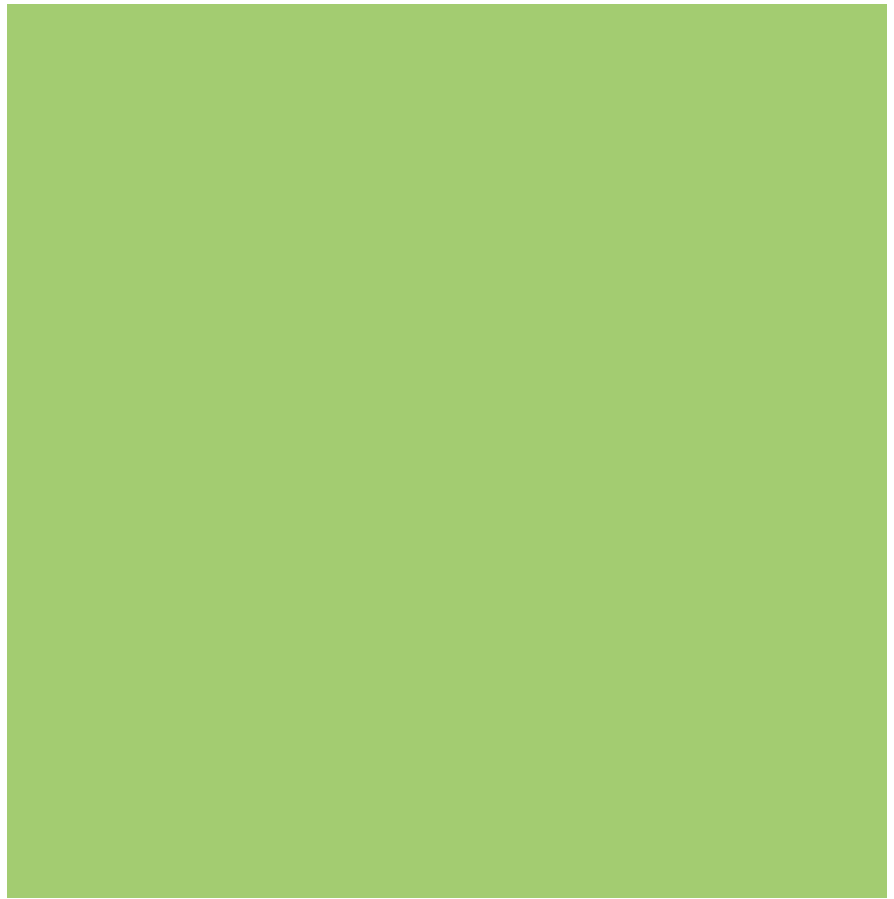
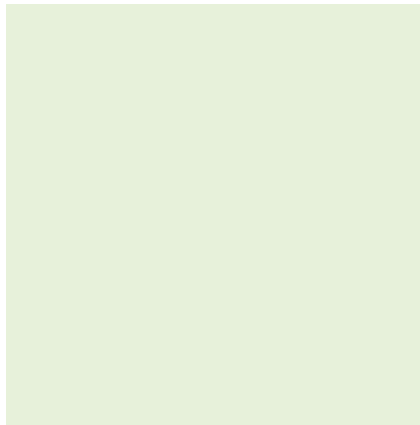
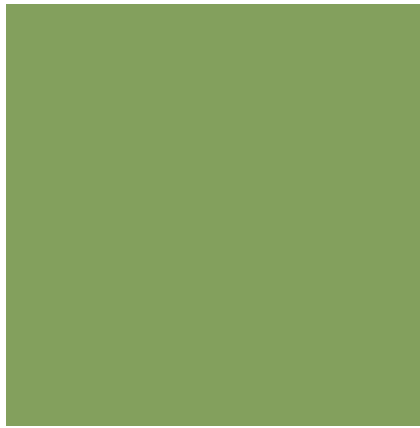


## Appendix B – Growth Forecast



# Municipal District of Greenview and the Town of Valleyview Growth Forecasts

WORKING PAPER  
INTERNAL DRAFT 2

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# Executive Summary

This analysis assumes that future economic, employment and population growth in the Study Area (comprised of the Town of Valleyview and Municipal District of Greenview) will be led by a number of 'driver industries', defined to include Agriculture and Related, Support Activities for Oil Extraction, Retail Services, and Tourism. The remaining sectors of the Study Area economy are assumed to be 'support industries', and generally grow in tandem with population.

Assuming a moderate economic growth outlook that is generally in line with historical trends, the Study Area's population is expected to increase from 7,430 in 2017 to approximately 9,000 by 2027, representing an average annual growth rate of 1.9 per cent. Across the same time period, the total number of jobs located in the Study Area is projected to increase from 4,030 to about 4,800, representing an average annual growth rate of 1.8 per cent.

This analysis denotes a number of 'Intermunicipal Development' (IDP) areas, generally located around the municipal border of Valleyview. These IDP areas are primarily undeveloped as of 2017, but have been assigned a development type (residential, commercial, industrial, agricultural) intended for future use.

Using geographic and land use definitions and designations outlined in the Valleyview Intermunicipal Development Plan<sup>1</sup> (2009), this analysis finds that the IDP areas are expected to remain undeveloped until at least 2021, regardless of intended development type. Valleyview presently contains a significant amount of undeveloped urban reserve, which was found to be a more likely site for development relative to the IDP areas. Using these assumptions, this analysis found that population in IDP areas (residential) would reach approximately 550 by 2027. The total number of jobs in IDP areas (residential, commercial and industrial) would reach approximately 100 by 2027. While estimated residential and employment development capacities within the Town of Valleyview would be approached in this forecast, only a small portion of developable area is utilized in IDP areas. These IDP areas do not include the planned Big Mountain Industrial Park in the MD of Greenview or the Valleyview Airport.

The proposed realigning of Highways 43 and 49 does not impact forecasts of aggregate population and job growth. However, the realigning would likely impact the geographic prioritization of commercial and industrial development. Job growth would occur sooner in IDP areas close to the new highway location, with the timing of development and corresponding job growth in Valleyview's urban reserve slowing as a result. The timing of the highway realignment would obviously be a major factor in determining the timing of growth in these IDP areas. This adjusted forecast finds that total jobs in commercial and industrial IDP areas exceeds 300 by 2027, compared to about 75 jobs in the prior forecast. As a result, job growth in the rest of Valleyview slows to 0.8 per cent, from 1.7 per cent in the prior forecast.

Forecasts related to residential IDP areas are unaffected by the proposed highway realignment.

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<sup>1</sup> Valleyview Intermunicipal Development Plan, April 2009. <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/VV-IDP-Final.pdf>

# Growth Scenarios

A population and employment forecasting model was used to project growth for each of three scenarios.

- ▶ **Low Scenario:** This scenario represents a continuation of the current slowdown in the economic growth in the region, including lower growth in the oil industry, which does not recover to the pre-oil price decline levels of 2014. Further, this scenario assumes that little to no action is taken in the region to encourage its potential as a tourism hub. Population growth in the region is assumed to continue to exhibit only minimal growth.
- ▶ **Base Scenario:** This scenario represents the 'best guess' as to the growth which can be expected for the region and assumes that energy prices recover to levels which will remain slightly below those that existed prior to the oil price declines of 2014. Further, this scenario assumes that the development guidelines introduced in the Town of Valleyview are somewhat successful in establishing the region as a tourism hub, bringing corresponding output and employment gains in the retail sector. Population growth is assumed to increase relative to recent trends, but remains below the projected provincial average.
- ▶ **High Scenario:** This scenario represents an 'optimistic' picture of future growth that can be expected for the region, including a return of oil prices to levels similar to those that existed prior to the oil price declines of 2014. Further, this scenario assumes that Valleyview is successful in establishing itself as a tourism hub; and that that a revitalized Valleyview commercial sector initiates a period of high growth in retail activity. Population growth in the region is assumed to increase substantially, driven primarily by employment-induced migration.

# Base Year Profile

## TOWN OF VALLEYVIEW

Between 2011 and 2016 the Town of Valleyview's population increased from 1,761 to 1,863 according to the Federal Census- an average annual growth rate of about 1.1%. Based on analyzing historical population trends, along with population projections completed by Alberta Treasury Board and Finance,<sup>2</sup> Valleyview's 2017 population was estimated to have not changed substantially from its 2016 level.

The median age of Valleyview's population in 2016 was 38.6 years, compared to the provincial average of 36.7 years. As well, according to the 2016 Federal Census Profiles,<sup>3</sup> approximately 45% of Valleyview's labour force possessed a postsecondary certificate, diploma or degree, compared to the provincial average of 55%; and the town's participation rate was 67.8% (compared to the provincial average of 71.8%).

## MUNICIPAL DISTRICT OF GREENVIEW

Between 2011 and 2016 the Municipal District (MD) of Greenview's population increased from 5,299 to 5,583 according to the Federal Census - an average annual growth rate of about 1.0%. Based on analyzing historical population trends, along with population projections completed by Alberta Treasury Board and Finance,<sup>4</sup> the MD of Greenview's 2017 population was estimated to have not changed substantially from its 2016 level.

The median age of the MD of Greenview's population in 2016 was 39.9 years, compared to the provincial average of 36.7 years. As well, according to the 2016 Federal Census Profiles,<sup>5</sup> approximately 41% of the MD of Greenview's labour force possessed a postsecondary certificate, diploma or degree, compared to the provincial average of 55%; and the district's participation rate was 72.7% (compared to the provincial average of 71.8%).

## OTHER GEOGRAPHIES

Other geographies included in this analysis, which possess significant economic linkages with both Valleyview and the MD of Greenview, include the Town of Grande Cache, the Town of Fox Creek, Sturgeon Lake 154 (Reserve), the City of Grande Prairie, and the County of Grande Prairie. These economic linkages exist in the form of commuting relationships and retail spending overlap.

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<sup>2</sup> Alberta Treasury Board and Finance, Alberta Population Projections (2017-2041), CD18 (Medium Scenario). <https://www.alberta.ca/population-statistics.aspx>

<sup>3</sup> Statistics Canada. 2017. Valleyview, T [Census subdivision], Alberta and Alberta [Province] (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

<sup>4</sup> Alberta Treasury Board and Finance, Alberta Population Projections (2017-2041), CD18 (Medium Scenario). <https://www.alberta.ca/population-statistics.aspx>

<sup>5</sup> Statistics Canada. 2017. Greenview No. 16, MD [Census subdivision], Alberta and Greenview No. 16, MD [Census subdivision], Alberta (table). Census Profile. 2016 Census. Statistics Canada Catalogue no. 98-316-X2016001. Ottawa. Released November 29, 2017.

## 2017 Population of Municipalities in the Economic Sub-Region

Geography	2017 Population Estimate
Valleyview	1,863
MD of Greenview	5,299
Grande Cache	3,571
Fox Creek	1,971
Sturgeon Lake 154	1,512
Grande Prairie	64,785
County of Grande Prairie	22,858

### BASE LABOUR FORCE AND YEAR JOBS

The estimated labour force along with the number of jobs located in the Town of Valleyview and the MD of Greenview in the base year (2017) are shown in the tables below, according to 2-digit NAICS categories.

The difference between the labour force and jobs measures is that the former estimates the industry of employment for workers residing in the geography, while the latter estimates actual employment by industry in the geography.

The Town of Valleyview's labour force and job total were estimated at 985 and 1,750 respectively. This means that in total, there are 765 workers that commute to Valleyview to work each day (on a net basis).

The MD of Greenview's labour force and job total were estimated at 3,110 and 2,280 respectively. This means that there are 830 workers in the MD that commute to another community for work each day (on a net basis).

## Town of Valleyview, Labour Force and Jobs Estimates by Industry, 2017<sup>6</sup>

Industry	Labour Force	Jobs	Net Commuters
11 Agriculture, forestry, fishing and hunting	30	56	26
21 Mining, quarrying, and oil and gas extraction	135	233	98
22 Utilities	25	25	0
23 Construction	90	242	152
31-33 Manufacturing	30	35	5
41 Wholesale trade	20	37	17
44-45 Retail trade	135	219	84
48-49 Transportation and warehousing	30	54	24
51 Information and cultural industries	15	15	0
52 Finance and insurance	25	28	3
53 Real estate and rental and leasing	0	19	19
54 Professional, scientific and technical services	15	35	20
55 Management of companies and enterprises	0	0	0
56 Administrative and support, waste management and remediation services	25	64	39
61 Educational services	55	59	4
62 Health care and social assistance	105	164	59
71 Arts, entertainment and recreation	10	22	12
72 Accommodation and food services	130	207	77
81 Other services (except public administration)	40	95	55
91 Public administration	70	142	72
All industry categories	985	1,750	765

<sup>6</sup> Net Commuters is equal to the number of jobs in the community minus the local labour force. Where Net Commuters is positive, there is a net inflow of workers to the municipality. Where Net Commuters is negative, there is a net outflow of workers from the municipality.



## MD of Greenview, Labour Force and Jobs Estimates by Industry, 2017<sup>7</sup>

Industry	Labour Force	Jobs	Net Commuters
11 Agriculture, forestry, fishing and hunting	585	397	-188
21 Mining, quarrying, and oil and gas extraction	390	417	27
22 Utilities	45	29	-16
23 Construction	405	298	-107
31-33 Manufacturing	130	89	-41
41 Wholesale trade	90	60	-30
44-45 Retail trade	245	164	-81
48-49 Transportation and warehousing	225	154	-71
51 Information and cultural industries	0	2	2
52 Finance and insurance	35	23	-12
53 Real estate and rental and leasing	55	38	-17
54 Professional, scientific and technical services	110	77	-33
55 Management of companies and enterprises	0	0	0
56 Administrative and support, waste management and remediation services	80	59	-21
61 Educational services	170	110	-60
62 Health care and social assistance	180	116	-64
71 Arts, entertainment and recreation	25	18	-7
72 Accommodation and food services	85	55	-30
81 Other services (except public administration)	160	115	-45
91 Public administration	95	60	-35
All industry categories	3,110	2,280	-830

<sup>7</sup> Net Commuters is equal to the number of jobs in the community minus the local labour force. Where Net Commuters is positive, there is a net inflow of workers to the municipality. Where Net Commuters is negative, there is a net outflow of workers from the municipality.

# Driver Industries

This section of the report provides information on the driver industries defined for the Town of Valleyview and the MD of Greenview, and rationales as to why these industries are expected to drive near-term job growth in the region. While the Town of Valleyview and the MD of Greenview differ from each other in terms of industry prevalence and economic strengths possessed, the high degree of interrelatedness between the two municipalities generally allows for mutually beneficial growth and a shared outlook.

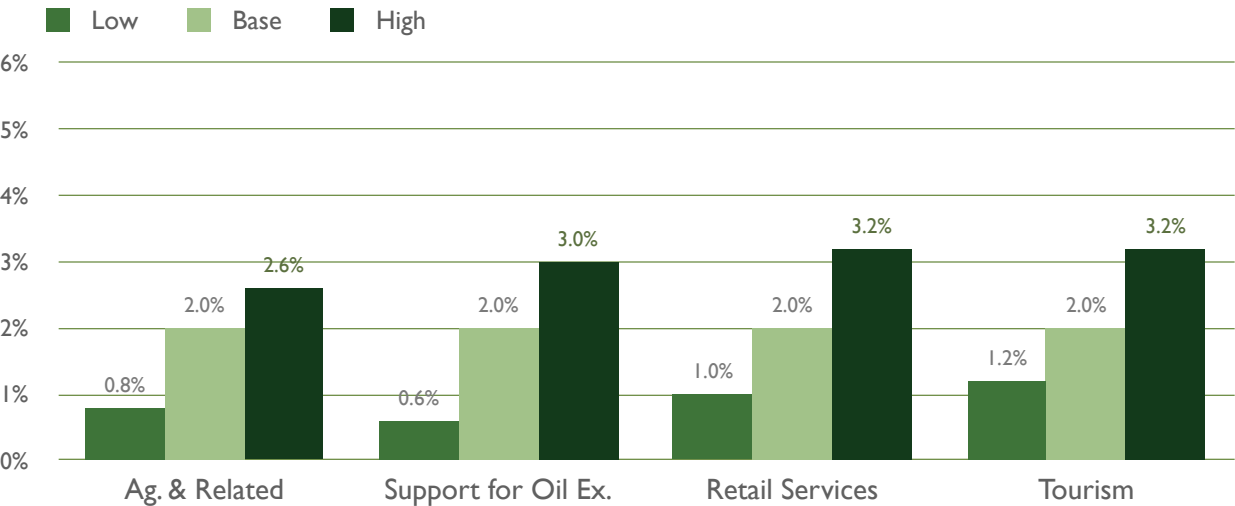
In general, the driver industry groups listed above act to support economic growth in both the Town of Valleyview and the MD of Greenview, with exceptions noted in the driver industry descriptions section below. It is also noted that the expected output and employment growth rates of these regional drivers are reliant to some extent on economic conditions which may be external to the region (i.e. oil prices, economic and labour market conditions in other regions of Alberta, etc.)

For each scenario, a series of growth rates were developed for the industries (or industry groups) that are expected to lead growth in the region – referred to as ‘Driver Industries’. For the Study Area, four Driver Industry groups have been identified as follows:

- ▶ Agriculture and Related
- ▶ Support Activities for Oil Extraction
- ▶ Retail Services
- ▶ Tourism

Each of the industries included as Driver Industries has been determined to have a particular level of influence on employment in the Town of Valley and/or the MD of Greenview. Growth of these industries has been determined to have an affect on the net migration of workers and their families to the region. The importance of each industry to either municipality is summarized in the following section. The information presented for each industry category has been based on research of publicly available information, with sources are provided as they are referenced below.

## Scenario-Specific Driver Industry Employment Growth Rates (Average Annual)



The growth rates for each driver industry in each scenario have been based on a review of the historical growth patterns for these industries in the context of the expected growth of the region and province in the future.

## AGRICULTURE AND RELATED

Agriculture is an important industry of employment in both the Town of Valleyview and the MD of Greenview. While the majority of the region's primary agriculture activity occurs in the MD of Greenview, a number of related and supporting and specialized sub-sectors provide opportunities for growth in the region as a whole. These sub-sectors are outlined below.

### Agri-Tourism

Agri-tourism is a form of niche tourism involving any agriculturally based operation or activity that brings visitors to a farm or ranch. The sector could include employment in the agriculture, forestry, fishing and hunting as well as the food and accommodation sector.

Agri-tourism is growing in popularity internationally, as evidenced by nearby Smoky Lake's 2-day pumpkin festival which drew an estimated attendance of 5,000 people.<sup>8</sup>

An example of a business already operating in the region is Summer's Gold U-Pick Strawberries (Greenview).

### Commercial Greenhouses

Valleyview and Greenview primarily rely on Freson Bros. and Co-op Foods (or larger grocers in Grande Prairie) for their produce, which source most of their fruit and vegetables from California and other major producing regions. This means that the produce must travel long distances to reach the area and can only provide a limited range of specialty food products. Commercial greenhouses are capable of providing higher-quality produce, niche food items, and crops that are native or popular in the region - with typically much lower transportation costs. Commercial greenhouses can also provide agri-tourism opportunities.

The aforementioned Summer's Gold (Greenview) is the only commercial greenhouse currently operating in the region- though there is significant evidence of growth potential with 230 commercial greenhouses operating in Alberta. A growth limitation in this sub-sector is that commercial greenhouses are only typically economically viable at a minimum size of 1-2 acres, with much larger operations exhibiting improved sustainability.

### Agricultural Processing

Processing raw materials and intermediate products derived from the agricultural sector allows for significant value-added potential. Agri-processing includes activities such as meat and dairy processing, grain and oilseed milling, and fruit and vegetable preserving.

While the region hasn't yet exhibited strong gains in this sub-sector, food and beverage processing businesses is Alberta's third-largest manufacturing sector and employs 20,400 province-wide (17.7% of Alberta's manufacturing jobs). Alberta is also the third largest producer and exporter of agri-food products in Canada. Employment grew at a robust annual average of 3.2% nationally in this sub-sector between 2013 and 2016.

While the region does not yet exhibit a high degree of specialization in this sub-sector, examples of businesses currently operating include seed cleaning services provided by the Valley View Seed Cleaning Co-Operative (Valleyview) and More Seed Processors (Greenview).

### Agri-Hubs

Agri-hubs are collections of agriculturally-focused businesses that support each other, and exist to promote growth in the industry. An agri-hub has already been formed in the region, with the Valleyview and Districts

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<sup>8</sup> Alberta Agriculture and Forestry, Agri-tourism: Rural Festivals and Special Events. [http://www1.agric.gov.ab.ca/\\$department/deptdocs.nsf/all/agdex1364](http://www1.agric.gov.ab.ca/$department/deptdocs.nsf/all/agdex1364)

Agricultural Society active since 1967. The Society organizes events such as an agricultural fair, horse show, and rodeo, and provides equipment and facilities for agricultural events.

At present, it has been estimated that approximately 80 of the jobs located in Valleyview are directly involved in the agriculture and related driver industry group (representing about 5% of total local jobs). In Greenview, about 380 jobs are associated with the agriculture and related industry group (representing about 17% of local jobs).

Employment in the region's agriculture and related driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 2.6% in the high growth scenario; and 0.8% in the low growth scenario.

## SUPPORT ACTIVITIES FOR OIL EXTRACTION

The support activities for oil extraction sector has played a significant part in the economic growth of the region. This driver industry group includes jobs across a variety of industries, including mining, quarrying and oil and gas extraction, construction, transportation and warehousing, and professional, scientific and technical services. For 2017, it has been estimated that there approximately 295 jobs related to support activities for oil extraction in the Town of Valleyview (representing about 17% of total jobs), and approximately 540 related jobs in the MD of Greenview (representing 24% of total jobs).

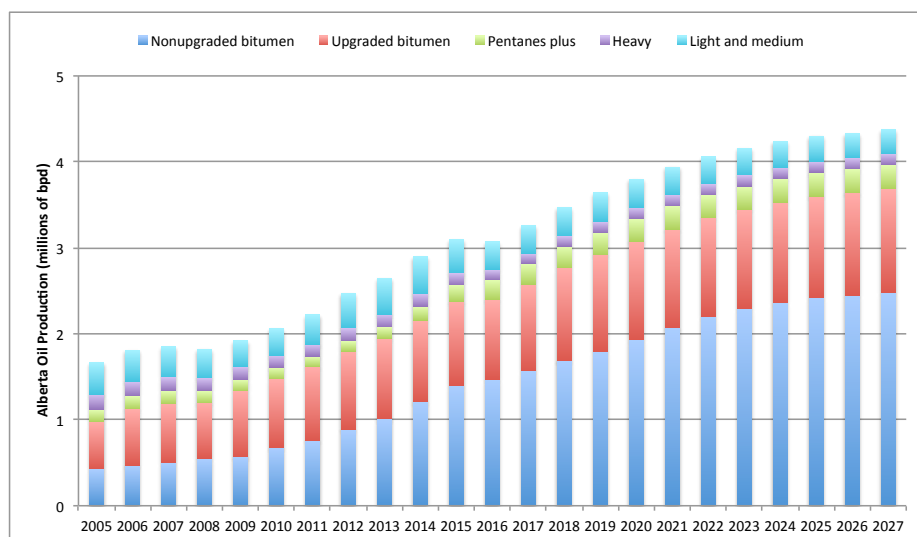
Resource extraction is the primary driver of Alberta's economy, including oil and gas fields along the eastern slope of the Rockies, oil sands to the north of Edmonton, and extensive mining operations in Alberta and the Northwest Territories. For Valleyview and Greenview, businesses in this industry are primarily involved in oil-related equipment rental as well as transportation services.

Based on the latest forecast from the Alberta Energy Regulator,<sup>9</sup> crude oil production in Alberta is expected to increase from an average of 3.26 million barrels per day in 2017 to 4.38 million barrels per day by 2027, an average annual increase of about 3%. While this rate of production growth is below that observed in Alberta between 2007 and 2017 when crude production increased at an average annual rate of 5.8%, the industry has yet to fully recover from the price collapse that began in 2014 and capital investment in new, large-scale extraction projects has been limited. Historical and projected levels of provincial oil production (according to the type of oil produced) are shown in the chart below:

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<sup>9</sup> Alberta Energy Regulator, Alberta supply of crude oil and equivalent, Base case forecast, March 2018, [https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?embed=y&showShareOptions=true&display\\_count=no&showVizHome=no](https://www2.aer.ca/t/Production/views/ExecutiveSummaryFigure7Albertasupplyofcrudeoilandequivalent/Figure7Albertasupplyofcrudeoilandequivalent?embed=y&showShareOptions=true&display_count=no&showVizHome=no)

## Alberta Oil Production by Type, Historical and Forecast, 2005 to 2027



The gradual stabilization of crude oil prices is a critical factor in achieving the increased production growth described above. In its 'base case' forecast,<sup>10</sup> the Alberta Energy Regulator expects the benchmark price of West Texas Intermediate (WTI) to increase from the 2017 average of US\$50.95 to US\$84.47 by 2027. This price forecast supports the assumption of moderate production growth, with the 'breakeven' price for new projects estimated to be around US\$55.<sup>11</sup> Forecasters are generally not optimistic that oil prices will soon return to the highs observed in previous years, when WTI reached a peak of US\$98.05 in 2013.

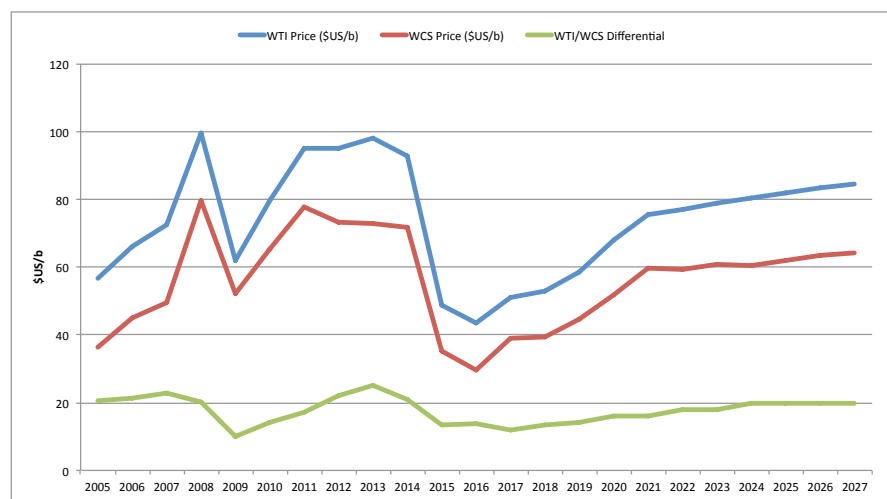
It is noted that producers of heavy oil in Alberta do not typically receive the WTI price for their product. Heavy oil prices are discounted for the extra costs required for transportation and upgrade. The benchmark price for Alberta producers is better reflected by the Western Canadian Select (WCS) benchmark, which typically trades at a US\$10-25 discount relative to WTI. While WCS traded at an average discount of about US\$12 in 2017, this differential is expected to widen to US\$20 by 2027, due primarily to pipeline capacity and upgrading constraints. While a provincial government initiative that intends to provide \$1 billion to bitumen upgrading investment between 2019 and 2027 could assist in narrowing the price gap,<sup>12</sup> forecasters anticipate a widening of the WTI/WCS price differential - another factor likely to moderate growth in Alberta's oil sector relative to recent historical averages, and correspondingly limit growth somewhat in the supporting industries located in the region.

<sup>10</sup> Alberta Energy Regulator; Price of WTI, Base case forecast, March 2018, [https://www2.aerca.ca/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&showShareOptions=true&display\\_count=no&showVizHome=no](https://www2.aerca.ca/Production/views/ExecutiveSummaryFigure3PriceofWTI/ExecutiveSummaryFigure3PriceofWTI?embed=y&showShareOptions=true&display_count=no&showVizHome=no)

<sup>11</sup> Nia Williams, Canada's oil sands survive, but can't thrive in a \$50 oil world, Reuters, October 18, 2017.

<sup>12</sup> Dean Bennett, Alberta to invest \$1B over 8 years on bitumen upgrading projects, Global News, February 26, 2018.

## WTI and WCS Price and Differential per Barrel, Historical and Base Forecast, 2005 to 2027



This driver category includes a wide variety of sub-industries with support relationships to the oil sector, such as nonresidential maintenance and repair, services to buildings and dwellings, waste management and remediation, scenic and sightseeing transportation and support activities for transportation, commercial and industrial machinery and equipment rental and leasing. Direct support industries to the energy sector are also included in this driver category, such as mineral exploration, geophysical services and surveying. Industries related to manufacturing and distribution can also be included in this category, such as cutting and machine tool accessory, rolling mill, and other metalworking machinery manufacturing, material handling equipment manufacturing, valve and fittings other than plumbing, wholesale trade, and warehousing and storage.

Examples of businesses currently operating in the region that fall into this driver industry group include Direct Pressure (oilfield trucking) and Lukan 4 (oilfield maintenance) in Valleyview; and Debolt Contracting Ltd. (oilfield equipment supply) and Northland Tank and Heavy Haul Ltd. (oil-related tank transportation) in Greenview.

Employment in the region's support for oil extraction driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.0% in the high growth scenario; and 0.6% in the low growth scenario.

### RETAIL SERVICES

While growth in retail services activity is typically driven by local population growth, the Town of Valleyview's strategic location at Highways 43 and 49 allows for access to a market of non-local retail spending.

Highway traffic contributes to retail spending, with potential consumers who may be in Valleyview on a temporary (travelers passing through) or semi-temporary (tourists in the region) basis. A substantial number of workers in the oil and agricultural sectors also pass through Valleyview. It is estimated that traffic on Highway 43 has increased by more than 40% since 2009. These impermanent consumers represent a significant opportunity for output and employment growth in Valleyview's retail sector.

Proximity to Grande Prairie also serves as an opportunity for local retailers. While Grande Prairie retailers are competitors with Valleyview (with as much as 60% of Valleyview's retail spending estimated to flow into Grande Prairie), strategic specialization and expansion on part of local retailers could attract a greater number of consumers from the Grande Prairie area. Valleyview is strategically located in the southeastern area of Grande Prairie's 'Primary Trade Area'.<sup>13</sup> Residents within a 45-minute drive time of Valleyview (many

<sup>13</sup> Retail Market & Gap Analysis - City of Grande Prairie, Cushing Terrell Architecture Inc., 2016.

of whom lacking access to a variety of retail services in their own municipalities) represent a potential consumer base that is approximately 2.5 times larger than that which Valleyview presently serves.

Valleyview's capacity to attract consumer spending from outside of the municipality is supported by a 2016 inventory of retail space, which estimated a total of 165,000 square feet of space - significantly more than the estimated 90,000 square feet that would be required if Valleyview's resident spending were entirely self-contained.<sup>14</sup>

A comprehensive set of commercial development guidelines introduced in 2016 should assist Valleyview in attracting a greater amount of retail spending. These guidelines encourage the development and beautification of downtown Valleyview through aesthetic and accessibility improvements with an "aim to encourage design that communicates the traditional commercial and civic heart of the community, and enhances the character, pedestrian orientation and vitality of downtown and as an important community focal point."<sup>15</sup> The development guidelines also include a plan for highway commercial areas that aim to improve signage, landscaping, pedestrian accessibility, and safety. The downtown and highway commercial development guidelines should enhance Valleyview's ability to generate additional retail spending from all sources of non-local consumers.

The largest segment of the local retail sector is comprised of the "convenience" category, which includes grocery and specialty foods, personal services, pharmacy, alcohol and tobacco, and health services, representing 47% of utilized retail space. Notable growth potential exists in this sub-sector, as Valleyview is estimated to retain less than 50% of local resident spending in this category. Examples of highway commercial businesses that fall into this category include the recently developed Tim Hortons as well as the Shell Super Station.

The "comparison goods" category, which includes home furnishings, clothing and apparel, home improvement and garden, jewelry and accessories, sporting goods, toys and hobbies, and auto parts and accessories, represents 22.5% of utilized retail space. Valleyview retailers likely face significant competition in this category from larger Grande Prairie retailers. Specialization in this sub-sector could enhance downtown Valleyview's ability to attract inter-regional "destination retail" consumers. An example of a business currently operating in Valleyview that falls into this category is House of Treasures, a jewelry store focusing on rare/antique items.

The "food and beverage, entertainment" category, which includes entertainment and leisure and food and beverages, comprises just 18.2% of local utilized retail space. Growth in this sub-sector might be linked to the town's ability to increase tourism activity. An example of a business currently operating in Valleyview that falls into this category is the Western Valley Bar and Grill.

A vacancy rate of about 12.2% in Valleyview's retail space should allow for growth to occur throughout each retail sub-sector of this driver industry.

At present, it has been estimated that approximately 130 of the jobs located in Valleyview are directly involved in retail services (representing about 8% of total local jobs). Approximately 100 jobs in the MD of Greenview have been allocated to the retail services driver industry group, representing about 4% of local jobs in 2017.

Employment in Valleyview's retail services driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.2% in the high growth scenario; and 1.0% in the low growth scenario.

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<sup>14</sup> Valleyview Economic Development Strategy, August 2017, Prepared by Modus and Urban Systems.

<sup>15</sup> Valleyview Development Guidelines, July 26, 2016, Prepared by Modus.  
<http://valleyview.ca/wp-content/uploads/2016/10/FINAL-Valleyview-Development-Guidelines-v4.compressed.pdf>

## TOURISM

Tourism is an already-important industry in the Town of Valleyview and MD of Greenview- and is a sector that possesses significant growth potential. Sub-sectors within this driver group include information and cultural industries, arts entertainment and recreation, accommodation and food services, retail trade, and agriculture (related to the agri-tourism sub-sector described earlier).

The outlook for tourism in the Valleyview and Greenview is correlated to some of the factors discussed in the prior section outlining the importance of retail as a driver industry. For example, Valleyview's location at the junction of Highways 43 and 49 generates the immediate potential to retain visitor traffic. Traffic volume patterns suggest that between 7,000 and 7,800 vehicles pass Valleyview on Highway 43 to the north, between 4,800 and 6,900 on Highway 43 to the south, and between 2,240 and 3,070 on Highway 49 to the northeast on a daily basis.<sup>16</sup> Given the strategic highway location, along with very few other urban centres in close proximity, Valleyview has the potential to enhance its position as a tourism hub in the region, with surrounding Greenview benefiting.

Further supporting the potential for tourism growth in the region, the Valleyview Visitor Centre is acknowledged as being one of the most popular, high growth visitor centres in Alberta. The number of annual visits to the Centre increased rapidly from 17,170 visitors in 2014 to 21,900 in 2016. Visitor tracking data suggests that approximately 55% of the region's tourism-oriented visitors are Albertans, while 16% are from other parts of Canada and 8% are U.S. residents.

The region already has a total of 10 hotel/accommodations businesses, with 2 located in downtown Valleyview, 4 in Valleyview's highway commercial area, and 4 in Greenview. The recently constructed Paradise Inn and Suites adjacent to Highway 43 suggests that there remains the capacity for further growth in this sector.

Tourist attractions in the Valleyview include: the Red Willow Player's theatre company, a Farmer's Market, a recently constructed indoor recreation centre, and a number of bars and restaurants. Tourism destinations are more outdoor-focused in Greenview, which include Young's Point Provincial Park, Snipe Lake, Swan Lake, Greenview Golf Resort, and a number of campgrounds and businesses supporting outdoor recreation (such as boat rentals and fishing/hunting supply stores).

Along with food and accommodation businesses and arts and recreation-oriented activities, tourism can also generate growth in more loosely-related sectors. For example, six pet boarding businesses already exist in the region- presumably to accommodate tourists.

In total, an estimated 300 jobs exist in this driver industry group (190 in Valleyview and 110 in Greenview), spread across a variety of industries; and representing approximately 7% of regional employment.

Employment in the region's tourism driver industry group is expected to increase at an average annual rate of 2.0% in the base growth scenario; 3.2% in the high growth scenario; and 1.2% in the low growth scenario.

## Support Industries

While industries such as health and educational services are recognized as being important employers in the region, representing a combined 220 jobs in the Town of Valleyview and 230 in the MD of Greenview, the region possesses only a marginal ability to influence growth in these sectors through its own policy initiatives and strategies. Growth in these industries is more likely to be driven by demographic shifts in the region, with higher birth rates increasing the demand for education services, and an aging population increasing the demand for health services, as seniors tend to utilize a relatively greater amount of health care.

Of those other industrial sectors investigated, none were determined to be of sufficient significance in terms of direct employment in the region to be included as a Driver Industry for this study.

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<sup>16</sup> Valleyview Economic Development Strategy, August 2017, Prepared by Modus and Urban Systems.



The region's Support Industries include all of those that are not classified as being Driver Industries, and were estimated to represent approximately 2,200 jobs in the entire Study Area in 2017. Employment in these Support Industries is generally assumed to change in proportion with population, which is affected by migration (related to Driver Industry growth) and natural increase considerations.

# Forecast Results

All results presented and discussed in this section of the report reflect the Base scenario. Forecast results associated with the High and Low scenarios can be found in the Appendix.

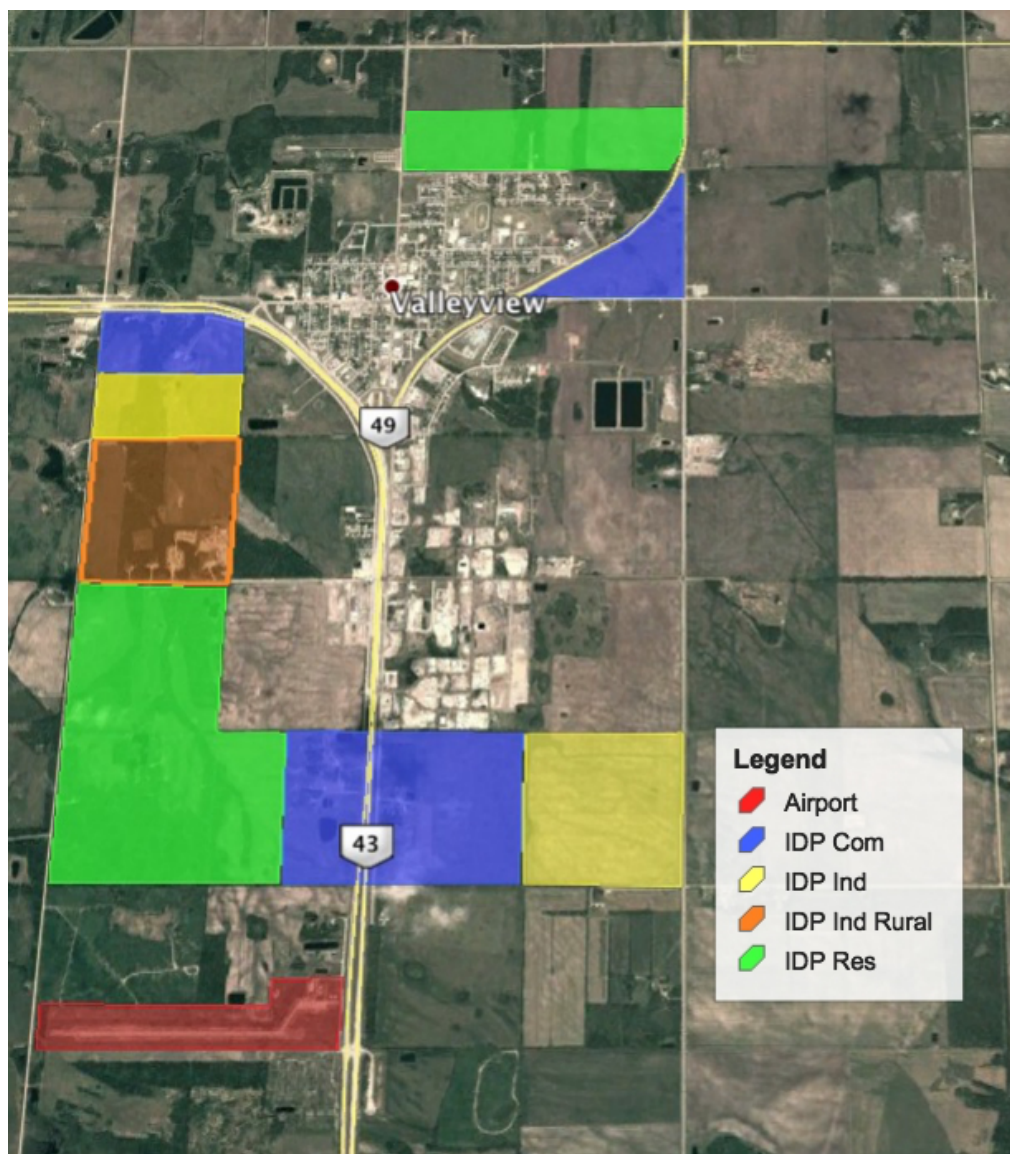
## Geographies

For the purposes of this analysis, geographies in the Study Area have generally been disaggregated according to location and future land use. Geographies denoted as 'IDP' refer to sections of land adjacent to the Town of Valleyview, included in the 2009 Valleyview Intermunicipal Development Plan (IDP)<sup>17</sup> with an assigned future land use (Residential, commercial, industrial or agricultural reserve). Lands designated in the IDP for future agricultural use were not disaggregated and were included as part of the 'Rest of MD of Greenview' geography. These IDP areas are shown on the map below.

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<sup>17</sup>Valleyview Intermunicipal Development Plan, April 2009. <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/VVIDP-Final.pdf>

## Map of Town of Valleyview with IDP Geography Overlay (2009 Designations)









## Geographies Used in the Forecast, Base Year Information

Geography	Description	Population (2017)	Employment (2017)
Airport	Valleyview Airport	0	15
Rest of MD of Greenview	Greenview, excluding the Hamlets, IDP areas,, and Industrial Park	4,787	1,946
Hamlets	Hamlets of Debolt, Grovedale, Landry Heights, Little Smoky, and Ridge Valley	778	319
IDP - Commercial	IDP areas designated for Commercial development	0	0
IDP - Industrial	IDP areas designated for Industrial development	0	0
IDP - Industrial (Rural)	IDP areas designated for Industrial development (not subject to future annexation applications)	0	0
IDP - Residential	IDP areas designated for Residential development	0	0
Industrial Park	Big Mountain Industrial Park	0	0
Rest of Valleyview	Town of Valleyview, excluding all IDP areas	1,865	1,750
Study Area Total	All Study Area geographies	7,430	4,030

Total base year (2017) population and employment estimates for each geography included in the analysis are presented in the table above. Note that in the base year (2017), it was assumed that no residential, commercial or industrial development had been started in any of the IDP areas. This assumption was supported by satellite images of the region retrieved from Google Earth.

Note that the hamlets located in the MD of Greenview have been disaggregated and assessed as a unique geography. These hamlets include Debolt, Grovedale, Landry Heights, Little Smoky, and Ridge Valley. Where available, informal population estimates were collected for each hamlet. In cases where a population estimate was not available, satellite images retrieved from Google Earth were used to approximate a hamlet's current population. In total, these hamlets were estimated to represent a population of 778 and a job base of 319.

Disaggregating the hamlets from the MD of Greenview was deemed necessary due to the relatively higher growth and development plans related to hamlets such as Grovedale. Per the hamlet's Area Structure Plan,<sup>18</sup> long-term population growth rates as high as 8.1 per cent were projected, with relatedly high rates of job growth associated with the nearby Big Mountain Industrial Park.<sup>19</sup> Such significant rates of population and employment growth are generally not anticipated in the rest of the MD of Greenview.

## Population

Population forecasts were performed using 2017 as a base year and covered the period extending to 2027. Factors considered in the population include:

- Fertility rates: The ten-year (2007-16) average of birth rates according to age cohorts was calculated for Census Division 18 and applied to the Study Area to forecast the annual number of births.

<sup>18</sup> Grovedale Area Structure Plan, October 16, 2017 - Draft #2, Version #8, File #1320-01, <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/GASP-October-16-2017-Draft2-Version8.pdf>

<sup>19</sup> Big Mountain Industrial Park Area Structure Plan, Opus Stewart Weir Ltd, June 2016, <http://mdgreenview.ab.ca/wp-content/uploads/2013/12/Big-Mountain-Industrial-Park-Area-Structure-Plan.pdf>

- Mortality rates: The five-year (2013-17) average of mortality rates according to specific age was calculated for Census Division 18 and applied to the Study Area to forecast the annual number of age-specific deaths.<sup>20</sup>
- Migration: The amount of in-migration to the Study Area was projected relative to the expected level of job growth within the Study Area, and the ability of the existing local population to fill these positions. An age- and gender-specific migration profile was calculated based on the ten-year (2008-17) average of in-migration population growth in Census Division 18.<sup>21</sup>
- Population capacity: In geographies containing population (or the potential for residential development), a 'full buildout' capacity was estimated based on the existing amount of residential development and population, the remaining amount of land available for development in the geography, and prevailing population density estimates. These capacities were used as a general limit to migration-based population growth, and is a 'soft' constraint in the sense that a geography's population may exceed this capacity in the case of natural growth.
- Geography sequencing: Residential geographies were assumed to grow in population according to a general sequence. For example, it was assumed that currently vacant land designated for residential purposes within the Town of Valleyview would be developed and approach a threshold close to its population capacity before residential development occurred in IDP geographies.
- Growth status: Growth status is used in this analysis to allocate and prioritize migration-based population growth. For example, the MD of Greenview (excluding its hamlets and IDP geographies) was assumed to receive no migration-based population growth, and grows only in accordance with its projected natural rate of increase (births minus deaths).

### Total Population Forecast by Geography, 2017-2027

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	0	0	0	0	0	0	0	0	0	0	0	-
Rest of MD of Greenview	4,787	4,810	4,831	4,850	4,867	4,883	4,897	4,910	4,922	4,933	4,943	0.3%
Hamlets	778	782	786	795	863	933	1,003	1,072	1,144	1,217	1,290	5.2%
IDP - Commercial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Industrial (Rural)	0	0	0	0	0	0	0	0	0	0	0	-
IDP - Residential	0	0	0	0	50	82	213	294	380	467	555	-
Industrial Park	0	0	0	0	0	0	0	0	0	0	0	-
Rest of Valleyview	1,865	1,869	1,873	1,879	1,927	1,975	2,024	2,072	2,121	2,171	2,200	1.7%
Study Area Total	7,430	7,461	7,490	7,524	7,707	7,872	8,137	8,348	8,567	8,787	8,989	1.9%

In the Base scenario, the total population in the Study Area is projected to increase from 7,430 in 2017 to 8,989 in 2027, representing an average annual growth rate of 1.9 per cent. The highest rate of population growth is expected to occur in the hamlets of the MD of Greenview, with an average annual growth rate of 5.2 per cent. Conversely, the remainder of the MD of Greenview is expected to grow at just 0.3 per cent

<sup>20</sup> Statistics Canada, CANSIM Table 17-10-0085-01, Components of population growth by census division, age group and sex, <https://www150.statcan.gc.ca/t1/tbl/en/tv.action?pid=1710008501>

<sup>21</sup> Ibid.

over the ten-year period, driven exclusively by a higher projected number of births relative to deaths. The Town of Valleyview is expected to reach its estimated population capacity of about 2,200 by the end of the forecast, with all existing developable residential land consumed. The gradually diminishing amount of developable residential land in Valleyview is expected to initiate development in the adjacent IDP area designated for residential use beginning in 2021, though it is unlikely that this geography will near its population capacity within the scope of this forecast, reaching approximately 555 by 2027. Residential development has not been assumed to occur in any other geography of the Study Area.

A more detailed forecast reporting the age and gender of each geography's population, as well as the components of population growth, can be found in the Appendix.

## Employment

Employment forecasts were performed using 2017 as a base year and extending to 2027. Note that these employment forecasts reflect the respective job locations according to geography, rather than the location of the labour force employed in these occupations. Factors considered in this analysis include:

- ▶ Driver Industry growth: Driver Industry Groups and their respective scenario-specific rates of employment growth are described in an earlier section of this document. These Industry Groups can be generally thought of as the primary motivators of economic growth in the Study Area, spurring migration-based population growth as well as job growth in Support Industries.
- ▶ Support employment growth: Those industries designated as support in the Study Area are discussed in an earlier section of this document. Job growth in support industries is assumed to occur according to population growth.
- ▶ Participation rates: Labour force participation rates in the Study Area impact the ability of the local population to fill newly created jobs that are generated in Driver and Support Industries. The five-year (2013-17) average of labour force participation rates in Alberta were calculated according to age cohort<sup>22</sup> and applied in the forecast.
- ▶ Employment capacity: In geographies containing commercial or industrial activity (or the potential for development), a 'full buildout' capacity was estimated based on the existing amount of development and jobs, the remaining amount of land available for development in the geography, and prevailing employment density estimates.
- ▶ Employment profiles: These profiles are specific to NAICS, and reflect the type of jobs that would be expected to be located in a geography based on its designation. For example, a geography designated as industrial would contain a greater proportion of manufacturing jobs in its profile; while a residential or commercial geography would contain more retail-based jobs. These profiles can also impact the rate and timing of growth in different types of geographies. If the oil and gas sector is expected to exhibit a relatively higher rate of growth in the forecast, it would make sense that these jobs be located in industrial geographies.
- ▶ Geography sequencing: Geography-specific job growth was assumed to occur according to a general sequence. For example, it was assumed that currently vacant land designated for employment purposes within the Town of Valleyview would be developed and approach a threshold close to its capacity before development occurred in IDP geographies.

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<sup>22</sup> Statistics Canada, CANSIM Table 14-10-0018-01, Labour force characteristics by sex and detailed age group, <https://www150.statcan.gc.ca/t1/tb1/en/tv/action?pid=1410001801>

## Total Job Forecast by Geography, 2017 to 2027

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	15	15	15	15	16	16	17	18	18	19	19	2.6%
Rest of MD of Greenview	1,946	1,946	1,966	1,982	1,992	2,000	2,000	2,000	2,000	2,000	2,000	0.3%
Hamlets	319	342	353	367	384	413	443	473	503	533	563	5.9%
IDP - Commercial	0	0	0	0	0	1	2	11	15	20	25	-
IDP - Industrial	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Industrial (Rural)	0	0	0	0	1	3	6	12	16	21	26	-
IDP - Residential	0	0	0	0	0	1	3	10	15	19	25	-
Industrial Park	0	0	0	0	2	6	12	23	31	41	51	-
Rest of Valleyview	1,750	1,779	1,793	1,809	1,829	1,870	1,910	1,951	1,993	2,034	2,075	1.7%
Study Area Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

From an estimated base of just over 4,000, the total number of jobs in the Study Area is expected to reach 4,811 by 2027, representing an average annual growth rate of 1.8 per cent. Similar to the total population forecast described in the prior section of this document, the highest average annual rate of job growth is expected in the hamlets of the MD of Greenview (5.9 per cent). Job growth in the Big Mountain Industrial Park (expected to begin in 2021) is also related to high growth in the nearby Hamlet of Grovedale. Job growth in the rest of the MD of Greenview is minimal, reaching its estimated capacity of about 2,000 by 2022. Moderate job growth is anticipated in the Town of Valleyview at an average annual rate of 1.7 per cent, given the relatively abundant amounts of undeveloped commercial and industrial land available at present. Given the potential for job growth in Valleyview, it is unsurprising that commercial and industrial development in the adjacent IDP areas occurs at a relatively slow pace, beginning in 2021 but exhibiting only slight growth through 2027.

### NAICS

The North American Industry Classification System (NAICS) is a commonly used method of classifying businesses according to type of economic activity performed. In this forecast, employment is analyzed and presented according to 2-digit NAICS, of which there are 20 categories.



## Total Job Forecast by NAICS, 2017 to 2027

NAICS	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Accommodation and food services	262	266	270	274	279	285	291	298	304	311	317	1.9%
Administrative and support, waste management and remediation services	123	123	124	124	125	127	129	132	134	137	139	1.3%
Agriculture, forestry, fishing and hunting	453	462	471	481	491	500	510	521	531	542	553	2.0%
Arts, entertainment and recreation	41	41	42	43	44	45	46	47	48	49	50	2.0%
Construction	540	545	549	552	556	569	581	599	614	630	646	1.8%
Educational services	169	170	171	171	172	176	179	185	189	193	198	1.6%
Finance and insurance	51	51	51	52	52	53	54	55	56	58	59	1.4%
Health care and social assistance	280	282	283	284	285	291	296	304	310	317	323	1.4%
Information and cultural industries	17	17	17	18	18	18	19	19	19	20	20	2.0%
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	0	-
Manufacturing	124	125	126	126	127	130	133	137	141	144	148	1.8%
Mining, quarrying, and oil and gas extraction	650	662	676	689	704	718	732	747	762	777	792	2.0%
Other services (except public administration)	210	211	212	213	214	219	223	230	235	241	246	1.6%
Professional, scientific and technical services	112	113	114	115	116	119	122	125	128	131	134	1.9%
Public administration	202	204	204	205	206	209	212	217	221	225	230	1.3%
Real estate and rental and leasing	57	57	57	57	58	59	60	61	62	63	64	1.3%
Retail trade	382	389	394	400	407	416	424	434	444	453	463	1.9%
Transportation and warehousing	208	210	213	216	218	223	228	234	239	245	250	1.9%
Utilities	54	55	55	55	55	57	58	60	61	63	65	1.8%
Wholesale trade	97	97	98	99	99	101	103	106	109	111	114	1.6%
Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%

The table above presents a total job forecast in the entire Study Area by the 20 2-digit NAICS categories.

As might be expected, the highest rates of average annual job growth are observed in those industries closely correlated with the Driver Industry groups described earlier in this document. Industries including agriculture, forestry, fishing and hunting (Agriculture and Related), arts, entertainment and recreation (Tourism), information and cultural industries (Tourism), mining, quarrying, and oil and gas extraction (Support Activities for Oil Extraction), and retail trade (Retail Trade Services) generally exhibit the highest rates of average annual job growth of around 2.0 per cent.

Conversely, jobs in industries that are more closely related to Support Industries, such as public administration, real estate and rental and leasing, and health care and social assistance, generally exhibit lower rates of average annual growth. Job growth in these Support Industries is correlated with population growth in the region, but in some cases may increase at a rate less than that of population. These Support Industry growth trends are based on the analysis of historical trends in Alberta.

## Estimated Jobs by NAICS and Geography, Base Year (2017)

NAICS	Airport	Greenville	Hamlets	IDP Com	IDP Ind	IDP Ind Rural	IDP Res	Ind Park	Valleyview	Total
Accommodation and food services	0	48	8	0	0	0	0	0	207	262
Administrative and support, waste management and remediation services	0	50	8	0	0	0	0	0	64	123
Agriculture, forestry, fishing and hunting	0	341	56	0	0	0	0	0	56	453
Arts, entertainment and recreation	0	16	3	0	0	0	0	0	22	41
Construction	0	256	42	0	0	0	0	0	242	540
Educational services	0	94	15	0	0	0	0	0	59	169
Finance and insurance	0	20	3	0	0	0	0	0	28	51
Health care and social assistance	0	100	16	0	0	0	0	0	164	280
Information and cultural industries	0	1	0	0	0	0	0	0	15	17
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0
Manufacturing	0	76	13	0	0	0	0	0	35	124
Mining, quarrying, and oil and gas extraction	0	358	59	0	0	0	0	0	233	650
Other services (except public administration)	0	99	16	0	0	0	0	0	95	210
Professional, scientific and technical services	0	66	11	0	0	0	0	0	35	112
Public administration	0	52	8	0	0	0	0	0	142	202
Real estate and rental and leasing	0	32	5	0	0	0	0	0	19	57
Retail trade	0	141	23	0	0	0	0	0	219	382
Transportation and warehousing	15	119	20	0	0	0	0	0	54	208
Utilities	0	25	4	0	0	0	0	0	25	54
Wholesale trade	0	52	8	0	0	0	0	0	37	97
Total	15	1,946	319	0	0	0	0	0	1,750	4,030

## Jobs Forecast by NAICS and Geography, End of Forecast (2027)

NAICS	Airport	Greenvie w	Hamlets	IDP Com	IDP Ind	IDP Ind Rural	IDP Res	Ind Park	Valleyvie w	Total
Accommodation and food services	0	49	14	3	0	0	2	0	249	317
Administrative and support, waste management and remediation services	0	51	13	1	0	0	0	0	74	139
Agriculture, forestry, fishing and hunting	0	356	105	0	6	6	0	12	69	553
Arts, entertainment and recreation	0	16	5	0	0	0	0	0	27	50
Construction	0	260	71	2	7	7	0	14	284	646
Educational services	0	95	25	3	0	0	6	0	69	198
Finance and insurance	0	20	5	1	0	0	1	0	32	59
Health care and social assistance	0	101	27	3	0	0	3	0	190	323
Information and cultural industries	0	1	0	0	0	0	0	0	18	20
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0
Manufacturing	0	78	21	0	2	2	0	4	41	148
Mining, quarrying, and oil and gas extraction	0	374	110	0	6	6	0	12	285	792
Other services (except public administration)	0	100	27	5	0	0	5	0	110	246
Professional, scientific and technical services	0	67	19	1	1	1	0	3	42	134
Public administration	0	52	13	1	0	0	0	0	163	230
Real estate and rental and leasing	0	33	9	0	0	0	1	0	22	64
Retail trade	0	146	42	4	0	0	8	0	264	463
Transportation and warehousing	19	123	36	0	2	2	0	4	64	250
Utilities	0	25	7	0	2	2	0	0	29	65
Wholesale trade	0	52	14	1	1	1	0	2	43	114
Total	19	2,000	563	25	26	26	25	51	2,075	4,811

The tables above report the estimated number of jobs, by geography and NAICS, in both 2017 and 2027.

### DRIVER AND SUPPORT INDUSTRIES

In this analysis, industries are allocated in proportions to Driver and Support groups. Employment in Driver Industries is driven by scenario-specific rates of job growth; and Support employment is generally driven by

regional population growth. A description of how Driver Industries were designed and used in this analysis can be found in an earlier section of this document.

### Total Driver Industry Jobs by Industry Group, 2017 to 2027

Driver Industry Group	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Agriculture and Related	462	471	480	490	500	510	520	530	541	552	563	2.0%
Support Activities for Oil Extraction	841	858	875	893	911	929	948	967	986	1,006	1,026	2.0%
Retail Services	229	234	239	244	248	253	258	264	269	274	280	2.0%
Tourism	298	304	310	316	323	329	336	342	349	356	363	2.0%
Total	1,831	1,867	1,905	1,943	1,982	2,021	2,062	2,103	2,145	2,188	2,232	2.0%

The table above shows the total number of jobs in the Study Area related to Driver Industries through the forecast. From a base of 1,831 in 2017, Driver Industry jobs increase across all groups at an average annual rate of 2.0 per cent to reach a total of 2,232 by 2027.

## Total Support Jobs by NAICS, 2017 to 2027

NAICS	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Accommodation and food services	79	79	80	80	80	82	84	87	89	91	94	1.8%
Administrative and support, waste management and remediation services	123	123	124	124	125	127	129	132	134	137	139	1.3%
Agriculture, forestry, fishing and hunting	0	0	0	0	0	0	0	0	0	0	0	-
Arts, entertainment and recreation	0	0	0	0	0	0	0	0	0	0	0	-
Construction	486	490	492	494	497	509	520	537	551	565	580	1.8%
Educational services	169	170	170	171	172	176	179	185	189	193	198	1.6%
Finance and insurance	51	51	51	52	52	53	54	55	56	58	59	1.4%
Health care and social assistance	280	282	283	283	285	291	296	304	310	317	323	1.4%
Information and cultural industries	0	0	0	0	0	0	0	0	0	0	0	-
Management of companies and enterprises	0	0	0	0	0	0	0	0	0	0	0	-
Manufacturing	111	112	113	113	114	117	119	123	126	130	133	1.8%
Mining, quarrying, and oil and gas extraction	0	0	0	0	0	0	0	0	0	0	0	-
Other services (except public administration)	210	211	212	213	214	219	223	230	235	241	246	1.6%
Professional, scientific and technical services	73	73	73	74	74	76	78	80	82	84	87	1.8%
Public administration	202	203	204	204	206	209	212	217	221	225	230	1.3%
Real estate and rental and leasing	57	57	57	57	58	59	60	61	62	63	64	1.3%
Retail trade	115	116	116	117	117	120	123	127	130	133	137	1.8%
Transportation and warehousing	104	105	105	105	106	109	111	115	118	121	124	1.8%
Utilities	54	55	55	55	55	57	58	60	61	63	65	1.8%
Wholesale trade	87	88	88	88	89	91	92	95	97	100	102	1.6%
Total	2,199	2,215	2,223	2,230	2,244	2,293	2,336	2,407	2,463	2,521	2,579	1.6%

A forecast of job growth across Support Industries is shown in the table above. Support jobs represent 2,199 positions in 2017, and increase at an average annual rate of 1.6 per cent to reach 2,579 jobs by 2027.

Support job growth is strongest in industries such as retail trade, construction, and transportation and warehousing (1.8 per cent). Support jobs in industries such as public administration, real estate and rental and leasing, and administrative and support, waste management and remediation services grow at a relatively lower rate (1.3 per cent).

Note that some 2-digit NAICS do not report any employment categorized as Support - this is because the entirety of that industry was assumed to a Driver in this analysis.

## Proposed Highway Realignment

Economic growth associated with development along Highways 43 and 49 is an important consideration within the Study Area. As such, the proposed realignment of these highways has the potential to impact the economic forecasts discussed in this report.

The proposed realigning of Highways 43 and 49 does not impact forecasts of aggregate population and job growth. However, the realigning would likely impact the geographic prioritization of commercial and industrial development. Job growth would occur sooner in IDP areas close to the new highway location, with the timing of development and corresponding job growth in Valleyview's urban reserve slowing as a result.

This analysis assumes that commercial and industrial development in the relevant IDP areas would occur one year sooner (2020), relative to the forecast results discussed earlier in this report. The timing and construction details of the highway realignment project would obviously impact this assumption. Note that job growth in the residential IDP areas is unaffected by the highway realignment, as this job growth is correlated to population growth in the respective area(s). Population forecasts related to residential IDP areas are unaffected by the proposed realignment.

A total job forecast by geography is shown in the table below. Total jobs in commercial and industrial IDP areas reaches just over 300 by 2027 in this forecast, compared to a total of 77 in the forecast where highway realignment was not considered. The higher rate of job growth in IDP areas has the effect of reducing the amount of new jobs created in the rest of Valleyview, which reaches about 1,900 (average annual growth of 0.8 per cent), compared to a total of 2,075 in the prior forecast (average annual growth of 1.7 per cent).

## Total Job Forecast by Geography, 2017 to 2027 (Highway Realignment)

Geography	2017	2018	2019	2020	2021	2022	2023	2024	2025	2026	2027	AAG
Airport	15	15	15	15	16	16	17	18	18	19	19	2.6%
Rest of MD of Greenview	1,946	1,946	1,966	1,982	1,992	2,000	2,000	2,000	2,000	2,000	2,000	0.3%
Hamlets	319	342	353	367	384	413	443	473	503	533	563	5.9%
IDP - Commercial	0	0	0	0	0	8	13	47	64	81	99	-
IDP - Industrial	0	0	0	5	10	24	39	52	68	85	103	-
IDP - Industrial (Rural)	0	0	0	5	10	24	39	52	68	85	103	-
IDP - Residential	0	0	0	0	0	1	3	10	15	19	25	-
Industrial Park	0	0	0	0	0	0	0	0	0	0	0	-
Rest of Valleyview	1,750	1,779	1,793	1,800	1,814	1,829	1,843	1,857	1,871	1,886	1,900	0.8%
Study Area Total	4,030	4,082	4,127	4,173	4,226	4,314	4,398	4,509	4,607	4,708	4,811	1.8%



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