11%
55-56 Business, building and other support services	3.76%	3.23%	3.37%	3.61%	3.50%	3.39%	3.35%	-1.90%
61 Educational services	6.72%	6.24%	6.63%	6.42%	6.08%	6.00%	5.83%	-2.36%
62 Health care and social assistance	9.49%	9.34%	9.97%	10.87%	10.74%	10.63%	10.64%	1.93%
51-71 Information, culture and recreation	3.89%	3.56%	3.99%	3.82%	3.77%	3.31%	3.50%	-1.75%
72 Accommodation and food services	5.99%	5.69%	6.38%	6.21%	6.25%	6.20%	6.14%	0.40%
81 Other services (except public administration)	4.86%	4.59%	5.05%	4.88%	5.02%	4.95%	5.05%	0.63%
91 Public administration	4.07%	4.16%	4.46%	4.31%	4.05%	4.12%	4.05%	-0.10%

Table 10: Share of employment by industries for the Province of Alberta
 Source: Urbanics Consultants Ltd. and Statistics Canada

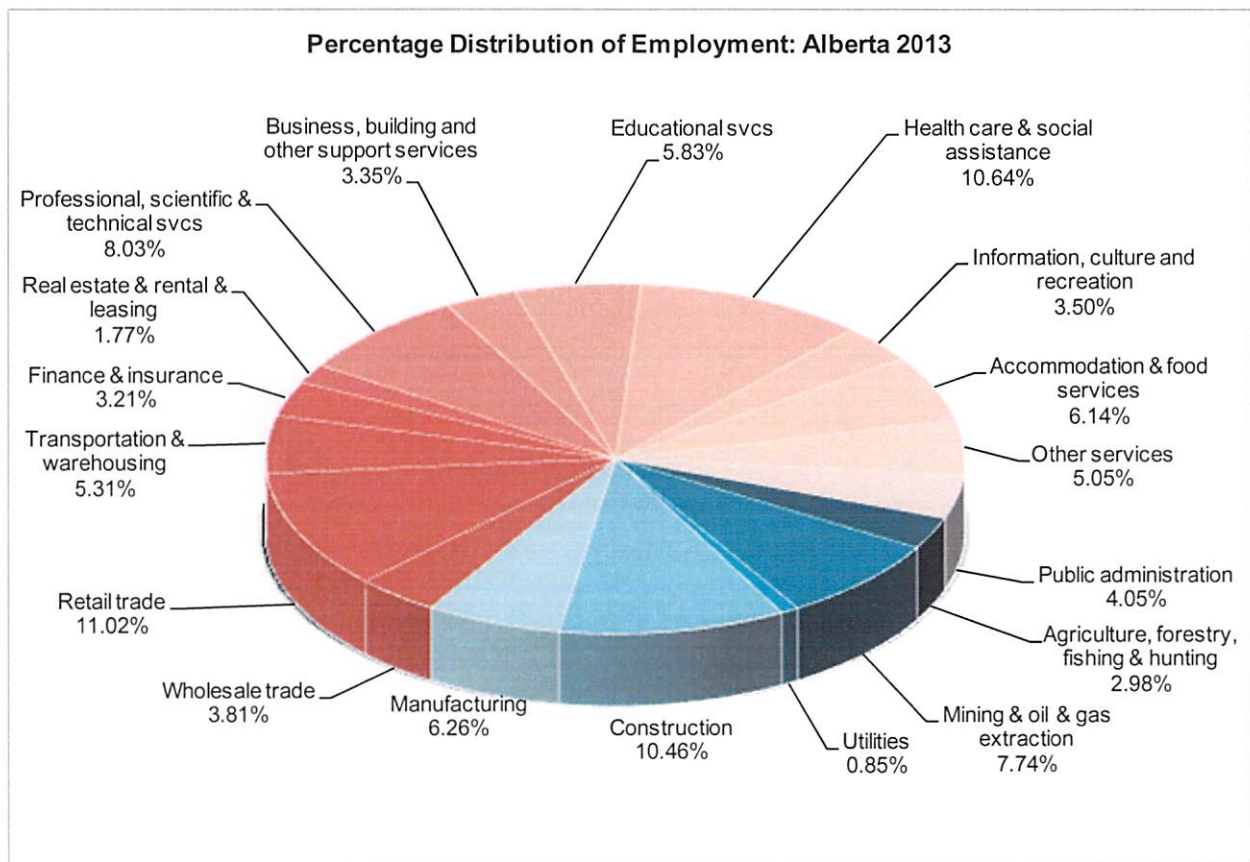


Figure 9: Share of employment by industries for the Province of Alberta
 Source: Urbanics Consultants Ltd. and Statistics Canada

Table 9 and Figure 8 provide GDP shares by industry and Table 10 and Figure 9 provide employment shares by industry, for the Province of Alberta. By comparing these datasets the following observations can be made:

- Mining, oil and gas industry employed roughly 7.7% of the labour force and represented roughly 24.55% of the provincial GDP in 2013. Also, the mining, oil and gas industry experienced a contraction in its GDP share during 2007-2013, even though its employment share expanded during the same period.
- Manufacturing industry employed roughly 6.3% of the labour force and represented 6.9% of the provincial GDP in 2013. The industry contracted both in terms of its GDP share and employment share during 2007 -2013, i.e. its share in provincial GDP and employment declined.
- Construction industry employed roughly 10.5% of the labour force and represented 10.7% of the provincial GDP in 2013. It displayed significant growth in GDP and employment share during 2007-2013.
- Retail trade employed 11% of the provincial labour force but represented only 4.3% of the provincial GDP in 2013. It has displayed positive growth during 2007-2013.
- Accommodation and food services industry employed roughly 6.1% of the provincial labour force but represented only 2.1% of the provincial GDP in 2013. It displayed modest growth (both GDP and employment share) during 2007-2013.

3.2 Regional Economic Trends in Alberta

Even though the Province of Alberta has displayed strong economic growth over the last decade, not all of the economic regions in Alberta have benefitted to the same extent. Much of the growth during 2001- 2013 has accrued to the economic regions of Calgary, Red Deer and Edmonton; the only notable exception is the Wood Buffalo and the Cold Lake Region. This is not surprising as these three economic regions, i.e. Calgary, Red Deer and Edmonton, accounted for over 2.4 million people or roughly 80% of the provincial population and 1.58 million jobs or 71% of the province's jobs. In addition, these economic regions displayed significant economic growth over the last decade due to the booming energy sector. For example, the Calgary, Red Deer and Edmonton economic regions displayed annual average employment growth rates in the range of 2.8% - 2.9% during 2001 -2013, which outpaced the provincial employment growth rate of 2.6% during the same period.

Economic Regions	Population (persons x 1,000)					Employment (persons x 1,000)				
	2001	2006	2011	2013	Annual Avg % Growth (2001-2013)	2001	2006	2011	2013	Annual Avg % Growth (2001-2013)
Canada	24,439.0	26,145.9	27,987.3	28,673.2	1.3%	14,940.9	16,410.2	17,306.2	17,731.2	1.4%
Alberta	2,364.9	2,702.5	3,006.6	3,172.4	2.5%	1,630.6	1,916.5	2,094.1	2,211.0	2.6%
Lethbridge-Medicine Hat	185.5	203.8	219.2	227.3	1.7%	119.2	140.2	140.3	140.2	1.4%
Camrose-Drumheller	141.3	150.2	156.0	159.9	1.0%	92.2	106.9	107.2	108.5	1.4%
Calgary	833.8	976.3	1,110.9	1,179.7	2.9%	601.1	722.7	779.3	832.4	2.8%
Banff-Jasper-Rocky Mountain House	63.1	66.6	71.9	74.0	1.3%	45.9	50.1	53.2	52.8	1.2%
Red Deer	118.6	141.0	154.3	161.8	2.6%	83.3	101.3	108.0	115.5	2.8%
Edmonton	787.6	897.6	1,000.7	1,064.4	2.5%	527.7	602.4	692.7	741.1	2.9%
Athabasca-Grande Prairie-Peace River	162.3	181.1	190.6	195.5	1.6%	109.3	129.8	134.7	137.2	1.9%
Wood Buffalo-Cold Lake	72.7	85.9	103.0	109.8	3.5%	52.1	63.0	78.9	83.3	4.0%
Town of Edson	7.6 *	8.1 *	8.5 *		1.1%	4.8 *	5.5 *	4.9 **		0.2%

Table 11: Population and employment growth in Alberta and its economic regions

Source: Urbanics Consultants Ltd., Census 2001, 2006, 2011*, NHS 2011** and Labour Force Survey data

The Banff- Jasper- Rocky Mountain House Economic Region, which includes the Town of Edson, grew at only half the provincial growth rate (1.3% population growth rate vs. 2.5% for the Province and 1.2% employment growth rate vs. 2.6% for the Province during 2001 - 2013); with the Town of Edson recording an even lower population growth rate of 1.1% and roughly 0.2% annual employment growth rate (Table 11). In addition, from 2001 to 2013, the Town of Edson displayed a higher unemployment rate (5.7% vs. 4.3%) and a lower employment rate (71.6% vs. 73.4%) in comparison to the Banff-Jasper-Rocky Mountain House Economic Region (Table 12).

Economic Regions	Unemployment rate					Employment rate				
	2001	2006	2011	2013	Avg % (2001-2011)	2001	2006	2011	2013	Avg % (2001-2011)
Canada	7.2%	6.3%	7.4%	7.1%	7.1%	61.1%	62.8%	61.8%	61.8%	62.2%
Alberta	4.7%	3.4%	5.5%	4.6%	4.8%	69.0%	70.9%	69.7%	69.7%	69.9%
Lethbridge-Medicine Hat	4.3%	3.0%	5.5%	4.2%	4.5%	64.3%	68.8%	64.0%	61.7%	65.4%
Camrose-Drumheller	3.5%	2.8%	4.5%	3.7%	3.7%	65.3%	71.2%	68.7%	67.9%	68.9%
Calgary	4.6%	3.2%	5.7%	4.8%	4.9%	72.1%	74.0%	70.2%	70.6%	71.7%
Banff-Jasper-Rocky Mountain House	3.6%	x	3.5%	4.0%	4.3%	72.7%	75.2%	74.0%	71.4%	73.4%
Red Deer	5.0%	3.9%	5.8%	4.9%	4.9%	70.2%	71.8%	70.0%	71.4%	70.6%
Edmonton	5.0%	3.8%	5.5%	4.8%	4.9%	67.0%	67.1%	69.2%	69.6%	68.4%
Athabasca-Grande Prairie-Peace River	4.9%	3.3%	5.6%	3.9%	5.0%	67.3%	71.7%	70.7%	70.2%	69.4%
Wood Buffalo-Cold Lake	4.6%	4.3%	5.2%	4.1%	4.4%	71.7%	73.3%	76.6%	75.9%	75.1%
Town of Edson	5.4%	6.5%	5.1%		5.7%	70.6%	73.7%	70.4%		71.6%

Table 12: Unemployment and employment rates for Alberta and its economic regions

Source: Urbanics Consultants Ltd., Census 2001, 2006 and 2011, NHS 2011 and Labour Force Survey data

3.3 Wages in Alberta

The high growth economic regions of Calgary and Edmonton displayed higher average hourly wages in comparison to other economic regions in the Province, i.e. \$27.64 and \$26.68 respectively in comparison to the overall average of \$26.58 for all economic regions in 2013 (Alberta Wage and Salary Survey 2013). The Wood Buffalo and Cold Lake Economic Region displayed the highest average hourly wage (with \$31.63) in the Province (Figure 10); primarily due to its vast oil sands deposits. In contrast, the Banff- Jasper- Rocky Mountain House Economic Region displayed an average hourly wage of \$21.93, which is significantly below the 2013 provincial average hourly wage of \$26.58 (Alberta Wage and Salary Survey 2013).

Figure 11 provides industry specific average hourly wages for the Banff- Jasper- Rocky Mountain House Economic Region. The figure illustrates that other than the retail trade, information and culture, arts, entertainment and recreation and the accommodation and food services industries, all other industries had higher average hourly wages in comparison to the overall average hourly wage for the Banff- Jasper- Rocky Mountain House Economic Region. Most notable amongst the industries with the highest average hourly wages in 2013 are the goods producing industries such as mining and oil and gas (\$31.81) and utilities (\$37.55) and the services producing industries such as professional, scientific and technical services (\$34.13), transportation and warehousing (\$28.72) and public administration (\$30.11).

It should be noted that similar data is not available for the industries in the Town of Edson but they can be expected to display similar wage levels.

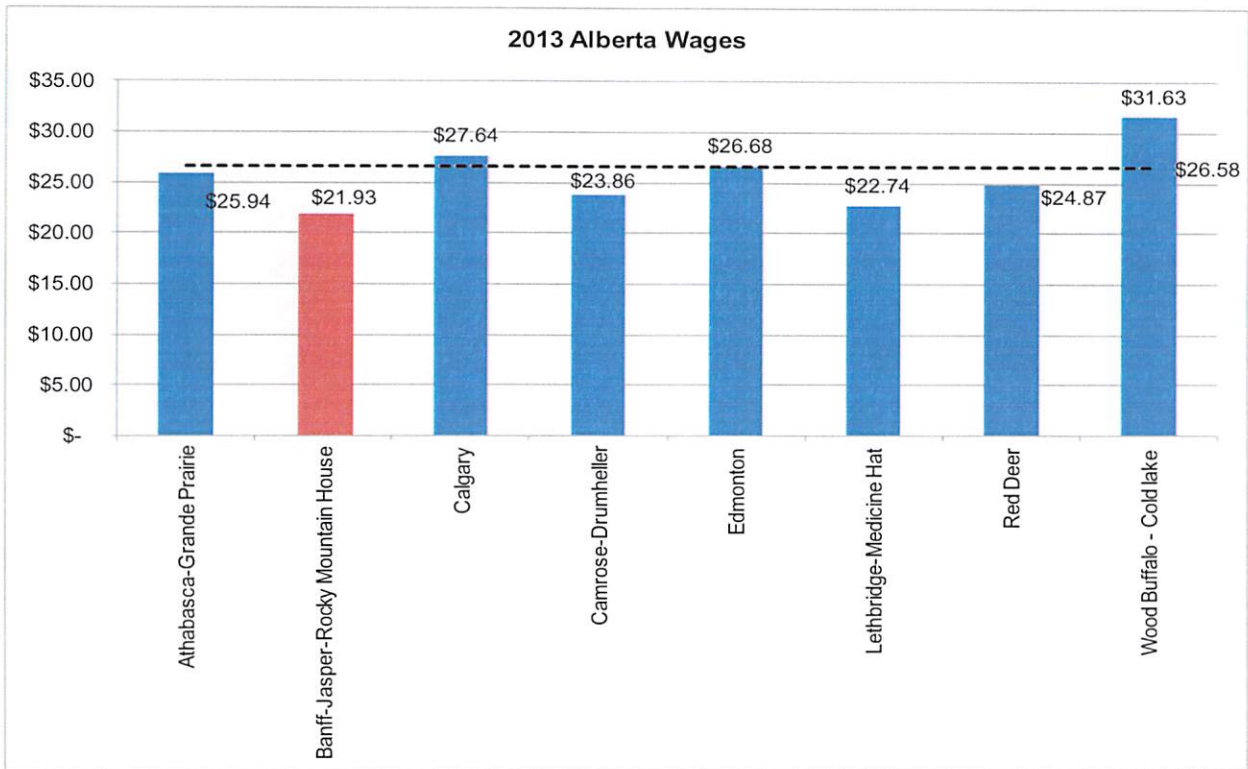


Figure 10: Wages in Alberta and its economic regions, 2013
 Source: Urbanics Consultants Ltd. and 2013 Alberta wage and salary survey

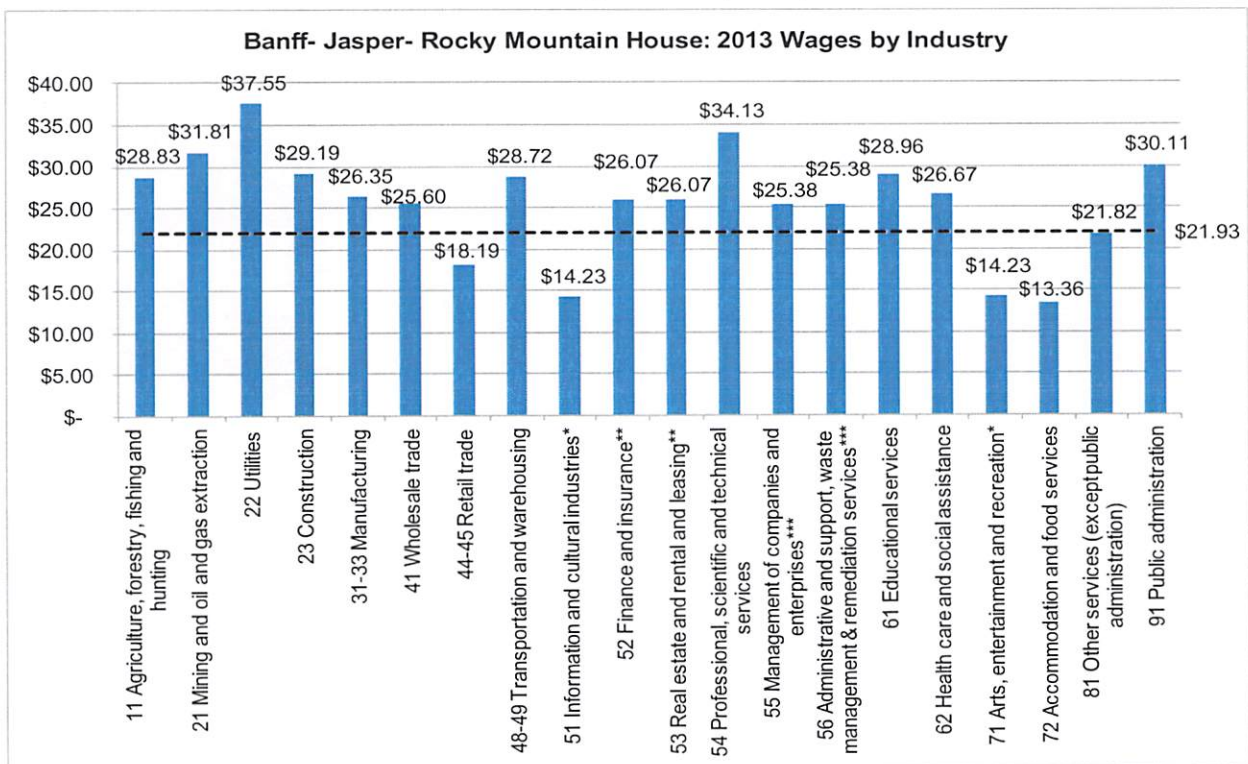


Figure 11: Wages by industry for the Banff- Jasper- Rocky Mountain House Economic Region
 Source: Urbanics Consultants Ltd. and 2013 Alberta wage and salary survey

3.4 Employment Growth Projections for Alberta

The Government of Alberta's Employment Outlook for 2013 - 2017 (Canadian Occupational Projection System or COPS) suggests significant job growth across all industries, the manufacturing industry being an exception. The Province is expected to gain roughly 158,000 new jobs during the period 2013 – 2017 (Figure 12); especially in the following industries:

1. Construction industry is expected to add nearly 29,300 jobs.
2. Health care and social assistance industry is expected to add nearly 29,100 jobs.
3. Retail trade industry is expected to add nearly 23,200 jobs and wholesale trade another 6,800 jobs.
4. Professional, scientific and technical services and retail trade industry is expected to add nearly 17,000 jobs, with nearly 10,500 jobs in the professional business services sector and the remaining in the computer system design services (4,600 jobs) and other professional services (1,900 jobs) (Figure 13).
5. FIRE industry and business building and other support services will add roughly 6,000 jobs during the same period (2013 - 2017).
6. Accommodation and food services industry is expected to add over 7,800 jobs each during the same period (2013 - 2017).
7. Transportation and warehousing industry is expected to add over 7,100 jobs.
8. Mining and oil and gas industry will add 3,600 jobs during 2013 - 2017. However, the entire job growth is expected in the support activities for mining and oil and gas (7,800 additional jobs), while oil and gas extraction and mining industries are both expected to lose over 4,200 jobs during the same period (Figure 13).

The manufacturing industry is expected to lose over 3,900 jobs from 2013 to 2017; the only notable exception is the food and beverage products industry, which is expected to add 800 jobs during this period. All the other manufacturing industries including wood products, paper, rubber, plastics and chemicals, metal fabrication, computer, electronic and electrical products and all other manufacturing industries are expected to lose between 200 jobs to 1,700 jobs during this period.

These employment projections for the Province of Alberta will be used in the latter part of the study to identify employment growth at a provincial level and for developing an employment growth estimate for the Town of Edson based on the proportional size of its economy.

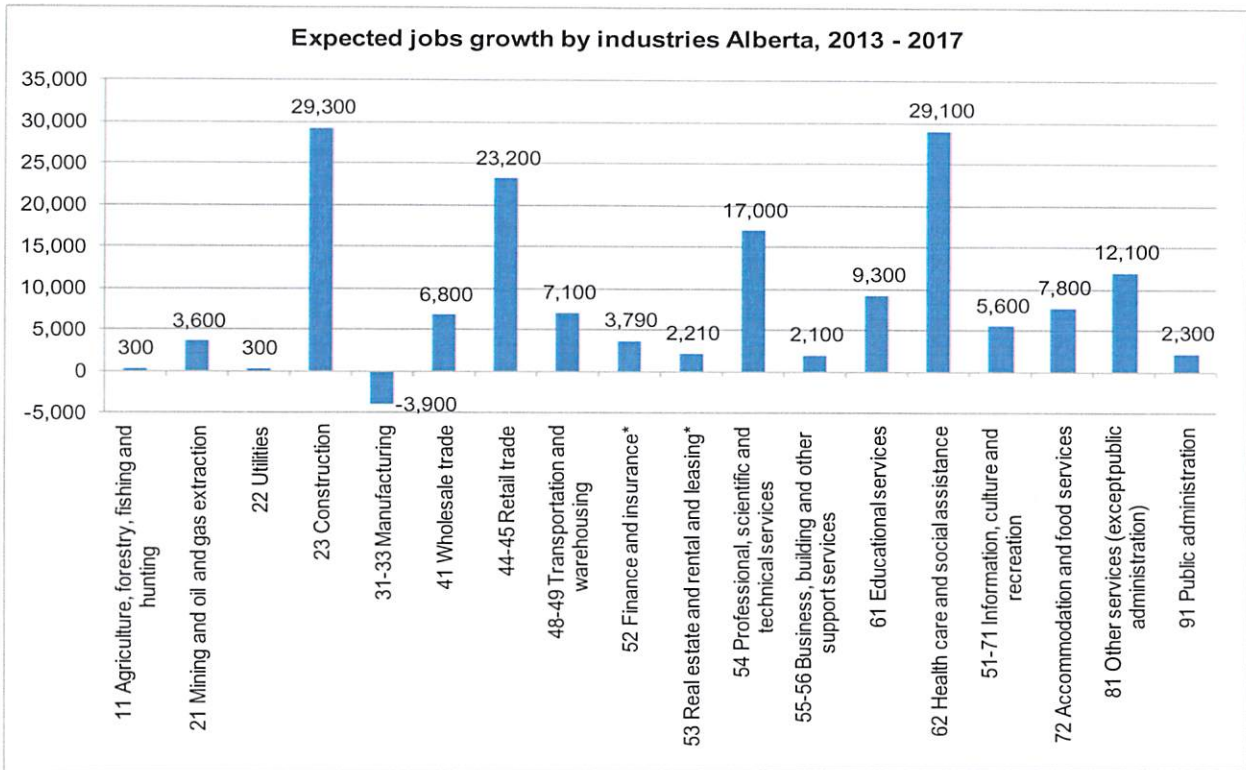


Figure 12: Alberta Employment Growth 2013 - 2017
Source: Government of Alberta

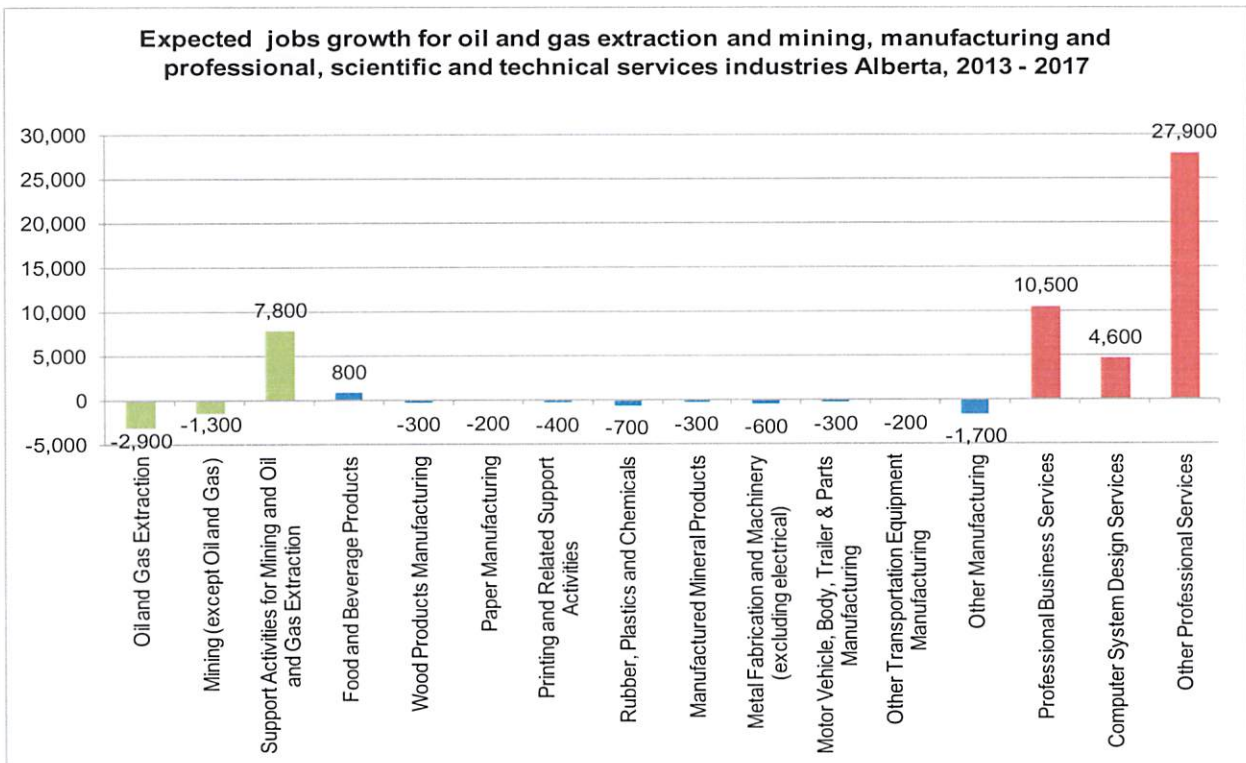


Figure 13: Employment growth for select industries in Alberta, 2013 - 2017
Source: Government of Alberta

3.5 Town of Edson Economy and Labour Force

The Town of Edson is strategically located along the Trans Canada Yellowhead Route and benefits from significant regional level private, commercial and industrial traffic flows. Its main industries are: mining, oil and gas extraction; retail; professional, scientific and technical industries; and the tourism industry. A large share (roughly 20%) of Town's labour force is employed in the tourism industry due to its close proximity to several tourism, arts and culture and outdoor activities related attractions, such as:

- **Museums**, such as the Red Brick Arts Centre and the Galloway Station Museum.
- **Attractions**, such as the natural limestone caves (Cadomin Caves) and Emerson Lake.
- **Outdoor recreation activities**, such as the hiking trails of the Cardinal Divide, the Hoodoos – Wild Sculpture Trail, the Silver Summit Ski Hill, Hornbeck Cross Country Ski, sled and ATV trails, Slo Pitch and Spray Park.

The Town of Edson had a labour force (population aged 15 years and over) of approximately 4,960 in 2011. Table 13 and Figure 14 compare Edson's employment distribution by industries to that of the neighbouring municipalities, Census Division No. 14 and the Province of Alberta. Some of the major observations are:

- **Major industries by employment share for the Town of Edson:** Retail trade (14.2%), mining, oil and gas extraction (12.9%), accommodation and food services (11.2%), construction (7.3%), professional scientific and technical services (6.9%), manufacturing (6.4%) and transportation and warehousing (6.3%) are the seven largest industries in terms of employment in Edson's economy. Together these industries are responsible for over 65% of all employment in the Town.
- **Edson enjoys significant competitive advantages:** The Town's employment share for several of its industries, such as retail trade, professional, scientific and technical services industries, and the accommodation and food services sector, is larger than its neighbouring municipalities, which suggests that these industries are exporting goods and services to neighbouring municipalities. Similarly, industries such as mining, oil and gas extraction, retail trade, transportation and warehousing sector and accommodation have significantly larger employment shares in comparison to the provincial average and can be expected to export goods and services to a much a larger region (highlighted rows in Table 13 and Figure 14).

Employment distribution by industries National Household Survey data, 2011	Town of Edson	Town of Hinton	Yellowhead County	Division number 14	Alberta
Total labour force (population aged 15 years & over)	4,960	5,825	6,095	16,880	2,115,640
Industry - not applicable	75	110	25	210	27,490
All industries	4,885	5,715	6,070	16,670	2,088,145
11 Agriculture, forestry, fishing and hunting	55 (1.1%)	110 (1.9%)	730 (12.0%)	890 (5.3%)	61,165 (2.9%)
21 Mining and oil and gas extraction	630 (12.9%)	1,030 (18.0%)	1,160 (19.1%)	2,815 (16.9%)	136,500 (6.5%)
22 Utilities	25 (0.5%)	0 (0.0%)	100 (1.6%)	130 (0.8%)	22,035 (1.1%)
23 Construction	355 (7.3%)	370 (6.5%)	700 (11.5%)	1,425 (8.5%)	195,905 (9.4%)
31-33 Manufacturing	315 (6.4%)	570 (10.0%)	330 (5.4%)	1,215 (7.3%)	123,465 (5.9%)
41 Wholesale trade	170 (3.5%)	110 (1.9%)	145 (2.4%)	420 (2.5%)	89,000 (4.3%)
44-45 Retail trade	695 (14.2%)	770 (13.5%)	430 (7.1%)	1,895 (11.4%)	229,225 (11.0%)
48-49 Transportation and warehousing	310 (6.3%)	370 (6.5%)	665 (11.0%)	1,350 (8.1%)	104,770 (5.0%)
52 Finance and insurance*	100 (2.0%)	90 (1.6%)	75 (1.2%)	265 (1.6%)	68,760 (3.3%)
53 Real estate and rental and leasing*	45 (0.9%)	140 (2.4%)	65 (1.1%)	255 (1.5%)	40,090 (1.9%)
54 Professional, scientific and technical services	335 (6.9%)	200 (3.5%)	210 (3.5%)	735 (4.4%)	162,490 (7.8%)
55-56 Business, building and other support services	90 (1.8%)	80 (1.4%)	150 (2.5%)	355 (2.1%)	75,500 (3.6%)
61 Educational services	235 (4.8%)	295 (5.2%)	255 (4.2%)	785 (4.7%)	141,550 (6.8%)
62 Health care and social assistance	285 (5.8%)	410 (7.2%)	355 (5.8%)	1,050 (6.3%)	206,695 (9.9%)
51-71 Information, culture and recreation	200 (4.1%)	105 (1.8%)	135 (2.2%)	425 (2.5%)	75,185 (3.6%)
72 Accommodation and food services	545 (11.2%)	565 (9.9%)	165 (2.7%)	1,275 (7.6%)	125,810 (6.0%)
81 Other services (except public administration)	260 (5.3%)	270 (4.7%)	285 (4.7%)	820 (4.9%)	101,275 (4.8%)
91 Public administration	215 (4.4%)	230 (4.0%)	115 (1.9%)	560 (3.4%)	128,720 (6.2%)

Table 13: Employment by industries for Edson and its neighbouring municipalities
Source: Urbanics Consultants Ltd. and NHS 2011

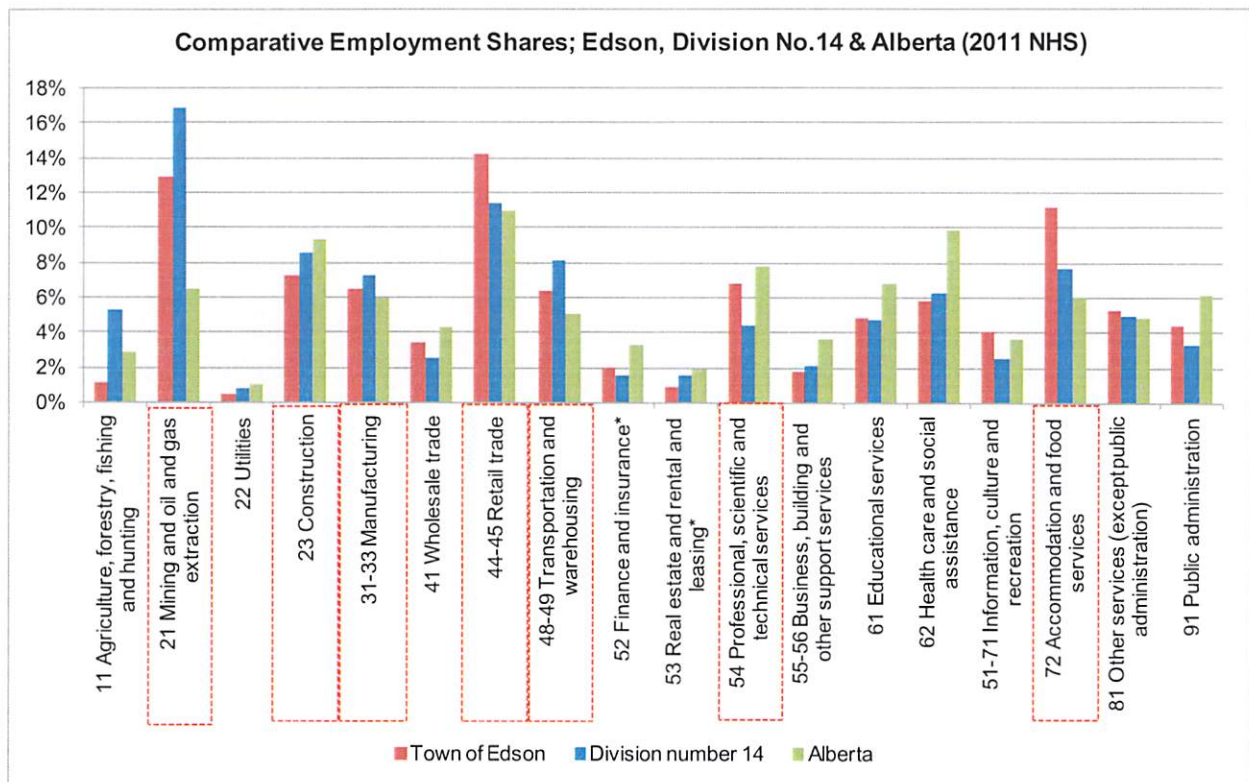


Figure 14: Employment by industries for Edson, Census Division No. 14 and Alberta
Source: Urbanics Consultants Ltd. and NHS 2011

3.6 Employment Distribution Trends

Next the employment distribution trends for the Town of Edson were examined in comparison to the Province of Alberta and Canada. This analysis examines the employment counts, by industry, for each of these geographies for 2001, 2006 and 2011. It should be noted that the 2001 and 2006 employment distributions are based on the 2001 and 2006 Census and the 2011 employment distribution is based on 2011 National Household Survey (NHS), which might suffer from some data quality issues. However, in the absence of any other source for the 2011 employment data, this study uses the NHS 2011 dataset for further analyses.

Table 14 provides a detailed comparison of historical employment distribution trends across industries for the Town of Edson, the Province of Alberta and Canada. Some of the major observations noted from the table are:

- A larger share of Edson's workforce is employed in the goods-producing industries than the Province of Alberta and the nation as a whole. In 2011, roughly 28% of Edson's labour force is employed in the goods-producing industries as compared to 26% for the Province and 21% for Canada.
- The mining, oil and gas industry is especially important to the Town's economy. The industry employed roughly 13% of the total labour force in the Town, which is roughly double that of the Province and eight times that of the national employment share for the industry in 2011.
- The retail trade industry is the largest employer in the Town, with over 14% of the total employment share. This is significantly higher than the 11% - 11.6% employment share in the retail industry observed at the Provincial and national level.
- The accommodation and food services industry is currently the third largest employer in the Town; it employed roughly 11% of Edson's labour force in 2011 (nearly double that of the provincial and national employment share for the industry in 2011).
- Other major sectors of Edson's economy include the construction, transportation and warehousing, professional, scientific and technical service and manufacturing industries.

Figure 15 provides the actual employment numbers for each of the industries for 2001, 2006 and 2011.

Industries	2001			2006			2011		
	Edson	Alberta	Canada	Edson	Alberta	Canada	Edson	Alberta	Canada
Good Producing Industries	28.1%	23.8%	23.0%	32.1%	24.3%	21.1%	28.2%	25.8%	20.9%
11 Agriculture, forestry, fishing and hunting	1.7%	5.5%	3.4%	3.5%	4.3%	2.9%	1.1%	2.9%	2.5%
21 Mining and oil and gas extraction	9.4%	4.3%	0.9%	15.7%	5.9%	1.2%	12.9%	6.5%	1.5%
22 Utilities	1.3%	0.8%	0.8%	0.3%	1.0%	0.8%	0.5%	1.1%	0.9%
23 Construction	4.8%	4.5%	3.1%	4.4%	5.2%	3.4%	7.3%	9.4%	6.9%
31-33 Manufacturing	11.0%	8.7%	14.8%	8.2%	7.9%	12.8%	6.4%	5.9%	9.2%
Services Producing Industries	71.9%	76.2%	77.0%	67.5%	75.7%	78.9%	71.3%	74.2%	79.1%
41 Wholesale trade	2.7%	4.8%	4.6%	3.4%	4.8%	4.6%	3.5%	4.3%	4.2%
44-45 Retail trade	14.1%	11.9%	12.0%	17.1%	11.9%	12.2%	14.2%	11.0%	11.6%
48-49 Transportation and warehousing	5.2%	4.5%	4.2%	5.4%	4.2%	4.1%	6.3%	5.0%	4.7%
52 Finance and insurance	1.7%	3.6%	4.5%	1.8%	3.5%	4.6%	2.0%	3.3%	4.4%
53 Real estate and rental and leasing	2.3%	1.9%	1.7%	2.9%	2.1%	1.9%	0.9%	1.9%	1.8%
54 Professional, scientific and technical services	2.0%	7.2%	6.5%	1.9%	7.8%	6.9%	6.9%	7.8%	7.1%
55-56 Business, building and other support services	2.3%	3.2%	3.3%	1.9%	3.1%	3.6%	1.8%	3.6%	4.2%
61 Educational services	7.2%	7.1%	7.0%	6.0%	6.8%	7.3%	4.8%	6.8%	7.4%
62 Health care and social assistance	10.4%	9.8%	10.5%	6.6%	10.1%	11.1%	5.8%	9.9%	11.1%
51-71 Information, culture and recreation	2.6%	4.4%	4.6%	1.9%	3.9%	4.5%	4.1%	3.6%	4.5%
72 Accommodation and food services	11.1%	7.9%	7.0%	8.9%	7.3%	7.0%	11.2%	6.0%	6.4%
81 Other services (except public administration)	5.7%	5.0%	4.9%	5.6%	5.3%	5.0%	5.3%	4.8%	4.6%
91 Public administration	4.6%	4.9%	6.2%	4.1%	5.0%	6.2%	4.4%	6.2%	7.2%

Table 14: Employment share by industries in Edson, Alberta and Canada (2001-2011)
Sources: Urbanics Consultants and Statistics Canada, Census 2001 & 2006 and NHS 2011

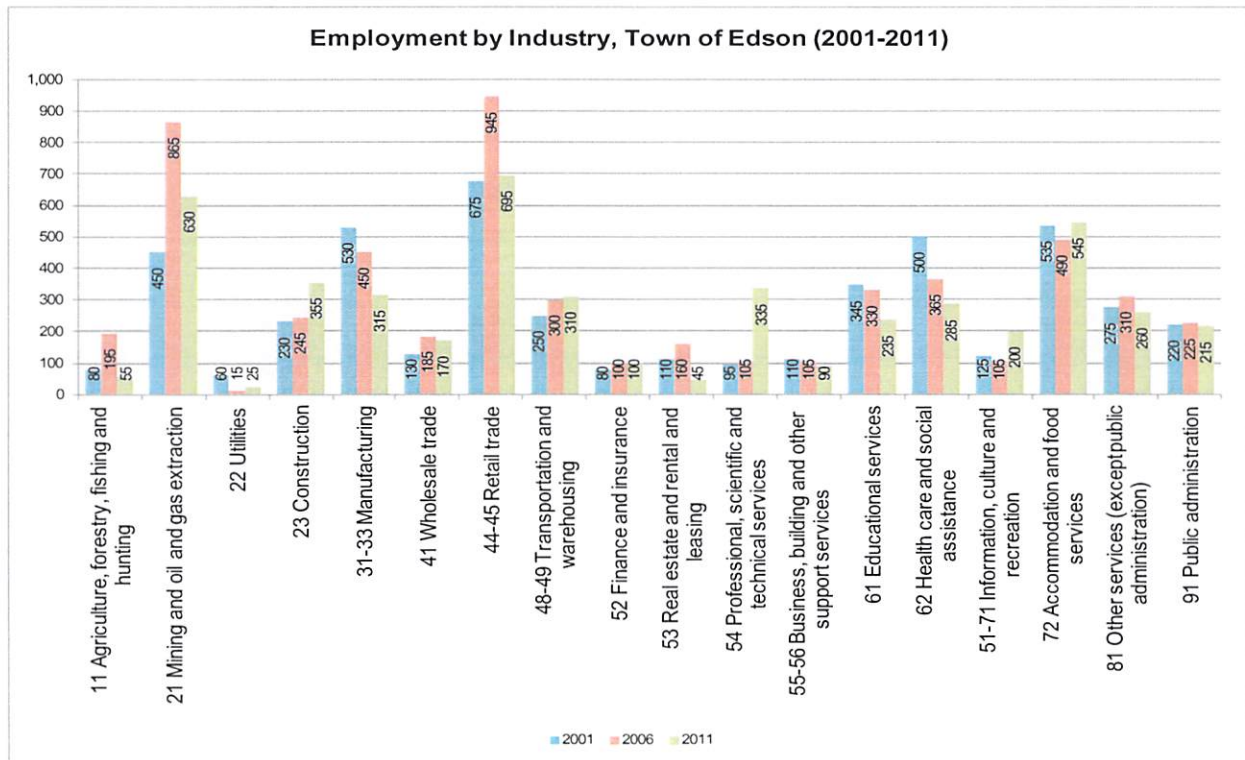


Figure 15: Edson employment by industry, 2001-2011
Sources: Urbanics Consultants Ltd. and Statistics Canada, Census 2001 & 2006 and NHS 2011

The next section examines the Town of Edson's economy using two methods: the Location Quotient method and the Shift Share method.

3.6.1 Location Quotient Analysis

One of the two main methods of examining the economic base of a geographic area or region is the Location Quotient Analysis. It provides an important tool for examining and identifying basic and non-basic industries. Basic industries are responsible for much of the economic growth in a region as they export goods and services from a region, while, non-basic (or service) industries, in turn, support basic industries. Identifying basic industries (export industries) is critical to understanding the degree to which an industry is specialized within an area and for developing economic development policies for the region. For example, economic development opportunities may exist for the additional growth of basic industries as a result of the presence of an existing skilled labour pool or other resources such as suppliers, facilities or transportation hubs in the region.

The use of Location Quotient Analysis allows a researcher to compare employment concentrations by industries in a study area to a larger region to understand its economic strengths and weaknesses. A Location Quotient (LQ) greater than 1.0 indicates that an area has proportionately more workers than the larger comparison area (in our case, the Province of Alberta) employed within a specific industry sector. This implies that an area is producing more of a product or service than is being consumed by the area residents and the excess is available for export outside the area. However, it should be noted that a LQ greater than 1 does not necessarily mean that an area industry is exporting; there may simply be excessive local demand.

Similarly, a LQ significantly less than 1.0 suggests a lower employment share in an industry at the local level in comparison to the Province. This suggests that the local industry is employing a lower share of its labour force and some of the economic opportunities are being lost to the neighbouring regions. Thus, it identifies a weakness (weaker employment) in the local economy and indicates an opportunity to develop businesses to meet the local demand.

Table 15 provides the Location Quotients, by industry, for the Town of Edson in relation to the Province of Alberta in 2001, 2006 and 2011.

Location Quotient: Edson and Alberta	2001	2006	2011
Goods Producing Sector	1.18	1.32	1.09
11 Agriculture, forestry, fishing and hunting	0.30	0.82	0.38
21 Mining and oil and gas extraction	2.20	2.65	1.97
22 Utilities	1.50	0.28	0.48
23 Construction	1.07	0.85	0.77
31-33 Manufacturing	1.27	1.03	1.09
Services Producing Sector	0.94	0.89	0.96
41 Wholesale trade	0.57	0.71	0.82
44-45 Retail trade	1.18	1.44	1.30
48-49 Transportation and warehousing	1.16	1.29	1.26
52 Finance and insurance	0.46	0.52	0.62
53 Real estate and rental and leasing	1.19	1.40	0.48
54 Professional, scientific and technical services	0.28	0.24	0.88
55-56 Business, building and other support services	0.72	0.61	0.51
61 Educational services	1.02	0.88	0.71
62 Health care and social assistance	1.06	0.66	0.59
51-71 Information, culture and recreation	0.59	0.49	1.14
72 Accommodation and food services	1.41	1.22	1.85
81 Other services (except public administration)	1.14	1.07	1.10
91 Public administration	0.93	0.82	0.71

Table 15: Location Quotient – Edson & Province of Alberta – 2001, 2006 & 2011
Sources: Statistics Canada, Urbanics Consultants Ltd.

Table 15 illustrates the importance of the mining, oil and gas extraction and manufacturing industries in the Town of Edson (where $LQ > 1$), from 2001 to 2011. These industries had a higher employment share in Edson as compared to the Province and are more likely to be basic industries, i.e. are more likely to export goods a much larger region. In contrast, agriculture, forestry, fishing and hunting, utilities and construction industries displayed an LQ of less than 1 and are expected to be local serving non-basic industries.

Among the services-producing industries, the most prominent industries (those with an $LQ > 1$) were retail trade, transportation and warehousing, accommodation and food services and other services. All these industries displayed higher concentration of employment as compared to the Province, during 2001, 2006 and 2011, and may be exporting services outside of the local economy. The information, culture and recreation industry should also be distinguished, as it displayed an $LQ > 1$ in 2011. It should be noted that the Town of Edson would be well served by capitalizing on its strategic location along the Trans Canada Yellowhead Route, to further increase employment in the transportation and warehousing industry. Also, even though the LQ for professional, scientific and technical services was less than 1 in 2001, 2006 and 2011, it might be servicing a larger area beyond its municipal limits.

3.6.2 Shift Share Analysis

The second most commonly used method for examining the economic base and components of economic growth is the Shift Share Analysis. The method relies on disaggregating industry specific employment, in a geographic region, into the following three components:

- Provincial share of growth: growth resulting from growth in the overall economy.
- Industrial mix: Identifies slow growing and fast growing industries based on provincial growth rates for the industry.
- Competitive effect: Identifies leading and lagging industries in the region. In addition, it identifies the industries that benefit from unique location advantages offered by a region.

Thus, by disaggregating growth into its three components, this analysis can be used to identify specific industries that have significant competitive advantage in comparison to other industries in a region, i.e. industries that not only outperform regional and industry specific employment growth but also benefit from unique location advantages offered by a region.

Table 16 provides the findings from the Shift Share Analysis for the period 2006 to 2011 and suggests that the Town lost a total of 630 jobs, resulting from:

- Regional Share: 1,632 jobs were added through overall growth in the economy
- Industrial Mix: 7 jobs were added through industry specific growth in the province
- Regional Shift: 2,269 jobs were lost during 2006 – 2011

It should be noted that due to the absence of Town-level employment data from the 2011 Census, 2011 NHS employment numbers were used for the analysis. Also, it is important to note that the NHS 2011 suffers from some data quality issues; the data used in this analysis had a Global Non-response rate of 27.6% (i.e. the share of households that did not respond or provided a partial non-response). The NHS 2011 data suggests that the Town lost roughly 630 jobs from 2006 -2011, which may have been due to prolonged economic downturn. However, the loss in employment still appears to be higher than what can be expected based on the Town's population growth and regional unemployment rates. Therefore, the reader is advised to keep this limitation in mind while examining the following findings.

Based on the 2011 NHS, even though the Province of Alberta displayed strong growth in employment, the Town of Edson lost roughly 630 jobs from 2006 - 2011. Much of this decline in employment can be attributed to the Regional Shift (loss of 2,269 jobs) component for the Town; with both the services-producing sector (loss of 1,209 jobs) and goods-producing sector (loss of 1,060 jobs) displaying strong declines in employment. Among services-producing industries, apart from the professional, scientific and technical services, information, culture and recreation and accommodation and food services sector (which added roughly 200 jobs, 74 jobs and 18 jobs respectively), all of the other industries displayed strong declines in employment. Similarly, nearly all of the goods producing industries declined during 2006 – 2011, with the exception of the utilities sector, which displayed small positive employment growth during this period. Thus, the professional, scientific and technical services, the information, culture and recreation and the accommodation and food services sector are important to the economic health of Edson and efforts should be made to retain and expand employment in these industries. Surprisingly, the competitive advantage in the mining and oil and gas extraction and the manufacturing industries was not reflected in this analysis, this might be a result of greater competitive pressures in the region; i.e. cheaper land, lower taxes etc.

SHIFT SHARE ANALYSIS, Edson / Alberta (2006-2011)	Regional Share	Industrial Mix	Regional Shift	Total Emp Growth
Goods Producing Sector	526	144	-1060	-390
11 Agriculture, forestry, fishing and hunting	58	-81	-117	-140
21 Mining and oil and gas extraction	257	119	-611	-235
22 Utilities	4	2	4	10
23 Construction	73	252	-215	110
31-33 Manufacturing	134	-148	-121	-135
Services Producing Sector	1107	-138	-1209	-240
41 Wholesale trade	55	-25	-45	-15
44-45 Retail trade	281	-93	-438	-250
48-49 Transportation and warehousing	89	75	-154	10
52 Finance and insurance	30	-8	-22	0
53 Real estate and rental and leasing	48	-15	-148	-115
54 Professional, scientific and technical services	31	-1	200	230
55-56 Business, building and other support services	31	21	-67	-15
61 Educational services	98	-4	-190	-95
62 Health care and social assistance	108	-7	-181	-80
51-71 Information, culture and recreation	31	-10	74	95
72 Accommodation and food services	146	-108	18	55
81 Other services (except public administration)	92	-32	-111	-50
91 Public administration	67	68	-145	-10
Total, all industries	1632	7	-2269	-630

Table 16: Shift Share Analysis: Town of Edson
Source: Urbanics Consultants Ltd

3.7 Employment Growth Projections

The employment projections for the Town of Edson are based on the following three methods:

1. Extrapolation Method: Relies on historical working-age population (15 years and over) to employment ratios to estimate future employment.
2. Constant Share Method: Uses the historical share of employment in the local economy in larger economy to estimate future employment (based on employment projections of the larger economy).
3. Shift Share Method: Identifies employment growth opportunities that might arise from unique location advantages enjoyed by a particular industry in the Town.

3.7.1 Extrapolation Method

The Extrapolation Method uses historical ratios of employment to working –age population (15 years and over) to forecast industry specific employment levels over the study period. This method assumes that future employment can be determined by extrapolating historical levels of employment in a particular sector for the region. This method relies on the population to employment ratios derived from Census population counts for the working-age population and employment counts from the 2011 NHS. This method of linear extrapolation is mathematically simple and provides viable estimates of employment levels in the region. Table 17 and Figure 16 summarize the results derived from the extrapolation technique.

The main findings from the Extrapolation Method include:

- Goods-producing sector is expected to add roughly 149 jobs from 2011 – 2021 (or 15 jobs per year during the period 2011-2021). The main growth industries will be:
 - Mining and oil and gas extraction (68 jobs); and,
 - Construction (38 jobs).
- Services-producing sector is expected to add 376 jobs from 2011 – 2021 (or 38 jobs per year during the period 2011 - 2021). The main growth industries will be:
 - Retail trade (75 jobs);
 - Accommodation and food services (59 jobs);
 - Professional, scientific and technical services (36 jobs);
 - Transportation and warehousing (33 jobs); and,
 - Health care and social assistance (31 jobs).

Extrapolation method	Census Counts			Pop to emp	Population Projections					
	2001	2006	2011		2016	2021	2026	2031	2036	2041
Total Population	7,595	8,100	8,475		9,010	9,521	10,001	10,447	10,903	11,394
Population 15 years and over (Medium Scenario)	5,880	6,395	6,835		7,210	7,570	8,000	8,510	8,990	9,440
All industries	4,800	5,515	4,885	71.5%	5,153	5,410	5,718	6,082	6,425	6,747
Good Producing Industries	1,350	1,770	1,380	20.2%	1,455	1,529	1,615	1,717	1,815	1,906
11 Agriculture, forestry, fishing and hunting	80	195	55	0.8%	58	61	64	68	72	76
21 Mining and oil and gas extraction	450	865	630	9.2%	665	698	737	784	829	870
22 Utilities	60	15	25	0.4%	26	28	29	31	33	35
23 Construction	230	245	355	5.2%	374	393	416	442	467	490
31-33 Manufacturing	530	450	315	4.6%	332	349	369	392	414	435
Services Producing Industries	3,450	3,725	3,485	51.0%	3,675	3,861	4,079	4,341	4,585	4,814
41 Wholesale trade	130	185	170	2.5%	179	188	199	212	224	235
44-45 Retail trade	675	945	695	10.2%	733	770	813	865	914	960
48-49 Transportation and warehousing	250	300	310	4.5%	327	343	363	386	408	428
52 Finance and insurance	80	100	100	1.5%	105	111	117	125	132	138
53 Real estate and rental and leasing	110	160	45	0.7%	47	50	53	56	59	62
54 Professional, scientific and technical services	95	105	335	4.9%	353	371	392	417	441	463
55-56 Business, building and other support svcs	110	105	90	1.3%	95	100	105	112	118	124
61 Educational services	345	330	235	3.4%	248	260	275	293	309	325
62 Health care and social assistance	500	365	285	4.2%	301	316	334	355	375	394
51-71 Information, culture and recreation	125	105	200	2.9%	211	222	234	249	263	276
72 Accommodation and food services	535	490	545	8.0%	575	604	638	679	717	753
81 Other services (except public administration)	275	310	260	3.8%	274	288	304	324	342	359
91 Public administration	220	225	215	3.1%	227	238	252	268	283	297

Table 17: Extrapolation Method: Employment Projections by Industry (2001 -2041)
Source: Urbanics Consultants Ltd.

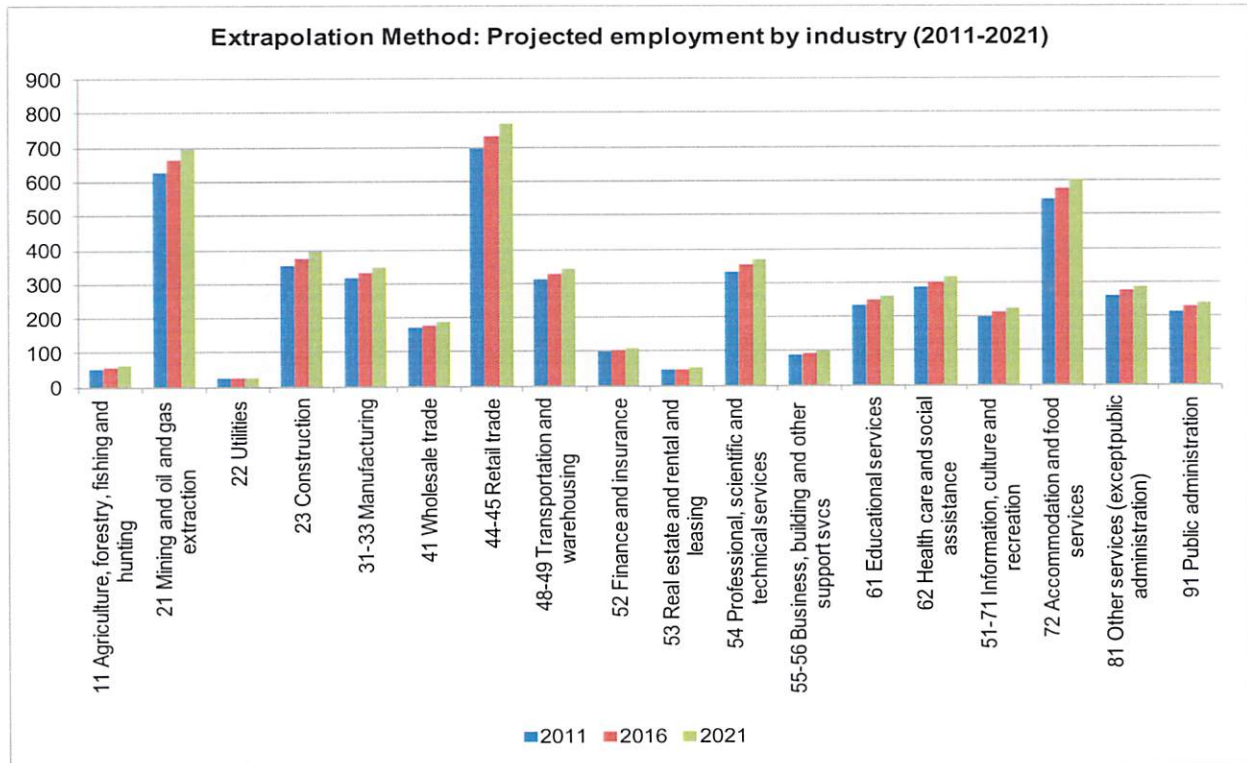


Figure 16: Extrapolation Method: Employment Projections by Industry (2011 -2021)
Source: Urbanics Consultants Ltd.

3.7.2 Constant Share Method

This method is based on the assumption that the local share of the reference region's economic activity remains constant. This assumes that the local economy is closely related to the larger region and any changes to the larger region's economy will be closely reflected in the local economy. The benefit of this method is that employment projections for larger regions are more frequent, detailed and reliable in comparison to smaller areas. In this case, the reference region is the Province of Alberta.

The Constant Share Method uses employment growth rate projections from the Government of Alberta's Employment Outlook for 2013 - 2017 (Canadian Occupational Projection System or COPS), which projects significant job growth across all industries except the manufacturing industry during 2013 - 2017. The employment projections for the Province were linearly extrapolated for the remaining period, i.e. 2018 - 2021, to estimate industry specific employment levels for the Province during 2011 - 2021. Further, industry specific ratios were developed based on the share of Edson's employment in a specific industry to the Provincial employment in the same industry for the year 2011. Also, it was assumed that these ratios will stay constant over the projection horizon, i.e. 2011 - 2021.

Table 18 and Figure 17 summarize the results derived from the Constant Share Method. Main findings are:

- Goods-producing sector is expected to add roughly 420 jobs from 2011 - 2021 (or 42 jobs per year during the period 2011-2021). The main growth industries will be:
 - Mining and oil and gas extraction (264 jobs); and,
 - Construction (137 jobs).
- Services-producing sector is expected to add 417 jobs from 2011 - 2021 (or 42 jobs per year during the period 2011-2021). The main growth industries will be:
 - Retail trade (103 jobs);
 - Health care and social assistance (102 jobs);
 - Accommodation and food services (80 jobs);
 - Transportation and warehousing (76 jobs);
 - Other services (except Public Administration) (58 jobs); and,
 - Professional, scientific and technical services (43 jobs).

Constant share projection method	Census Counts			% of AB Emp	Population Projections	
	2001	2006	2011		2016	2021
Total Population	7,595	8,100	8,475		9,010	9,521
All industries	4,800	5,515	4,885	0.2%	5,350	5,595
Good Producing Industries	1,350	1,770	1,380	1.1%	1,679	1,800
11 Agriculture, forestry, fishing and hunting	80	195	55	0.1%	55	52
21 Mining and oil and gas extraction	450	865	630	0.5%	799	894
22 Utilities	60	15	25	0.1%	23	24
23 Construction	230	245	355	0.2%	457	492
31-33 Manufacturing	530	450	315	0.3%	345	338
Services Producing Industries	3,450	3,725	3,485	2.8%	3,757	3,902
41 Wholesale trade	130	185	170	0.2%	171	170
44-45 Retail trade	675	945	695	0.3%	798	798
48-49 Transportation and warehousing	250	300	310	0.3%	360	386
52 Finance and insurance	80	100	100	0.1%	101	101
53 Real estate and rental and leasing	110	160	45	0.1%	45	45
54 Professional, scientific and technical services	95	105	335	0.2%	356	378
55-56 Business, building and other support svcs	110	105	90	0.1%	89	89
61 Educational services	345	330	235	0.2%	226	243
62 Health care and social assistance	500	365	285	0.1%	348	387
51-71 Information, culture and recreation	125	105	200	0.3%	203	208
72 Accommodation and food services	535	490	545	0.4%	608	625
81 Other services (except public administration)	275	310	260	0.3%	301	318
91 Public administration	220	225	215	0.2%	151	154

Table 18: Constant Share Method: Employment Projections by Industry (2001 -2021)
Source: Urbanics Consultants Ltd.

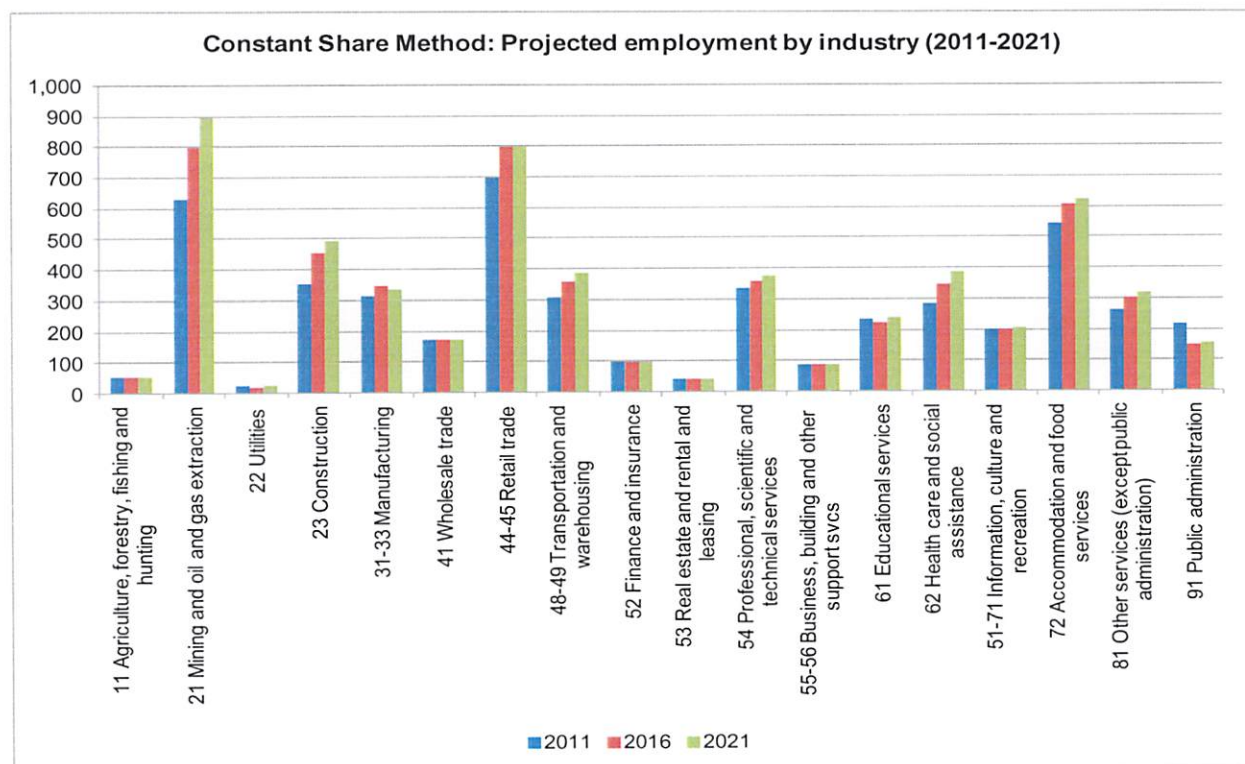


Figure 17: Constant Share Method: Employment Projections by Industry (2011 -2021)
Source: Urbanics Consultants Ltd.

3.7.3 Shift Share Method

The Shift Share Method is an extension of the Shift Share analysis, which was discussed earlier in the Economic Base Analysis section. This method utilizes a region's historical employment growth patterns related to an industry's competitive position (and location advantages) as well as its responsiveness to provincial and industry level growth patterns. Thus, by disaggregating employment growth into the above-mentioned three components, this method recognizes that some local industries might grow at different rates than their counterparts in the reference region. This would assume added importance if the local economy specializes in certain industries and benefits from increased employment in the specific industry. Thus, while the Constant Share Method does not account for such changes (shifts), the Shift Share Method accounts for these changes by recognizing trends and accounting for them in the employment projections.

Table 19 and Figure 18 summarize the results derived from the Shift Share Method. Some of the main findings are:

- Goods-producing sector is expected to add roughly 185 jobs from 2011 - 2021 (or 19 jobs per year during the period 2011-2021). The growth industries will be:
 - Mining and oil and gas extraction (124 jobs); and,
 - Construction (88 jobs).
- Services-producing sector is expected to add 177 jobs from 2011 - 2021 (or 18 jobs per year during the period 2011-2021). The main growth industries will be:
 - Professional, scientific and technical services (86 jobs);
 - Accommodation and food services (84 jobs);
 - Health care and social assistance (61 jobs);
 - Transportation and warehousing (43 jobs);
 - Other services (except Public Administration) (34 jobs);
 - Information, culture and recreation (24 jobs); and,
 - Retail trade (11 jobs);

Shift share projection method	Census Counts			Population Projections	
	2001	2006	2011	2016	2021
Total Population	7,595	8,100	8,475	9,010	9,521
All industries	4,800	5,515	4,885	8,847	8,890
Good Producing Industries	1,350	1,770	1,380	1,573	1,565
11 Agriculture, forestry, fishing and hunting	80	195	55	43	32
21 Mining and oil and gas extraction	450	865	630	738	754
22 Utilities	60	15	25	24	25
23 Construction	230	245	355	435	443
31-33 Manufacturing	530	450	315	333	313
Services Producing Industries	3,450	3,725	3,485	3,637	3,662
41 Wholesale trade	130	185	170	166	161
44-45 Retail trade	675	945	695	754	706
48-49 Transportation and warehousing	250	300	310	345	353
52 Finance and insurance	80	100	100	99	96
53 Real estate and rental and leasing	110	160	45	31	20
54 Professional, scientific and technical services	95	105	335	376	421
55-56 Business, building and other support svcs	110	105	90	83	76
61 Educational services	345	330	235	207	205
62 Health care and social assistance	500	365	285	330	346
51-71 Information, culture and recreation	125	105	200	210	224
72 Accommodation and food services	535	490	545	610	629
81 Other services (except public administration)	275	310	260	290	294
91 Public administration	220	225	215	137	130

Table 19: Shift Share Method: Employment Projections by Industry (2001 -2021)
Source: Urbanics Consultants Ltd.

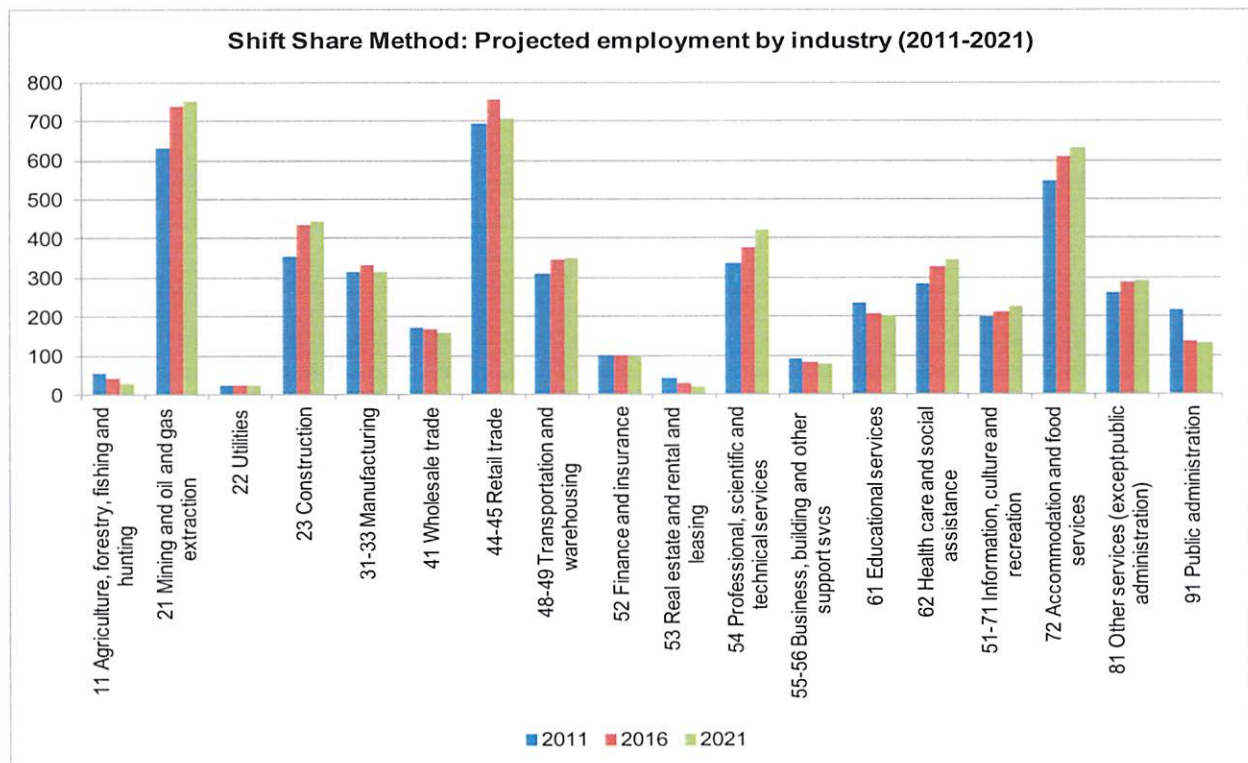


Figure 18: Shift Share Method: Employment Projections by Industry (2001 -2021)
Source: Urbanics Consultants Ltd.

3.7.4 Reconciliation of the Three Methods

Figure 19 provides the employment growth projection by industrial sectors for the Town of Edson by using the three methods, Extrapolation Method, Constant Share and Shift Share Method.

The growth estimates are consistent across the three methods and suggest that the mining and oil and gas extraction, and construction industries will experience the most growth in the goods producing sectors. Among the services sector, the retail trade, transportation and warehousing, professional, scientific and technical services, health care and social assistance and accommodation and food services industries will experience the most growth during the period 2011 - 2021.

The three growth projections can also be simply averaged to reconcile the differences between the three projection methods. Figure 20 summarizes the employment growth estimates derived from the three projection methods.

According to the projections, Edson is expected to add roughly 575 new jobs across all NAICS industry categories between 2011 and 2021. The major growth industries in the Town are expected to be:

- Goods-producing sector is expected to add roughly 252 jobs from 2011 - 2021 (or 25 jobs per year). The main growth industries will be:
 1. Mining and oil and gas extraction (152 jobs); and,
 2. Construction (88 jobs).
- Services-producing sector is expected to add 323 jobs from 2011 - 2021 (or 32 jobs per year). The main growth industries will be:
 3. Accommodation and food services (74 jobs);
 4. Retail trade (63 jobs);
 5. Health care and social assistance (65 jobs);
 6. Professional, scientific and technical services (55 jobs); and,
 7. Transportation and warehousing (51).

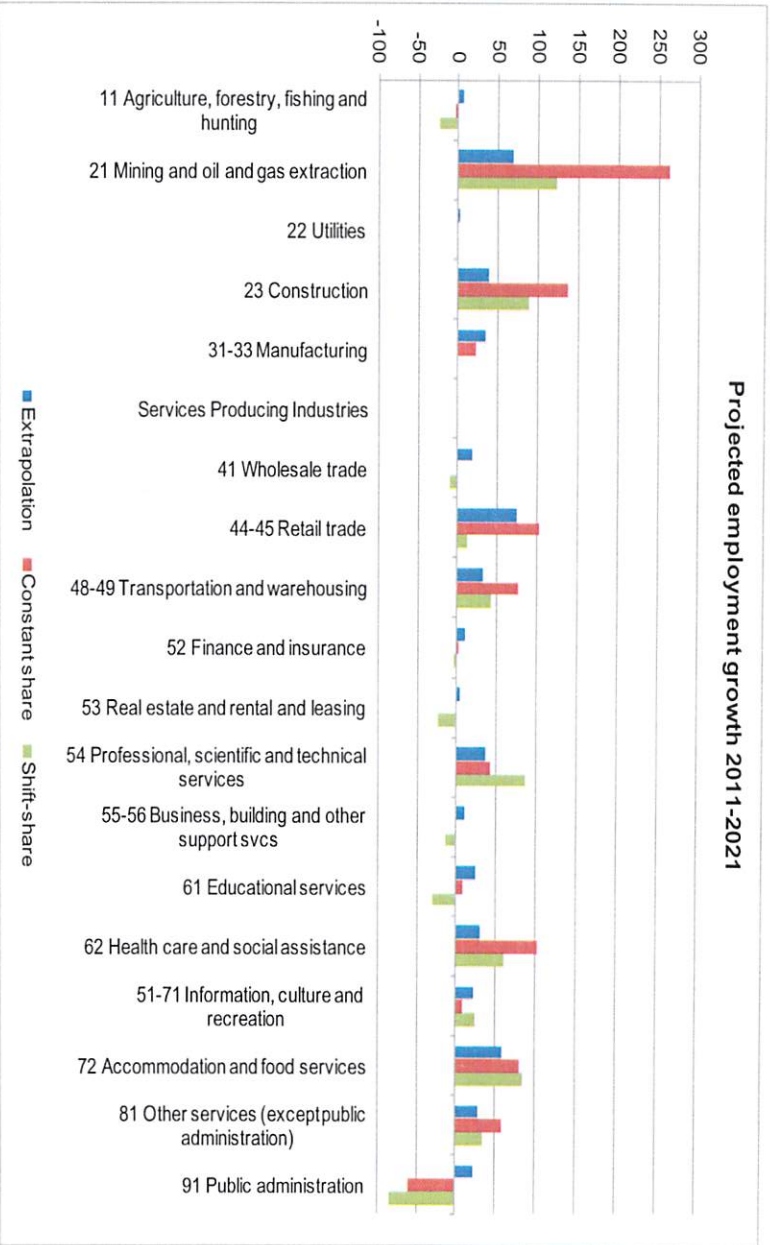


Figure 19: Employment Growth Projections by Industry, 2011 - 2021
Source: Urbanics Consultants Ltd.

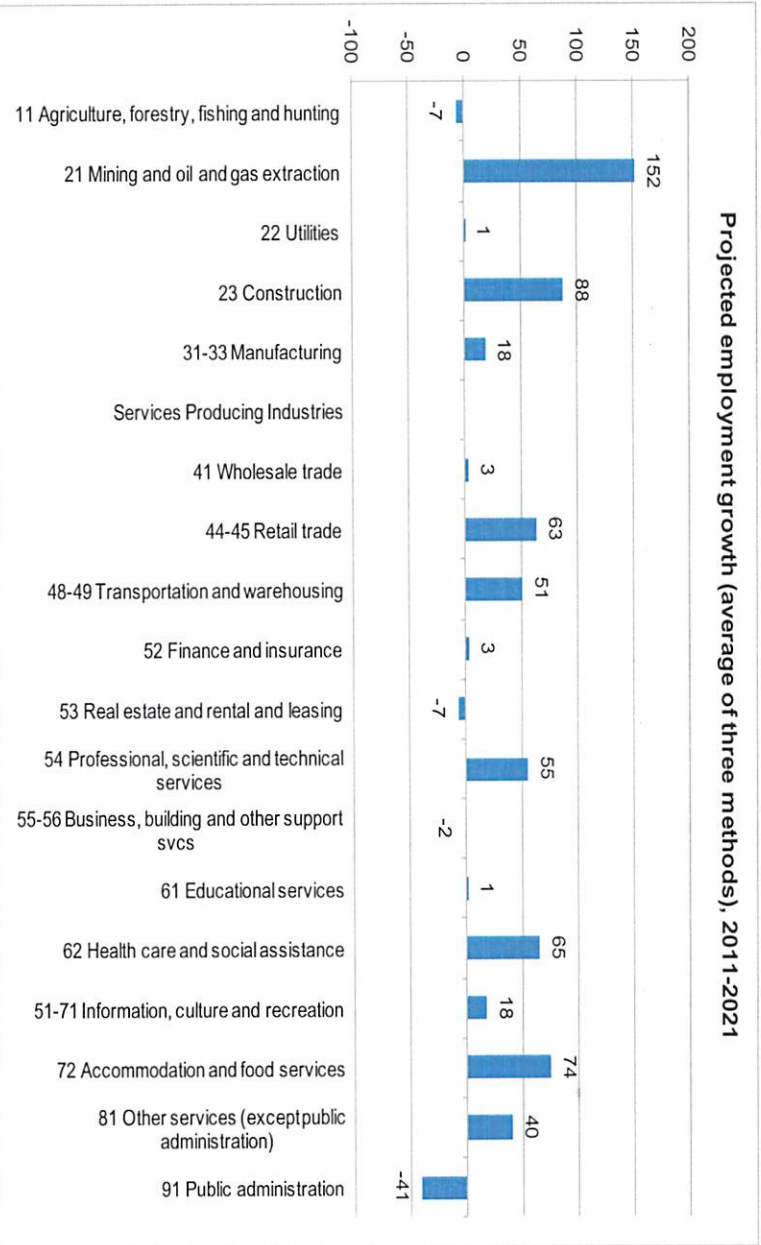


Figure 20: Edson Employment Projections by Industry - Average Projection
Source: Urbanics Consultants Ltd.

3.8 Non Residential Land Requirements

The study also used the employment projections to develop a rough estimate of the non-residential land use requirements for the Town of Edson, during the period 2011 – 2021. The rough estimate of land requirements was based on

- estimated employment growth by industrial sectors;
- allocation of projected employment growth to various land uses (commercial, industrial, business park and other land uses);
- floor area requirement per employee by type of industrial sectors; and,
- floor area ratios for new non-residential developments.

For the sake of simplicity the industries were organized into five main industrial sectors:

1. **Primary Industries Sector:** Agriculture, forestry, fishing and hunting; mining and oil and gas extraction; and utilities.
2. **Manufacturing and Construction Sector:** Construction; and manufacturing.
3. **Wholesale, Retail Trade and Transportation:** Wholesale trade; retail trade; and transportation and warehousing.
4. **FIRE and Business Services Sector:** Finance and insurance; real estate and rental and leasing; professional, scientific and technical services; business, building and other support services; accommodation and food services; and other services (except public administration).
5. **Public Services Sector:** Educational services; health care and social assistance; information, culture and recreation; and public administration.

It should be noted that a more detailed land requirement analysis was beyond the scope of this study. As a result, this analysis does not take into account the existing land use capacity of the Town, and it is only indicative of the scale and quantity of land that might be required to accommodate projected growth of employment during 2011-2021. Table 20 provides the assumptions that were used to estimate the non-residential land use demand projections. Table 21 provides the preliminary estimates for the type and scale of non-residential land that might be required by the Town from 2011 – 2021, to accommodate the projected employment growth.

Non-Residential Land Use Demand Assumptions	Commercial	Industrial	Business Park	Other
Employment Allocation				
Primary Industries Sector		90%	10%	
Manufacturing and Construction Sector		75%	25%	
Wholesale, Retail Trade and Transportation	75%	25%		
FIRE and Business Services Sector	20%		80%	
Public Services Sector				100%
Floor Area requirement by Industrial Sectors				
Primary Industries Sector		1,000 sf/emp	750 sf/emp	
Manufacturing and Construction Sector		1,000 sf/emp	750 sf/emp	
Wholesale, Retail Trade and Transportation	1,000 sf/emp	1,000 sf/emp		
FIRE and Business Services Sector	500 sf/emp		500 sf/emp	
Public Services Sector				500 sf/emp
Floor Area Ratio for New Non-Residential Uses				
Primary Industries Sector		20%	45%	
Manufacturing and Construction Sector		20%	45%	
Wholesale, Retail Trade and Transportation	35%	20%		
FIRE and Business Services Sector	45%		45%	
Public Services Sector				45%

Table 20: Non-Residential Land Use Demand Assumptions
Source: Urbanics Consultants Ltd.

Built-up Space for Accomodating Employment Growth (2011-2021)	Empl Growth (2011-2021)	Commercial	Industrial	Business Park	Other
Primary Industries Sector	146		131,400 sq ft	10,950 sq ft	
Manufacturing and Construction Sector	106		79,500 sq ft	19,875 sq ft	
Wholesale, Retail Trade and Transportation	117	87,750 sq ft	29,250 sq ft		
FIRE and Business Services Sector	163	16,300 sq ft		65,200 sq ft	
Public Services Sector	43				21,500 sq ft
Total space required for each land use (sq ft)	575	104,050 sq ft	240,150 sq ft	96,025 sq ft	21,500 sq ft

Land Required for New Growth (2011-2021)	Empl Growth (2011-2021)	Commercial	Industrial	Business Park	Other
Primary Industries Sector	146		657,000 sq ft	24,333 sq ft	
Manufacturing and Construction Sector	106		397,500 sq ft	44,167 sq ft	
Wholesale, Retail Trade and Transportation	117	250,714 sq ft	146,250 sq ft		
FIRE and Business Services Sector	163	36,222 sq ft		144,889 sq ft	
Public Services Sector	43				47,778 sq ft
Total land required to accommodate growth in employment during 2011 -2021	square foot acres	286,937 sq ft 6.59 acres	1,200,750 sq ft 27.57 acres	213,389 sq ft 4.90 acres	47,778 sq ft 1.10 acres

Table 21: Non-Residential Land Use Demand Estimate
Source: Urbanics Consultants Ltd.

Thus based on the above-mentioned assumptions the Town is expected to require roughly 40 acres of non-residential land to accommodate the projected growth in employment (575 employees) during 2011 - 2021.

3.9 Major Growth Industries

The following section provides a brief description of the major growth industries in the Town of Edson. These include: mining and oil and gas extraction; construction; manufacturing; health care and social assistance; professional, scientific and technical services; and retail trade. Together these industries are expected to add roughly 575 jobs in Edson during 2011-2021. It should be noted that due to the absence of Town-level employment data from the 2011 census, the 2011 NHS employment numbers were used for the following analysis.

3.9.1 Mining and Oil and Gas Extraction

This industry includes companies involved in activities such as: exploring for crude petroleum and natural gas; drilling, completing and equipping wells; operating separators, emulsion breakers, de-silting equipment and field gathering lines for crude petroleum; mining for coal, metal ore, and non metallic mineral mining and quarrying; and other activities in the preparation of oil and gas up to the point of shipment from the producing property.

The Mining and Oil and Gas Extraction industry is a major part of the Edson economy, and is the second largest employer in the Town after the retail trade industry. Edson's growth has been based on coal from the rich Alberta Coal Branch since the 1930s and the oil and natural gas related industries since the 1960s. Some of the largest employers in this industry are Luscar Sterco Ltd. and Trans Canada Oil and Gas. Also, similar to other businesses in the Town, a large proportion of this industry is made up of smaller firms (i.e. those with fewer than 25 employees), which provide support services to other large firms. The Town of Edson can potentially capitalize on its competitive expertise in the oil and gas sector, fabrication and transportation sector.

Employment in the Alberta mining, oil and gas sector is expected to grow at an average of .4% from 2013 to 2017 (Figure 21). This industry accounted for 6.5% of total employment in Alberta in 2011 and is expected to grow to 7.7% by 2017 (Table 23). The Town of Edson is expected to display significant employment growth in this sector from an employment share of 12.9% in 2011 (Table 22) to nearly 14.3% in 2021 (Table 24); i.e. add roughly 150 jobs during 2011 - 2021. Further, with high average hourly wages associated with this industry the Town can be expected to benefit significantly from increases in employment in this sector. These projections, of course, are based upon prevailing sentiments on the health of the extraction industries generally and that there will be a ready global market for Albertan commodities.

Industries	2011 Jobs	Share of Labour Force		
	Edson	Edson	Alberta	Canada
Good Producing Industries	1,380	28.2%	25.8%	20.9%
11 Agriculture, forestry, fishing and hunting	55	1.1%	2.9%	2.5%
21 Mining and oil and gas extraction	630	12.9%	6.5%	1.5%
22 Utilities	25	0.5%	1.1%	0.9%
23 Construction	355	7.3%	9.4%	6.9%
31-33 Manufacturing	315	6.4%	5.9%	9.2%
Services Producing Industries	3,485	71.3%	74.2%	79.1%
41 Wholesale trade	170	3.5%	4.3%	4.2%
44-45 Retail trade	695	14.2%	11.0%	11.6%
48-49 Transportation and warehousing	310	6.3%	5.0%	4.7%
52 Finance and insurance	100	2.0%	3.3%	4.4%
53 Real estate and rental and leasing	45	0.9%	1.9%	1.8%
54 Professional, scientific and technical services	335	6.9%	7.8%	7.1%
55-56 Business, building and other support services	90	1.8%	3.6%	4.2%
61 Educational services	235	4.8%	6.8%	7.4%
62 Health care and social assistance	285	5.8%	9.9%	11.1%
51-71 Information, culture and recreation	200	4.1%	3.6%	4.5%
72 Accommodation and food services	545	11.2%	6.0%	6.4%
81 Other services (except public administration)	260	5.3%	4.8%	4.6%
91 Public administration	215	4.4%	6.2%	7.2%

Table 22: Employment in Edson by Industry and Comparative Workforce Share 2011
Sources: Statistics Canada; Urbanics Consultants

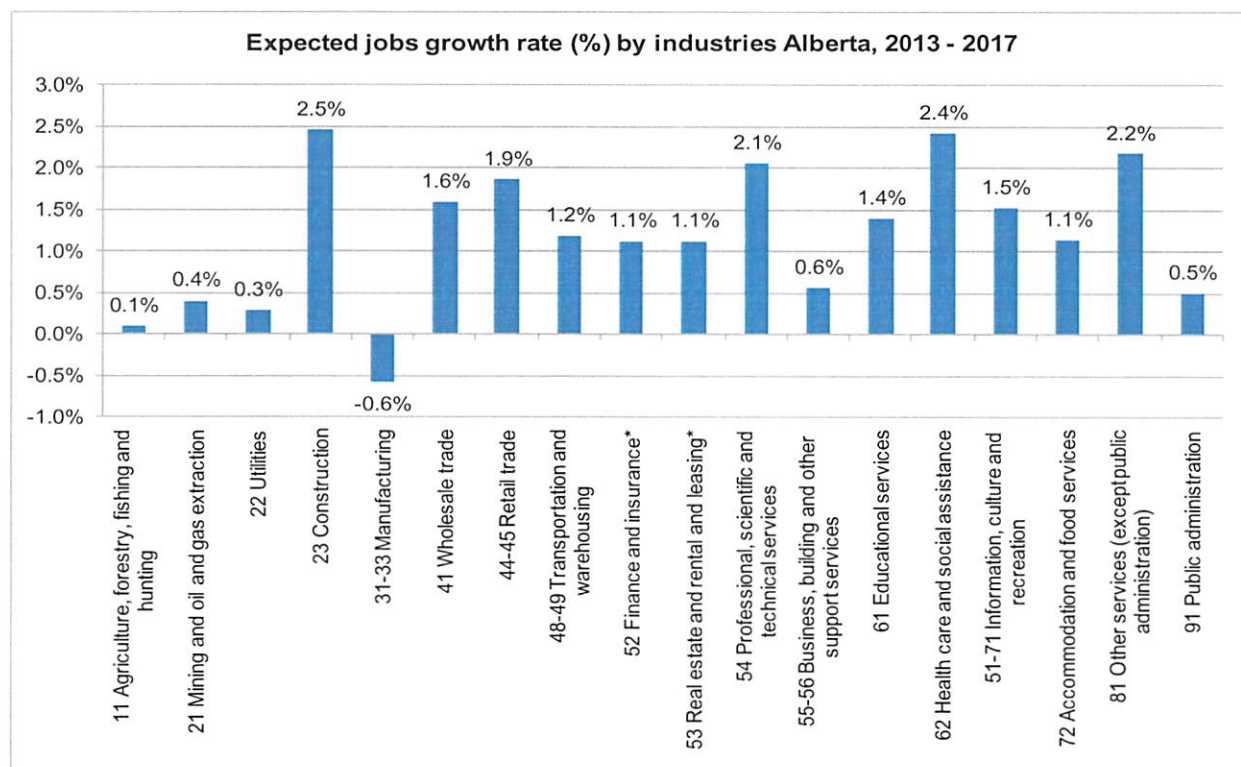


Figure 21: Expected jobs growth rate (%) by industries for Alberta, 2013 – 2017
Sources: Canadian Occupational Projection System (COPS) and Urbanics Consultants Ltd.

3.9.2 Construction

The Construction industry includes companies that construct, repair or renovate residential, commercial and industrial buildings of all types (e.g. houses, apartment buildings, condominiums, office towers, shops, malls, oil refineries, petrochemical plants, power plants, etc.). The industry also includes firms which perform engineering works (e.g. highways, bridges, pipelines) as well as subdivide and develop land. While there are a few large firms like Johnson & Herbert Construction involved in construction in the County, there are many more small firms (i.e. those with fewer than 25 employees) making up the industry.

The Province of Alberta is expected to display a significant growth (at an annual rate of 2.5%, Figure 21) in employment related to the construction sector, which is expected to increase the total percentage of the workforce in this sector from 9.4% in 2011 to 11.1% by 2017 (Table 23). The overall number of Edson workers employed in construction is projected to increase by roughly 88 jobs during 2011 - 2021, increasing the percentage of the workforce employed in the construction industry from 7.3% in 2011 to over 8.1 % in 2021(Table 24).

3.9.3 Accommodation and Food Services

The Accommodation and Food Services sector includes accommodations, such as hotels, motels, resorts, Casino hotels, bed and breakfasts, cottages and cabins, parks and campgrounds, hunting and fishing camps as well as full-service restaurants, special food services, caterers, mobile food services and drinking places.

The Accommodation and Food Services sector benefits from the presence of several tourism, arts and culture, and outdoor activities related attractions in close proximity to the Town of Edson. The accommodations and food services sector is the third largest employer in the Town. Also, the sector is expected to increase in employment share from 11.2% in 2011 to roughly 11.3% in 2021(Table 24); i.e. add roughly 75 jobs during the forecast period. It should be noted that this sector displays some of the lowest hourly wages in the economic region (the average hourly wage was only \$14.23 in 2013) and is not expected to lead to significant direct economic impacts for the Town. However, the indirect economic impacts from this sector can be expected to be very significant as it can drive revenues for the other tourism related industries in the town.

Employment Projection: Alberta	Employment		Employment Share (%)	
	2011	2017	2011	2017
All industries	2,088,145	2,307,100	100%	100%
Goods Producing Sector	539,070	648,500	25.8%	28.1%
11 Agriculture, forestry, fishing and hunting	61,165	60,200	2.9%	2.6%
21 Mining and oil and gas extraction	136,500	177,100	6.5%	7.7%
22 Utilities	22,035	20,600	1.1%	0.9%
23 Construction	195,905	255,900	9.4%	11.1%
31-33 Manufacturing	123,465	134,700	5.9%	5.8%
Services Producing Sector	1,549,070	1,658,600	74.2%	71.9%
41 Wholesale trade	89,000	89,300	4.3%	3.9%
44-45 Retail trade	229,225	263,100	11.0%	11.4%
48-49 Transportation and warehousing	104,770	123,500	5.0%	5.4%
52 Finance and insurance	68,760	69,360	3.3%	3.0%
53 Real estate and rental and leasing	40,090	40,440	1.9%	1.8%
54 Professional, scientific and technical services	162,490	174,900	7.8%	7.6%
55-56 Business, building and other support svcs	75,500	75,000	3.6%	3.3%
61 Educational services	141,550	138,200	6.8%	6.0%
62 Health care and social assistance	206,695	257,700	9.9%	11.2%
51-71 Information, culture and recreation	75,185	76,700	3.6%	3.3%
72 Accommodation and food services	125,810	141,100	6.0%	6.1%
81 Other services (except public administration)	101,275	118,400	4.8%	5.1%
91 Public administration	128,720	90,900	6.2%	3.9%

Table 23: 2011 Employment count and projected employment for Alberta (2017)

Sources: Canadian Occupational Projection System (COPS) and Urbanics Consultants Ltd.

Employment Projection: Edson	Employment		Employment Share (%)	
	2011	2021	2011	2021
All industries	4,885	5,460	100%	100%
Goods Producing Sector	1,380	1,631	28.2%	29.9%
11 Agriculture, forestry, fishing and hunting	55	48	1.1%	0.9%
21 Mining and oil and gas extraction	630	782	12.9%	14.3%
22 Utilities	25	26	0.5%	0.5%
23 Construction	355	443	7.3%	8.1%
31-33 Manufacturing	315	333	6.4%	6.1%
Services Producing Sector	3,485	3,808	71.3%	69.8%
41 Wholesale trade	170	173	3.5%	3.2%
44-45 Retail trade	695	758	14.2%	13.9%
48-49 Transportation and warehousing	310	361	6.3%	6.6%
52 Finance and insurance	100	103	2.0%	1.9%
53 Real estate and rental and leasing	45	38	0.9%	0.7%
54 Professional, scientific and technical services	335	390	6.9%	7.1%
55-56 Business, building and other support svcs	90	88	1.8%	1.6%
61 Educational services	235	236	4.8%	4.3%
62 Health care and social assistance	285	350	5.8%	6.4%
51-71 Information, culture and recreation	200	218	4.1%	4.0%
72 Accommodation and food services	545	619	11.2%	11.3%
81 Other services (except public administration)	260	300	5.3%	5.5%
91 Public administration	215	174	4.4%	3.2%

Table 24: 2011 Employment count and projected employment for Edson (2021)

Sources: Canadian Occupational Projection System (COPS) and Urbanics Consultants Ltd

3.9.4 Retail Trade

The Retail Trade industry includes two types of retailers: stores that attract walk-in customers for products and related services; and non-store retailers who reach customers and market merchandise via other methods (e.g. infomercials, direct-response advertising, catalogues, in-home demonstrations and vending machines). This industry typically has the highest employment levels; over 11% of Alberta's workforce were employed in retail trade in 2011 (Table 23).

The retail trade sector is the largest employer in the Town with roughly 14.2% of Edson's workforce in 2011 (Table 24); primarily because it serves a much larger regional market. The sector is expected to decline in employment share from 14.2% in 2011 to roughly 13.9% in 2021. However, the sector is still expected to add over 60 jobs during the forecast period. Major Edson employers in this industry include Walmart, Linford Foods, Extra Foods and Canadian Tire. This sector also displays below average hourly wages in the economic region (the average hourly wage was only \$18.19 in 2013) and is expected to have a positive (though limited) wealth impact on the Town.

3.9.5 Health Care and Social Assistance

The Health Care and Social Assistance industry includes establishments and services such as: hospitals, nursing and residential care facilities and out-patient care centres; offices of health practitioners (e.g. dentists, doctors, etc.); medical and diagnostic laboratories; home health care services; ambulance services; social assistance services (e.g. for children, youth, the elderly, families); community food, housing, emergency and relief services; vocational rehabilitation services; and daycare services.

The health care and social services sector in Edson is expected to increase its employment share from 5.8% in 2011 to roughly 6.4% in 2021 (Table 24); adding roughly 65 jobs during this period. Also, with the completion of the New Edson Healthcare Centre, by 2016, the facility will add roughly 6,500 square metres of built space with 24 acute care beds and 76 continuing care beds, which will translate into the creation of new jobs in this sector. This industry is expected to grow with the graying Canadian population. Further, with an average hourly wage rate of \$26.67, this sector is expected to add significantly to the economy and expenditure potential of the Town.

3.9.6 Professional, Scientific and Technical Services

The Professional, Scientific and Technical Services industry includes enterprises that make knowledge and skills available to other organizations or to the public, often on a project by project basis. For example, they may provide: legal services and accounting and related services; architectural, engineering and related services; surveying and mapping services; graphic, industrial or computer systems design services; management, scientific and technical consulting services; research and development services; advertising, public relations or market research services; translation services; and veterinary services.

The Town of Edson has a significantly higher share of employment in this sector in comparison to its neighbouring communities, which indicates a regional level location advantage for the Town. The projections also indicate that the industry will increase its employment share from 6.9% in 2011 to over 7.2% in 2021 (Table 24), adding roughly 55 new jobs during the same period. The industry is a primary driver of innovation as well as specialized services associated with other major industries, such as the energy sector, and the Town would be well served by attracting such firms to the Town of Edson. Also, since the professional, scientific and technical services display the highest average hourly wage amongst all the industries (\$34.13 in 2013), any expansion in this sector will have significant economic impacts for the Town.

3.9.7 Transportation and Warehousing

The Transportation and Warehousing industry includes companies that: transport passengers by rail, water, air or road; transport goods by rail, water, air, road or pipeline; and warehouse or store goods. In 2011, the industry accounted for only 5% of Alberta's workforce but 6.3% of Edson's (Table 22), which is not surprising given the location of Edson along the Trans Canada Yellowhead Route and the Canadian National Railway.

The Town is very well situated for regional and national level transportation flows and can benefit from the expansion of such services throughout Western Canada. The study anticipates that the employment share of this sector will increase from 6.3% in 2011 to roughly 6.7% in 2021 and will add roughly 50 jobs to the economy (Table 24). Further, an increase in the high paying transportation and warehousing jobs (average hourly wage was \$28.72 in 2013) can be expected to have significant positive impacts on the Town's economy.

3.9.8 Underrepresented Industries

There are two other industries that can have significant positive impacts on the Town's economy and yet are underrepresented in Edson; these are the manufacturing industry and the agriculture, forestry, fishing and hunting industry

Manufacturing Industry

Metal fabrication, petrochemicals and transportation equipment are just a few of the areas supported by this industry. Also included are manufacturers of food, beverages, tobacco products, textiles and textile products, clothing, coal products, chemicals, plastics and rubber, computer and electronic products and other goods.

The manufacturing sector in the Town of Edson has witnessed significant contraction in employment share from 11.1% in 2001 to roughly 6.4% in 2011 (Table 14). Based on the historical performance and a declining Provincial outlook for the industry the Town's manufacturing industry is expected to contract even further to only 6.1% of the employment share by 2021 (Table 24); adding less than 20 jobs over the study period.

In spite of a weak employment outlook for the industry, the manufacturing industry is vital to the mining and oil and gas extraction industry. As a result, the Town would be well served by facilitating growth in this sector. For example the Town could promote growth in this sector by ensuring that there is sufficient acreage of land available for industrial uses and by listening to the concerns of the manufacturing community.

Agriculture, Forestry, Fishing and Hunting Industry

The Agriculture, Forestry, Fishing and Hunting Industry includes a variety of establishments or services: farms, orchards, greenhouses, nurseries and other places that grow crops, plants or trees; ranches, farms, feedlots and other places that raise animals, produce animal products or fatten animals; fishing and trapping activities; and agricultural support services such as planting, harvesting or management.

The agriculture and forestry industry in Edson declined from 1.7% of the employment base in 2001 to 1.1% in 2011 (Table 14). The industry is expected to decline to less than .9% of the employment base by 2021 (Table 24). Even though it has such a small employment base, the industry is an important economic activity in the region. It produces forest products, straw, hay,

cereal grains, dairy products, cattle, poultry, horses, sheep, hogs, honey, seed potatoes and vegetables. Two of the major employers in this industry are Weyerhaeuser Canada and Sundance Forest Industries. The Town of Edson would be well served by exploring potential opportunities in this industry; especially those related to value-added agricultural and forestry products.

4 Main Findings

This study examines the demographic characteristics of the Town's population and makes population projections for the period 2011 -2041. Also, it examines the Town's economy and the distribution of jobs in various industrial sectors to forecast employment, by industry, related non-residential land requirements and major growth industries, over the next decade (2011-2021).

The population of the Town of Edson is expected to grow from 8,475 in 2011 to about 11,400 in 2041; this represents an annual growth rate of 1.0%. The main implications for the Town of Edson over the next 30 years are:

- **Working-age (15- 64 years age-cohort):** The proportion of the working-age residents (15-64 years) will decline from 71% in 2011 to nearly 60% in 2041 (Table 7). In spite of the overall decline in population share, this age-cohort is expected to add roughly 750 people from 2011 - 2041.
- **Seniors (65 years and over age-cohort):** The proportion of seniors in the population is expected to grow from 9% in 2011 to nearly 23% in 2041(Table 7). This suggests an increase of some 1,855 people 65 years and over, from 2011 - 2041.
- **Younger-age (15 years and younger age-cohort):** The proportion of younger-age residents below 15 years of age is expected to decline from 19% in 2011 to 17% in 2041(Table 7). In spite of the overall decline in population share, this age-cohort is expected to add roughly 320 younger residents from 2011 - 2041.

The study also found that the seven largest industries, in terms of employment size and share of Edson's economy, are: retail trade; mining, oil and gas extraction; accommodation and food services; construction; professional, scientific and technical services; manufacturing; and transportation and warehousing. Further, the Town of Edson is expected to add roughly 575 new jobs between 2011 and 2021 (Figure 20); primarily in the following industries:

1. Mining and oil and gas extraction (152 jobs);
2. Construction (88 jobs);
3. Accommodation and food services (74 jobs);
4. Retail trade (63 jobs);

5. Health care and social assistance (65 jobs);
6. Professional, scientific and technical services (55 jobs); and,
7. Transportation and warehousing (51 jobs).

Further, the Town of Edson is expected to require over 40 acres of non-residential land to accommodate the projected growth in employment (575 employees), from 2011 - 2021. The distribution of this projected demand is (Table 21):

- Commercial land: 6.6 acres;
- Industrial land: 27.6 acres;
- Business park: 4.9 acres; and,
- Other land use (public services): 1.1 acres.

The declining population trend in the 15-64 years age-cohort and the increasing population trend in the 65+ years age-cohort suggests that the Town would be well served by attracting new employees, businesses and investments. Also, the Town would derive significant benefit from undertaking business consultations to determine strategies for retaining and promoting existing businesses. For example ensuring adequate land capacity and reducing the costs of development would go along way in promoting new investments in the Town. Additionally, even though the survey is not wholly representative of Edson's population, it has identified some economic development initiatives that the Town could potentially undertake to alleviate some of the major issues identified by respondents (Appendix 1: Survey Findings).

The reader should note that these population and employment projections only provide the most likely path of population and employment growth as well as non-residential land demands for the Town of Edson. These projections do not account for any unpredictable economic activity, such as a large industrial development or resource extraction project in the Town of Edson or the surrounding region. These unpredictable economic activities can significantly alter some of the assumptions noted in this study and may necessitate the re-examination of the study's findings.

Appendix 1: Survey Findings

The Study also conducted a short online survey to gather feedback from the Town's businesses. The survey's goal was to gain a better understanding of the local labour market and ease of doing business in the Town, from local employers' perspectives.

While every effort was made to encourage all industries voice their thoughts and opinions, the total number of responses received (38 responses) were well below the level of statistical validity; and the findings from the survey might not be representative of the entire population of the Town of Edson. The reader of this report is, therefore, requested to keep this limitation in mind while examining some of the findings from the survey.

In total, 38 businesses responded to the survey; the distribution of respondents, by industry, is shown on the chart on the following page. Also, several industries were either over or underrepresented among the respondents. For example, the Mining, Quarrying and Oil and Gas extraction industry was underrepresented, making up 5.25% of the survey respondents and 12.90% of the Town's actual labour force. Similarly, the Accommodation and Food Services sector and the Manufacturing industry were underrepresented (Figure 22). Also, responses were not received from the utilities, wholesale trade, administrative, support, waste management and remediation services and public administration sectors.

On the other hand, the Retail Trade sector, which makes up the largest share of the Town's labour force, was overrepresented with 26.32% of survey respondents in this sector compared to 14.20% of the Town's labour force. Similarly, the responses from the Real Estate and Rental and Leasing and Educational Services were slightly overrepresented in the survey. Since, the survey does not claim statistical validity, no measures have been undertaken to address overrepresentation or underrepresentation.

The survey also asked respondents to rate the Town of Edson overall as a place to do business (Figure 23). The responses were:

- Excellent (18%);
- Good (66%);
- Poor (13%);
- Very Poor (0%); and
- No Comment (3%).

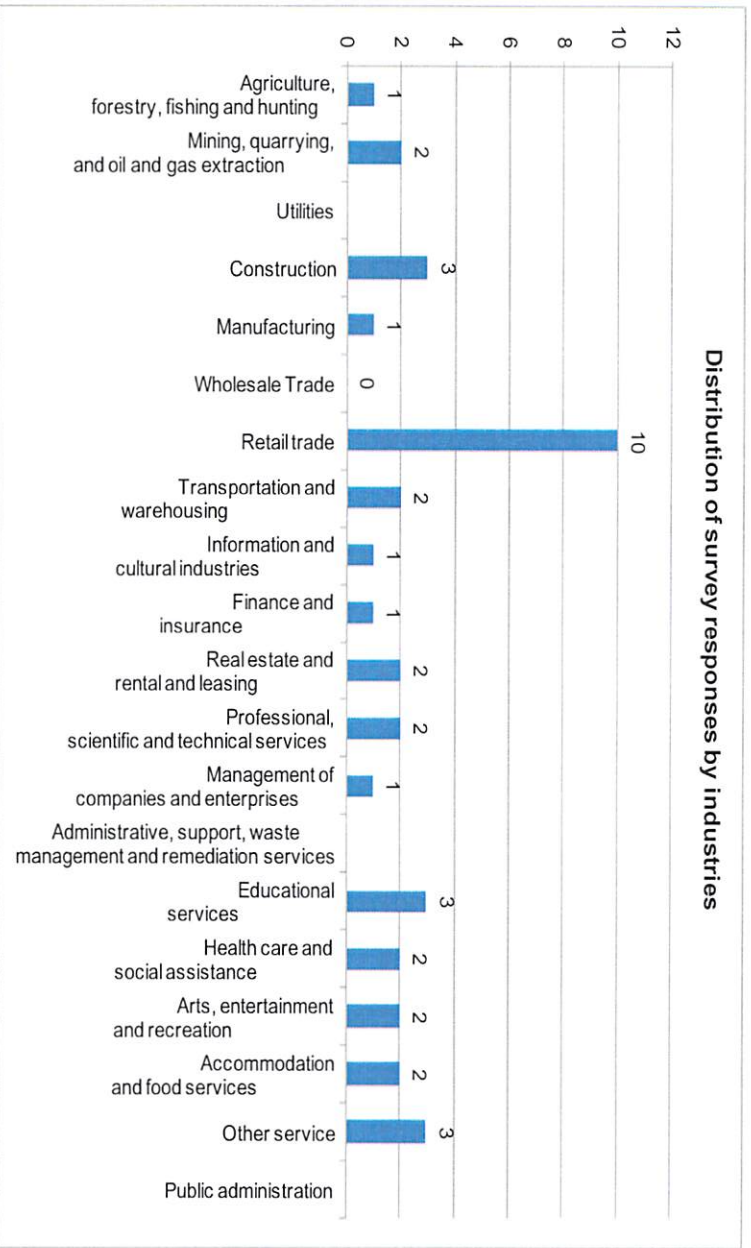


Figure 22: Distribution of survey respondents by industries
Source: Urbanics Consultants Ltd.

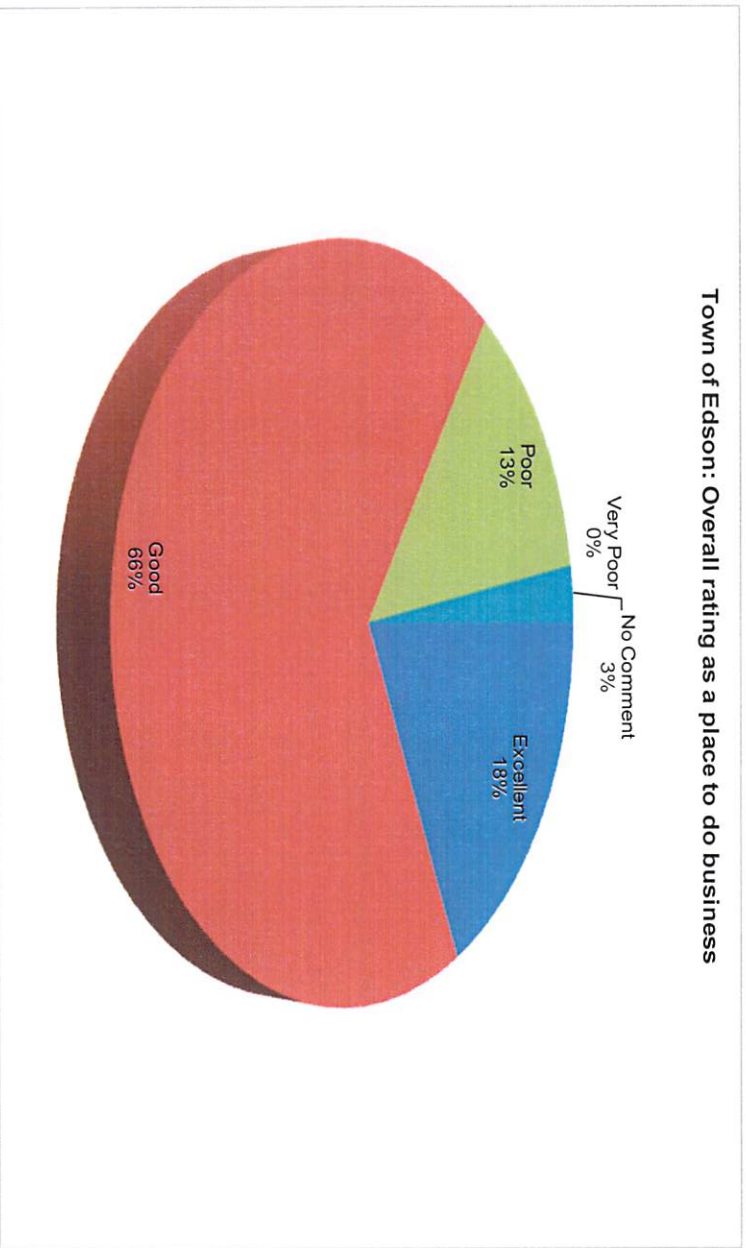


Figure 23: Overall rating as a place to do business
Source: Urbanics Consultants Ltd.

Respondents were then asked to rate factors more specific to Edson **as a place to do business**. They were asked to rate the Town (excellent, good, poor, very poor and no comment) on seven factors including: labour availability; labour costs; availability of management staff; transportation costs; business and occupancy costs; municipal tax rates; and the cost of utilities.

The responses were varied, with some categories such as cost of utilities (58% excellent or good vs. 24% poor or very poor) and municipal tax rates (52% excellent or good vs. 19% poor or very poor) overwhelmingly positive. Other categories, while still positive, show potential room for improvement. These include:

- Labour costs (47% good vs. 42% poor or very poor);
- Transportation costs (42% good vs. 39% poor or very poor); and
- Business occupancy costs (42% excellent or good vs. 32% poor or very poor).

Additionally, there were a few categories that were much less positive; these categories should be seen as opportunities to improve the business environment and attract investments to the Town of Edson. These include:

- Labour availability (56% poor or very poor vs. 39% good); and
- Availability of management staff (47% poor or very poor vs. 29% excellent or good).

Further, respondents were asked to rate the Town of Edson based upon **quality of life** issues, including the quality of public schools, vocational/technical schools, municipal services, and amenities, as well as the quality and affordability of housing and the quality of local streets.

Three categories stood out as overwhelmingly positive; quality of public schools, quality of municipal services, and quality of amenities. Two categories, quality of local streets and quality of vocational/technical schools, were more contentious, with respondents ranking them equally positive (excellent or good) and negatives (poor or very poor).

The only category which ranked overwhelmingly negative was that of quality and affordability of housing, with only 24% of respondents ranking it as excellent or good and 71% ranking it as poor or very poor.

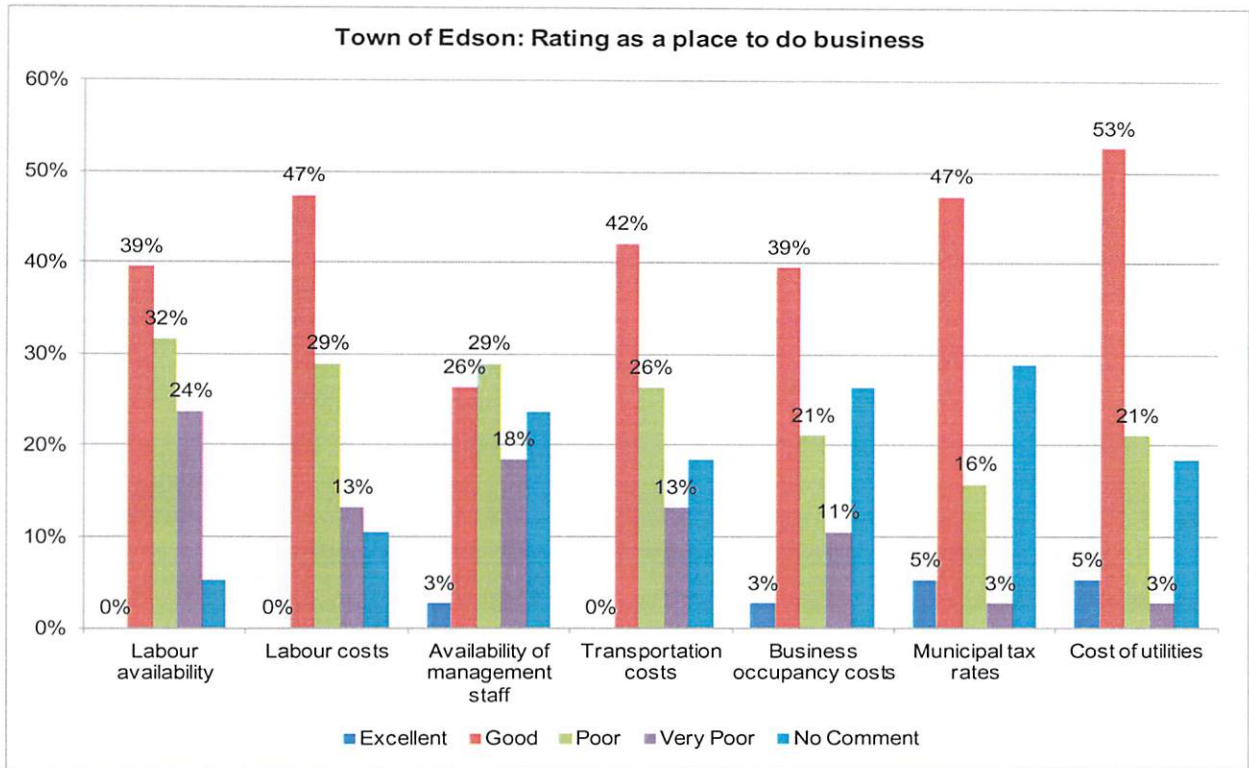


Figure 24: Rating Edson as a place to do business
Source: Urbanics Consultants Ltd.

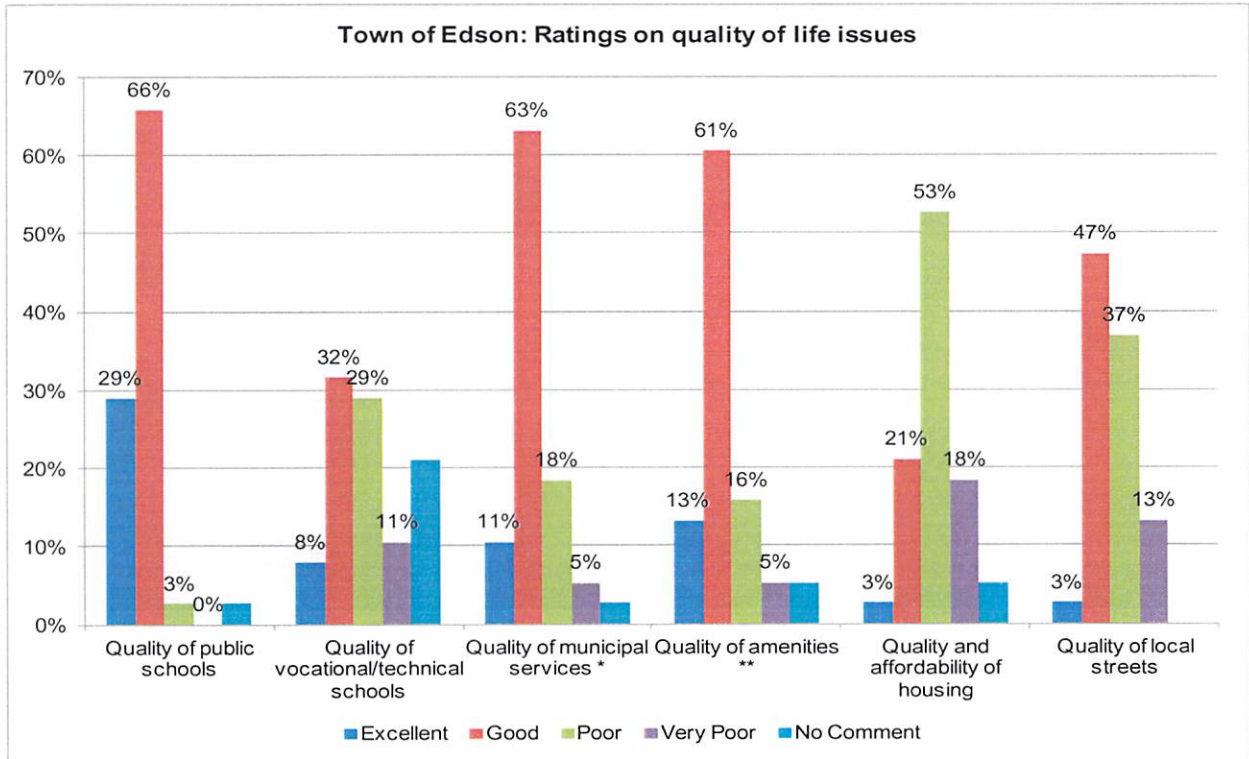


Figure 25: Rating Edson's Quality of Life
Source: Urbanics Consultants Ltd.

Respondents to the survey were then asked about their businesses, in terms of sales by geographical area and the company's purchases by geographical area.

Results showed that the larger part of respondents' sales were fairly local in nature, with 48% of sales within the Town of Edson and 34% within Yellowhead County. The majority of remaining sales were conducted in the rest of Alberta (16%), with a very small percentage going outside of the province (2%) or country (1%). Some of the sales identified in the survey were:

- Heavy equipment for oilfields
- Construction services and building supplies
- Retail sales of sporting equipments, apparel and accessories
- Transportation services to employees and private group transportation
- General gift ware, fresh flowers, and gifts
- Financial, business support and consulting services
- Real estate sales/property management/mortgage brokerage services
- Office supplies, business machines, source dealer - electronics
- Food, liquor and entertainment
- Recycling services

On the other hand, the companies surveyed made purchases which were more varied geographically. Companies almost made purchases almost equally from the Town of Edson (30%), the rest of the Province of Alberta (30%) and the rest of Canada (27%). There were fewer purchases made from Yellowhead County (7%) and internationally (6%). Some of the purchases identified in the survey were:

- Heavy equipment and farm equipment parts and supplies
- Heavy equipment, truck parts and other commercial equipment
- Wood for remanufacture, oilfield supplies for resale
- Musical instruments
- Food and liquor products and restaurant supplies
- Diamond products, grouts
- Daycare toys and furnishings, creative supplies
- IT related products & services; consulting, audit & accounting services
- Clothing, costumes and accessories
- Office furniture, stationary and computer equipment

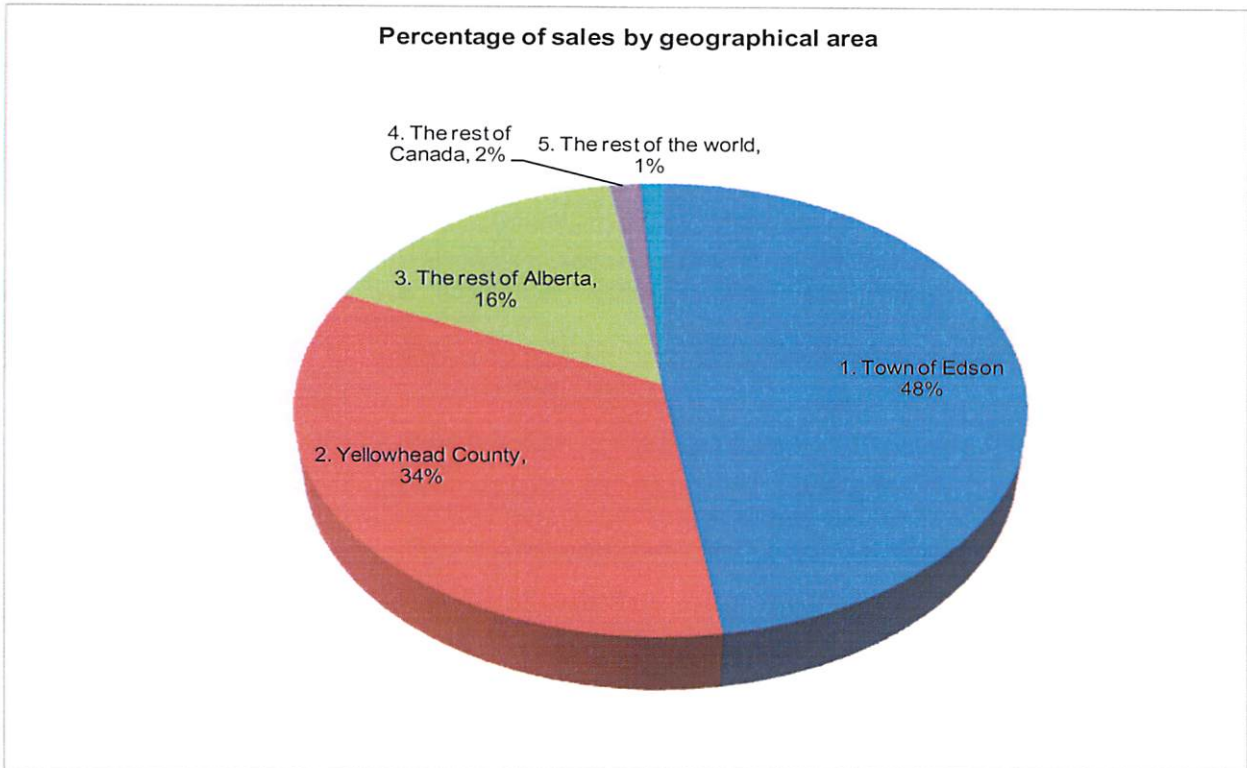


Figure 26: Percentage of sales by geographic area
Source: Urbanics Consultants Ltd.

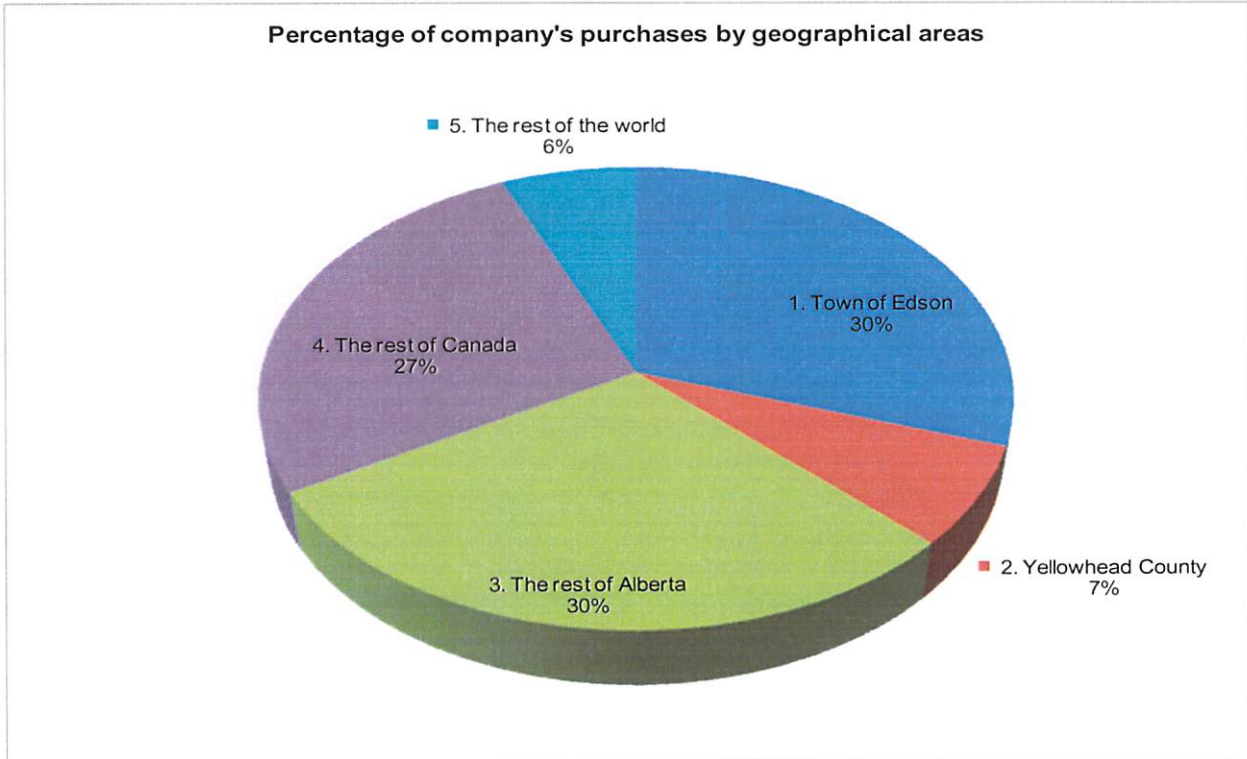


Figure 27: Percentage of purchases by geographic area
Source: Urbanics Consultants Ltd.

The survey went on to question respondents about recent changes, and expected changes, to their business in terms of number of employees, gross sales, and total payroll.

The first question asked respondents to compare any changes to the number of employees and gross sales in the current year (2014) with the previous year (2013). In terms of the companies' gross sales and total payroll, there was a marked increase with 71% of respondents denoting these had increased from the year previous. Regarding the number of employees, most respondents (44%) noted that the number of employees at their company had not changed from the previous year. However, the second most populous answer among respondents (39%) stated the number of employees had actually increased from a year earlier.

The second question asked respondents to estimate any expected changes over the next year, from 2014 to 2015. The responses show respondents were confident in their businesses, with 74% of respondents expecting an increase to gross sales and 66% of respondents expecting an increase to their company's payroll. Employers expected the number of employees at their firm to largely remain the same over the next year (51% of respondents), though 46% stated they expected the number of employees to increase.

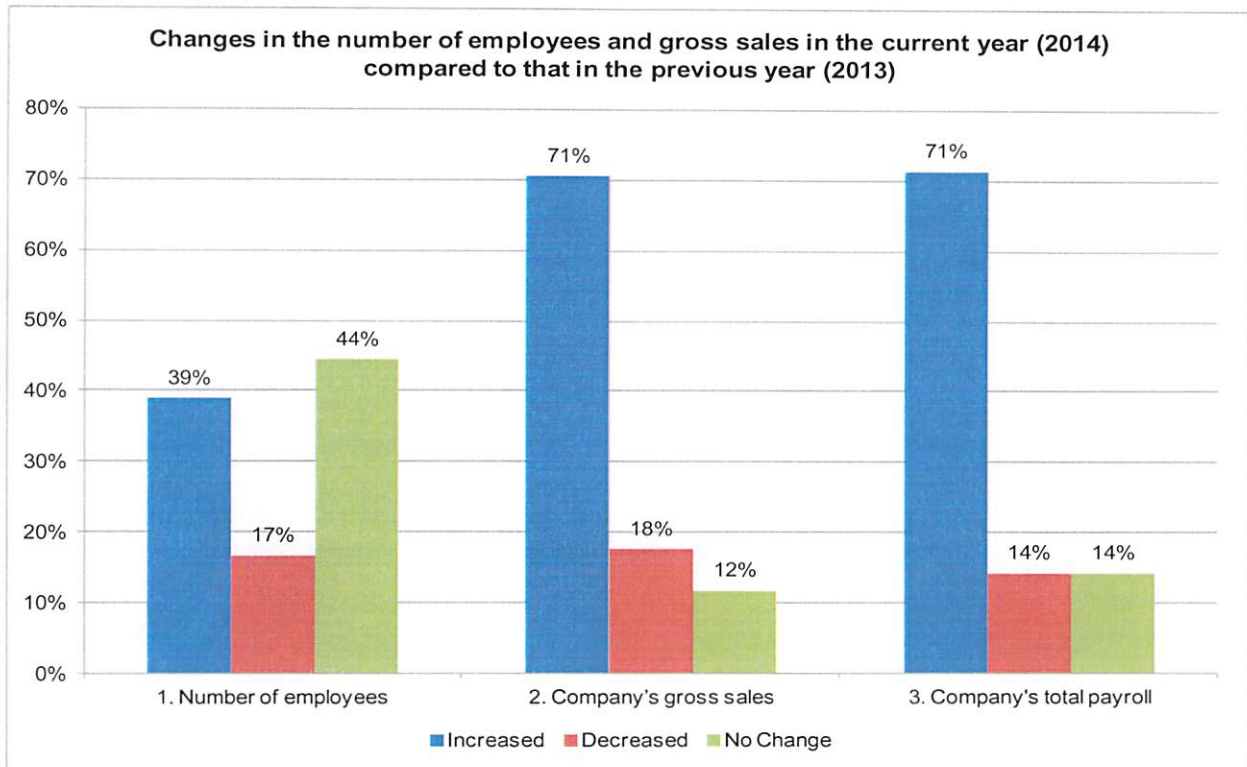


Figure 28: Changes in number of employees and gross sales during 2013-2014
Source: Urbanics Consultants Ltd.

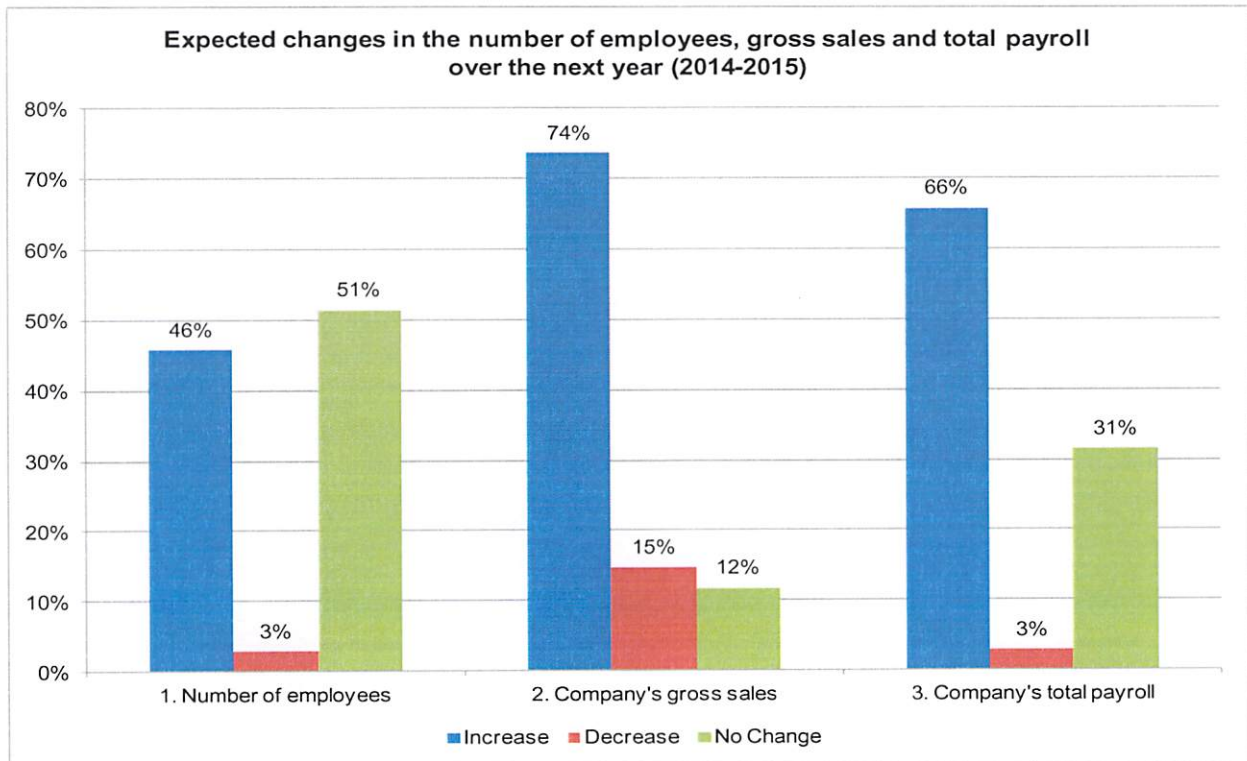


Figure 29: Anticipated changes in number of employees and gross sales during 2014-2015
Source: Urbanics Consultants Ltd.

In addition to the above numerical responses, respondents were asked to answer a number of long answer qualitative questions regarding business in the Town. These questions included:

- Please comment on any current issues or trends (local, regional and global) that might be having a significant impact on your business or industry?
- If there was one thing you would change in our Town to make it a better place to do business, what would it be?
- If you have any other comments or suggestions related to this survey, please provide them.

The responses from these questions have been grouped into related topics and listed in the following pages.

Physical Improvement Opportunities:

- Make Edson more attractive (clean up 2nd and 4th Ave.)
- Pay more attention to the downtown core (unsightly buildings, etc.)
- Fill in all of the empty store space in the downtown area and give people a reason to shop downtown
- Revitalize the main street to make it more inviting to tourism
- Update the downtown and encourage businesses to stay for the long term
- Work with the county to pave more roads
- The Town of Edson and the Ministry of Highways should work together to improve the appearance of the highway frontage areas.

More Amenities:

- Enhance the quality of recreation and arts facilities to attract more permanent residents and young families to create a stable employment pool.
- Upgrade town facilities (pool, field house) to encourage potential employees to move to this area and increase the tax base. No out of town workers want to move here. Our town is lagging others of similar size in many areas.
- More police services to keep our businesses and streets safer
- Improve public transportation

Labour and Education Related Initiatives:

- Create more post secondary education choices, so skilled people will stay
- Promote efforts to train and retrain the local workforce
- Attract more workers to the Town

- Concerns related to changes in the foreign worker program and its impact on local businesses; especially in trades such as restaurants.

Land Use Initiatives:

- Increase affordable accommodations for staff as well as family friendly facilities
- More affordable housing so it becomes more attractive for prospective employees to come to Edson
- Ensure sufficient supply of commercial space and industrial land
- Promote greater housing stock and diversity of housing
- Address absentee landlords and workers campsites.

Supporting and Retaining Local Businesses:

- Support local business, encourage development through mentoring and advisory services
- Subsidize employment for companies competing for employees with oilfield
- Streamline process to establish new businesses and services; especially those that are not presently in Edson
- Plan for potential slowdowns and layoffs in mining, oil and gas production and forestry industries
- Promote growth of creativity and knowledge-based businesses

Lower Costs of Doing Business:

- Modify tax rate for business to be more in line with that for the residential properties, so that businesses do not have to subsidize residential properties
- Make space like offices, shops and land available at a reasonable price.
- Make the process of applying/reading/and fulfilling development requirements and/or compliance conditions easier to understand and navigate.
- Lower rent and utilities expenses.
- Lower off site levies to reduce development costs. The levies are making construction too expensive within the Town of Edson; and more companies are moving developments to the County lands. Work with landowners and developers to come up with more reasonable levy costs that allow the Town to expand

Appendix 2: Cohort-Component Method and Assumptions

This report utilizes the Cohort-Component method for population projections. This method utilizes the knowledge of age-sex distribution of population at any point of time (base population) along with the most likely assumptions related to the components of demographic change, such as fertility, mortality and migration, to project population growth in a geographic region. This method has the following functional form,

$$P_{i,t} = P_{i-1,t-5} + B_{t-5,t} - D_{i-1,t-5,t} + M_{t-5,t}$$

Where,

P_t = population at time t, age cohort i (5 year age cohorts)

P_{t-5} = population at time t-5 (5 year time intervals), age cohort i-1

$B_{t-5,t}$ = births, in the interval from time t-5 to t

$D_{i-1,t-5,t}$ = deaths, in the interval from time t-5 to t, in the age cohort i-1

$M_{t-5,t}$ = net migration, in the interval from time t-5 to t

The first round of the Cohort-Component method is executed by utilizing the base population and the assumptions regarding the future births, deaths and migration (the historical trend, methods and assumptions are covered in the Assumptions sections). Then the results from the first round of projections are utilized to perform the second round of the projections for the next 5 years. This process is repeated several times to generate consistent population projections for the study period for each of the population growth scenarios.

This method is used to generate three different population growth scenarios (high, medium and low growth scenarios) and to identify the most likely growth scenario for further analyses.

Fertility Rate Assumptions

The fertility rate assumptions for the Town of Edson are based on historical data for CD 14, which is from Alberta Vital Statistics, and Alberta Treasury Board and Finance. The dataset provide the historical age-specific fertility rates (ASFR) as well as the total fertility rates (TFR) for the Census Division No. 14.

Fertility Rates	Canada			Alberta			Division No. 14		
	2001	2006	2011	2001	2006	2011	2001	2006	2011
15-19	16.3	13.7	12.6	21.1	20.2	17.3	29.28	22.99	26.11
20-24	56.1	51.1	45.7	68.7	68.6	58.9	120.82	139.76	105.14
25-29	97.9	98.5	95.2	104.6	110.5	107.8	137.45	142.86	136.26
30-34	89.9	100.9	105.9	93	108.1	114.6	84.52	71.88	83.83
35-39	35.5	44.9	52.3	36.2	48	53	21.56	32.85	28.77
40-44	6.1	7.4	10.3	5.9	7.6	11	3.86	1.64	6.99
45-49	0.3	0.3	0.5	0.3	0.4	0.5	0.00	0.00	0.00
TFR	1510.4	1586.2	1610	1649.1	1815	1807	1987.46	2059.89	1935.53

Table 25: Historical ASFR and TFR: Census Division No. 14, Alberta and Canada
Source: Alberta Vital Statistics, and Alberta Treasury Board and Finance and Statistics Canada

Historically, the ASFR for the Census Division No. 14, the Province and Canada is highest among women in the 20-24, 25-29 and 30-34 age cohorts and declines for women younger than 20 and older than 35. Also, age-specific fertility rates (ASFR) as well as the total fertility rates (TFR) have been much higher in the Census Division No. 14 in comparison to the Province of Alberta and Canada; the long term (10 year average) TFR for the Census Division No. 14 is 2018 (just below replacement level), the Province of Alberta is 1808 and Canada is 1593.

The study assumes that the future ASFR and the TFR for the Town of Edson will be similar to the Census Division No. 14. Thus, based on the long term TFR trends for the Division No, 14 the study develops three fertility rate scenarios; high, medium and low fertility rate scenarios. The high fertility rate scenario assumes that the fertility rates in Edson will increase from 1987 in 2013 to 2018 in 2021 and then remain constant during 2021 – 2041. The medium fertility rate scenario assumes that the TFR in the county will stay constant at 2013 levels, i.e. 1987, during the study period. The low fertility rate scenario assumes that the TFR in the county will decline in near future and achieve the 10 year provincial average TFR rate of 1808 by 2021 and then stay constant during the study period. The Figure 30 graphically illustrates the three fertility rate assumptions for the Town of Edson during the study period (2011-2041).

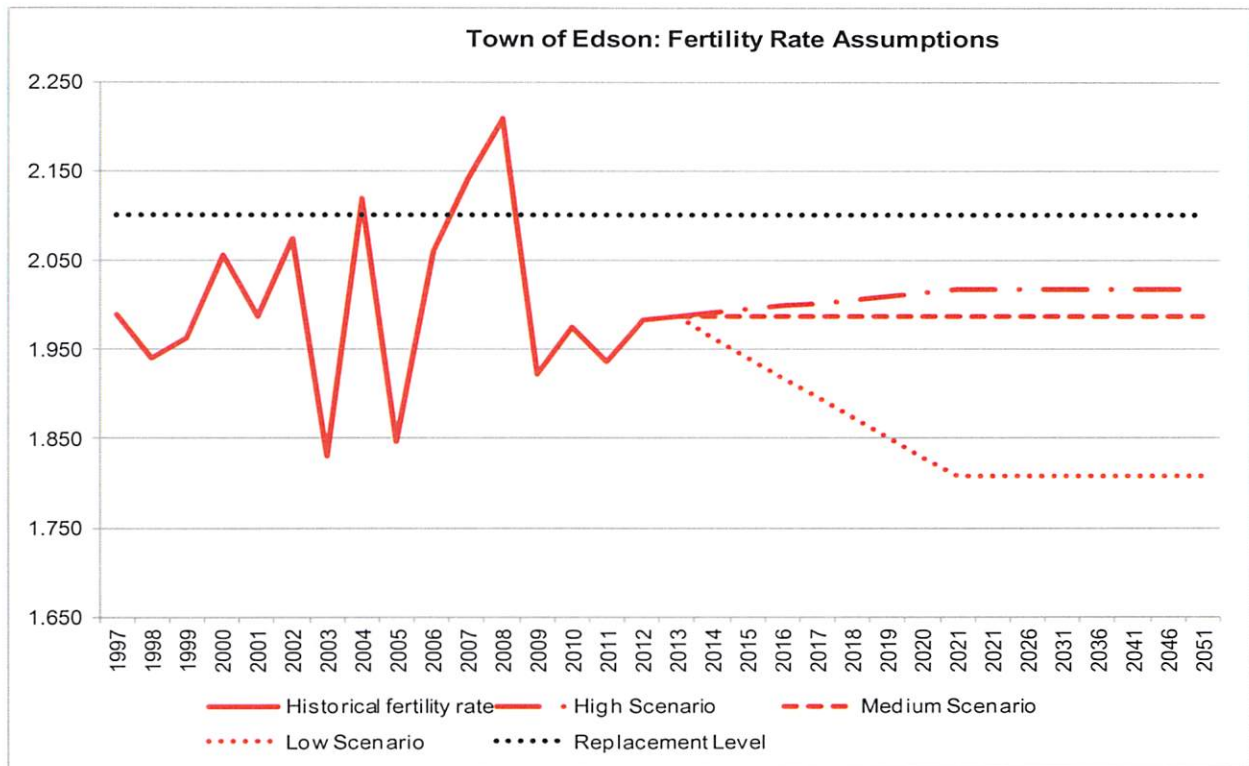


Figure 30: Town of Edson: Fertility rate assumptions
 (Source: Urbanics Consultants Ltd., Statistics Canada, Canadian Vital Statistics, Alberta Vital Statistics, & Alberta Treasury Board and Finance)

Mortality Assumptions

This study assumes that the mortality and life expectancy experiences of the residents of the Town of Edson will be similar to the Province of Alberta. These assumptions were developed by utilizing the age and sex specific death rates for Alberta during the period 1921-2009 and the age and sex specific life tables (5X5) for Alberta during the periods 2000-2004 and 2005-2009 from the Canadian Human Mortality Data.

The historical death age and sex specific death rates were utilized to forecast mortality rates and survival rates for the period 2010 – 2041 based on the Lee Carter model (1992). The model structure is given by,

$$\ln(m_{x,t}) = a_x + b_x k_t + \varepsilon_{x,t}$$

Where a_x is the age pattern of the log mortality rates averaged across years; b_x reflects the relative change in the log mortality rate at each age; k_t measures the general level of the log mortality rates; and $\varepsilon_{x,t}$ is the residual at age x and year t . The k_t is then adjusted to reflect the observed mortality rates and extrapolated using a random walk with drift model (ARIMA). From this forecast of k_t the forecasted age-specific log mortality rates are obtained, which are then used to generate the age and sex specific survival rates for the study period.

All the three population growth scenarios are based on the forecasted survival rates for the population disaggregated by sex and age cohorts. Based on these assumptions the average life expectancy is expected to gradually increase from 78.14 in 2009 to 82.1 years in 2041 for men and from 82.79 years in 2009 to 87.1 years in 2041 for women.

Migration Assumptions

The migration assumptions for the population projections rely on Table 051-0063 of Statistics Canada, which provides the components of population growth by census division, sex and age cohort for the period 2001-2013 for the Census Division 14. Next, the direct method for estimating migration was used to develop the population forecasts. The direct method utilizes the age and sex specific data on the immigration (people moving to Canada), emigration (people moving away from Canada), inter-provincial migration (migration between provinces and territories), intra-provincial migration (movement within a province) as well as the non-permanent residents (e.g., foreign students and workers, refugees). The historical data suggests a great deal of volatility in the changes in population in Census Division No. 14 due to in-migration and out-migration (Figure 31). This study assumes that the Town of Edson will display proportionally similar migration dynamics; i.e. based on 30% of population share of the Town.

The high growth scenario assumes the population inflow from migration will increase from 10 people during 2006-2011 to a net inflow of 468 people during 2036-2041. The medium growth scenario assumes steady increases from about 10 people during 2006-2011 to an inflow of roughly 216 people during 2036-2041). In contrast, the low growth scenario assumes a constant influx of about 10 people during any 5 year period throughout the study period.

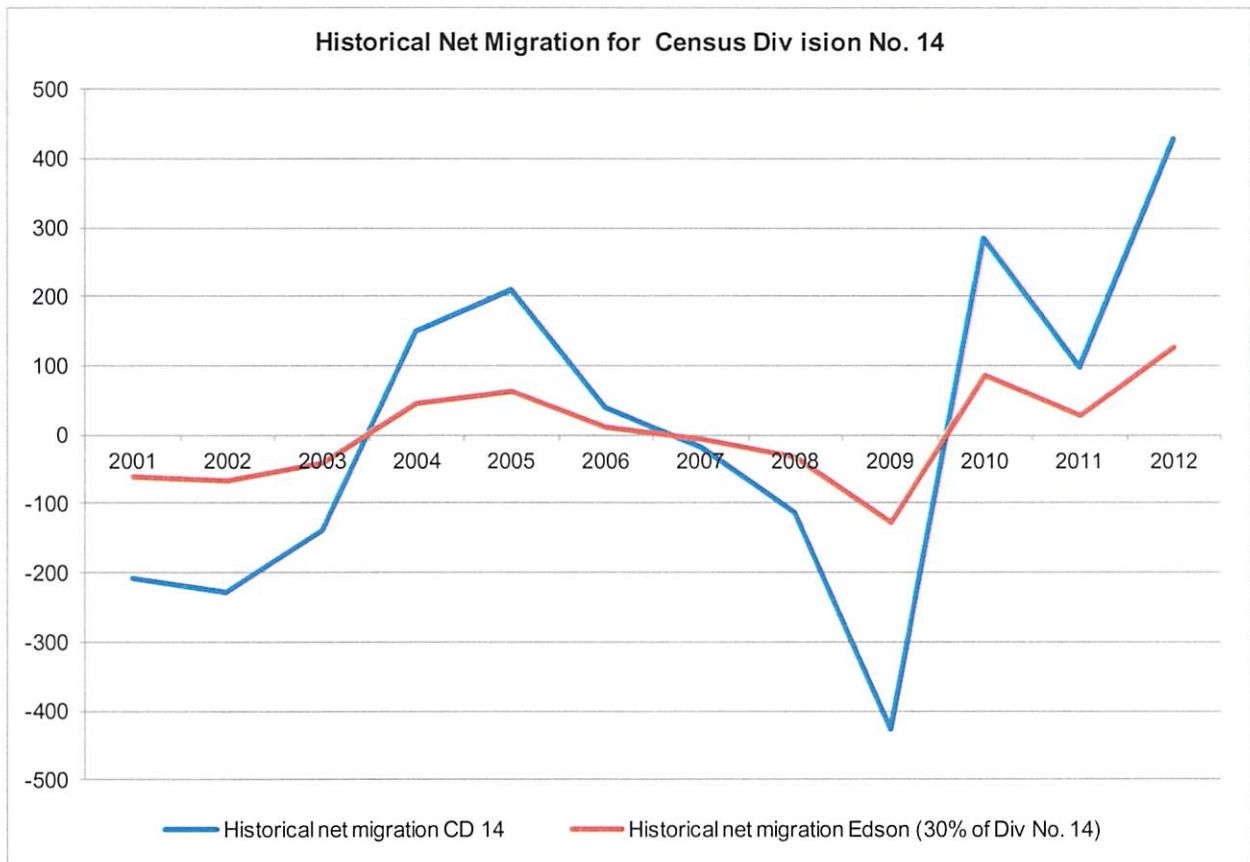


Figure 31: Historical net migration Census Division No. 14 & the Town of Edson
 Source: Urbanics Consultants Ltd. & Statistics Canada, Table 051-0053

Appendix 3: High Growth Scenario

TOTAL POPULATION	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	540	550	590	679	672	674	660	700	783
5-9	585	545	520	589	679	675	679	667	709
10-14	590	610	530	544	618	714	716	729	727
15-19	650	585	595	512	530	607	705	709	723
20-24	555	695	580	571	493	514	594	695	701
25-29	565	595	730	630	631	566	602	700	821
30-34	525	630	675	763	671	681	627	676	789
35-39	670	580	620	711	806	724	746	704	769
40-44	720	675	605	613	707	804	725	749	711
45-49	565	715	650	580	593	690	790	713	740
50-54	445	550	715	629	563	578	677	778	704
55-59	260	435	490	694	612	549	566	665	767
60-64	265	255	380	489	692	614	554	575	677
65-69	205	220	215	354	463	663	590	535	557
70-74	165	160	185	202	336	442	636	567	515
75-79	120	155	160	168	185	311	412	596	534
80-84	80	75	150	141	149	165	279	373	541
85-89	55	40	55	122	116	123	138	235	316
90+	35	30	30	53	112	135	153	175	260
TOTAL POPULATION	7,595	8,100	8,475	9,043	9,626	10,229	10,849	11,541	12,343

MALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	280	285	315	360	360	365	362	388	437
5-9	295	280	270	311	357	357	363	360	387
10-14	305	300	280	276	318	365	367	375	375
15-19	345	295	280	271	269	313	361	364	372
20-24	300	390	290	270	263	262	307	356	360
25-29	295	300	380	299	281	277	279	328	382
30-34	265	320	355	415	342	333	339	354	418
35-39	335	315	320	375	439	371	368	382	405
40-44	365	345	330	323	379	443	378	377	392
45-49	280	360	335	322	317	373	438	374	373
50-54	245	270	370	327	316	311	367	433	369
55-59	140	240	250	356	316	306	303	360	425
60-64	130	130	195	247	352	314	306	304	361
65-69	110	120	105	179	232	335	299	293	292
70-74	65	75	85	96	166	217	316	283	278
75-79	50	60	70	76	86	152	199	291	262
80-84	30	35	65	58	64	74	131	173	255
85-89	15	15	15	50	46	51	59	105	140
90+	15	5	10	15	40	48	55	65	103
TOTAL MALES	3,865	4,140	4,320	4,627	4,942	5,266	5,598	5,965	6,387

FEMALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	260	265	275	319	312	310	298	312	347
5-9	290	265	250	278	322	317	316	306	322
10-14	285	310	250	268	300	349	349	354	352
15-19	305	290	315	241	261	294	344	345	351
20-24	255	305	290	301	230	252	287	338	341
25-29	270	295	350	330	350	289	323	372	440
30-34	260	310	320	348	329	348	288	322	371
35-39	335	265	300	336	368	353	377	323	364
40-44	355	330	275	290	328	361	347	373	319
45-49	285	355	315	258	276	317	352	340	367
50-54	200	280	345	302	247	267	309	345	335
55-59	120	195	240	338	296	242	263	305	341
60-64	135	125	185	242	339	300	249	271	316
65-69	95	100	110	175	232	329	291	242	265
70-74	100	85	100	106	169	225	320	284	237
75-79	70	95	90	92	99	159	213	305	271
80-84	50	40	85	82	85	92	148	199	286
85-89	40	25	40	72	70	73	80	130	176
90+	20	25	20	39	72	87	98	110	157
TOTAL FEMALES	3,730	3,960	4,155	4,416	4,685	4,963	5,251	5,576	5,956

Appendix 4: Medium Growth Scenario

TOTAL POPULATION	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	540	550	590	675	659	640	609	626	679
5-9	585	545	520	589	675	660	642	612	630
10-14	590	610	530	542	613	701	689	675	647
15-19	650	585	595	510	524	597	687	676	663
20-24	555	695	580	568	486	502	577	669	660
25-29	565	595	730	626	619	542	564	645	744
30-34	525	630	675	759	659	656	584	610	697
35-39	670	580	620	708	796	700	701	634	665
40-44	720	675	605	612	701	790	696	699	633
45-49	565	715	650	577	587	678	769	677	682
50-54	445	550	715	627	557	568	660	752	663
55-59	260	435	490	693	607	540	552	645	737
60-64	265	255	380	488	689	606	541	555	648
65-69	205	220	215	352	459	656	579	517	533
70-74	165	160	185	202	333	437	628	554	496
75-79	120	155	160	167	184	307	407	587	520
80-84	80	75	150	141	148	164	275	367	532
85-89	55	40	55	122	116	123	137	231	310
90+	35	30	30	53	112	134	151	172	255
TOTAL POPULATION	7,595	8,100	8,475	9,010	9,521	10,001	10,447	10,903	11,394

MALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	280	285	315	357	350	343	328	339	368
5-9	295	280	270	311	354	347	340	326	337
10-14	305	300	280	275	317	360	355	348	335
15-19	345	295	280	270	266	309	353	348	342
20-24	300	390	290	269	260	257	300	345	341
25-29	295	300	380	299	278	270	269	314	360
30-34	265	320	355	412	334	318	314	317	367
35-39	335	315	320	373	432	356	342	341	347
40-44	365	345	330	323	376	435	361	347	347
45-49	280	360	335	322	315	369	428	355	342
50-54	245	270	370	326	314	308	362	421	349
55-59	140	240	250	355	314	303	298	352	411
60-64	130	130	195	247	351	311	301	297	350
65-69	110	120	105	178	230	331	294	285	282
70-74	65	75	85	95	165	214	311	277	269
75-79	50	60	70	76	86	150	196	287	256
80-84	30	35	65	58	64	73	129	170	251
85-89	15	15	15	50	45	50	58	103	137
90+	15	5	10	15	40	47	54	63	100
TOTAL MALES	3,865	4,140	4,320	4,610	4,889	5,150	5,392	5,634	5,891

FEMALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	260	265	275	318	309	298	281	287	311
5-9	290	265	250	278	321	313	302	286	293
10-14	285	310	250	267	296	341	335	327	313
15-19	305	290	315	240	258	288	334	328	321
20-24	255	305	290	299	226	245	277	324	319
25-29	270	295	350	327	340	271	295	331	384
30-34	260	310	320	348	325	338	270	293	330
35-39	335	265	300	335	364	343	359	292	318
40-44	355	330	275	289	325	355	335	351	286
45-49	285	355	315	255	271	309	341	322	340
50-54	200	280	345	300	243	260	298	331	313
55-59	120	195	240	337	294	237	254	293	326
60-64	135	125	185	241	338	296	241	259	298
65-69	95	100	110	174	230	325	285	232	250
70-74	100	85	100	106	168	223	316	278	226
75-79	70	95	90	91	98	158	211	301	265
80-84	50	40	85	82	84	91	147	197	282
85-89	40	25	40	72	70	72	79	128	173
90+	20	25	20	39	72	87	97	109	155
TOTAL FEMALES	3,730	3,960	4,155	4,399	4,632	4,851	5,055	5,269	5,504

Appendix 5: Low Growth Scenario

TOTAL POPULATION	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	540	550	590	672	640	565	523	522	552
5-9	585	545	520	588	670	639	564	523	522
10-14	590	610	530	540	608	690	659	584	543
15-19	650	585	595	508	518	586	668	637	562
20-24	555	695	580	565	478	488	556	638	607
25-29	565	595	730	621	607	520	530	598	680
30-34	525	630	675	756	648	634	547	557	625
35-39	670	580	620	705	786	678	664	578	588
40-44	720	675	605	610	695	776	669	655	569
45-49	565	715	650	575	580	664	745	639	625
50-54	445	550	715	625	550	556	640	721	616
55-59	260	435	490	691	603	529	536	619	699
60-64	265	255	380	488	686	599	528	535	617
65-69	205	220	215	350	455	649	565	496	503
70-74	165	160	185	201	330	432	618	540	474
75-79	120	155	160	167	182	304	400	577	504
80-84	80	75	150	140	147	162	271	360	522
85-89	55	40	55	122	115	122	135	228	304
90+	35	30	30	53	111	133	150	169	250
TOTAL POPULATION	7,595	8,100	8,475	8,977	9,410	9,725	9,969	10,175	10,363

MALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	280	285	315	354	338	300	279	279	294
5-9	295	280	270	311	350	335	297	276	276
10-14	305	300	280	275	316	355	339	302	281
15-19	345	295	280	269	264	304	344	328	291
20-24	300	390	290	267	256	251	292	331	316
25-29	295	300	380	298	275	264	259	300	339
30-34	265	320	355	409	327	305	294	289	329
35-39	335	315	320	371	425	343	321	310	305
40-44	365	345	330	322	373	427	346	324	313
45-49	280	360	335	321	314	365	418	337	316
50-54	245	270	370	326	312	305	356	409	329
55-59	140	240	250	355	311	298	291	342	394
60-64	130	130	195	247	349	308	295	289	338
65-69	110	120	105	177	227	327	287	275	269
70-74	65	75	85	95	163	211	306	269	258
75-79	50	60	70	75	85	148	192	281	247
80-84	30	35	65	58	63	72	127	166	245
85-89	15	15	15	50	45	50	57	101	134
90+	15	5	10	14	40	46	53	61	96
TOTAL MALES	3,865	4,140	4,320	4,594	4,834	5,013	5,153	5,269	5,373

FEMALES	2001	2006	2011	2016	2021	2026	2031	2036	2041
0-4	260	265	275	318	302	264	243	243	258
5-9	290	265	250	277	320	304	267	246	246
10-14	285	310	250	265	292	335	319	282	262
15-19	305	290	315	239	254	281	324	308	271
20-24	255	305	290	298	222	237	264	307	291
25-29	270	295	350	324	331	256	271	298	341
30-34	260	310	320	347	321	329	253	269	296
35-39	335	265	300	333	361	335	343	267	283
40-44	355	330	275	288	321	349	323	331	256
45-49	285	355	315	253	267	300	327	302	310
50-54	200	280	345	299	238	251	284	312	286
55-59	120	195	240	337	291	231	244	278	305
60-64	135	125	185	241	336	292	233	246	279
65-69	95	100	110	173	228	322	279	221	234
70-74	100	85	100	106	168	221	313	271	216
75-79	70	95	90	91	97	156	208	296	257
80-84	50	40	85	82	84	90	145	193	277
85-89	40	25	40	72	70	72	78	126	170
90+	20	25	20	39	72	87	97	108	153
TOTAL FEMALES	3,730	3,960	4,155	4,382	4,576	4,712	4,816	4,905	4,991