

LAC LA BICHE COUNTY

ECONOMIC DEVELOPMENT STRATEGY

JUNE 2020



Lac La Biche County
welcoming by nature.





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Introduction

Lac La Biche County spans over 12,000 square kilometres in Northeastern Alberta, and it includes the hamlets of Plamondon, located in the northwest part of the County, and the hamlet of Lac La Biche. It is located just two and a half hours from Edmonton. The County has a diverse landscape, with agriculture dominating its southwestern corners, and rustic Canadian shield and lakes in its northern stretches. Its diversity of natural resources, however, is surpassed by its cultural diversity of residents. Lac La Biche County is unique among northern communities of its size, in that it is home to a thriving and longstanding Lebanese population, as well as residents of Russian, French, Indigenous and Metis identity and heritage, among others.

Lac La Biche County's population declined by 0.9% between the census periods 2011-2016, a stark contrast to the rest of Alberta during that period which grew by 11.6% during that time. Its economy has historically benefitted from Alberta's oil patch further north, but its other mainstays – agriculture, tourism, and forestry – have withstood numerous economic swings throughout the years. It also benefits from the presence of Portage College located in the hamlet of Lac La Biche, as well as health care and government services.

Lac La Biche County has recently undergone a series of efforts toward diversifying its economic base and stemming leakage. Its 2019 Retail Gap Analysis, and its Tourism Strategy and Product Development Plan are both actionable documents that point to the County's opportunities to better leverage its current assets, as well as further build its markets. Lac La Biche County's positioning as a recreational or cottage destination, for example, has been recognized by the Province since 1985 in the Lakeland Sub Regional Integrated Resource Plan. This points to the evident and longstanding opportunities that need only be harnessed to reap their benefits.

This strategy's process was interrupted by the COVID-19 pandemic, which had unprecedented impacts on the local, national, and global economy. This crisis only served to highlight some of Lac La Biche County's evident opportunities: its strong existing business base and 'shop local' sentiment, its potential as a local and regional tourism destination, and increasing 'shop local' sentiment among its resident base. It also amplified the need for diversification.

The community's economic resilience is not to be undervalued. It should be captured and carried forward as Lac La Biche County's greatest asset that can be built upon for future generations. This Economic Development Strategy calls for increased interaction between the County and its existing business base, reinforcing and building the entrepreneurial capacity that exists, creating the conditions for increased collaboration and innovation, and, finally, it looks forward to ambitious investment in tourism and seasonal resident attraction.

This report includes the following:

- **SOARR Assessment and Strategic Directions:** An overview of the Strengths, Opportunities, Aspirations, Risks, and Results, coming from the background report review and stakeholder engagement, culminating in the presentation of themes, target markets and sectors to inform the subsequent Action Plan.
- **Supporting Background Components:** All supporting materials that informed the SOARR and preliminary directions, including the economic base analysis, economic forecast and local impacts of market trends discussion, and Business Satisfaction Survey findings.

FIGURE 1
AREAS OF FOCUS OF THE
ECONOMIC DEVELOPER



The Role of Economic Development

Defining where economic development efforts fit into the County, and what the economic developer has influence over, is a crucial step to creating a strategy and action plan. Economic development is different in every community based on the needs and sectors of strength in that community. Overall, though, economic development's role can be summarized in the categories in Figure 1 above.

The economic developer should act as a conduit between the business community or investors, and the County. The role of that department is to act as cheerleader for local businesses, and to ensure that any interactions that businesses have with the County are positive, and that businesses feel supported by the County. The economic developer can also assist investors with navigating the County's processes when applying for development permits or funding programs. Economic developers are ideally relationship brokers, who can introduce businesses or investors to opportunities in the community, and should be included in every aspect of the development process within the County.



Understanding COVID-19 Impacts

SHORT-TERM ACTION

As of April 2020, COVID-19's full impacts on the local, national, and global economy are unclear. Businesses have been forced to adjust to physical distancing measures or cease operations entirely for the time being. Stimulus packages and initiatives by federal and provincial governments to address these challenges are changing daily, which makes it difficult for economic developers to stay on top of the best path forward to support the local business community and economy.

One thing we do know, though, is that communication and strong relationships with the existing business base is more important than ever. Listening to business' concerns at a time like this, and tracking that information, will be crucial to adequately advocate for their needs in the short and long-term. There are some short-term actions that must be taken to address COVID-19's impacts, but this setback has only cemented the need for the County to be both proactive and reactive in its approach to economic development.

LONG-TERM STRATEGIZING

COVID-19 will not last forever, but it has highlighted the need for resilience and recovery in long-term economic development strategizing. Lac La Biche County has historically felt the swing effects of the oil industry's boom and bust cycles, and was in the midst of a downturn prior to COVID-19 measures. If anything, this moment in time has cemented the need to diversify Lac La Biche County's economy and strengthen the business base that exists.

The key lessons from these two recent challenges – that of oil and gas' downturn, coupled with a pandemic that has derailed the economy, is the need for a long-term strategy that utilizes Lac La Biche County's strengths, and builds a solid foundation for the future.

Strengths, Opportunities, Aspirations, Risks, and Results for Lac La Biche County

SOARR ASSESSMENT

A SOARR Assessment is a model for reflecting on strategic planning by studying identified Strengths, Opportunities, Aspirations, Risks and Results (SOARR). It is a forward-looking model, taking elements of what would traditionally be affiliated with a Strengths Weaknesses Opportunities and Threats (SWOT) analysis and using insights gained through stakeholder consultations to inform what is desired for the future and how to know when our aspirations have been met. The key concepts underpinning the SOARR model are outlined in the figure below. The SOARR Assessment is used in conjunction with the rest of the content of this Background Report. In essence, it represents a summary of all the key learnings uncovered to date so that some preliminary directions can be explored for the Economic Development Strategy.

FIGURE 2
KEY CONSIDERATIONS FOR A SOARR ANALYSIS





STRENGTHS

What can we build on?



What are we doing well?

What key achievements are we most proud of?



NATURAL BEAUTY - The area has plenty of natural resources for outdoor recreation opportunity. The lake is beautiful and there is an underleveraged trail system on Crown Land that is widely enjoyed by residents. Nearby provincial parks.

LOCATION - Lac La Biche County is located on major highways and rail lines.

BOLD CENTRE - A state of the art recreation facility for residents to enjoy. Strong family programming.

LAND AVAILABILITY - Lac La Biche County has significant inventory of available land, whether County or Crown owned for development.

MULTICULTURAL DIVERSITY - Lac La Biche County has strong representations of Lebanese, Russian and Indigenous peoples that contribute to the cultural diversity of the area.

PORTAGE COLLEGE - Located in the hamlet of Lac La Biche, the college represents a local talent pipeline and presents opportunities for continued learning.

HOSPITAL AND HEALTH CARE RESOURCES - Lac La Biche County has particularly good health care resources and accessibility for its size.

NEIGHBOURING FIRST NATIONS AND SETTLEMENTS - These communities add to the cultural diversity of the area, and position Lac La Biche County as a central service centre for these communities.

OIL AND GAS - Lac La Biche County has relied heavily on a strong oil and gas industry.

FORESTRY - The forestry industry provides employment to plenty of residents and points to opportunities for value added forestry.

FIBRE INTERNET (PROJECTED COMPLETION 2021) - There is currently a broadband project that will enhance internet services throughout Lac La Biche County and provide state of the art connectivity.

AGRICULTURAL BASE - Lac La Biche County's farms and ranches are an integral part of the local economy and a few of them are innovative tourism drivers as well.

LARGE LINEAR TAX BASE - Resources and ability for the municipality to capitalize on opportunities.

RESILIENT COMMUNITY - Businesses and residents have seen boom and bust cycles countless times and are well positioned to weather its challenges. Business Satisfaction Survey results show that business longevity – those that have been in the County for over 10 years – is strong.

CULTURAL EXPERIENCES - Museums, events, farmers markets are all available in Lac La Biche County.

CURRENT PROJECTS UNDERWAY - Airport Master Plan, Placemaking Strategy, and the County's Retail Gap Analysis all point to thoughtful and responsible planning on the County's part.





OPPORTUNITIES

What are our best possible future opportunities?



What changes in demand do we expect to see in the future?

What external forces or trends may positively affect development?



LONE EAGLES RESIDENT ATTRACTION - Pending the completion of fibre internet and following remote working trends brought about by COVID-19, Lac La Biche County could be marketed to remote worker young professionals as an ideal place to live and play.



CONTINUED TOURISM DEVELOPMENT

Huge potential for the region and was an action item that was highlighted in stakeholder interviews and consultations. In 2019, the region developed a cohesive tourism plan which should continue to be prioritised in this economic development strategy.

1. The lake is a key asset for the region and its health must be restored quickly as it negatively effects the community image.
2. Cultural tourism was also highlighted in the plan and continued development is important.
3. Better promotion of the visitor information centre was an action highlighted in the stakeholder consultations.
4. Continue to amplify efforts to engage with social media influencers (e.g. targeting camping/hiking/fishing) promoters to come to the region.
5. Further, increasing focus on the farmers market would be beneficial as the community feels it is one of the best in Northern Alberta.
6. Implementing a strong marketing campaign post COVID-19 highlighting the importance in shopping local (and in-graining these habits early).
7. Agri-Tourism – could be an additional focus area. Focusing on farm experiences (BnBs, animal care, flower production etc.) There is large demand in city centres for more of these product experiences.



PLACEMAKING AND BRANDING - Creating brand recognition for Lac La Biche County that has cohesion across tourism branding, resident attraction branding, and investment attraction.



BUSINESS MORALE - Throughout consultations, it was identified that businesses in Lac La Biche County required a renewed sense of pride of place and identity, which would assist the County with being welcoming to new businesses and investors. An extended business morale initiative, like the ongoing Purple Checkmark customer service initiative, could facilitate this.



DIGITAL MAIN STREET & DIGITIZATION OF BRICK AND MORTAR BUSINESSES - COVID-19 has forced brick-and-mortar locations in many parts of the country to largely cease in-person operations. Exciting pivots that use mobile apps have assisted businesses in continuing operations. In the future, combining in-person retail with ecommerce will be a path to resilience for local retail businesses.



ATTRACTION OF GREENHOUSE/VERTICAL GROWING BUSINESSES - This opportunity could assist with local food security by growing produce locally.



DOWNTOWN REVITALIZATION - Adding an additional farmers' market to downtown Lac La Biche County, and hosting events in the County's downtown centres will be future initiatives that assist with breathing life into the County's downtown cores after physical distancing measures are ceased.



DISTRIBUTION CENTRE - On major highways and rail lines, we can leverage Lac La Biche County's location advantages. Lac La Biche County is a hub for Northeast Alberta tourism activity.



ENHANCE PORTAGE COLLEGE'S LOCAL TRAINING OPPORTUNITIES - This is a key opportunity moving forward. Whichever target sectors are selected collaboration with the training provider will ensure the long-term talent pipeline.



COMMUNICATE THE STREAMLINED DEVELOPMENT PROCESS AND BUSINESS-FRIENDLY CULTURE AT THE COUNTY

The Business Satisfaction Survey revealed that businesses are largely unaware of improvements to the development and permit process that the County has undertaken in recent years. Ongoing relationship building and communication with the County's business base will ensure that the community is aware that the County is supportive to businesses.



BECOME A HEALTH CARE HUB - Lac La Biche County's superior health care amenities for its size, and its location, can make it a rural healthcare hub for the Northeast of Alberta.



SHOP LOCAL

SHOP LOCAL PROGRAMS - INCENTIVE PROGRAM OR OTHER - There is strong potential to capitalise of COVID-19 in the recovery stage and encourage residents to continue to shop locally. Perhaps a marketing campaign could be developed.



GROWING RETAIL OPPORTUNITIES - This was a key theme identified in the stakeholder interviews the need for several large block stores to keep retail spending within the region. Examples include Tim Horton's and Canadian tire.



BIOFUEL, HEMP PRODUCTION, AND OTHER VALUE-ADDED OPPORTUNITIES

Industrial Hemp production has been identified as being highly suited to Northern Alberta communities due to climatic conditions. Further exploration of this opportunity would be beneficial to identify potential partners, risk mitigation etc.



IMPLEMENT A BUSINESS LICENSE PROCESS SO THE COUNTY CAN KEEP TRACK OF ITS BUSINESS BASE Business survey results showed that the highest priority business factors to improve business satisfaction would be improving the development/building permit process, development fees and offsite levies, and municipal property taxes. All of these factors suggest that increasing communication with the business community about improvements to these processes or assisting with navigation of these internal processes would increase business satisfaction.



CREATION OF BUSINESS PROGRAMS FOR BUSINESS AND/OR PROPERTY IMPROVEMENT - Business survey results showed that a priority area for attention would be developing some programs for businesses to improve their properties or invest in their businesses.



OIL AND GAS - Although oil and gas sector is in a period of sharp decline as it enters its mature stage of the product life cycle there are opportunities for the region to target firms engaging in system optimisation and Maintenance (e.g. survey drones). The high value of these projects means they still have high Maintenance fees that are ongoing, and Lac La Biche County's geographic proximity is beneficial to capture them.



FORESTRY - has seen a sharp decline since COVID-19 and oil prices drop. However, Lac La Biche County has a strong forestry sector driven by a large firm APACC. Value-added firms could potentially be attracted but the economic conditions may not be favourable at this time.



ASPIRATIONS

What do we care deeply about achieving?



What are we deeply passionate about?
What difference do we hope to make for businesses, residents, and institutions?



FRIENDLIEST - Be known as the friendliest community in North-eastern Alberta with the best view, and the best internet.



MORE VISITORS AND BUSINESS - Increased tourism, businesses, and visitors.



RETIREEES - Attractive community for retirees.



QUALITY OF LIFE - Lac La Biche County is known for its outdoor amenities, quality of life, and is a home to young professionals.



MOST CONNECTED - Being the most connected County by 2021.



ECONOMICALLY DIVERSE - Being an economically diversified community.



HEALTH & WELLBEING - An active community where residents are engaged with health and wellbeing.



SAFE - Lac La Biche County is known as a safe community; insurance rates reflect this.



RISKS

How will we recognize and mitigate or eliminate potential risks?



What are the key goals we would like to accomplish in order to achieve these results?



RESISTANCE TO COMPETITION - The community will continue to resist competition.



OIL INDUSTRY - Lac La Biche County will remain subject to oil industry volatility.



GOVERNMENT SUPPORT - Lac La Biche County will remain subject to government investment and support for oil and gas, admin locations.



SAFETY - Lac La Biche County will continue to be perceived as an unsafe community.



LAKE REVITALISATION - Revitalisation of the lake proves extremely difficult or lengthy, impacting long term tourism and sports fishing activities.



PAST EXPERIENCE - Investors put off from investing due to previous experience of the town.



EMBRACING CHANGE - Without willingness to embrace change, Lac La Biche County will be left behind other peer communities.



RESULTS

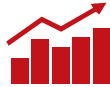
How will we know we are succeeding?



What are the key goals we would like to accomplish in order to achieve these results?



RESIDENTS - Increase in number of residents, especially those aged 25-40, and retirees.



BUSINESS - Increase in number of new businesses.



INCOME LEVELS - Socio-economic mobility (visible change in income level).



REAL ESTATE - Increases in the real estate market.



CRIME RATE - Lac La Biche County's crime rate goes down and is perceived as a safe community.



BRANDING - A strong brand and wide brand recognition regionally, provincially. A great reputation built on the community's outdoor assets, quality of life and economic opportunities.



EMPLOYMENT - Vibrant community with lots of jobs.



DOWNTOWN - Downtown Main Street storefronts are filled and thriving.





Economic Forecasts and Local Impacts of Market Trends

Strong economic development strategies build on the unique assets and resources of their communities; communicating those characteristics to potential investment and development partners to demonstrate unique value propositions is key. Growing numbers of 21st-century entrepreneurial communities are using local advantages to spur innovation, investment and job creation, while retaining their cultural and environmental assets. These trends support the fact that the selection of economic development opportunities is rooted in the philosophy that initiatives must ultimately increase the total wealth within a region. This is accomplished in two ways:

1. Export Development - any initiative that brings new money into the community

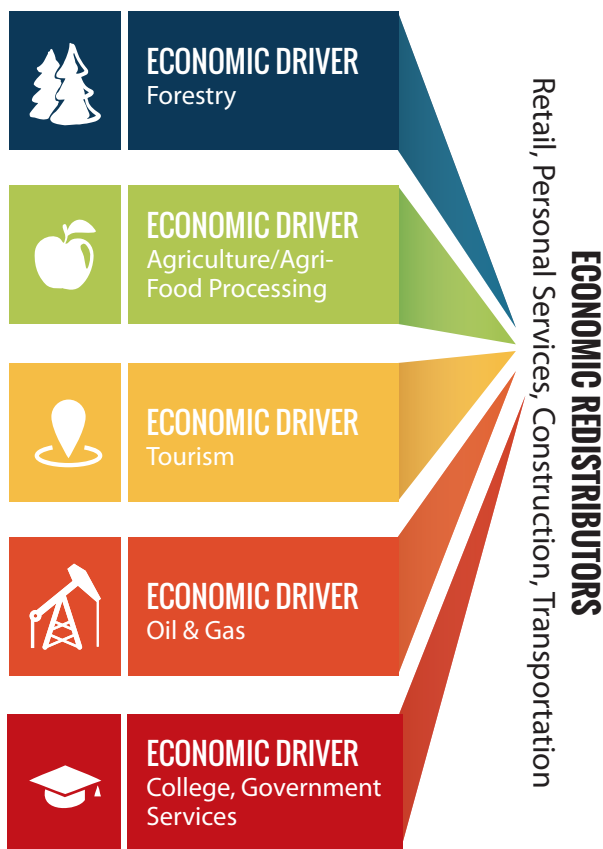
- Starting/attracting a business that sells products/ services outside the community
- Attracting visitors who then purchase local products/ services
- Encouraging existing business to sell their product/ service outside the community

2. Import Substitution - any initiative that keeps money in the community

- Encouraging people and businesses to purchase their goods/services locally rather than importing them from another community
- Starting/attracting businesses that recognize leakage and provide a product/service to stop it

The key sectors for economic growth in Lac La Biche County that were identified throughout background analysis and stakeholder engagement for this process are pictured in Figure 3. They are categorized as Economic Drivers – those that feed external, or new money into the economy – and Economic Redistributors.

FIGURE 3
ECONOMIC DRIVERS FOR
LAC LA BICHE COUNTY





RETAIL SECTOR ACTION

As an economic redistributor, the growth and health of the retail sector is subject to the health of economic driver sectors. That said, action within that sector is an opportunity in Lac La Biche County. The County's Retail Gap Analysis indicates that there is opportunity to attract a large retailer to the hamlet of Lac La Biche to serve its large trade area of 27,000. It further reveals the opportunity to support existing retail businesses to increase their market share, a sentiment that was echoed throughout stakeholder consultation for this strategy. Further, the current COVID-19 situation has influenced spending habits supporting local retailers, and this is an opportunity that can be capitalized upon coming out of the pandemic.

ECONOMIC DRIVERS

Based on the Strengths and Opportunities of the region, several target sectors were reviewed to inform big-picture thinking around how Lac La Biche County can best leverage those sectors. It is important as an economic developer to understand the international, national and local policies and market trends that impact any given sector, as attraction and retention activities must be tailored to support them. This section will review the major trends, opportunities, and potential impacts in Alberta and Canada of the following industry sectors:

- Agriculture and agri-food: Industrial hemp and flax, Agri-food manufacturing
- Forestry
- Oil and Gas
- Tourism



AGRICULTURE & AGRI-FOOD

The recent development of COVID-19 is drastically impacting the global and Canadian economy, in particular the agriculture sector. Whilst the exact economic ramifications of the virus are now unknown, what is clear is that businesses within the agriculture and agri-food sector will need immediate government support as farmers and food processors struggle to manage cash flow requirements. The Canadian Federation of Agriculture (CFA) has been communicating with the Federal Government to ensure the sector has access to foreign workers despite border closure. Farm Credit Canada (FCC) has also recently been issued \$5 billion from the Federal Government to ensure they can support farmers during this downturn¹. As the situation continues to evolve, Lac La Biche County must continue to support local businesses to the best of its capabilities.

Putting the current situation aside, Agriculture is still a key component of Alberta's economy, earning 26% of Canada's farm cash receipts in 2015². The wide diversity of landscapes and favourable climatic conditions means that the province supports a variety of crops and livestock, with the Province recording over 43,000 farms in 2016 or 21% of Canada's total³. The Province's agricultural land base is also significant, with over 50.3 million acres that accounted for 31.7% of the national total in 2016.

Due to high production volume, exports form a core part of Alberta's agriculture sector. In 2018, Alberta was the third-largest exporter of primary and processed agricultural and food products in Canada, exporting C\$11.6 billion to international markets⁴. These exports are driven by Alberta's strong international reputation as a clean and safe food producer that consistently produces high quality products.

Similar to the province, agriculture is essential to the local economy. The hamlet of Plamondon in particular is a hub for agricultural activity, and its network of Co-op agricultural retailers supply the farming and broader community with needed farm and ranch supplies, as well as groceries and fuel. Similar to the province, agriculture is essential to the local Lac La Biche County economy. In 2016, Lac La Biche County had 238 farms with almost 100,000 acres in crop land. Gross receipts grew by 55.74% over a five year period to 2015 to reach \$31.8 million. The County has also experienced a 196% increase in the value of Livestock and Poultry in five years, with valuations over \$46 million in 2016⁵.

1 Food Credit Canada 2020, <https://www.fcc-fac.ca/en/about-fcc/media-newsroom/news-releases/2020/lending-capacity-increases-to-alleviate-industry-financial-pressure.html>

2 Statistics Canada. Table 32-10-0436-01 Farms classified by total gross farm receipts in the year prior to the census

3 Statistics Canada. Table 32-10-0403-01 Farms classified by farm type

4 The Government of Alberta, Export Catalogue 2019, Accessed from: <https://open.alberta.ca/dataset/d9d76bbb-b9de-429b-b8a8-d0ec5496ad08/resource/bbb07760-9914-4bc5-b2a1-3155cc3c1170/download/export-catalogue-web-july2019.pdf>

5 Alberta Hub, Lac La Biche County Agriculture Profile, <http://www.albertahub.com/wp-content/uploads/2014/09/Lac-La-Biche-County-Ag-Profile-2017.pdf>



Opportunity: Industrial Hemp and Flax

A report published by The Northern Alberta Development Council identified the processing of industrial hemp and flax fibre as a potential way to contribute to economic diversification within Northern Alberta⁶. The report found that growing industrial hemp is an advantage for northern communities as it can adapt to a wide variety of soil and climatic conditions in Alberta. Hemp is also a photoperiod (light) sensitive crop meaning northern communities such as Lac La Biche County, which enjoy long summer days, can produce 20-30% higher yields of stalks than in southern regions of Alberta⁷.

In addition to the obvious benefits in growing and processing industrial hemp, there are also opportunities to increase manufacturing of hemp in the local region. Due to its durability, strength to weight ratio and composition, hemp has a wide variety of uses in the textile industry. For example, manufacturing of apparel (e.g. clothes), to industrial textile products (e.g. rope), as a bio-composite for some automobile parts and also within the textile, paper and building markets.

Several businesses are already taking advantage of this trend such as the Canadian Rockies Hemp Corporation (CRHC) which is an innovative agribusiness operating in Alberta aiming to develop Alberta as the global hemp processing hub. The CRHC recently built the largest hemp processing plant in North America in Bruderheim that is capable of processing 50,000 acres of hemp per year⁸. Innotech Alberta also operates a smaller hemp fibre processing pilot plant located in Vegreville. This facility has the ability to commercially process straw through the \$4 million 1 tonne/hour capacity decortication line⁹. The Canadian Hemp Trade Alliance (CHTA) was also established in 2003 to promote Canadian hemp and hemp products globally and provides support to farmers, processors and manufacturers.

Similar to hemp, the processing of flax fiber also presents a substantial opportunity for Northern Alberta communities to continue economic diversification efforts due to favourable growing conditions. Research from the Flax Council of Canada found that the flax industry contributes to \$300 million annually to the Canadian economy, however only 9% is currently produced in Alberta¹⁰. Research conducted by Innotech Alberta has identified several promising lines and varieties of northern adapted flax and also conducted initial conversations with two Chinese textile manufacturers who showed interest in sourcing Northern Growth Alberta flax¹¹.

Combined, the literature reviewed suggests that there are substantial opportunities for Lac La Biche County to capitalise on growth within the industrial hemp and flax from both a growing and processing perspective and also within the manufacturing space.

6 Northern Alberta Development Council, 2019 https://nadc.ca/media/17833/2018-19-annual-report.pdf?utm_source=Email_marketing&utm_campaign=Winter_Newsletter_2019&cmp=1&utm_medium=HTMLEmail
7 Alberta Hub, 2016 http://www.albertahub.com/wp-content/uploads/2019/10/Alberta_HUB_HEMP_FIBRE_Final_27Nov19.pdf
8 Canadian Rockies Hemp Corporation, 2019, <https://canadianrockieshemp.com/about-us/>
9 Northern Alberta Development Council, Industrial Hemp Flax 2018 <https://nadc.ca/media/17436/hemp-and-flax-proceedings-report-final.pdf>
10 Source: <https://www.nadc.gov.ab.ca/Docs/Early-Maturing-Flax.pdf>
11 InnoTech Alberta, Northern Alberta Bioeconomy Initiative 2018. <https://nadc.ca/media/17659/flax-research-final-report.pdf>

Opportunity: Agri Research and Development

Alberta is also home to world class research and development in the Agri-product space with more than 22 research and innovation facilities in the province which specialize in crops and cereals, poultry and swine, agronomy, biomaterials and food safety. The Alberta Hub region of northern communities is also home to Alberta's first Food Science Centre (FSC)¹² located at Portage College in St. Paul which is approximately 1.5 hours from Lac La Biche County. The FSC is a product development facility with a complete Business Incubator Program including fully functional labs, commercial kitchen and office suites for rent. The development of this program suggests there are possibilities to attract more of this type of centre and research development within Lac La Biche County.

Opportunity: Vertical Farming

Over the past decade closed-field agriculture or vertical farming have seen increased investment activity as technological advancements in precision technology, data processing and smart farming has substantially lowered costs. Vertical farming is the practice of growing crops vertically in stacked layers. The process generally occurs in a controlled-environment agriculture (CEA) which allows the farmer to control nearly all inputs in the growing process. Farming techniques include hydroponics (growing plants without soil), aquaponics (cultivating plants in water) and aeroponics (cultivating plants in an air or mist rich environment)¹³.



According to a recent report¹⁴, the US vertical farming market is projected to reach around \$3 billion by 2024, growing at a CAGR of more than 24% during the 2018-2024 period. This growth is being driven by strong consumer demand for more sustainable food sources. Some of the key advantages in using vertical farming techniques is it offers a speedier supply chain for seedling production, removes the need for herbicides, pesticides and fertilizers, can reduce CO2 emissions as transportation costs are lowered, products can be grown year round with higher crop yield, less water production is used as there are greater opportunities for recycling to occur.

A key disadvantage with vertical farming is the high energy costs associated with powering the LED lights. In some cases, the cost can be so high it raises the product prices, so they are not competitive with other locally grown alternatives. To overcome this challenge renewable energy sources are often used to lower the key costs. Furthermore, as they industry is still in the early growth phases many vertical farms take several years to turn a profit on the produce.

12 Advances in greenhouse automation and controlled environment agriculture: A transition to plant factories and urban agriculture, International Journal of Agriculture and Biological Engineering (2018).

13 Advances in greenhouse automation and controlled environment agriculture: A transition to plant factories and urban agriculture, International Journal of Agriculture and Biological Engineering (2018).

14 Vertical Farming in the US – Industry Outlook and Forecast 2019-2024



Opportunity: Agri-Food Manufacturing

There is a strong opportunity amongst northern Alberta communities including Lac La Biche County to engage in value-added food processing. According to Invest Alberta¹⁵, Alberta's food and beverage processing industry was the largest manufacturing employer in the province in 2018, employing 26,300 people, and accounting for \$15.2 billion in manufacturing sales. However, agri-food manufacturing is only a small proportion of northern Alberta communities including Lac La Biche County. These communities are well positioned to engage in food and beverage manufacturing due to the continuous supply of raw ingredients from Canadian farms combined with the fact that Canada has the lowest labour costs within the G7¹⁶.

The Canadian government has also outlined strong support for growing the agriculture and agri-food sector within Alberta. Beginning in April 2018, the Canadian Agriculture Partnership¹⁷ is a five-year \$3 billion federal-provincial-territorial investment in the agriculture, agri-food and Agri-based products sector. Provincially, the Canadian government has invested \$406 million in different strategic programs and initiatives. Whilst current funding programs for agri-food manufacturing have currently closed, they signify strong government support for growing the Agri-Food sector within Alberta. Lac La Biche County should continue to monitor the Canadian Agriculture Partnership website for notification when more funding options become available.

15 Invest Alberta, 2018, Agriculture and Agri-Food Industry Profile, Accessed from: <https://investalberta.ca/industry-profiles/agri-foods/>
16 Canadian Government, The Canadian Advantage, http://publications.gc.ca/collections/collection_2018/aac-aafc/A22-621-2018-eng.pdf
17 Canadian Agriculture Partnership 2018, <https://cap.alberta.ca/CAP/>



FORESTRY

Forestry and Logging With Support Activities is also an essential part of Alberta and Lac La Biche County's economy. The province currently has 38 million hectares of forests, which is equal to the land mass of Japan, and the provincial government allows an annual harvest of more than 31 million cubic metres of timber. Whilst global demand of newspaper print has lowered in recent years, growth of up to 40% in Canada's e-commerce industry is increasing demand for paperboard that is used in delivery products. Increasing demand for sanitary products in emerging markets has also helped the industry.

Commodity production has been a staple in Alberta's forestry sector and within Lac La Biche County. This includes standard lumber, pulp and paper and panel boards. However, these products have to compete in a highly-cost competitive global industry that has been hit hard with the recent COVID-19 price fluctuations. In the wake of COVID-19, lumber prices have plummeted to new lows, currently valued at US\$320 per 1,000 board feet as of 24th of March. This swing is dramatic, with the commodity reaching a high of US\$463 in February of this year and \$629 at its peak in mid 2018. The wild price swings in combination with the devastation of mountain pine beetle have resulted in many Alberta producers struggling to survive.

Opportunity - Value-Added Product Manufacturing

Value-added products include treated lumber, engineered wood products, shakes and shingles, posts, poles, log and timber-frame homes, mouldings, pallets, boxes, cabinets, furniture, art and other finished or semi-finished goods. The advantage in manufacturing these products is they generate more value per unit, yet generally are produced at lower volumes than typical commodity production.

As value added volume is generally low, most value-added firms are small to medium sized businesses. Research from the government of British Columbia found that 88 per cent of value-added manufacturers employed fewer than 50 people and 45 per cent employed fewer than 10¹⁸. Some key challenges in establishing value added manufacturing is for small firms to secure stable fibre supply from primary manufacturers.

However, the forestry industry in Lac La Biche County has grown in recent years driven by the addition of a pulp mill, Alberta Pacific Forestry Industries. There is an opportunity for Lac La Biche County to leverage the strengths of this firm to expand the forestry industry into more value-added product manufacturing. As the economy recovers from COVID-19, great support will need to be placed to nurture more business investments within the region.



OIL AND GAS SECTOR - MOVING FORWARD IN A TIME OF GREAT UNCERTAINTY

Alberta's economy has struggled to recover from the 2015-16 oil shock and the latest mix of virus related financial uncertainty and dramatic oil demand reduction (e.g. reduced travel) has sent oil prices down to US\$30 per barrel. Although economic predictions from TD Bank anticipate a slight recovery in oil prices once the worst of the pandemic has hit, they have downgraded oil projections to between \$US40 and US\$50 over the next two years.

What is most worrying is the current Alberta budget relies on a US\$58 assumption for world oil prices for this fiscal year, roughly \$20 above current levels. This discrepancy, combined with exchange rate fluctuations, mean the budget could deteriorate up to \$5 - \$5.5 billion across the next year. According to TD, this would cause a revised budget deficit target of \$12 billion.

On a positive note, the economic impact from this drastic drop in oil prices is unlikely to have as severe an impact on Alberta's economy as was felt during 2015-16 price crash. This is because since 2014, the industry has undergone serious consolidation and restructuring as the industry shifts from its growth phase to its mature phase. This has seen a slowdown in production growth, the number of new projects and capital expenditure in addition to massive employment reductions.

According to a report from the Parkland Institute, a non-partisan public policy research institute, 2014 saw peak employment for the Canadian oil and gas industry. Since then, employment across the sector has decreased for three years before increasing slightly in 2018 and declining further in 2019. Overall, the industry has terminated an estimated 53,119 jobs from 2014-2019 and saw oil capital expenditure decrease by an estimated 64.6% during the same period

The report also found that the industry slowdown has resulted in firms attempting to do more with less, with productivity per employee in Canada's oil sands industry growing by 72% from 2011 through 2019 and productivity in oil and gas overall growing by 47%. This productivity increase and subsequent labour reduction has been driven largely technological innovations such as driverless haul trucks in the oil sands, greater data analytics technology and horizontal multi-well drilling pads.

Opportunity - Grow Number of Oil Tech Firms

For Lac La Biche County, this means that a greater focus on economic diversification should be a key priority. However, due to the size of the industry and value of current projects the county should also continue to support existing businesses associated with the oil and gas sector. Further, there could be opportunities to attract firms specialising in oil and gas related technological innovations by leveraging Lac La Biche County's geographic proximity to the Athabasca oil sands. Opportunities also exist for firms that specialise in consultative or provide maintenance services who could help local oil businesses develop successful maintenance strategies¹⁹.



TOURISM

Tourism is a crucial industry for Canada, with over 192,000 small and medium-sized businesses that operate over the country. Tourism drives economic development for many communities, with one in 11 jobs in Canada supported by the tourism sector. Further, tourism is a crucial driver of employment for workers under the age of 35, with 51% of this workforce currently occupying jobs in the sector.²⁰

Similar to the national context, tourism is an essential part of Alberta's economy, and its significance is only expected to continue to grow moving forward. In October 2019, Travel Alberta CEO Royce Chwin announced that the Province is aiming to increase tourism revenue to \$20 billion by 2030, to be incorporated into Travel Alberta's new 10-Year Tourism Strategy due to be released later in 2020.

The economic fallout of COVID-19 has been huge for the tourism sector across Canada. In the coming months Lac La Biche County must work hard to ensure all current operators within the sector are supported as consumer spending slumps and people are reluctant to travel. Whilst attracting new operators within this current economic climate will prove difficult, The County should continue focus on implementing initiatives outlined in the recent Tourism Strategy and Product Development Plan. Implementation of initiatives such as developing outdoor experiences, cultural and culinary tourism and improving regional assets outlined within this report is strongly recommended as they present a unique opportunity for the county to develop the region. Further, it is likely that COVID-19's impacts will influence more regional, car travel, which suggests opportunities to attract visitors from Edmonton. Additionally, the following opportunities have been identified during the literature review which could complement Lac La Biche County's tourism strategy moving forward.

²⁰ Destination Canada 2016-2020 Corporate Plan, https://www.destinationcanada.com/sites/default/files/archive/2016-01-01/AboutUs_Publications_CorporatePlanSummary_2016-2020_EN.pdf

CASE STUDY: ELLIOT LAKE, ONTARIO

A success story in cottage development worth noting is Elliot Lake, Ontario. In Elliot Lake, the closures in the 1990s of its main employers, uranium mines, threatened to deplete the city's population and by 500 people. The City reacted by focusing on both retirement residential development, and cottage development. The City acquired special rights to acquire and develop Crown land for residential purposes and undertook environmental analysis of its lakes and land assets to understand infrastructure requirements. The City created an arms length non-profit development commission to manage marketing and development. Through close relationships with the Ministry of Natural Resources (MNR), the commission was able to establish an MOU with the MNR that established a simplified process for securing Crown land and determining its value.

In the beginning, the City acquired and sold 253 lots on 10 lakes. Each title was given a covenant requiring the buyer to build a reasonably sized dwelling within a given deadline. This prevented speculation, ensured the creation of jobs in construction and servicing, and increased the assessed value of the land. If the conditions were not met, the municipality had the right to buy back the lot for 80% of the purchase price.

Elliot Lake's cottage lot project is widely considered a success. It is estimated that each lot buyer invested at least \$227,500 in purchase price, lot clearing, building, and permits, accounting for a total economic stimulus of \$57 million. Much of that spending went to local businesses like contractors and landscapers. The project was also a success at attracting residents – retirees and young families and has helped stabilize the population to around 11,000. It was such a success that the City will be using generated surplus from lot sales to plan Phase 2 of the development.²¹

Opportunity - Cottage Destination

The Lakeland region has been identified as an area with significant potential to develop as a cottage destination since 1985 by the Lakeland Sub-regional Integrated Resource Plan. Its natural assets, with numerous lakes and forested landscape, are similar to some of those found in other successful cottage destinations like Kenora, Ontario or Muskoka, Ontario. Those destinations are located roughly 2 hours from nearby urban centres (Winnipeg and Toronto respectively) and act as a gateway to the Canadian shield. Lac La Biche County's location 2.5 hours from Edmonton can position it to become the cottage country of Northern Alberta.

Throughout stakeholder engagement, it was identified that developing Lac La Biche County's position as a tourism destination, and revitalizing the lake were top of mind for many Lac La Biche County residents. Further, an aspiration that came to the fore was to be a desirable place to live for young families and retirees alike "with the best view." Positioning Lac La Biche County as a cottage destination would attract more seasonal tourists, but would also contribute to residential development and resident attraction. If targeted appropriately, this type of development could lead to four-season retirees residing in Lac La Biche County in four-season accommodations.

Positioning Lac La Biche County to become a cottage destination is a long-term strategy that requires significant research into land inventories - which would likely involve cooperation with the Provincial government especially for the development of Crown Land – infrastructure needs, environmental impacts, among others.

Opportunity -Online Presence

Increases in technology and the prevalence of mobile phones are changing consumers' interaction with communities, as they require higher digital functionality such as the ability to conduct online purchases or geotag a location. By 2021, more than 26% of leisure travellers and 20% of business travellers globally will be "mobile-only," operating with smartphones and tablets²². Lac La Biche County should work with operators to ensure all tourism content can be viewed on a mobile device and that they are compatible with conducting purchases.

21 <https://economicdevelopment.org/2016/02/the-higher-ed-blog-elliott-lakes-other-economic-development-success-story/>

22 Travel Alberta, Annual Report 2018-19, <https://open.alberta.ca/dataset/42bc31f3-a760-44e6-b01c-50f97ba83a28/resource/9e3bd799-919b-4f1c-bdf8-7a6dd9625659/download/culture-and-tourism-annual-report-2018-2019-web.pdf>



Opportunity - Influencer Marketing

Influencer marketing is another growing trend within the tourism space. Forbes²³ defines influencer marketing as “a relationship between a brand and an influencer” whereby the influencer promotes a regions brand through social media outlets such as Instagram and YouTube. Research shows consumers place high trust in influencers, with 49% of consumers depending on influencer recommendations and 30% purchasing a product after seeing it on a social platform. Influencer marketing will also allow the tourism board to better target geographically disperse market segments than via traditional media²⁴. There are opportunities to incorporate influencer marketing into Lac La Biche County’s existing tourism strategy.



Opportunity - Target Transformative Travellers and Visitation in Shoulder Seasons

Destination Canada has specified that it is seeking to shift its marketing focus from experiential travellers to transformative travellers. They have also identified a priority to grow tourism during the shoulder season and try to increase smaller urban and rural visitation by increasing advertisement of cultural events and nature-based attractions. There is potential for Lac La Biche County to leverage more national partnerships to raise awareness of the region.

Opportunity - Farm to Table

Culinary tourism is another popular and fast-growing segment of the global tourism industry. Culinary tourism was identified by Lac La Biche County within their tourism strategy as being a potential tourism market and this option should continue to be explored. Lac La Biche County is fortunate in that it has a diverse ethnic population mix that could be leveraged to identify unique flavours and dishes. Similarly, leveraging the strong agriculture sector and surrounding farmers could be used to showcase the wide variety to fresh produce the region possesses.

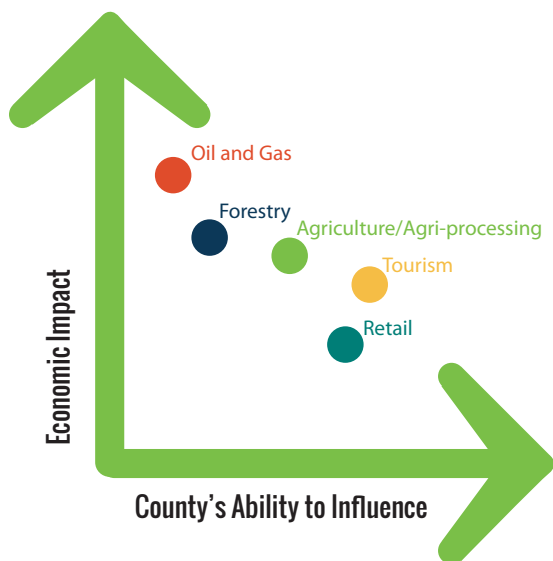


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Forbes, 2018, <https://www.forbes.com/sites/theyec/2018/07/30/understanding-influencer-marketing-and-why-it-is-so-effective/#21adf04371a9>
Digital Marketing Institute, 2018 <https://digitalmarketinginstitute.com/en-ca/blog/20-influencer-marketing-statistics-that-will-surprise-you>



FIGURE 4
ANTICIPATED ECONOMIC IMPACT/
ABILITY TO INFLUENCE MATRIX



Prioritizing Economic Development Activities

Understanding where to place economic development priorities must start with those areas that the County has the most ability to influence. Figure 4 places Lac La Biche County's key sectors on a matrix that shows the relationship between the economic impact a sector can have, and the County's ability to influence that sector. Efforts should be placed on those sectors that fall in the top right section of this matrix – those that will have the highest economic impact (most jobs created, most new money brought into the local economy), and that the County can and the most influence over through direct action.

Oil and Gas and Forestry are placed in the top left, because when these industries are active, they can have the highest economic impact, though they are subject to external forces that are outside the County's control or jurisdiction, leaving the community vulnerable to boom and bust cycles.

Thus, Lac La Biche County's economic development strategy should prioritize those sectors where the County can have most influence with the best return on investment.

FIGURE 5
VALUE PROPOSITION MATRIX FOR
LAC LA BICHE COUNTY SECTORS

INDICATORS	AGRICULTURE & AGRI-FOOD PROCESSING	OIL AND GAS	TOURISM	FORESTRY	RETAIL
Estimated long-term growth of sector	Moderate	Strong	Moderate/Unclear	Moderate	Moderate-Strong
Complement to existing local economic base	Strong	Moderate-strong	Strong	Moderate	Strong
Potential to have a significant impact on the local economy	Strong	Low	Moderate-Strong	Moderate	Strong
Alignment with County's priorities and previous plans	Moderate-Strong – Farm to table tourism experiences were identified as a priority in the Tourism Strategy.	Moderate – previous Economic Development Strategies prioritized support for oil businesses; there is a need to retain that activity to benefit from any future upswings.	Strong – Lac La Biche County has prioritized tourism development in recent years with a 2019 Tourism Strategy.	Moderate – Industrial development and the provision of industrial lands for activity is noted throughout the literature.	Strong – Retail Gap Analysis identifies need for larger retailer to stem economic leakage.
Current state of the local sector	Moderate-Strong	Weak	Moderate	Moderate	Weak-Moderate
Current ability to capitalize on the sector	Moderate – Network of surrounding agricultural businesses and Lac La Biche County's location in NE Alberta where hemp growing may be ideal can be leveraged.	Weak – Oil and gas is currently experiencing a downturn.	Strong – Lac La Biche County's outdoor assets, as well as its cultural amenities are all strong factors to regional tourism attraction.	Moderate – Lac La Biche County benefits from some forestry activity with ALPAC; small value-add business activity could be attracted.	Strong – Lac La Biche County has available land to develop and Retail Gap Analysis identifies ample room in the market.
Capitalize on these competitive advantages	Lac La Biche County is home to plenty of ranching activity that is open to farm visits and tourism. The Province has invested in farming immigration in 2019 – potential to leverage new small-scale family farm businesses.	Oil and gas support businesses continue to operate in Lac La Biche County; maintaining them will be important.	The lake. Outdoor recreation opportunities. Cultural tourism (Indigenous, strong Lebanese and Russian communities).	Availability of wood resources.	Room in the market to supply residents with needed amenities; local retailers have the opportunity to capitalize. Shop Local messaging is prevalent because of COVID-19 and that spirit can be carried over post-COVID-19.
Beware of these competitive disadvantages	Leveraging surrounding agricultural producer businesses can be difficult, as supply chains are often well established and difficult to penetrate. Major newcomer processing businesses would likely require serviced development land.	Oil and Gas is currently experiencing a difficult downturn; it will be important to be ready when it bounces back, but it is important to prioritize beyond this sector.	The lake requires some revitalization, products and experiences are currently under development.	Forestry is often a mature industry that can be difficult for new entrants to break into. Assisting any interested investors with navigating that system will be key.	Difficulty in development processes; need to streamline the process for interested developers.



Strategic Objectives

Develops strategic objectives for Lac La Biche County, emanating from the SOARR Assessment conducted above. There are two components to the matrix:

- **ASPIRATIONS:** Across the top of the matrix table are a series of ideas associated with aspirations identified in the SOARR. Aspirations can be understood as key goals for the region.
- **STRATEGIC OBJECTIVES:** Along the left side of the matrix are a series of strategic objectives that make sense for Lac La Biche County, based on its identified sectors of strength and opportunities.

A checkmark indicates where strategic objectives intersect with aspirations. The matrix helps to illustrate the ways that the County's aspirations overlap with strategic objectives. The proposed Strategic Objectives are presented on the next page.

FIGURE 6
STRATEGIC OBJECTIVES AND ASPIRATIONS MATRIX

STRATEGIC OBJECTIVES	ASPIRATIONS			
	BUSINESS GROWTH	ECONOMIC DIVERSIFICATION	INCREASED TOURISM	ATTRACTION OF RETIREES AND YOUNG PROFESSIONALS
OBJECTIVE 1 Economic Resilience	✓	✓	✓	✓
OBJECTIVE 2 Innovation and Entrepreneurship	✓	✓	✓	✓
OBJECTIVE 3 Attract Tourists and Residents	✓	✓	✓	✓







STRATEGIC OBJECTIVE 1

FOCUS ON BUILDING ECONOMIC RESILIENCE

Why? This objective captures the historic resilience of Lac La Biche County's business base and seeks to take the factors that have contributed to its successes a step further. Many of the County's businesses have weathered boom and bust cycles due to oil and gas activity, and recent economic conditions have highlighted the need for BRE outreach. This strategic objective relates to the aspirations **business growth** and **economic diversification**.

STRATEGIC OBJECTIVE 2

FOCUS ON CAPACITY BUILDING FOR INNOVATION AND ENTREPRENEURSHIP

Why? This strategic objective relates to **economic diversification** by creating the conditions and partnerships necessary to foster innovation and entrepreneurship in new sectors in Lac La Biche County, and it also relates to **increased tourism** and **business growth**. Throughout consultations, it was identified that working closely with Portage College on projects that would contribute to growing the local economy is a great opportunity. The college brings in students that could contribute their ideas and skills to the local economy, and it is well positioned to contribute to research and development of many of Lac La Biche County's target sectors.

STRATEGIC OBJECTIVE 3

FOCUS ON ATTRACTING TOURISTS AND RESIDENTS

Why? This strategic objective addresses the aspirations of **increased tourism** and **attraction of retirees and young professionals** both separately and as a joint project. Attracting these targets must be done in a directed manner, but Lac La Biche County has a distinct opportunity to position itself as a cottage country that would increase the County's tax base and bring in seasonal residents as well as tourists.

Critical Path Actions

A number of items emerge from the action plan as being essential to a long-term foundation for success. The priorities in the following table are emphasized and should occur within the first year of adoption of the strategy.

PRIORITY	INVESTMENT CONSIDERATIONS	RISKS OF INACTION
EVIDENCE-BASED BR+E OUTREACH AND ACTION	The first step to tracking local business activity is implementing business licensing in Lac La Biche County. This will assist the County with all BRE activities, and will assist with the creation of an internal business listing. Secondly, staff time should be used to conduct targeted outreach to key business sectors. This can be done with the data provided by the Business Satisfaction Survey to start with. Continue to use tools like Triage BR+E on a regular basis to track evidence-based business community needs, as opposed to anecdotal evidence.	Businesses may become disengaged or there is the risk of flight from the community; businesses may remain unaware of supports that could assist them to expand.
PLACEMAKING/PLACE BRANDING	\$90,000 for a brand design/market research firm to complete community perception mapping, discovery sessions with members of the community, wordmark and slogan concepts, and a brand manual. Cost does not include the price of adjusting everything from letterhead to gateway signs, to logos on public works vehicles.	Placemaking and branding is the first step to effective marketing – for resident, investment, and tourist attraction. Without a cohesive and strong brand, marketing efforts can fall flat or send confusing messages.
COTTAGE/VACATION DESTINATION DEVELOPMENT BUSINESS PLAN	Developing Lac La Biche County as a seasonal vacation destination is a long-term vision that requires short term action. A business plan and feasibility study will need to be commissioned in the short-term to fully understand land availability, infrastructure requirements, and the most appropriate organizational model to create cottage development activity. It will also require an understanding of the current market for development; if no private developers are interested in the short-term, Lac La Biche County should consider creating a Development Corporation or Commission to take the lead on development and marketing of lots.	Lac La Biche County has held potential as a cottage or cabin destination since 1985, when it was identified in the Lakeland Subregional Plan. Through consultation for this Strategy, it became evident that that potential resonates with many stakeholders. Environmental regulations may inhibit this type of development, so understanding those parameters is key. Now is the time to rise up to the potential and lay the foundation for development – otherwise, that potential may continue to lay dormant in the decades to come.
RETAIL ACTION	The retail sector has been hit significantly hard by COVID-19, but the Retail Gap Analysis (2019) reveals that this sector already had gaps in Lac La Biche County. Investing in their competitiveness will include investments in digital capacity building, and working closely with them to sell needed items that residents may be sourcing online. Further, retail storefronts in the hamlets of Plamondon and Lac La Biche can be supported by activating downtown spaces through farmer's markets and outdoor events.	Residents will continue to outshop, and existing retailers in Lac La Biche County will lose sales to online shopping. In terms of digital capacity, if Lac La Biche County retailers do not upgrade online selling capacity, they run the risk of falling behind on retail trends.

Interpreting the Action Plan

The action plan below includes description of action, suggested timing of implementation, and potential/suggested partners.

The second column provides a high-level estimate of staff time investment, illustrated by an icon (☹), and financial investment considerations, illustrated by a dollar sign (\$). The estimates of the suggested range these suggest are as follows:

☹ Minimal staff hours needed. Estimate approximately one to three staff days/month.

☹☹ Estimate approximately one to two weeks of staff time/month.

☹☹☹ Estimate significant staff time input. Examples include hands-on activities such as Business Retention and Expansion meetings, execution of events and farmers' markets, and coordinating with consultants on major projects such as Investment Readiness Study, Cottage Development Business Plan, and Place Branding activities. When creating workplans, consider additional Economic Development HR needs to undertake larger projects in the desired time frames.

\$ = \$0-5,000. Financial investment in this activity is minimal; some investment may be required in ongoing operating expenses. Examples include "boosting" or sponsoring social media posts.

\$\$ = \$5,000-\$10,000. Financial investment in this activity may involve some larger expenses; i.e. sponsorship of events, or expenses related to Economic Development staff attendance at trade shows.

\$\$\$ = \$10,000-\$100,000. Upfront financial investment in activities like paying consultants (Place Branding, Investment Readiness Study, or Cottage Development Business Plan), are required to move forward with major initiatives.



STRATEGIC OBJECTIVE 1 FOCUS ON BUILDING ECONOMIC RESILIENCE

This Strategic Objective will include actions that will move Lac La Biche County's local economy towards a more sustainable future.

Cultivating resilience in Lac La Biche County's local economy, strengthening the existing business base, and creating pride and openness to new business and growth should be the starting point of economic development actions. Addressing immediate-need issues brought on or highlighted by recent economic downturns must be done prior to, or concurrently with the attraction of new investment.

Further, a strong through-line of this strategy was the resilience of Lac La Biche County's business base. Many businesses in Lac La Biche County have remained open for a long time; Business Satisfaction Survey results showed that 73% of the 80 businesses surveyed had been in operation for 10+ years. Harnessing some of that resilience, ensuring there are opportunities for start-ups, and increasing morale of business owners are all fundamentals that are pointed to in this series of actions.

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: BR+E		
<p>Engage in BR+E follow up interviews with Triage cases identified in the Business Satisfaction Survey, prioritizing Red Flags (potential closures, downsizing, or those with imminent lease expirations) to determine pinch points and challenges to existing businesses in Lac La Biche County.</p> <p>Engage in follow-up interviews with green flags and other survey respondents to capture successes that can be carried forward as benefits to doing business in Lac La Biche County.</p> <p>TIMING: Immediate/Short term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹☹</p> <p>MONEY: \$</p>	<p>Relationships between the business community and Economic Development practitioners in Lac La Biche County are strengthened based on statistically relevant data. Actions stemming from BRE actions benefit the broader business community.</p> <p>Highest priority actions from the Business Survey (Development/Building permit process, Development charges and off-site levies) are communicated and businesses know they can reach out to the County's Economic Development Office with questions or concerns around that process, which has been streamlined in recent years.</p> <p>PM: BRE follow-up meetings are complete.</p>
<p>Engage in targeted BRE activities with oil and gas businesses in Lac La Biche County to determine what will be needed to retain them.</p> <p>TIMING: Short/Medium term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>Lac La Biche County is well-positioned to capture benefits of any future growth regional in the oil and gas sector.</p> <p>PM: BRE meetings are complete.</p>
<p>Celebrate local success stories on social media. Create a social media campaign that highlights business success stories that have survived economic downturns brought on by oil industry swings and COVID-19.</p> <p>TIMING: Short/Medium term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>Awareness is created around success stories.</p> <p>PM: Social media campaign launched.</p>
<p>Capitalize on consumer's reluctance to travel to urban centres to shop, and capture 'support local' sentiments brought on by COVID-19 by launching a 'Shop Local' campaign throughout Lac La Biche County. The Retail Gap Analysis indicates that consumer retention is only 34%, so outflow of retail dollars is considerable. Build off the established #LLBCTogether hashtag that has been created to direct messaging toward supporting local businesses.</p> <p>TIMING: Short/Medium term</p> <p>PARTNERS: ROABA, Chamber of Commerce, Community Futures, etc.</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>Support for local businesses is tied into existing community support campaigns; local shopping habits will be strengthened among residents. Consumer retention is heightened.</p> <p>PM: Shop local campaign launched. Retailer feedback.</p>

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: Investment Readiness		
<p>Continue to work toward the attraction of a box retailer that will complement Lac La Biche County's existing retail base, to address economic leakage as per recommendations in the Retail Gap Analysis 2019.</p> <p>Work closely and actively with the Planning and Development team to this end, to ensure that any potential investors are met with a "red carpet" experience when dealing with the County.</p> <p>Continue to engage with ICII to keep abreast of best practices in retail attraction.</p> <p>TIMING: Short/Medium term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹☹</p> <p>MONEY: \$\$</p>	<p>More retail dollars are spent locally.</p> <p>PM: A large retailer is located in Lac La Biche County, and retail dollars are retained in the County.</p>
<p>Engage in an Investment Readiness Study that will assist Lac La Biche County with understanding the steps that must be taken to be ready for external investment by commercial and industrial firms. This study should include available land, infrastructure considerations on commercial or industrial properties, ease of investment inquiry process, etc.</p> <p>Sectors to consider investment readiness for include agriculture and vertical farming, which have significant power and water use considerations; and manufacturing – including the attraction of hemp processing activity to the County.</p> <p>TIMING: Medium term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹</p> <p>MONEY: \$\$\$</p>	<p>Lac La Biche County has the knowledge necessary to invest and work towards investment readiness.</p> <p>PM: Investment Readiness Study complete.</p>
<p>Implement business licencing for those looking to operate in Lac La Biche County.</p> <p>Use this information to develop an internal business directory.</p> <p>TIMING: Short-Medium term</p> <p>PARTNERS: N/A</p>	<p>TIME: ☹☹☹</p> <p>MONEY: \$</p>	<p>The business directory can be used for future outreach purposes, partnership building among businesses, and determining market gaps for targeted investment attraction.</p> <p>PM: Business licensing program implemented, business directory created.</p>

STRATEGIC OBJECTIVE 2 | FOCUS ON INNOVATION AND ENTREPRENEURSHIP

This Strategic Objective focuses on moving Lac La Biche County's economy forward. It supports the development of sectors of opportunity that play to Lac La Biche County's strengths – agriculture (hemp, vertical agriculture), opportunities related to the airport, and the digitization of the retail sector.

Throughout consultation for this Strategy, the strength of having Portage College located in the hamlet of Lac La Biche was highlighted as an underleveraged opportunity to the advancement of many of the County's economic opportunities. Many of the actions under this Strategic Objective involve working collaboratively with the college to enhance workforce opportunities and innovation.

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: Develop hemp growing and hemp processing in Lac La Biche County.		
<p>Establish a Hemp Steering Committee Lac La Biche County should create a hemp steering committee to concentrate and align county efforts. This committee should include a mixture of representatives from:</p> <ul style="list-style-type: none"> • Lac La Biche County • Portage College (including a representative from the Natural Resource Management Program) • a local farmer representative appointed by LARA • Lac La Biche and District Chamber of Commerce • Alberta HUB • Community Futures • Innotech Alberta Fibre Processing Plant. <p>Note this is not a definitive list, and additional members can be added to this committee.</p> <p>The mandate of this committee should be advocating and coordinating efforts to increase hemp growing and processing in Lac La Biche County.</p> <p>TIMING: Immediate and ongoing</p> <p>PARTNERS: Portage College, Lac La Biche County, Innotech Alberta Fibre Processing Pilot Plant, the local farming community, Agricultural Service Board, Chamber of Commerce Representative etc.</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>There is a high degree of collaboration and coordination amongst key stakeholders across Lac La Biche County regarding the direction for hemp. Farmers have increased awareness about the business opportunities of growing hemp.</p> <p>PM: Steering committee created.</p>
<p>Continue to Support the Agricultural Symposium run through Portage College</p> <p>Continue to support Portage College to develop and run the agricultural symposium that seeks to educate local community leaders and farmers on agriculture as a viable economic development strategy. The County should also investigate inviting regional farmers who have been successful at growing hemp to share their success stories. Finally, inviting potential investors interested in starting a hemp processing plant should be investigated during this symposium series.</p> <p>TIMING: Immediate and ongoing</p> <p>PARTNERS: Portage College, Lac La Biche County, external stakeholders.</p>	<p>TIME: ☹</p> <p>MONEY: \$\$</p>	<p>An increased number of local farmers are aware of the industrial hemp licencing process and feel confident in either applying directly for the program or reaching out to the county to receive support during the application process.</p> <p>PM: Ongoing involvement with symposium.</p>

ACTION, TIMING, PARTNERS	TIME (☺) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
<p>Hemp Licence Assistance Program</p> <p>Develop a program that works with local businesses in Lac La Biche County to assist in completing the paperwork to obtain an Industrial hemp licence. This program should include educating interested farmers about the application process and aiding with completing the required documents. A clear target on the number of farmers assisted through this program should be established to ensure the resource is utilised and promoted effectively.</p> <p>Information about this resource should be made available either on the economic development or agriculture sections of the Lac La Biche County website as well as being advertised directly to the local farming community.</p> <p>TIMING: Short-Medium</p> <p>PARTNERS: Agricultural Services Department</p> <p>Target Sectors: Agriculture Sector</p>	<p>TIME: ☺</p> <p>MONEY: \$</p>	<p>An increased number of local farmers are aware of the industrial hemp licencing process and feel confident in either applying directly for the program or reaching out to the county to receive support during the application process.</p> <p>PM: # of new hemp licenses in the County.</p>
<p>Create a Hemp Information and Investment page on the Lac La Biche County Website.</p> <p>The investment and information landing page should be located under the economic development section of the website. It should clearly explain that Lac La Biche County is actively exploring hemp growing and processing prospects and is open to investments.</p> <p>Information on the value proposition of Lac La Biche County as a hemp growing region should also be outlined. This information can be drawn from existing sources (e.g. The Lac La Biche County Alberta Hub profile, Canadian Hemp Trade Alliance (CHTA) etc.) and detail what the County offers.</p> <p>The Economic Development Officer's contact information should be visible on the webpage.</p> <p>TIMING: Short-Medium</p> <p>PARTNERS: Internal – Communications Dept.</p>	<p>TIME: ☺</p> <p>MONEY: \$</p>	<p>Local farmers and potential investors are made aware of the County's vision for the hemp sector and the value proposition of investing in the County.</p> <p>PM: Webpage created.</p>
<p>Investigate alternative funding sources & increase participation in hemp industry events</p> <p>Investigate alternative funding sources that could be accessed by either local farmers or grants to Lac La Biche County to support the development of the hemp sector. Participation in key national/provincial hemp industry events such as the Canadian Hemp Trade Alliance: Annual Meeting and National Convention is important to better understand market trends and identify key partners.</p> <p>TIMING: Medium-Long term</p> <p>PARTNERS: Internal & CHTA</p>	<p>TIME: ☺☺☺</p> <p>MONEY: n/a</p>	<p>Lac La Biche County is aware of key hemp industry events and market trends. Connections have been established with key stakeholders, including farmers, processors, manufacturers, researchers, entrepreneurs and marketers.</p> <p>PM: Funding sources found.</p>

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: Attract a vertical farming company to the County		
<p>Establish a clear partnership around vertical farming initiatives with Portage College.</p> <p>Discussions with Portage College should be taken to understand the level of support services they are able to provide (e.g. non-credit courses, funding etc.) and the best way to approach attracting investments as a unified partnership.</p> <p>The County should also collaborate with local food industry stakeholders (e.g. grocery stores, restaurants) with the aim of compiling a list of distributors that would purchase from the local supply chain.</p>	<p>TIME: ☹</p> <p>MONEY: \$</p>	<p>All key stakeholders have a clear vision of what the vertical farming sector will look like in the County and understand next steps.</p> <p>PM: Partnership established and projects underway.</p>
<p>Actively target key vertical farming investors</p> <p>To ensure a sustainable and thriving vertical farming sector within the County requires external investments. As the vertical farming sector is still relatively new and growing, it is key that Lac La Biche County is proactive in targeting potential investors to move to the region. One example is Ottawa based company The Growcer, which has announced the construction of mini hydroponic farms from reused shipping containers across schools and universities in Canada. The company has partnered with Chartwells (the largest supplier of food services to post-secondary institutions in Canada) to begin this process.</p> <p>TIMING: Short-medium</p> <p>PARTNERS: Portage College, Lac La Biche County, external investor stakeholders</p>	<p>TIME: ☹☹</p> <p>MONEY: n/a</p>	<p>Vertical farming investors have been identified and targeted. Discussions are being had regarding the type of partnership/investment that best suits all parties.</p> <p>PM: # of inquiries with vertical farming investors. Vertical farming company established in Lac La Biche County.</p>
<p>Establish a vertical farming investment page on the Lac La Biche County website</p> <p>To help attract potential investors in the vertical farming space, Lac La Biche County should develop a vertical farming investment portal. This portal should include information about the County advantages, commitment to vertical farming and any financial benefits that are being offered.</p> <p>TIMING: Medium</p> <p>PARTNERS: Internal</p>	<p>TIME: ☹</p> <p>MONEY: \$</p>	<p>Potential investors and local businesses can clearly see the goal of the project and the value proposition of investing in vertical farming for Lac La Biche County. Investors can also easily find contact information if they require more information.</p> <p>PM: Webpage created.</p>
Action Area: Digital Capacity Building		
<p>Get Lac La Biche County retailers selling online.</p> <p>Communicate the benefits of Digital Mainstreet²⁶ service among Lac La Biche County's retailers (in downtown hamlets and elsewhere).</p> <p>Commit to the creation of a funding program to assist with any costs Lac La Biche County's retailers incur to use tools or services accessed through Digital Mainstreet or other digital assistance services.</p> <p>Explore whether Community Futures has any grants or available funding to this end.</p> <p>TIMING: Short</p> <p>PARTNERS: CF</p> <p><small>26 Digital Mainstreet is a program and service that helps main street businesses achieve digital transformation. The program is built around an online learning platform, structured training programs, and support staff that assist main street businesses grow and manage their business through the adoption of digital tools and technology. https://digitalmainstreet.ca/</small></p>	<p>TIME: ☹☹</p> <p>MONEY: \$\$</p>	<p>Lac La Biche County's retailers have access to needed toolkits and resources to digitize their operations and reach their customers through social media, apps, and e-commerce applications.</p> <p>PM: # of local retailers using ecommerce selling tools.</p>

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: Airport Reimagination		
<p>In conjunction with the Airport Master Plan initiative, ensure that Lac La Biche County's airport is well-positioned to enhance its role as an emergency-response hub for communities further north.</p> <p>TIMING: Short</p> <p>PARTNERS: N/a</p>	<p>TIME: ☹</p> <p>MONEY: \$</p>	<p>The airport is positioned to best capture its opportunities as an economic asset.</p> <p>PM: Airport Master Plan created with this vision.</p> <p>Increased airport activity.</p>
<p>Create a preferred rental rate incentive to attract a flight school tenant to the airport.</p> <p>Work with Portage Collage to determine if there are partnership opportunities that the County can assist with facilitating towards the goal of attracting a flight school to the airport.</p> <p>TIMING: Short</p> <p>PARTNERS: N/a</p>	<p>TIME: ☹</p> <p>MONEY: \$</p>	<p>The airport is positioned to attract more jobs and economic activity than it currently does.</p> <p>PM: Airport Master Plan created with this vision.</p> <p>Flight school established at the airport.</p>

STRATEGIC OBJECTIVE 3 | TOURISM AND RESIDENT ATTRACTION

This Strategic Objective imagines Lac La Biche County as a thriving cottage or cabin destination. It carries forward the County's evident opportunities for tourism product development as outlined in the Tourism Strategy and Product Development Plan (2019) as they relate to cultural tourism development. It also envisions an ambitious future where Lac La Biche County is a destination for seasonal weekend residents. Through place branding activities, Lac La Biche County will be able to define its resident and tourist target markets, and its unique value proposition.

ACTION, TIMING, PARTNERS	TIME (☹) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
Action Area: Tourism Product Development		
<p>Prioritize the development of tourism products as per the Tourism Strategy and Product Development Plan, 2019, especially cultural tourism products, and any that promote outdoor experiences.</p> <p>Tourism trends following COVID-19 suggest that trips in the short to medium-term will be local or regional in nature. Lac La Biche County is well positioned to attract tourists seeking outdoor getaways.</p> <p>TIMING: Medium</p> <p>PARTNERS: Portage College, regional Indigenous communities (see Tourism Strategy and Product Development Plan, 2019)</p>	<p>TIME: ☹☹</p> <p>MONEY: \$\$</p>	<p>Lac La Biche County will be better positioned to attract regional visitors from Edmonton or other nearby communities.</p> <p>PM: Tourism products established.</p>
<p>Support Lac La Biche County's downtowns hamlets by hosting small-scale events and farmers markets. These could be held outdoors in Plamondon and Lac La Biche County. Close streets during event durations when and where possible to encourage physical distancing in the short-term.</p> <p>TIMING: Short</p> <p>PARTNERS: n/a</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>This action has the added benefit of supporting Lac La Biche County's downtowns and brick and mortar businesses, which will have been impacted significantly by COVID-19 in the short-term.</p> <p>PM: # of events held downtown in Plamondon and Lac La Biche County.</p>
<p>Actively attract tourism operators like outfitters and short-term accommodation providers to Crown Land located in Lac La Biche County. Work with Alberta Environment and Parks actively to develop an information toolkit to assist operators with obtaining leases to operate on Crown Land, taking advantage of the Province's new 60-year lease availability.</p> <p>Create targeted tourism operator investment page on Lac La Biche County's website, with these resources.</p> <p>TIMING: Medium</p> <p>PARTNERS: Alberta Environment and Parks</p>	<p>TIME: ☹☹</p> <p>MONEY: \$</p>	<p>Tourism operators recognize Lac La Biche County as an opportune destination to open and operate a tourism business (outfitters, short-term accommodations) on Crown Land.</p> <p>PM: Webpage created, information toolkit created.</p>
<p>Complete a business plan toward cottage (or second-home vacation property) development, which includes product availability (land inventory), cost/benefit analysis, organizational model, stakeholder engagement requirements (likely the Province and current private landowners, Indigenous communities, etc.).</p> <p>TIMING: Medium-Long</p> <p>PARTNERS: Landowners, Alberta Environment and Parks</p>	<p>TIME: ☹☹☹</p> <p>MONEY: \$\$\$</p>	<p>Lac La Biche County has the internal knowledge of capacity and resources necessary to support the development of cottage or vacation properties.</p> <p>PM: Business plan/feasibility study complete.</p>

ACTION, TIMING, PARTNERS	TIME (☺) AND MONEY (\$) NEEDS	OUTCOMES, PERFORMANCE MEASURES (PM)
<p>Cement Lac La Biche County's long-term desire to develop as a cottage or cabin destination in the updates to the appropriate Provincial Regional and Sub regional Plans, which are being updated currently in 2020.</p> <p>TIMING: Short</p> <p>PARTNERS: Alberta Economic Development, Trade and Tourism</p>	<p>TIME: ☺</p> <p>MONEY: n/a</p>	<p>Lac La Biche County's long-term vision to be a cottaging and cabin destination is cemented in Provincial planning documents, thereby easing processes for those future developments.</p> <p>PM: Communication with the Province complete; intention written into subregional plan.</p>
Action Area: Tourism and Resident Attraction		
<p>Undergo Placemaking and Placebranding activities that unify Lac La Biche County's tourism, investment attraction, and resident attraction brand messaging.</p> <p>Use this opportunity to identify target markets that best fit Lac La Biche County's lifestyle and value proposition.</p> <p>TIMING: Short</p> <p>PARTNERS: N/A</p>	<p>TIME: ☺☺</p> <p>MONEY: \$\$\$</p>	<p>Lac La Biche County has a unified, fresh brand that can be used in all tourism, resident, and investment attraction activities.</p> <p>PM: Place branding strategy complete, brand implemented.</p>
<p>Once the new brand is established, use it to highlight stories of local residents, businesses, and tourists-turned-residents that will serve the dual purpose of generating community pride, and attracting target audiences to visit and live in Lac La Biche County. Desired target demographics identified throughout this process include young professionals and retirees.²⁷</p> <p>TIMING: Once new place brand is established</p> <p>PARTNERS: N/A</p>	<p>TIME: ☺☺</p> <p>MONEY: \$</p>	<p>Tourists and residents will be attracted to Lac La Biche County.</p> <p>PM: # of profiles generated on social media.</p>

27 See Kenora, Ontario's choosekenora.ca

Background Research

APPENDIX A: BACKGROUND DOCUMENTS REVIEW

A detailed review of all relevant municipal reports and policy documents has been conducted for Lac La Biche County. Documents reviewed include:

- Strategic Plan 2019-2024
- Strategic Plan for Economic Development 2013-15
- Tourism Strategy and Product Development Plan 2019-29
- Retail Gap Analysis 2019
- Alberta HUB Member Profile

The documents have been analyzed comparatively to uncover areas of thematic overlap. The policies have been cataloged according to common themes to observe patterns – in essence, to find the “common threads” among them.

The following observations are important, as they highlight themes that are strongly represented in the current policy framework internally, and where there is alignment with external policies in areas of importance. Further, it allows the identification of gaps that exist where key themes and areas of importance do not currently have prominence in the municipal policy framework. If these gaps represent key objectives or priorities that are identified through the research and community engagement process, they heighten awareness for further examination to ensure effective alignment with future priorities.

Three key themes were identified among the policies and documents with each theme having several common threads associated. They include:

Improve business/industry environment

Business Attraction and Retention - Provide support services to retain and enhance existing businesses within the Retail and Oil and Resources sector – specifically Steam-Assisted Gravity Drainage (SAGD) Projects – whilst supporting diversification within the tourism and agriculture industry.

Business Planning and Support - Providing current businesses with adequate financial support, particularly in the tourism and retail sector. Additionally, the county must ensure physical and technological infrastructure is in place to support current and future business needs.

Leveraging location - The county should utilise its geographic proximity to key road, rail and air transport networks to act as key distribution hub for the region. For example, providing access to the Athabasca Oil Sands project and Cold Lake deposits and servicing highway travellers passing through the county.

Affordable housing - Increasing the number of affordable housing options is critical to support businesses trying to attract and retain a workforce.

Partnership Development - Increase in public partnerships between municipal, regional and the, provincial governments when developing strategies and seeking funding grants (e.g. Alberta Tourism). Within the private sector, greater collaboration should be given to indigenous, tourism and oil and resources business leaders.

Tourism

Tourism Marketing & Promotion - A key priority is to ensure all promotional activities of tourism products are aligned within the region through a central organisation as current activity is fragmented.

Tourism Product Development - There is significant potential to build the county's product offerings across seven identified areas: outdoor experiences, cultural tourism, sport tourism, festivals and events, culinary tourism, improving the region as a winter destination, promoting dark/northern light viewings and increasing downtown activations.

Lifestyle Promotion - Differentiate the quality of life and lifestyle of Lac La Biche County compared to other northern communities (e.g. low cost of living, natural assets, cultural diversity and strategic location near transport hubs).

Improving quality of place/life

Environmental Protection - Ensure the protection of natural assets, particularly the region's waterways and lakes.

The figure below presents a common threads matrix, showing the association between each theme relative to the documents it has been identified in via a series of check marks. A single check mark (✓) indicates the document has some content relating to the theme, but it is not a primary focus of the document, while a double check mark (✓✓) indicates there is a primary focus on the theme.

Common Themes	Business Attraction and Retention	Business Planning and Support	Leveraging Location	Affordable Housing	Partnership Development	Tourism Marketing & Promotion	Tourism Product Development	Lifestyle Promotion	Environmental Protection
Strategic Plan 2019-2024	✓✓	✓✓			✓✓	✓✓	✓		✓
Strategic Plan for Economic Development 2013-15	✓✓	✓	✓✓	✓✓	✓✓	✓	✓✓	✓	✓
Tourism Strategy and Product Development Plan 2019-29	✓✓	✓			✓✓	✓✓	✓✓	✓	✓
Alberta HUB Member Profile			✓✓	✓			✓		
Retail Gap Analysis 2019	✓✓	✓	✓✓						
Budget 2020	✓✓	✓✓				✓	✓✓	✓	✓✓
Municipal Development Plan Bylaw 13-020	✓✓	✓✓	✓				✓✓	✓	
Land Use By-Law	✓✓	✓✓	✓	✓					
Visitor Friendliness Study		✓				✓✓	✓✓	✓✓	✓

STRATEGIC PLAN 2019-2024

Purpose: The 2019-24 strategic plan provides an overview of (5) strategic goals that aim to guide council decision making to ensure prosperous growth over the next five years. Combined, these goals aim to provide a solid framework to simplify council decision making and to ensure it aligns with the county's vision, whilst also efficiently using the county's limited resources.

Key Takeaways and Economic Considerations:

- GOAL 1: Economic Development** – Focus on diversifying the economy away from the oil and gas sector whilst establishing greater partnerships to promote business growth and retention.
- Ensuring physical and technological infrastructure is in place to support current and future business needs.
- GOAL 2: Recreation and Culture** – Continued focus on ensuring access to affordable recreational facilities to both urban and rural residents.
- GOAL 3: Social Wellness** – Increasing safety education programs across the community and establishing partnerships with community organisations to promote diversity.
- GOAL 4: Tourism** – Implementing a robust tourism and marketing strategy that supports existing businesses and establishes partnerships to increase the number of destination products.
- GOAL 5: Environment** – Protection of the County's local natural assets is of the upmost importance.

STRATEGIC PLAN FOR ECONOMIC DEVELOPMENT 2013-2015

Purpose: The Strategic Plan for Economic Development was created in 2012 in response to the county experiencing unprecedented growth in the number of development permits; from \$126 million in 2011 to \$930 million. This was due to a land swap deal with the Regional Municipality of Buffalo which allowed the County to claim 16 additional Townships. Further, the region was expected to receive \$11 billion in additional investments in Steam-Assisted Gravity Drainage (SAGD) Projects. To assist council effectively navigate this influx in economic activity, the strategic plan provides four key economic development priorities for the region.

Key Takeaways and Economic Considerations:

- GOAL 1: SAGD/resource contracts** – The report recommended increasing the number of SAGD contracts won by local businesses by developing industry partnerships and lobbying the government.
- The county is a geographic hub as it is intersected by three major arterial roads, a rail line and an airport which provides direct trade routes north to the South Athabasca Oil Sands and east to Cold Lake deposits. The county should leverage this to become a distribution centre for these projects.
 - The local airport is currently underutilised and could become a key transport link to oil projects in the region. There is also potential to expand the firefighting Air Tanker Base stationed there.
 - The county supports physical infrastructure for continued commercial and residential growth.
- GOAL 2: Workforce** – Recruiting and retaining commercial businesses is another key priority of the region.
- Prioritise revitalising the downtown core of the Hamlet of Lac La Biche County.
 - Leverage the county's large retail catchment area to ensure consumer spend remains local.
 - Reduce youth migration out of the county.

- Increase the inventory of affordable housing as it is limiting the availability of the local workforce. For example, rental accommodation is reporting a vacancy rate of near 0.
- Land prices are extremely affordable; roughly \$1 million per acre cheaper than the Regional Municipality of Wood Buffalo.

GOAL 3: Tourism – grow tourism efforts in the region

- Aim to develop the ecological tourism market through collaboration with provincial tourism agencies to promote the regions natural assets.
- Improve visitor signage, trail markers throughout the county and implement the lakeshore redevelopment plan to improve visitor experiences.
- Identify, attract and support businesses that enhance the visitor experience in the county.
- Become a lead in environmental assessment and monitoring protocols of water, air and land.

GOAL 4: Medical hub – Establish Lac La Biche County (William J. Cadzow) Health Care Centre as a medical hub for the northeast region to support oil businesses.

TOURISM STRATEGY AND PRODUCT DEVELOPMENT PLAN 2019-29

Purpose: The report provides a road map for tourism development in the Lac La Biche County region across a 10-year timeline. Whilst the region has several strong assets, the county must improve its market-ready tourism products, align its tourism promotion activities and update several key assets to meet this timeline. Five strategic goals are provided along with seven product development opportunities.

Key Takeaways & Economic Considerations:

Visitor Analysis: Results from a visitor survey of 187 people demonstrate that the region is highly reliant on local visitors, with 91% of visitors coming from Alberta.

- Of these visitors, visiting family and friends accounted for 22.3%, special events 22.3% and vacation 20.7%.

The county possesses a strong accommodation supply of approximately 600 hotel/motel rooms and 1,300 campsites but needs to increase occupancy rates during off-peak times.

GOAL 1: Organisational Development

- Report recommends creating a Destination Development Business Unit within the Economic Development Department to monitor the implementation of the Tourism Strategy and Product Development Plan.
- Report recommends allocating municipal funding to implement the strategy.

GOAL 2: Tourism product development

- **Outdoor experiences** – are a major driver of visitation for the county. The report priorities developing new products and ensuring existing attractions are visitor ready. For example, offering guided outdoor tours, equipment rentals for outdoor activities, canoe circuit tours and improving trail system quality.
- **Cultural tourism** – The report states there is a short-term opportunity to develop the regions Indigenous and French cultures into market ready products, as there are several existing assets in the region (e.g. Aboriginal People's Art and Artefacts Museum). Further, there is opportunity to develop a cultural space in McArthur Park and seek product clustering with attractions outside of the county (e.g. at Metis Crossing). The priority is to begin to establish connections with represents from these groups.

- **Dark Sky/Northern Lights Viewing** – report proposes establishing northern lights viewing experiences as the region lacks products currently in this area. Key examples included interactive tours and creating indoor/outdoor viewing platforms.
- **Sports Tourism** – Leverage the county's high-quality sporting facilities and central geographic location to attract more sporting events and tournaments. Specifically, the report recommends developing a Sports Tourism Hosting Plan.
- **Festivals and events** – Leverage the county's large event hosting capacity to attract more events (e.g. heritage festival, seasonal festivals) by developing a Tourism Festival and Event Strategy.
- **Culinary Tourism** – The county has several promising culinary assets (e.g. Brewery's) but currently does not possess a critical mass. The report proposes increasing these assets and developing a culinary festival that celebrates the diverse cultures in the region.
- **Lac La Biche County as a Winter Destination** – The majority of regional visitation occurs during summer months. The report recommends improving winter amenities such as skating trails, and increasing winter themed events (e.g. ice carving, Christmas light festival).
- Additionally, the report proposes offering animation (e.g. art installations, public performances & communal campfire) in key urban areas (e.g. downtown core) during high peak times. The report suggests implementing a destination animation partnership program that provides matching funding to local businesses.
- The county could also host an annual tourism forum to increase business collaboration.

GOAL 3: Asset and facility development

- McArthur Park was identified as being a core central hub for visitors and the report proposes redevelopment of the sites facilitates.
- The report recommends conducting a watershed study to identify impacts of blue-green algae found in the area and provide a strategy to improve overall water health.
- Supporting the downtown revitalisation project through introducing a destination activation events during peak periods is recommended to increase visitor satisfaction.
- Improving safety across the county should be prioritised and safety measures considered during tourism product development.
- Greater support should be placed in attracting niche accommodations such as ecolodges and comfort camping to the area.

GOAL 4: Business Attraction and Retention

- Develop a Tourism Business Retention and Expansion program (e.g. financial incentives) that supports business development is a key priority.
- Increase business engagement activities such as creating an industry portal where council and business owners can collaborate.
- Provide greater education services to support local businesses by working with provincial partners (Alberta Tourism and Alberta Economic Development).

GOAL 5: Marketing and Promotional Development

- The report outlines there are critical gaps in the promotion of the tourism products and a single organisation needs to be developed to align all activities.
- Increasing the length of stay of the VFR is critical to improving overall spend.
- Implementing a tourism registry to allow greater local participation in tourism activities.
- Improve data collection methodologies to collect more detailed visitor information is also required.

RETAIL GAP ANALYSIS 2019

Purpose: This report looks at providing a summary of the retail inventory in the hamlet of Lac La Biche County including the Hamlet of Plamondon ("Plamondon"). It provides a holistic overview of the retail trade area, current and future supply and retail expenditure across different categories. The report is intended to assist the County in promoting the community, working with developers and investors, as well as attracting new retail or business opportunities. It further aims to assist Planning as it relates to the optimal allocation for future retail commercial lands.

Key Takeaways & Economic Considerations:

Retail Trade Area

- Lac La Biche County possesses a large Retail Trade Area population of 27,000 (estimated for year end 2017) compared to the county population of 8,330.
- The large Total Trade Area is due to Lac La Biche County's centrality in the region with drive times estimated between 30, 60 and 90 minutes between communities such as Fort Saskatchewan and the Town of Athabasca.
- The hamlet is strategically positioned along Hwy 55 and serves as an ideal pit stop for passing motorists and other target users, particularly at the junction of Hwy 55 and 101st Avenue.
- The county's strategic location along major transport hubs and strong retail inventory allows it to capture an estimated 38% of the Total Trade Area spending (\$380 million).
- However, the long-term Trade Area population growth rate is low, forecasted to reach only 29,139 by 2027. The County should therefore focus on attracting the types of retail that would benefit the community and target the latter noted highway motorists.

Retail Supply

- The current overall vacancy rate is 17% which is high, but this includes two larger vacancies; former Ford Dealership and former RONA home improvement warehouse.
- When excluding these 2 larger formats, the vacancy drops to 6.9%, which for the Hamlet of Lac La Biche County is considered favourable.
- The report outlines the opportunity to attract a Canadian Tire or similar retailer for either of the two vacant lots with the RONA site preferred given its proximity to Downtown.
- However, for this location to reach its full value an at-grade rail crossing would have to be put in place that extends from 101st St. Further, any new businesses must not reduce demand for local services.
- Long term, the County should prioritise finding compatible retail businesses to fit within existing downtown vacant spaces or land fronting or visible to/from Hwy 55 at the gateway to the downtown.
- Support should be provided to existing businesses to increase their market share and resulting sales and profitability rather than adding new space to further dilute the market.
- Caution should be given for any retail growth the periphery of the downtown core which could reduce downtown retail supply.

Retail Demand & Spending

- Overall retail spending is low for most categories across the board, with a total average retention of only 34%. This means outflow is considerable for the community.
- Results from a telephone survey of 200 respondents found that 32% of respondents identified the Town of Athabasca as their primary shopping location. The most quoted reason for this outflow was greater product selection.
- Online spending also accounted for 5%-12% of local spending occurring outside the community. However, the report recommends that the county is unlikely to curb this trend due to the nature of purchases.

- Retail demand forecasts suggest there is not overwhelming demand for future retail outside of the downtown core, but there are tenants capable of improving sales retention and attraction in the County (e.g. Canadian tire).
- Home furnishings & improvement rank as the 5th top retail spending category for the region. Home Improvement & Garden is also ranked 2nd in terms of total floor space occupied in the TTA (61,261 sf).

ALBERTA HUB MEMBER PROFILE - LAC LA BICHE COUNTY

Purpose: The document provides a high-level snapshot of Lac La Biche County including demographics, key economic drivers and environmental conditions

Key Takeaways and Economic Considerations:

- Lac La Biche County is a small, northern located community roughly 2 ½ hours northeast of Edmonton with a population of 8,544 (2016).
- The region has abundant natural resources and the main industries for the region include oil and gas, forestry, tourism and agriculture. The Hamlet of Lac La Biche County serves as a business hub to the area.
- The county is strategically located to act as a distribution hub servicing.
- The region supports two schools and four post-secondary education facilities.

BUDGET 2020 - LAC LA BICHE COUNTY

Purpose: The 2020 budget was prepared to provide council with a detailed outline of spend allocated across council departments.

Key Takeaways and Economic Considerations:

- The budget represents an 8.09% reduction in total base expenditures, from \$54,487,458 in 2019 to \$50,078,360 in 2020. However, this includes a reduction of approximately \$2.9 million in debenture payments for the Bold Center that don't have to be made in 2020. If the effect of the debenture payment reduction is removed, the cost reduction is 3.98%.
- The recent federal election is not predicted to impact the community or budget changes.
- However, the recent provincial election is expected to be a key challenge for Lac La Biche County. As the council released their 2020 budget prior to the provinces, the council followed findings from a MacKinnon panel blue ribbon report that predicted provincial budget changes. Key changes that may impact the region include:
 - Downloading of current provincial costs of services, such as policing.
 - Reduction of grants like the Municipal Sustainability Initiative (MSI), the Strategic Transportation Infrastructure Program (STIP), the ID 349 transfer, Agriculture Service Board (ASB) funding, Family and Community Support Services (FCSS) grants, and public library grants.
 - Changes in property tax assessment of wells, pipelines, and machinery and equipment (M & E). Lac La Biche County is heavily dependent on these taxes to provide essential projects and services.
- To combat against these predicted changes, the budget includes a **Stabilization Operating Reserve** of \$5 million. The aim of this reserve is to cushion against downloading grant losses, or taxes lost from assessment changes. Once the change in government and corresponding funding changes are known, this funding could be challenged to additional cash projects (e.g. the broadband initiative).
- The County is seeking funding for a fibre and broadband initiative which is still under negotiation. If implemented this project could increase the attractiveness of the area for business investments.
- The county aims to build a new aquatic centre at the Bold Center estimated to cost \$15 million

which would increase the county's sporting event hosting capacity. This will be achieved by using its Municipal Sustainability Initiative (MSI) grant in conjunction with the federal Investing in Canada Infrastructure Program (ISIP) grant. However, approval is not guaranteed.

- Additionally, in 2019, the county was awarded a sports field contract for the Bold Center which has started construction. This significantly bolster the regions sport event hosting capacity.
- The Tourism and Economic Development budget is increasing by \$241,260 to \$752,751; indicating greater resources for department. The budget also listed some highlights from 2019:
 - Responded to three investment requests and reached out to ten investors/groups. Further investigation should be conducted to determine current progress on these potential investments.
 - The department attended seven tradeshow which they distributed over 6,000 Visitor Guides and engaged with over 10,000 people. An additional 3,000 Visitor Guides were distributed across western Canada.
 - Hosted the Power Up North! Conference aimed at developing entrepreneurial skills in the region. It should be investigated if this is an ongoing event for the region.
- More funding is being sought for hamlet maintenance and master plans for upgrade for McArthur Park and Trails which have been identified as key tourism assets for the region.
- There is potential for large new economic development projects to be financed with debentures. Council has earmarked \$2.9 million to be diverted to other uses in 2020 and another \$2.9 million in 2021. However, this financing requires long lead times of at least 6-months.
- The county is highly reliant on non-residential taxpayers (business, linear, and M & E) for overall tax revenue; approximately 90% of the County's tax base in 2018.
- Capital work projects included in the 2020 budget include:
 - The Mystic Beach access road paving project
 - There are funds available for new sidewalk and paving projects to improve the region.
 - The budget includes facilities work for the final phase of the County shop and renovations to the old Ford building, which will reopen in 2020 as the new Emergency Services Centre.

MUNICIPAL DEVELOPMENT PLAN BYLAW 13-020

Purpose: The purpose of the municipal development plan is to allow for planning and provides a framework for the future growth and development of the county.

Key Takeaways and Economic Considerations:

- A research report predicts that oil sands development will grow in investments from \$4 billion per year to \$8 billion. However, in light of recent economic changes these numbers appear to be significantly reduced.
- Increase of work camp members that form a shadow population will occur of around 4,900 people along the highway.
- The report references the AOSA Crisp report that forecasts total population in the county to be 24,000 by 2045.
- The report lists the number of commercial development permits in 2012 at 62 for a value of \$24.3 million and 152 industrial development permits at \$1.1 billion.
- The report highlights that traffic volumes along the Conklin area has grown due to oil sands activity with Highway 881 NE of Highway 858 saw a 62% increase (as of 2012).

LAC LA BICHE COUNTY VISITOR FRIENDLY ASSESSMENT AND ACTION PLAN

Purpose: The report aimed to analyse the destination appeal of the region in terms of its ambience and visual appeal, wayfinding signs, customer service, amenities and visitor information options.

Key Takeaways and Economic Considerations:

- Lac La Biche County is home to over 100 lakes and 70% of Alberta's class A beaches.
- The region is most visited as an outdoor destination by tourists seeking to explore the forests and waterways.
- There is not a single tourism body in the region, however tourism has been identified as key to economic development across the region.
- Lac La Biche County as a strong tourism product supply including
- The report outlined the County had not identified a key target market and instead the report proposes to target outdoor orientated families that seek to connect with nature and explore the relatively uncrowded parks and waterways in Lac La Biche County.
- The report identified the competitive advantage of the region being its accessible yet uncrowded outdoor experiences.
- The report provided 10 action items for the County to take into consideration including:
 - (1) Improve maintenance of the downtown area, (2) improve County safety, (3) establish a public art policy and program, (4) increase pedestrian accessibility such as widening the sidewalk, (5) develop a consistent signage program, (6) ensure the local visitor guide is available at local businesses, (7) ensure consistence in the County logo design, (8) create visitor information packages and maps, (9) create a hospitality ambassador program to welcome visitors to the region, (10) develop a tourism plan for entertainment options in the city.

LAC LA BICHE COUNTY LAND USE BYLAW

Purpose: The land use bylaw establishes regulations that control the type, location and intensity of land use and buildings around Lac La Biche County. It outlines the process for rezoning land and process for applying for permits. The bylaw is split into 7 parts including: (1) administration, (2) land use districts, (3) general regulations, (4) planning & development applications, (5) definitions, (6) overlays, (7) schedules.

Key Takeaways and Economic Considerations:

- The report lists the permitted uses and discretionary uses allowed for all types of possible development within the County included parks and residential, industrial and commercial developments.
- This document should be referred to when considering the long term strategy for the region. If any investments are targeted a review of the development application process should be conducted.

Appendix B:

Economic Baseline Analysis

This section of the report presents an overview of the demographic, labour force and industry composition in Lac La Biche County. The baseline analysis for Lac La Biche County is presented alongside the Division No. 12 and the Province of Alberta. The following data sources were used in developing this economic baseline information for the community of Lac La Biche County.

- Statistics Canada, National Household Survey, 2011
- Statistics Canada, Census Profile, 2011 & 2016
- Statistics Canada, Canadian Business Counts, December 2019
- Manifold Data Mining Inc., 2018

The Statistics Canada, 2016 Census of Population, is the latest and most widely available dataset and provides population, dwelling trends, immigration and ethnic diversity, income, education, labour force by industry and occupation and commuting patterns.

The CMHC data was used to determine housing construction activity in 2019. The June 2019 Canadian Business Counts was used to determine the total number of registered businesses in Lac La Biche County in 2019.

Where possible, Manifold Mining Data has been incorporated based on 2018 economic modelling and estimates. Since this data presents a snapshot in time and relies on different sources than the Census, comparison with Statistics Canada data over time has been used in a limited manner in this report and noted when done so.

Demographic Characteristics

POPULATION AND RELATED TRENDS

Figure 7 shows Lac La Biche County had a population of 8,634 in 2018, which is an increase of 3.6% from 2016. Whilst an increase, this figure still lags behind other key comparators, with population counts showing growth of 6.9% across Division No. 12 and 8.6% in Alberta over the same 2016 to 2018 period. However, this population growth is still comparatively better than compared to the 2011 to 2016 period, when Lac La Biche County saw a population decrease of 0.9%. Overall, this could indicate a slight recovery in the local economy.

Figure 8 outlines population projections for Lac La Biche County and comparator regions across two five-year periods, 2018 to 2023 and 2023 to 2028. Looking forward, Lac La Biche County's population is projected to decrease slightly by 0.7% across both five-year periods to total 8,515 in 2028. This negative population growth is well below the forecasted population growth in Division No. 12 of 7.1% and the Province at 10.3% across the same periods. Overall, a decrease in population could indicate lack of employment opportunities within Lac La Biche County, this could be due to the slowdown in the oil and gas industry sector.

Figure 9 presents the population breakdown of Lac La Biche County by broad age categories and compares it to the key comparators. Lac La Biche County has a marginally higher proportion of population in the 45-54 (14%) and 55-64 (14%) age brackets than both Division No. 12 and the Province, which each have 13% across both brackets. However, there is a greater concentration of younger workers in the age brackets 25-34 and 35-44 in Division No.12 and The Province then compared to Lac La Biche County.

FIGURE 7
HISTORIC, CURRENT POPULATION AND POPULATION CHANGE, LAC LA BICHE COUNTY & COMPARATORS, 2011 TO 2018

Year	Lac La Biche County	Division No. 12	Alberta
2011	8,402	63,427	3,645,257
2016	8,330	67,120	4,067,175
2018	8,634	71,738	4,417,880
% of Population Change (2011-2016)	-0.9%	5.8%	11.6%
% of Population Change (2016-2018)	3.6%	6.9%	8.6%

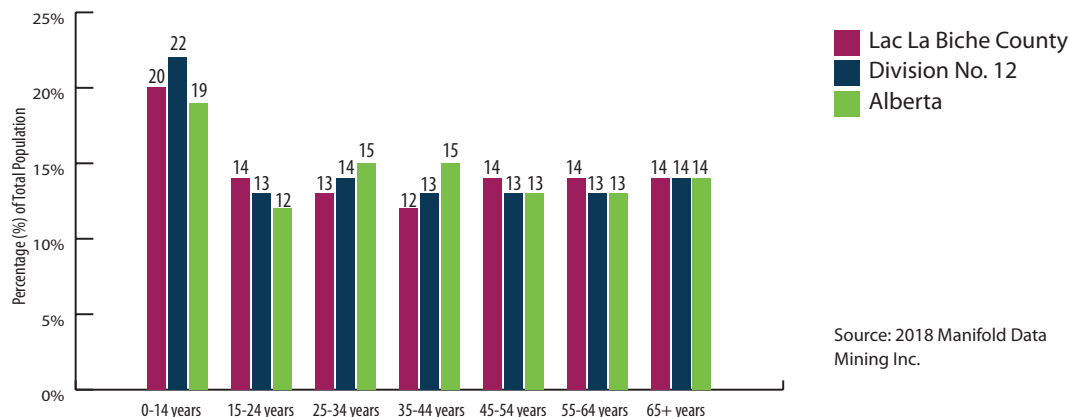
Source: Statistics Canada, 2011 Census of Population. Statistics Canada, 2016 Census of Population. 2018 Manifold Data Mining Inc.

FIGURE 8
PROJECTED POPULATION CHANGE, LAC LA BICHE COUNTY & COMPARATORS, 2018 TO 2028

Year	Lac La Biche County	Division No. 12	Alberta
2018	8,634	71,738	4,417,880
2023	8,574	77,016	4,925,270
2028	8,515	82,904	5,490,940
% of Population Change (2018-2023)	-0.7%	7.4%	11.5%
% of Population Change (2023-2028)	-0.7%	7.6%	11.5%

Source: 2018 Manifold Data Mining Inc.

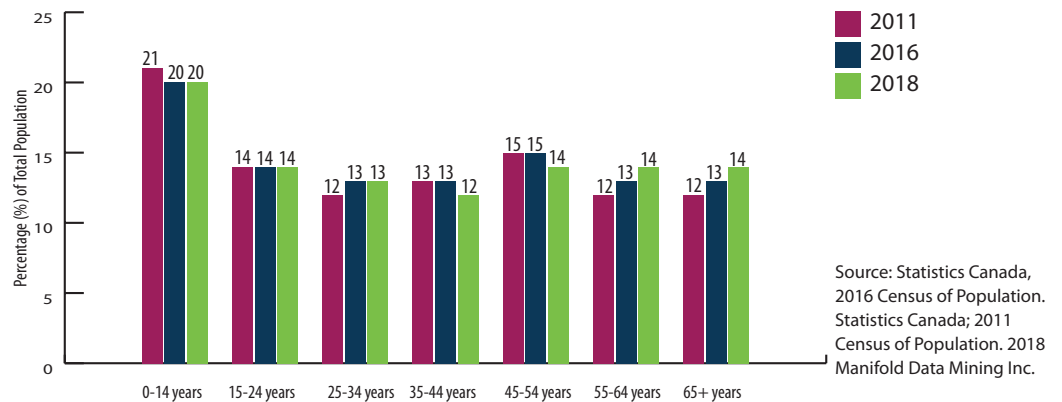
FIGURE 9
AGE OF THE POPULATION COMPARISON (%), LAC LA BICHE COUNTY & COMPARATORS 2018



Source: 2018 Manifold Data Mining Inc.

Figure 10 shows the changes in Lac La Biche County's population from 2011 to 2018. Interestingly, the region experienced the greatest growth in the 55-64 and 65+ age brackets, which recorded an increase of 95 people over the 2011 to 2018 period. There was also a slight recorded decline in people age 0-14 and 15-24 years, which could be indicative of the lack of employment opportunities regionally. Overall, the data indicates a growing aging population in Lac La Biche County and declining younger workforce, which should be monitored by the County as it is important when considering the available workforce to fill roles being vacated by retirees.

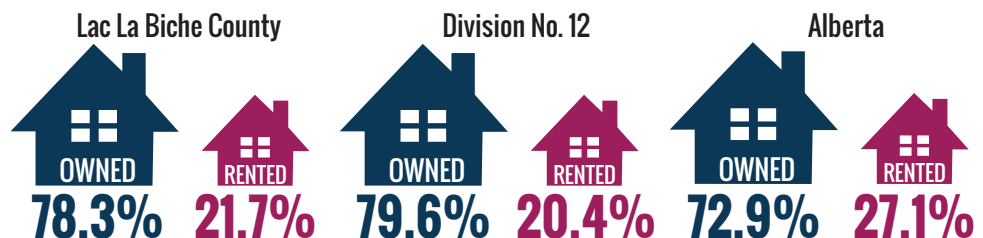
FIGURE 10
AGE OF THE
POPULATION
BY BROAD AGE
GROUPS (%),
LAC LA BICHE
COUNTY, 2011,
2016 & 2018



DWELLING TRENDS

As per 2018 data from Manifold Data Mining Inc., Lac La Biche County is comprised of approximately 3,236 private dwellings, of which 78.3% were owned dwellings while the remaining 21.7% were rented dwellings, which is below that of the Province (27.1%) (see Figure 11).

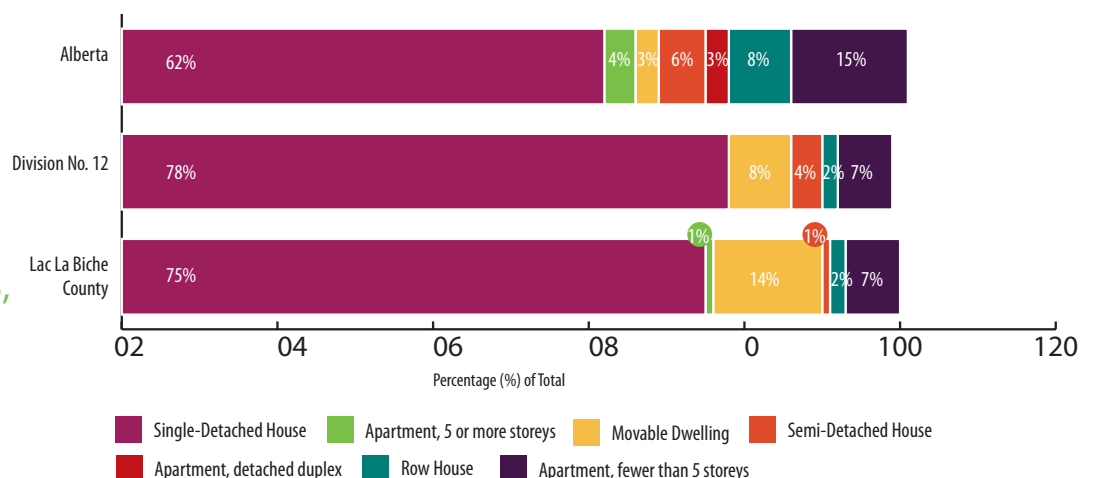
FIGURE 11
LAC LA BICHE
COUNTY HOME
OWNERSHIP &
COMPARATORS,
2018



Source: 2018 Manifold Data Mining Inc.

As shown in Figure 12, Lac La Biche County's existing housing stock is predominately comprised of single-detached dwelling (i.e.): low-density units at 75%. Lac La Biche County has a higher proportion of movable dwellings (14%) compared to Division No. 12 (8%) and the Province (3%). However, Lac La Biche County's proportion of row housing (2%) is significantly lower than that of the Province (8%).

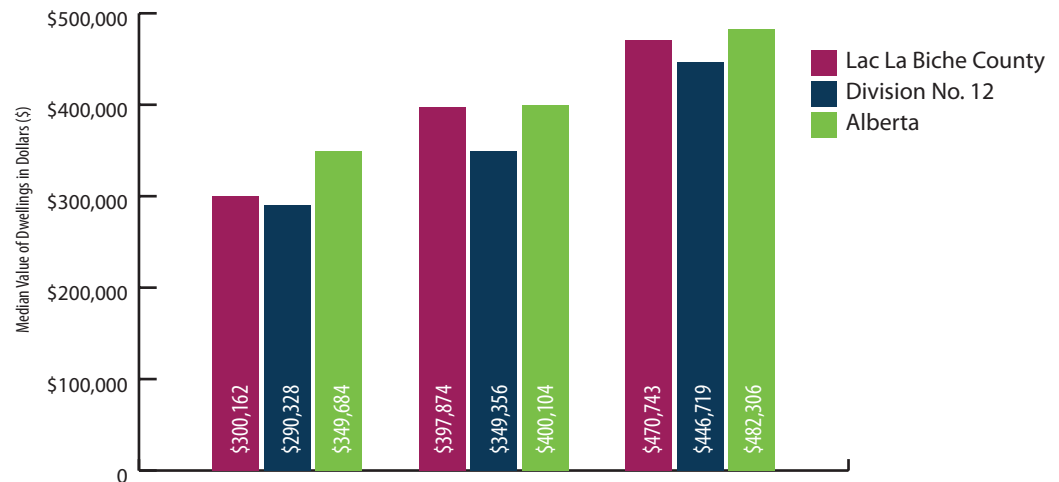
FIGURE 12
OCCUPIED
PRIVATE
DWELLINGS
BY TYPE, LAC
LA BICHE
COUNTY &
COMPARATORS,
2018



As shown in Figure 13, in 2018 Lac La Biche County shows a higher median housing value of \$470,743 compared to Division No 12 at \$446,719, yet is lower than Alberta at \$482,306. Dwellings in Lac La Biche County cost approximately \$24,024 more than dwellings in Division No. 12 and \$11,563 less than the Province. The median value of dwellings in Lac La Biche County saw the highest percentage increase over the 2011 to 2018 period compared to the key comparators at 57% or \$170,581.

FIGURE 13
MEDIAN
VALUE OF
DWELLINGS (\$),
LAC LA BICHE
COUNTY &
COMPARATORS,
2018

Source: 2018 Manifold Data Mining Inc.

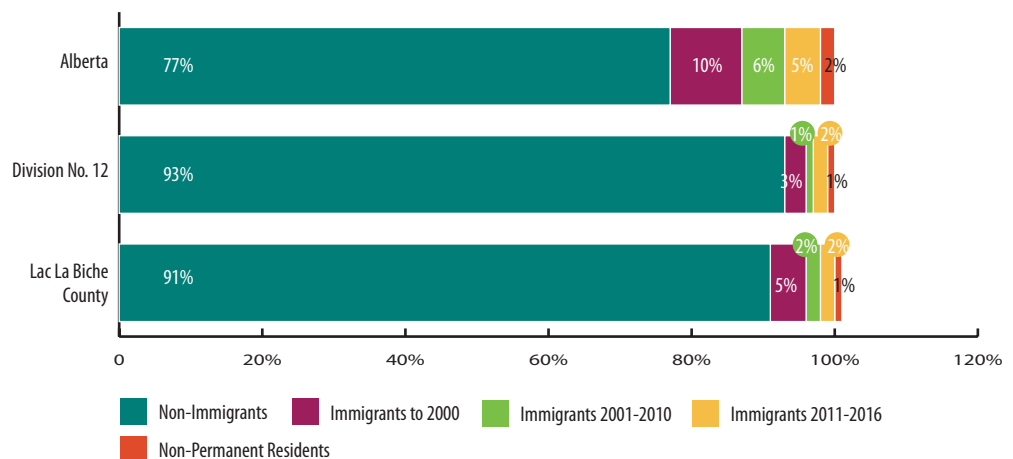


IMMIGRATION AND ETHNIC DIVERSITY

As seen in Figure 14, in 2016 Lac La Biche County had a significantly larger proportion of non-immigrants in its population at 91% compared to the Province at 77%. However, this high proportion of non-immigrants is in line with other communities in Division No. 12, which is only marginally higher at 93%. Interestingly, Lac La Biche County has seen a slowdown in immigration in recent years, with the majority of immigrants (5%) arriving prior to 2000 and only (3%) arriving during the 2001 to 2016 period. This slowdown is in line with communities across Division No.12, yet is significantly below that of the Province which has seen 13% of total immigration occurring from 2000 to 2016. Moving forward, Lac La Biche County should continue to monitor immigration numbers as immigrants are a good source of both skilled and unskilled labour for a community.

FIGURE 14
MIGRATION
LEVELS, LAC LA
BICHE COUNTY
AND KEY
COMPARATORS,
2016

Source: Statistics Canada, 2016 Census of Population

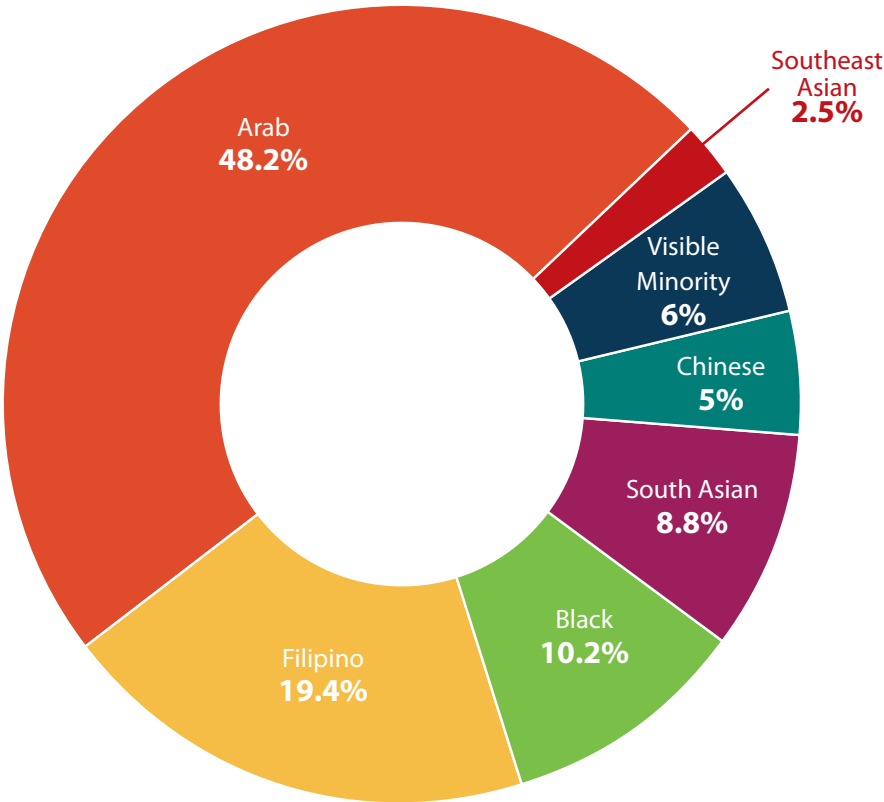


The ethnic diversity of Lac La Biche County is another way of understanding the composition of communities (see Figure 15). The Visible Minority refers to whether a person belongs to a visible minority group as defined by the Employment Equity Act. Visible minorities are defined as “persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour.”

Approximately 816 people (9.5% of the total population) identified themselves as a visible minority in Lac La Biche County. The Arab population is the largest minority group at 48.2%. This is followed by the Filipino population at 19.4% and the Black population at 10.2%. Overall, Lac La Biche County can be seen as a strong multicultural community that is welcoming of a wide range of different cultures.

FIGURE 15
VISIBLE
MINORITY,
LAC LA BICHE
COUNTY, 2018

Source: 2018 Manifold Data Mining Inc.

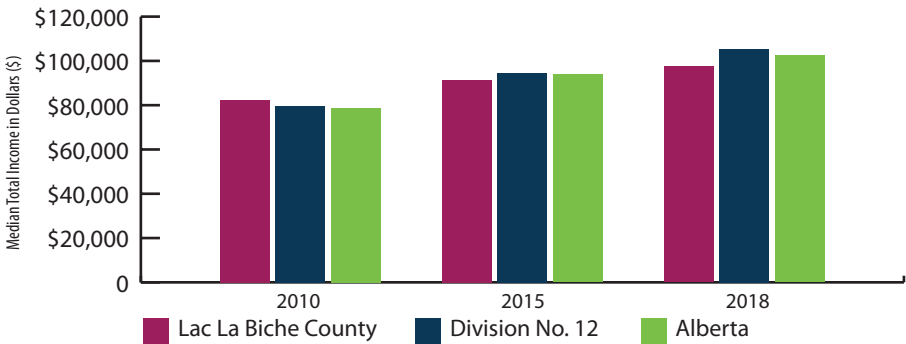


INCOME LEVELS

Figure 16 shows changes in median total household income for Lac La Biche County and the key comparators over the 2010 to 2018 period. The median income of a specified group is the amount that divides the income distribution of that group into two halves, i.e., the incomes of half of the units in that group are below the median, while those of the other half are above the median. For the 2011 and 2016 Census, the reference period is the previous calendar year for all income variables.

Median total income in Lac La Biche County in 2018 was \$97,470, which was slightly below that of the Division No. 12 at \$105,506 and the Province at \$102,378. From 2010 to 2018, median household income grew by 16% in Lac La Biche County, an increase of \$15,272. Whilst strong, this figure was significantly below that of the key comparators, with Division No. 12 experiencing income growth of \$25,779 (24%) and the Province \$23,746 (23%) over the same time period.

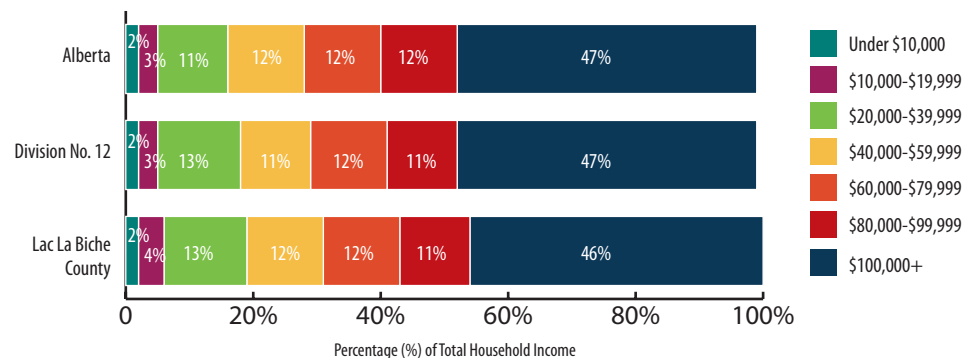
FIGURE 16
MEDIAN
HOUSEHOLD
INCOME (\$),
LAC LA BICHE
COUNTY &
COMPARATORS,
2010, 2015 &
2018



Source: Statistics Canada, 2016 Census of Population. Statistics Canada; 2011 Census of Population. 2018 Manifold Data Mining Inc.

Figure 17 shows total household income distributed by income groups. Lac La Biche County's distribution of income is only marginally different to that of Division No.12 and The Province. Most interestingly, the majority of households (over 46%) for all three comparators sit within the high-income group of \$100,000. This is most likely due to the high wages associated with the oil and gas sector which is a key industry for the Province.

FIGURE 17
HOUSEHOLD
INCOME BY
BROAD INCOME
GROUPS, (\$),
LAC LA BICHE
COUNTY &
COMPARATORS,
2018

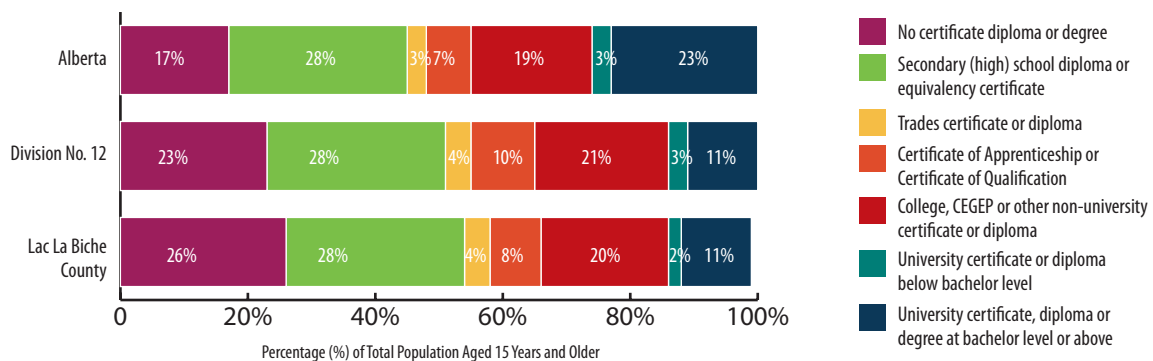


Source: 2018 Manifold Data Mining Inc.

EDUCATIONAL PROFILE

It was determined that in 2018, 26% of the population aged 15 years and over had no certificate, diploma or degree which was the highest ranking out of the key comparators (see Figure 18). For people with a secondary (high) school diploma or equivalency certificate, Lac La Biche County's share of the labour at 28% is on par with that of Division No. 12 and the Province. The share of people with college, CEGEP or non-university diploma or degree (20%) is marginally higher than the Province yet slightly lower than Division No. 12. Interestingly, Lac La Biche County and Division No.12 both have a significantly lower proportion of the population with a university certificate, diploma or degree at bachelor level or above, at 11% compared to the Province at 23%. This indicates that Lac La Biche County's population is comparatively less educated than the Province.

FIGURE 18
EDUCATIONAL ATTAINMENT OF POPULATION AGED 15 YEAR
AND OLDER, LAC LA BICHE COUNTY & COMPARATORS, 2018



Source: 2018 Manifold Data Mining Inc.

Figure 19 shows the major fields of study for Lac La Biche County's population aged 15 years and over with a postsecondary certificate, diploma, or degree. Over half of The County's population (54%) have not completed a post secondary education, which is 3% higher than Division No.12 and 10% higher than the Province. Out of the population with a post secondary education, 14% have an education related to architecture, engineering, and related technologies, followed by business management and public administration at 8%.

FIGURE 19
POSTSECONDARY CERTIFICATE; DIPLOMA OR DEGREE
BY FIELD OF STUDY (15 YEARS AND OVER), LAC LA BICHE
COUNTY AND KEY COMPARATORS, 2018

Total population aged 15 years and over with postsecondary qualifications by major field of study	Lac La Biche County	% of total	Division No. 12	% of total	Alberta	% of total
Total	6,881	100%	56,052	100%	3,568,240	100%
No postsecondary certificate, diploma or degree	3,686	54%	28,365	51%	1,579,420	44%
Education	360	5%	2,469	4%	137,375	4%
Visual and performing arts, and communications technologies	36	1%	512	1%	59,377	2%
Humanities	128	2%	830	1%	81,049	2%
Social and behavioural sciences and law	212	3%	1,785	3%	179,575	5%
Business, management and public administration	532	8%	4,154	7%	400,296	11%
Physical and life sciences and technologies	61	1%	620	1%	84,800	2%
Mathematics, computer and information sciences	74	1%	542	1%	71,821	2%
Architecture, engineering, and related technologies	973	14%	9,461	17%	510,471	14%
Agriculture, natural resources and conservation	164	2%	1,114	2%	54,337	2%
Health and related fields	456	7%	3,901	7%	300,683	8%
Personal, protective and transportation services	199	3%	2,299	4%	108,413	3%
Other fields of study	-	0%	-	0%	619	0%

Source: 2018 Manifold Data Mining Inc.

Labour Force Profile

LABOUR FORCE STATUS

The labour force profile shows that Lac La Biche County has a lower labour participation rate of 67.4% (see Figure 20) compared to the Province at 71.7%, indicating less people are employed or are actively seeking work. Further, Lac La Biche County has a marginally higher unemployment rate of 7.3% compared to the Province at 7.1%, which could indicate limited employment opportunities. Overall, this indicates a tighter local job market than the Province.

FIGURE 20
LABOUR FORCE
STATUS, LAC LA
BICHE COUNTY &
COMPARATORS,
2018

Labour force status for Population aged 15 years and over	Lac La Biche County	Division No. 12	Alberta
Participation rate	67.4%	71.3%	71.7%
Employment rate	62.5%	65.5%	66.7%
Unemployment rate	7.3%	8.2%	7.1%

Source: 2018 Manifold Data Mining Inc.

LABOUR FORCE BY INDUSTRY

Figure 21 shows the percentage of the employed labour force by industry in Lac La Biche County and comparative rates in Division No. 12 and Alberta in 2018. The analysis for Lac La Biche County shows that employment is centred in the following industry sectors:

- Construction – 517 people (11% of the total labour force).
- Retail trade – 450 people (10% of the total labour force).
- Educational services – 440 people (9% of the total labour force).
- Mining, quarrying, and oil and gas extraction – 428 people (9% of the total labour force).

Compared to Division No. 12 and Alberta, Lac La Biche County has a higher proportion of the labour force employed in the mining, quarrying, and oil and gas extraction sector, construction sector and educational services sector.

FIGURE 21
LABOUR FORCE BY INDUSTRY (%), LAC LA BICHE COUNTY & COMPARATORS,
2018

Total labour force population aged 15 years and over by industry - (NAICS)	Lac La Biche County	% of Total	Division No. 12	% of Total	Alberta	% of Total
Industry - not applicable	50	1%	758	2%	48,781	2%
All industries	4,590	99%	39,214	98%	2,511,180	98%
11 Agriculture, forestry, fishing and hunting	286	6%	2,227	6%	72,917	3%
21 Mining, quarrying, and oil and gas extraction	428	9%	5,806	15%	156,604	6%
22 Utilities	33	1%	268	1%	28,140	1%
23 Construction	517	11%	3,813	10%	256,557	10%
31-33 Manufacturing	193	4%	1,093	3%	140,515	5%

Total labour force population aged 15 years and over by industry - (NAICS)	Lac La Biche County	% of Total	Division No. 12	% of Total	Alberta	% of Total
41 Wholesale trade	98	2%	831	2%	91,808	4%
44-45 Retail trade	450	10%	3,704	9%	271,127	11%
48-49 Transportation and warehousing	371	8%	1,777	4%	127,561	5%
51 Information and cultural industries	34	1%	355	1%	39,931	2%
52 Finance and insurance	90	2%	794	2%	80,028	3%
53 Real estate and rental and leasing	57	1%	510	1%	49,909	2%
54 Professional, scientific and technical services	177	4%	1,410	4%	184,400	7%
55 Management of companies and enterprises	11	0%	55	0%	7,747	0%
56 Administrative and support, waste management and remediation services	162	3%	1,432	4%	98,008	4%
61 Educational services	440	9%	2,605	7%	161,523	6%
62 Health care and social assistance	397	9%	3,736	9%	267,723	10%
71 Arts, entertainment and recreation	94	2%	690	2%	54,115	2%
72 Accommodation and food services	254	5%	2,071	5%	168,811	7%
81 Other services (except public administration)	184	4%	1,833	5%	117,047	5%
91 Public administration	314	7%	4,203	11%	136,708	5%

Source: 2018 Manifold Data Mining Inc.

Figure 22 shows that the labour force by industry in Lac La Biche County had a drop of 225 people, a 5% decline from 2011 to 2016. The following sectors showed the largest growth in terms of net employment:

- Administrative and support, waste management and remediation services – net growth of 75 people (107%).
- Finance and insurance – net growth of 35 people (70%).
- Professional, scientific and technical services – net growth of 60 people (67%).
- Manufacturing – net growth of 45 people (39%).

Sectors that had the largest decline in employment for the same period were:

- Utilities – a decline of 30 people (-67%).
- Information and cultural industries – a decline of 30 people (-67%).
- Real estate and rental and leasing – a decline of 40 people (-57%).
- Wholesale trade – a decline of 85 people (-50%).

Figure 22 also includes labour force change 2016-2018. The 2016 information continues to come from Statistics Canada, 2016 Census and the 2018 information comes from Manifold Data Mining Inc. While this information comes from two different sources and is not an exact reflection of the labour force shift, it provides approximate insight to recent labour force trends by industry.

The following sectors showed the largest growth in terms of net employment:

- Information and cultural industries – an increase of 19 people (127%).
- Utilities – an increase of 18 people (120%).
- Real estate and rental and leasing – an increase of 27 people (90%).
- Sectors that had the largest decline in employment numbers for the same period were:
- Mining, quarrying, and oil and gas extraction – a decline of 17 people (-4%).
- Agriculture, forestry, fishing and hunting – a decline of 6 people (2%).

FIGURE 22
EMPLOYED LABOUR FORCE BY INDUSTRY (%), LAC LA BICHE COUNTY,
2011, 2016 & 2018

Total labour force population aged 15 years and over by industry - (NAICS)	Year			Labour Force Change 2011-2016		Labour Force Change 2016-2018	
	2011	2016	2018	Net Change	% Change	Net Change	% Change
All industries	4,560	4,335	4,590	-225	-5%	255	6%
Agriculture, forestry, fishing and hunting	405	280	286	-125	-31%	6	2%
Mining, quarrying, and oil and gas extraction	445	445	428	0	0%	-17	-4%
Utilities	45	15	33	-30	-67%	18	120%
Construction	505	525	517	20	4%	-8	-2%
Manufacturing	115	160	193	45	39%	33	21%
Wholesale trade	170	85	98	-85	-50%	13	15%
Retail trade	400	410	450	10	3%	40	10%
Transportation and warehousing	325	370	371	45	14%	1	0%
Information and cultural industries	45	15	34	-30	-67%	19	127%
Finance and insurance	50	85	90	35	70%	5	6%
Real estate and rental and leasing	70	30	57	-40	-57%	27	90%
Professional, scientific and technical services	90	150	177	60	67%	27	18%
Management of companies and enterprises	-	10	11	10	-	1	10%
Administrative and support, waste management and remediation services	70	145	162	75	107%	17	12%
Educational services	485	395	440	-90	-19%	45	11%
Health care and social assistance	375	385	397	10	3%	12	3%
Arts, entertainment and recreation	125	90	94	-35	-28%	4	4%
Accommodation and food services	230	240	254	10	4%	14	6%
Other services (except public administration)	210	180	184	-30	-14%	4	2%
Public administration	395	300	314	-95	-24%	14	5%

Source: Statistics Canada, 2011 National Household Survey. Statistics Canada, 2016 Census of Population 2018 Manifold Data Mining Inc.

COMMUTING PATTERNS

While the labour force by industry data provides information on the type of industry where Lac La Biche County's population are employed, it does not indicate if the labour force is employed in industries within Lac La Biche County or if they commute outside the community to work. The commuting patterns are important in this regard as it indicates where Lac La Biche County's labour force live and work.

The data, as shown in Figure 23, is interpreted as follows. The first column indicates the residents of Lac La Biche County working in Lac La Biche County. The second column (indicated as A in the table) indicates the number of residents 'working outside' Lac La Biche County while the third column (indicated as B in the table) indicates the number of jobs held by non-residents working in the community. When interpreting the table, if (B-A) is positive, it indicates a community is a net importer of workers; more people commute into the community to work in it than leave it. Conversely, if (B-A) is negative, it indicates a community is a net exporter of workers; more people leave the community to work than enter it for work.

As illustrated in Figure 23, approximately 2,030 residents work in Lac La Biche County's industrial sectors. The majority of residents perform jobs in Lac La Biche County's educational services, health care and social assistance, retail trade and public administration industry sectors. Approximately 800 Lac La Biche County residents work outside Lac La Biche County (A). Most residents travel to communities outside Lac La Biche County to work in the mining, quarrying, and oil and gas extraction and manufacturing industry sectors, among others. Mining, quarrying, and oil and gas extraction, educational services and retail trade are the top three sectors that attract the greatest number of non-residents to work in Lac La Biche County (B).

Considering the net flow of labour, Lac La Biche County is a net importer of workers. While commuter inflow accounts for 970 residents, commuter outflow only accounts for 800. Therefore, Lac La Biche County net imports 170 people. Mining, quarrying, and oil and gas extraction and transportation and warehousing account for the majority of worker import. Most workers come to Lac La Biche County to work in mining, quarrying, and oil and gas extraction (125); transportation and warehousing (45); and health care and social assistance. Conversely, the industry that exports the most workers includes manufacturing (-90).

FIGURE 23
NET EXPORT (-)/NET IMPORT (+) OF LABOUR BY INDUSTRY, 2016

Net Export (-)/Net Import (+) of Labour by Industry, 2016	Residents working IN Lac La Biche County	Lac La Biche County resident 'working outside' Lac La Biche County (A)	Non-Residents 'working in' Lac La Biche County' (B)	B-A = Net Import (+)/Net Export (-)
Total - Industry - North American Industry Classification System (NAICS) 2012	2,030	800	970	170
Agriculture, forestry, fishing and hunting	35	55	10	-45
Mining, quarrying, and oil and gas extraction	90	125	250	125
Utilities	20	0	0	0
Construction	85	85	50	-35
Manufacturing	30	100	10	-90
Wholesale trade	75	10	10	0
Retail trade	255	85	85	0
Transportation and warehousing	160	30	75	45
Information and cultural industries	10	0	0	0
Finance and insurance	60	15	20	5

Net Export (-)/Net Import (+) of Labour by Industry, 2016	Residents working IN Lac La Biche County	Lac La Biche County resident 'working outside' Lac La Biche County (A)	Non-Residents 'working in' Lac La Biche County' (B)	B-A = Net Import (+)/Net Export (-)
Real estate and rental and leasing	20	0	0	0
Professional, scientific and technical services	55	10	35	25
Management of companies and enterprises	0	0	0	0
Administrative and support, waste management and remediation services	50	40	30	-10
Educational services	325	65	90	25
Health care and social assistance	265	50	80	30
Arts, entertainment and recreation	75	0	20	20
Accommodation and food services	145	55	70	15
Other services (except public administration)	85	35	10	-25
Public administration	200	50	55	5

Source: Statistics Canada, 2016 Census of Population.

Figure 24 shows where residents of Lac La Biche County work. The majority of residents' commute to work in Athabasca County (34% of the commuting workforce), followed by Wood Buffalo (22% of the commuting workforce) and Boyle (11% of the commuting workforce).

FIGURE 24
PLACE OF WORK
FOR RESIDENTS
OF LAC LA BICHE
COUNTY, 2016

Communities	Number of Residents	% of the total
Commuting Workforce	800	100%
Athabasca County	275	34.4%
Wood Buffalo	175	21.9%
Boyle	90	11.3%
Improvement District No. 349	45	5.6%
Edmonton	35	4.4%
Cold Lake	25	3.1%
Bonnyville Town	20	2.5%
St. Paul	20	2.5%
Smoky Lake County	15	1.9%
Beaver Lake	10	1.3%
Bonnyville Municipal District No. 87	10	1.3%
Forestburg	10	1.3%
Forty Mile County	10	1.3%
Grande Cache	10	1.3%
Heart Lake	10	1.3%
Spruce Grove	10	1.3%
St. Paul County	10	1.3%
Strathcona County	10	1.3%
White Fish Lake	10	1.3%

Source: Statistics Canada, 2016 Census of Population.

Figure 25 shows the commuting patterns of workers who commute to Lac La Biche County to work. The majority of non-residents who work in the Lac La Biche County are from Wood Buffalo (205 people - 21.1% of total), Smoky Lake County (125 people - 12.9% of total), and Athabasca County (115 people - 11.9% of total).

FIGURE 25
PLACE OF
RESIDENCE FOR
WORKERS WHO
COMMUTE TO
LAC LA BICHE
COUNTY TO
WORK, 2016

Communities	Number of Residents	% of the total
Non-residents 'working in' Lac La Biche County	970	100%
Wood Buffalo	205	21.1%
Smoky Lake County	125	12.9%
Athabasca County	115	11.9%
Edmonton	115	11.9%
Calgary	50	5.2%
Red Deer	25	2.6%
Airdrie	20	2.1%
Bonnyville	20	2.1%
Cold Lake	15	1.5%
Barrhead County	10	1.0%
Rest of Communities	270	28%

Source: Statistics Canada, 2016 Census of Population.

LABOUR FORCE BY TOP OCCUPATION SUB-SECTORS

The labour force by occupations shows that trades; transport and equipment operators and related occupations rank the highest in Lac La Biche County, accounting for 25% (1,138) of total occupations. Trades; transport and equipment operators and related occupations are also the top occupations in Division No. 12 and in The Province. Lac La Biche County also has a similar percentage for sales and service occupations at 19% (873 occupations) compared to Division No. 12 at 18% (7,375 occupations).

FIGURE 26
LABOUR FORCE
AGED 15 YEARS
AND OVER BY
OCCUPATION
(%), LAC
LA BICHE
COUNTY &
COMPARATORS,
2018

Total labour force 15 years and over by occupation	Lac La Biche County	% of Total	Division No. 12	% of Total	Alberta	% of Total
	4,640	100%	39,972	100%	2,559,960	100%
Occupation - not applicable	50	1%	758	2%	48,781	2%
All occupations	4,590	99%	39,214	98%	2,511,180	98%
0 Management occupations	471	10%	4,592	11%	289,461	11%
1 Business; finance and administration occupations	592	13%	4,841	12%	389,855	15%
2 Natural and applied sciences and related occupations	176	4%	1,851	5%	195,023	8%
3 Health occupations	213	5%	2,154	5%	168,026	7%
4 Occupations in education; law and social; community and government services	453	10%	4,497	11%	253,122	10%
5 Occupations in art; culture; recreation and sport	93	2%	606	2%	59,669	2%
6 Sales and service occupations	873	19%	7,375	18%	540,527	21%
7 Trades; transport and equipment operators and related occupations	1,138	25%	8,630	22%	447,315	17%
8 Natural resources; agriculture and related production occupations	347	7%	2,713	7%	83,644	3%
9 Occupations in manufacturing and utilities	233	5%	1,956	5%	84,537	3%

Source: Statistics Canada, 2016 Census of Population. 2018 Manifold Data Mining Inc.

Business Environment and Structure

A business characteristics assessment was completed to study the number and type of businesses in the Lac La Biche County. Specifically, businesses in Lac La Biche County were profiled by total employee number, size of business establishments by employees and businesses by industry.

NOTES ON DATA

Statistics Canada's Canadian Business Counts Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for Lac La Biche County include all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of \$30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

INTERPRETING THE DATA

Canadian business counts are compiled from the Business Register, Statistics Canada's central listing of Canadian businesses. The Canadian Business Counts Data records business counts by "Total," "Indeterminate" and "Subtotal" categories. The establishments in the "Indeterminate" category include the self-employed (i.e. those who do not maintain an employee payroll but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Counts Data uses the CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada. There are some considerations when analyzing and interpreting the data.

- As changes to the Business Register's methodology or business industrial classification strategies can bring about increases or decreases in the number of active businesses, it is important to study the data as a percentage of total businesses rather than focus on absolute numbers.
- As mentioned above the "Indeterminate" category of businesses include contracted workers, family members or business owners who list the businesses as belonging to an industrial sector, and this may show high business numbers for an industry.

Statistics Canada also specifies that the business counts are based on the statistical concept of "location"—that is, each operating location is separately counted, including cases where one business comprises multiple locations. For example, a retail business with ten stores represents ten businesses in the Canadian business counts.

Canadian Business Counts Data includes all registered companies that have a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories in Lac La Biche County as the criteria for registering are different for both. The Canadian Business Counts data are used so that comparisons can be made to the Provincial Distribution of businesses across the same categories.

KEY BUSINESS CHARACTERISTICS

A detailed review of the business counts data was studied using the Canadian Business Counts. As of December 2019, approximately 1,356 businesses were registered in Lac La Biche County. Figure 26 shows the total businesses in Lac La Biche County.

Of the 1,273 businesses classified by industry, the majority were businesses without employees (i.e.) sole-proprietorships; approximately, 793 (62%) of businesses fall under this category. 272 businesses employ between 1 to 4 employees, while 164 businesses employed between 5 to 19 employees. Lac La Biche County has limited large business establishments, with approximately only 7 businesses employing at least 100 employees.

FIGURE 27
TOTAL BUSINESSES, LAC LA BICHE COUNTY, DECEMBER 2019

Category	Total Businesses	Total Without Employees	Total With Employees	Businesses With Employees							
				1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+
Total	1,356	850	506	293	106	63	31	6	4	3	0
Unclassified	83	57	26	21	4	1	0	0	0	0	0
Sub-total, classified	1,273	793	480	272	102	62	31	6	4	3	0
% of Sub-total	100%	62%	38%	21%	8%	5%	2%	0%	0%	0%	0%

Source: Canadian Business Counts, December 2019

The following sectors exhibited the highest proportion of business establishments by industry in 2019 (see Figure 28). These include sole-proprietorships and businesses with employees.

- Construction – 223 businesses (18% of total businesses)
- Agriculture, forestry, fishing and hunting – 217 businesses (17% of total businesses)
- Real estate and rental and leasing – 151 businesses (12% of total businesses)
- Transportation and warehousing – 111 businesses (9% of total businesses)

Analyzing sole-proprietorships (Figure 22), showed that industry sectors with the highest number of sole-proprietorships in 2019 remain consistent with the highest business establishment proportions. The sectors with the highest sole proprietorships in 2019 were:

- Agriculture, forestry, fishing and hunting – 181 businesses (23% of total businesses)
- Real estate and rental and leasing – 134 businesses (17% of total)
- Construction – 130 businesses (16% of total businesses)

Analyzing businesses with employees (Figure 22), it was determined that top industry sectors in 2019 were:

- Construction – 93 businesses (19% of total businesses)
- Retail trade – 63 businesses (13% of total businesses)
- Other services (except public administration) – 54 businesses (11% of total businesses)

FIGURE 28
BUSINESSES WITH AND WITHOUT EMPLOYEES BY INDUSTRY, LAC LA
BICHE COUNTY, 2019

Total Businesses	Total Businesses		Without Employees		Total, With Employees	
	Counts	%	Counts	%	Counts	%
Sub-total, classified	1,273	100%	793	100%	480	100%
Agriculture, forestry, fishing and hunting	217	17%	181	23%	36	8%
Mining, quarrying, and oil and gas extraction	39	3%	23	3%	16	3%
Utilities	3	0%	0	0%	3	1%
Construction	223	18%	130	16%	93	19%
Manufacturing	10	1%	5	1%	5	1%
Wholesale trade	22	2%	11	1%	11	2%
Retail trade	85	7%	22	3%	63	13%
Transportation and warehousing	111	9%	61	8%	50	10%
Information and cultural industries	6	0%	0	0%	6	1%
Finance and insurance	39	3%	30	4%	9	2%
Real estate and rental and leasing	151	12%	134	17%	17	4%
Professional, scientific and technical services	90	7%	53	7%	37	8%
Management of companies and enterprises	7	1%	7	1%	0	0%
Administrative and support, waste management and remediation services	40	3%	33	4%	7	1%
Educational services	9	1%	5	1%	4	1%
Health care and social assistance	53	4%	23	3%	30	6%
Arts, entertainment and recreation	10	1%	6	1%	4	1%
Accommodation and food services	57	4%	25	3%	32	7%
Other services (except public administration)	98	8%	44	6%	54	11%
Public administration	3	0%	0	0%	3	1%

Source: Canadian Business Counts, December 2019

As shown in Figure 29, Lac La Biche County is characterized by small enterprises that employ less than ten people (29%). The industries with the highest number of establishments employing fewer than ten people were:

- Construction – 83 businesses
- Other services (except public administration) – 49 businesses
- Transportation and warehousing – 43 businesses
- Retail Trade – 42 businesses

FIGURE 29
BUSINESSES WITH EMPLOYEES BY EMPLOYEE RANGE, LAC LA
BICHE COUNTY, 2019

Total	Total, with employees	Employee Range							
		1-4	5-9	10-19	20-49	50-99	100 - 199	200 - 499	500+
Sub-total, classified	480	272	102	62	31	6	4	3	0
Agriculture, forestry, fishing and hunting	36	22	6	3	4	1	0	0	0
Mining, quarrying, and oil and gas extraction	16	9	2	0	3	0	1	1	0
Utilities	3	0	0	2	1	0	0	0	0
Construction	93	63	20	6	3	0	1	0	0
Manufacturing	5	3	0	1	1	0	0	0	0
Wholesale trade	11	7	2	2	0	0	0	0	0
Retail trade	63	20	22	15	4	1	1	0	0
Transportation and warehousing	50	36	7	4	1	2	0	0	0
Information and cultural industries	6	1	3	2	0	0	0	0	0
Finance and insurance	9	1	2	5	1	0	0	0	0
Real estate and rental and leasing	17	10	2	4	1	0	0	0	0
Professional, scientific and technical services	37	34	3	0	0	0	0	0	0
Management of companies and enterprises	0	0	0	0	0	0	0	0	0
Administrative and support, waste management and remediation services	7	3	2	1	1	0	0	0	0
Educational services	4	1	1	0	1	0	0	1	0
Health care and social assistance	30	15	4	4	7	0	0	0	0
Arts, entertainment and recreation	4	1	2	1	0	0	0	0	0
Accommodation and food services	32	9	12	8	2	0	1	0	0
Other services (except public administration)	54	37	12	4	1	0	0	0	0
Public administration	3	0	0	0	0	2	0	1	0

Source: Canadian Business Counts, December 2019

INDUSTRY CONCENTRATION

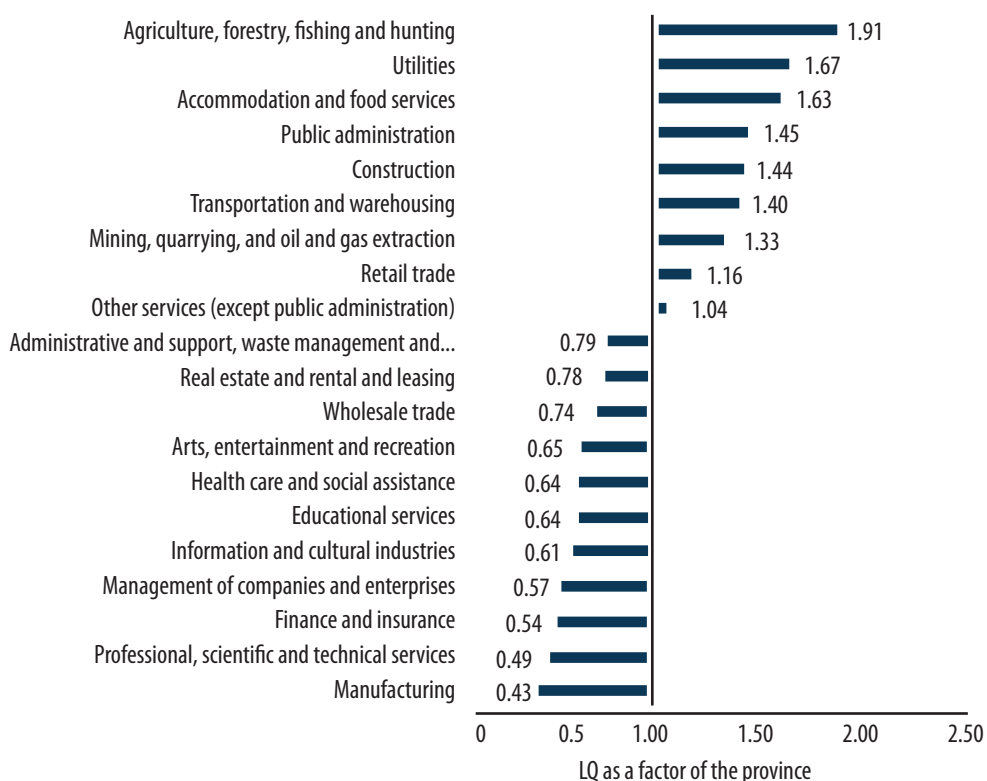
As part of the study, the Location Quotient (LQ) Analysis was completed to determine the concentration of jobs or industries in Lac La Biche County relative to The Province. It reveals what makes a region “unique.” The LQ’s Classifications are as follows:

- LQ greater than or equal to 1.25 – indicates that the community has a proportionately ‘high’ concentration of workers/industries than the larger comparison area employed in a specific industry.
- LQ lower than 1.25 and higher than 1.0 – indicates that the community has an ‘above average’ concentration of workers/industries than the larger comparison area employed in a specific industry.
- LQ 1.0 – indicates employment/industry concentration in the community is ‘on par’ with the larger comparison area employed in a specific industry.
- LQ lower than 1.0 and higher than 0.75 – indicates that the community has a ‘moderate’ concentration of workers/industries than the larger comparison area employed in a specific industry.
- LQ lower than 0.75 - indicates that the community has a ‘low’ concentration

The location quotients analysis (Figure 30) for the business sector in Lac La Biche County compared to the average Alberta community of business provides the following insights:

- Agriculture, forestry, fishing and hunting with an LQ of 1.91 is a competitive industry for Lac La Biche County. This industry includes 217 businesses, 5 of which have between 20 and 99 employees. Other notable competitive industries include public administration (LQ of 1.45), transportation and warehousing (LQ of 1.40) and mining, quarrying, and oil and gas extraction (LQ of 1.33).
- Notable sectors with businesses on par with business in the province include retail trade (LQ of 1.16), administrative and support, other services (except public administration) (LQ of 1.04) and waste management and remediation services (LQ of 0.79)
- Notable sectors with low business concentration compared to the Province include manufacturing (LQ of 0.43), professional, scientific and technical services (LQ of 0.49), and health care and social assistance (LQ of 0.64)

FIGURE 30
LOCATION
QUOTIENT (LQ)
ANALYSIS BY
BUSINESSES,
LAC LA BICHE
COUNTY, 2019



Source: Canadian Business Counts, December 2019

Appendix C:

Business Satisfaction Survey Results

The full Business Satisfaction Survey report is attached separately.

Appendix D:

Stakeholder Interview Themes

In developing the economic development strategy for Lac La Biche County, roughly 15 community leaders, business owners, industry leaders, and youth were consulted through one-on-one telephone interviews. These conversations uncovered opportunities, strengths, and pressure points in Lac La Biche County's local economy. Key themes have been identified from the stakeholder interviews that were conducted. They include:

THE OIL AND GAS SECTOR IS STILL IMPORTANT FOR THE LOCAL ECONOMY

A key theme that emerged from the stakeholder interviews is the continued importance of the oil and gas sector to the local economy. Although this sector has been declining over the past several years community members believe that there exist opportunities to capture greater value from this industry. One suggestion is for Lac La Biche County to better leverage its geographic proximity to the Steam-assisted gravity drainage (SAGD) projects to become a regional business hub. Lac La Biche County is the closest community the SAGD developments but receives less than 1% of their annual operational maintenance budget spend which is estimated to be between \$2-\$3 billion. This is because SAGD operators employ construction workers on a fly in and fly out basis which is limiting the economic development opportunities to the local economy.

To better capture the value from the SAGD projects, greater investments in developing commercial areas is required such as increasing the supply of developed industrial lots in Lac La Biche County. The creation of an industrial park that seeks to service SAGD project has the potential to significantly improve the economy for Lac La Biche County. A good example of a successful industrial park is the Brazeau Business park in the Town of Drayton Valley. The County could also leverage Portage College as they have a heavy equipment training program that could be engaged to assist in the construction and or supply of local talent.

BUSINESS ATTRACTION AND RETENTION

Lac La Biche County's declining population over recent years has resulted in several local businesses closing or significantly increasing product prices to cover costs. Therefore, an identified theme was the need to attract more new businesses and also provide support to existing ones. Several stakeholders interviewed proposed introducing a 3-year tax incentive scheme as a strategy to attract new businesses to the region. Further, there was a perception amongst stakeholders that the current tax rate of commercial and industrial land is extremely high. Even if the rate may be comparable to other community's, business owners feel like they are not getting value for their money and that this is discouraging new investments. which may be due to poor communication on the part of the County.

It was also noted that historically there has also been a trend amongst residents and some business leaders in blocking big businesses from establishing in Lac La Biche County. Overcoming this local community resistance therefore would be a key challenge if any large businesses are targeted in the economic development strategy.

Develop Tourism Opportunities

Tourism was also identified as being a critical resource to boost Lac La Biche County's economy that is currently being underutilised.

UNDERUTILISATION OF THE LAKE

One of the most important natural assets identified by stakeholders was Lac La Biche County lake. Stakeholder feedback indicated that the health issues associated with the lake and subsequent banning of certain sport fishing activities has reduced tourism visitation, with fishermen instead going to other lakes within the region (e.g. Cold Lake). Prioritising improving the health of the lake therefore should be a key priority within any economic development plan.

Similarly, increasing the number of facilities that are centered around the lake would also increase the attractiveness of Lac La Biche County as both a place to live and place to visit. For example, the creation of a boat ramp closer to Lac La Biche town was one proposed initiative as well as improving the local dock. Additionally, increasing the number of facilities and events in McArthur Park so that it becomes a central recreational hub would also strength Lac La Biche County's tourism offerings.

EXPANSION OF WALKING AND BACK COUNTRY SNOW MOBILE TRAILS

The County's abundance of natural resources was identified as a huge asset for the region that could be enhanced through the creation of additional walking and snow mobile trails. Currently, snow mobile riders are using private farmer property to engage with riding. However, if the council invested more in developing high quality trails then this could serve as a key attraction within the region and thereby increase visitation numbers.

COMMUNITY IMAGE AND BRANDING

High crime rates within Lac La Biche County in combination with high vacancies on the main street in Lac La Biche town was identified by stakeholders as not being attractive for tourists. Similarly, limited town events and tourism products means that the value proposition for visitors to come to the county is poor. There was consensus amongst stakeholders surveyed that improving branding and marketing would attract more tourists and therefore bolster the local economy.

Encourage Spending Locally

Another challenge facing Lac La Biche County businesses is the lack of local spend by residents. Stakeholder surveyed indicated that residents are more likely to travel outside of the County to other regional hubs to conduct shopping activities, specially for big item purchases, or buy online. A number of factors were identified behind this including:

- **High fuel prices** – All stakeholders interviewed indicated that fuel prices are on average 8-10 cents higher then other local communities. This has several negative impacts to the economy including discouraging visitors passing through the County from stopping and also incentivising local residents to fill up in other communities and conduct there weekly shopping there as well.
- **Limited product selection** – Due to the small number of local businesses and small product range many residents engage either in online shopping or travel outside of Lac La Biche County as there is a better product range. One proposed suggestion to combat this would be for local businesses to offer online ordering pick-up locations so that residents in more remote parts of the county could pick up items in the town.

Farm to Table

Agriculture is also an important part of the local economy and several stakeholders identified opportunities to expand within this sector. One recommendation was to engage with local indigenous communities to support vertical growing of vegetables. The idea is to create a program of 365 greenhouses at the family operation level and then coordinate an approach to connect those interested in growing with those interested in buying. The market could be used in large facilities like hospitals, the College cafeteria, local restaurants and tourist attractions like Metis Crossing. Whilst this is a small scale approach that could bolster the local tourism economy and increase job opportunities for families in indigenous communities.

Forestry Industry is a Pillar of Strength

Forestry was also identified as being critical in supporting Lac La Biche County's economy. However, unlike the oil and gas and tourism sectors which have been underperforming over recent years, forestry has seen consistent economic returns. Furthermore, key forestry businesses such as ALPAC are regarded as being prime examples of firms that have been investing in the local economy as they employ a large number of local residents. Stakeholders interviewed suggested that any new big businesses attracted should follow ALPACs model of prioritising hiring locally. Any economic development strategy should incorporate the forestry industry as being a key strength of the region.

Improving Community Engagement

An over arching theme identified in the interviews is that businesses feel council needs to be taking more action over improving the local economy. Many stakeholders interviewed felt that all that has occurred over previous years is talking without any action or results. There are many different interest groups in the local region which has resulted in it being difficult for council to reach a consensus and make progress. Therefore, a key theme is for council to improve upon its ability to implement meaningful changes in the local economy and to improve communication channels with local residents.

