Regional Economic Structure by Industry

March 2011

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Introduction

The report on Economic Structure by Industry was developed to give a broad overview of the contribution to the regional economy by each industry, and to measure how the regional economy is improving and diversifying over time. Ongoing analysis of the economy is an important deliverable for charting progress and facilitating the will for action that will influence regional economic growth and diversification. Through measurement, the value and effectiveness of economic development strategies can be monitored, assessed and evaluated.

Through the analysis of two different data sets obtained from Statistics Canada, this report presents the industry structure of the economy, by employment and firms as classified by the North American Industry Classification System (NAICS). The report also provides a detailed analysis of key industry clusters which have been identified as offering a high probability of sustainable economic growth and diversification for the region.

The Regional Economic Structure by Industry report was completed through a contractual arrangement with Initiatives Prince George, whose Senior Economic and Market Research Analyst researched, developed and wrote the report based on the guidance of the Alliance members. The report and information about other Alliance projects can be found at http://www.1697economicalliance.ca.

Methodology

Data for the analysis of employment by industry is obtained through the Labour Force Survey conducted by Statistics Canada. Industry Codes are assigned using survey respondents' job descriptions and are based on NAICS classification descriptions. The size of the estimate obtained through the survey process is highly correlated with the degree of variability; as such, employment estimates below 1,500 are suppressed.

Data for the analysis of firms by industry is obtained through the Business Register from Statistics Canada. This data set is sourced mainly from the Statistics Canada survey program and from Canada Revenue Agency's Business Number account files. The data reflects counts of establishments[1] by industry activity[2] (NAICS) and employment size ranges. For most establishments reported in the Business Register, employment estimates are derived using the amount of payroll deduction remittances made by employers on behalf of their employees. A measure of "10 employees" could represent "10 full-time employees", "20 part-time employees" or any other workforce combination. Thus, the Business Register data is not intended for compiling industry employment estimates.

Attempts should not be made to compare or find similarities between the employment and firm analyses, as they are performed with the use of two completely different data sets that are compiled with different methodologies and data collection procedures, and reflect slightly different geographies. It is possible, without any fault in the credibility of either data set, to see the patterns or trends of the two data sets behave in opposite directions or with different magnitudes.

[1] Prior to December 2008 Statistics Canada only provided counts for establishments; in December 2008, location counts were introduced, and establishment counts were produced for the last time. Counts of locations, defined as producing units at a single geographic location, provide a better measurement of actual business units. While the count of locations will naturally generate a higher number of firms than the count of establishments, the difference is not considered to be significant enough to prevent the use of both data sets in the analysis of industry changes over time. An examination of the 2008 establishment and location counts for the region reveals that neither data set contradicted the other in terms of the direction or relative magnitude of changes observed between 2007 and 2008. This report utilizes location counts for both 2008 and 2009, and establishment counts for all years prior.

[2] It is important to note that a firm's classification in a specific sector does not mean that firms do not participate in other sectors through the type of work that they do. For example, specialty trade contractors do most of their work in relation to construction and are classified as such, but many may also be involved in primary and secondary forestry and mining activities.

The terms used in the Economic Structure report are defined as follows: ‘Large’ firms – businesses with 50 or more employees; ‘Small’ firms – businesses with 19 or fewer employees; Firms with ‘no employees’ – businesses in the ‘indeterminate’ category, which include the self-employed (those who do not maintain an employee payroll, but may have a workforce which consists of contracted workers, family members or business owners) and firms that did not have employees in the previous 12 months.

Summary

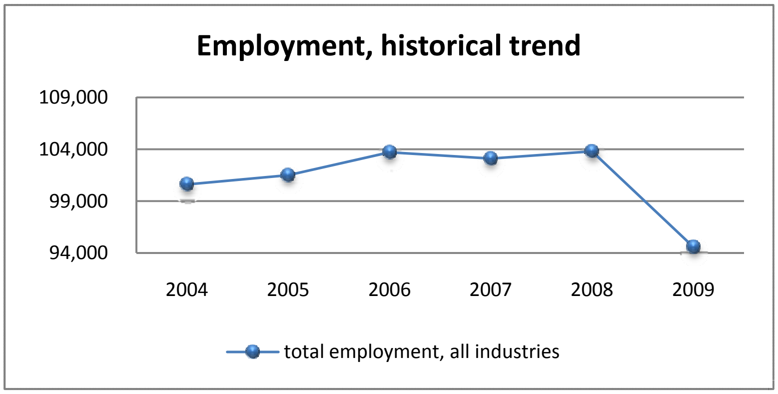
Employment in the region is concentrated mostly in services-producing sectors, although goods-producing sectors account for nearly one-third of employment; this is a higher concentration than in BC as a whole. Employment in the 16-97 region declined by 6.0% between 2004 and 2009; over this period, the most significant changes in the proportion of employment concentrated in each industry occurred in the *Manufacturing* and *Health Care & Social Assistance* sectors. The largest sectors in the region, ranked by employment, did not change significantly over this period, although *Construction* replaced *Transportation & Warehousing* in the top seven ranking.

The number of firms in the region declined by 9.4% overall between 2004 and 2009; the largest sectors, ranked by number of firms, remained unchanged. The proportion of firms in most sectors also remained relatively unchanged, with the exception of firms engaged in activities related to *Agriculture, Forestry, Fishing and Hunting*; the concentration of firms in this sector declined considerably between 2004 and 2009. Small business dominates in the region; the majority of the firms in the region have fewer than twenty employees.

A detailed industry cluster analysis has revealed that despite an overall decrease in employment in the region between 2004 and 2009, there was an increase in employment in three of the seven clusters analyzed. Despite the overall decline in firms in the region over this period, two of the clusters increased in their number of firms.

- The number of persons employed in the *Technology* cluster increased between 2004 and 2009, leading the cluster to make up 4.0% of employment in 2009. The number of firms in the cluster declined over the same period; nonetheless, *Technology* firms accounted for 7.6% of the total firms in the region in 2009.
- Employment in *Mining and Oil & Gas* increased significantly between 2004 and 2009, bringing this cluster’s proportion of total employment in the region to 3.2%. The number of firms in this cluster also increased over this period, although these firms still made up less than 1.0% of the regional total in 2009.
- The *Health Sciences* cluster increased in both employment and number of firms between 2004 and 2009. While this cluster accounted for 10.5% of total employment in the region in 2009, the firms in this cluster made up only 4.0% of total firms.
- The *Wood Products Manufacturing* cluster saw a decline in employment and number of firms between 2004 and 2009. This cluster accounted for 9.7% of regional employment in 2009, and 1.5% of total firms.
- Employment in the *Transportation & Warehousing* cluster accounted for 5.5% of total employment in the region in 2009, having declined considerably since 2004. The cluster’s share of firms declined steadily between 2004 and 2009 as a result of a declining number of firms, but still makes up 8.2% of the regional total.
- The *Tourism* cluster declined in both employment and firms between 2004 and 2009, but still made up a significant proportion of the regional totals in 2009 with 15.4% of total employment and 15.4% of total firms.
- The *Forestry* cluster’s share of total employment and firms declined between 2004 and 2009. However, this cluster still made up 4.7% of total employment and 11.2% of total firms in 2009.

Historical trends (total employment and number of firms)

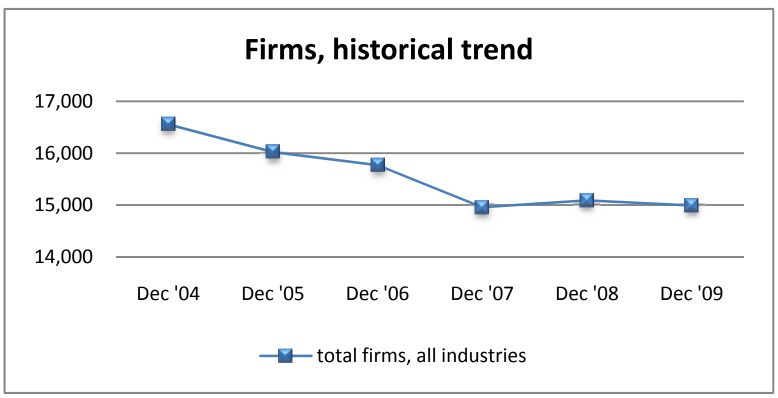


Source: Statistics Canada *Labour Force Survey*

Description and Analysis

Industry employment statistics are compiled for the Cariboo and Nechako Development Regions, using Labour Force Survey data obtained from Statistics Canada. This measure reports the annual average of the total number of persons estimated to be employed in all industries.

Employment numbers increased steadily in the five years leading up to the recession; the region experienced an annual average employment growth of 0.8% annually between 2004 and 2008, but declined by 8.9% in 2009 for an overall employment decline of 6.0% between 2004 and 2009.



Source: Statistics Canada *Business Register*

Description and Analysis

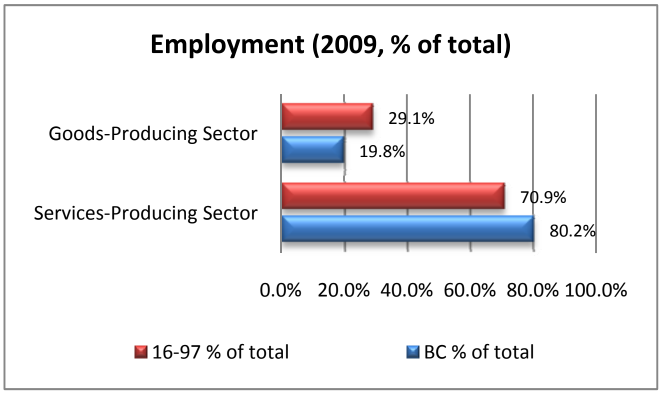
Industry firm statistics are compiled for the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, using Business Register data obtained from Statistics Canada. This measure reports the total number of firms established in the region in all industries.

There was a consistent decline in the number of total firms established in the region in the years prior to 2007, after which time the number of firms remained relatively unchanged. Overall, the region experienced a 9.4% decline in the number of firms between 2004 and 2009, a decline which can be largely attributed to a drop in the number of businesses with no employees. This may be an indication of self-employed persons opting to go to work with other established firms over this period.

Employment by Industry: Largest Sectors (2009, BC comparison)

Description and Analysis

This measure reports the largest sectors, ranked by proportion of total employment, in the Cariboo and Nechako Development Regions, combined. The proportions for these sectors are compared to the proportions in these sectors for the province as a whole.

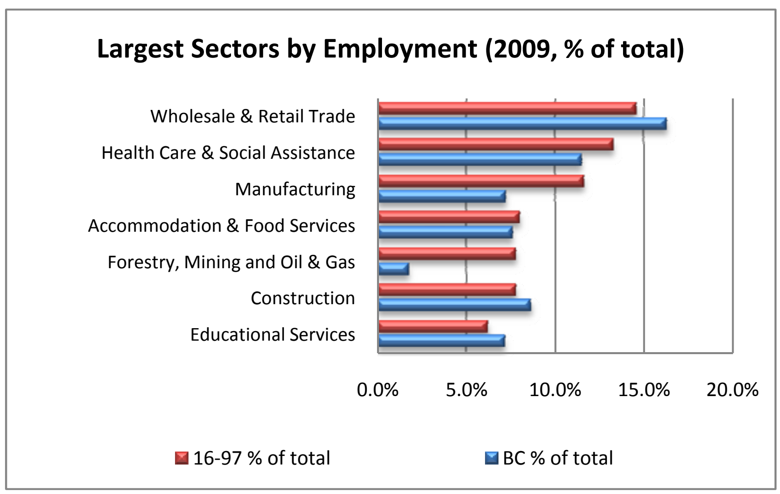


Source: Statistics Canada *Labour Force Survey*

There is a higher concentration of employment in sectors that are considered 'Goods-producing' in the 16-97 region (specifically *Manufacturing* and *Forestry, Fishing, Mining and Oil & Gas*) compared to BC as a whole, as reflected in the comparison of the region's largest sectors.

The region's larger relative proportion of employment in *Manufacturing* is mainly due to wood products manufacturing activities. In 2009, wood products manufacturing accounted for 7.5% of total employment in the region, but only 1.2% of total employment across BC. The difference between regional and provincial employment in *Forestry, Mining and Oil & Gas* is largely due to the large forest industry in the region relative to the province, but also reflects the growth of mining and oil & gas activities over the past five years.

Between 2004 and 2009, the proportion of total employment attributed to mining and oil & gas activities in the region increased from 1.0% to 3.2%; over the same period, forestry went from 5.6% to 4.7% of total employment. In comparison, the share of provincial employment attributable to mining and oil & gas activities and forestry changed less significantly (going from 0.5% and 1.0%, respectively, in 2004 to 1.1% and 0.6% in 2009).



Source: Statistics Canada *Labour Force Survey*

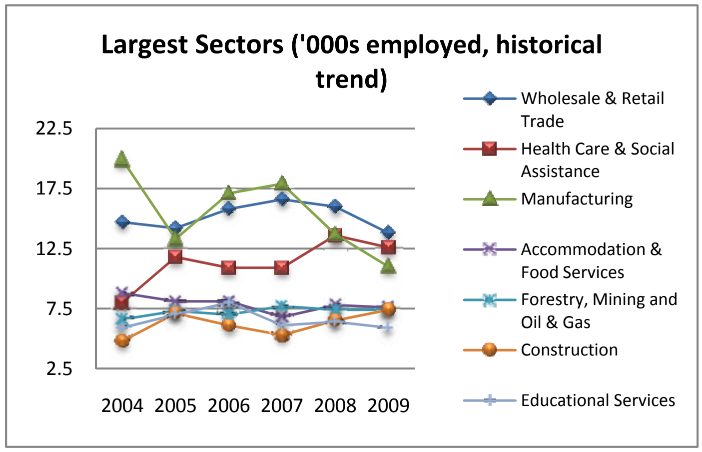
While BC has a higher proportion of employment in 'Services-producing' industries overall, the proportions of employment in the largest services-producing sectors in the 16-97 region are not significantly dissimilar to those for BC. Overall, the region's seven largest sectors accounted for 69.5% of total employment in 2009; these sectors made up 60.3% of total employment across the province.

Largest Sectors by Employment (historical trend)

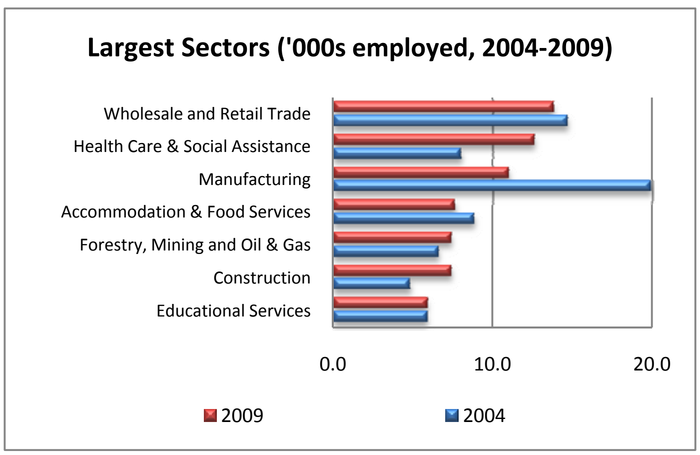
Description and Analysis

This measure reports the trend in number of persons employed in the largest sectors, ranked by proportion of total employment, in the Cariboo and Nechako Development Regions, combined.

There has been a slight change in the sectors that rank as the largest, by proportion of employment, over the last five years. The top sectors are mostly the same, with the exception that *Construction* replaced *Transportation & Warehousing* in the top seven ranking. Between 2004 and 2009, *Construction* employment increased by 54.2% while employment in *Transportation & Warehousing* declined by 23.5%. While one of the smaller of the top sectors at 7.8% of total employment in 2009 (up from 4.8% in 2004), the increase in *Construction* employment is noteworthy. The upward trend in the midst of an overall employment decline of 6.0% reflects continued strong activity in major projects in the region over the duration of the recession.



Source: Statistics Canada *Labour Force Survey*



Source: Statistics Canada *Labour Force Survey*

The most significant changes among the region's largest sectors occurred in the *Health Care & Social Assistance* and *Manufacturing* sectors. *Health Care & Social Assistance* employment increased 57.5% between 2004 and 2009, while employment in *Manufacturing* declined by 44.7% over the same period.[3] As a result, the proportion of employment attributable to *Health Care* activities increased from 8.0% to 13.3% while *Manufacturing* went from 19.8% to 11.6% of the region's employment over the same period.

Employment in *Forestry, Mining and Oil & Gas* increased 12.1% between 2004 and 2009, leading to a greater proportion of total employment for this sector (7.8% compared to 6.6% in 2004). Both *Wholesale & Retail Trade* and *Accommodation & Food Services* employment declined over this period (6.1% and 13.6%, respectively), but as *Trade* employment declined at the same rate as overall employment, this sector's proportion of total employment was unchanged at 14.6%. *Accommodation & Food Services* went from 8.7% to 8.0% of total employment. Employment in *Educational Services* remained stable over the period, although with the overall decline in employment, this sector's proportion of total employment increased slightly from 5.9% to 6.2%.

[3] Although the *Manufacturing* sector employed fewer persons in 2009 compared to 2004, it is important to note that 2004 represented the highest point in manufacturing employment over the last decade, and that employment in this sector declined mainly in 2008 and 2009, attributable in part to the downturn in the global economy. The current level of employment in *Manufacturing* is not likely reflective of a permanent change in the regional economy.

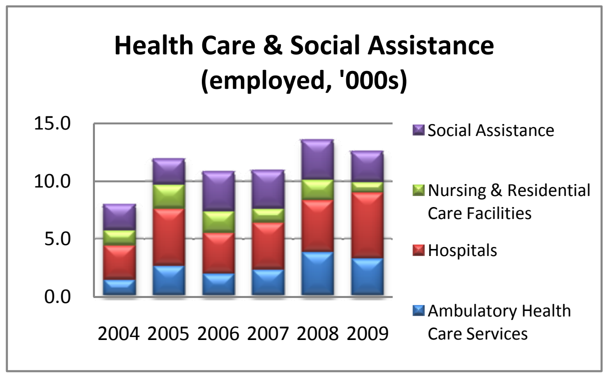
Largest Sectors by Employment (detailed analysis)

Wholesale and Retail Trade

Employment in this sector increased an average of 8.2% over 2006 and 2007, before declining an average of 8.7% over 2008 and 2009, for an overall decline of 6.1% between 2004 and 2009. Most of the decline occurred in Retail Trade (600 persons, or 5.0%, compared to a 300 person, or 10.7%, decline in employment in Wholesale Trade). Despite the decline, the proportions of total employment attributable to each category were relatively changed from the 2004 level, at 11.9% and 2.6% in 2009, respectively.

Health Care & Social Assistance

Employment in this sector grew 57.5% between 2004 and 2009. The majority of the increase in employment occurred in the Hospitals and Ambulatory Health Care Services categories (93.3% and 128.6%, respectively). As a result of the significant increase over this period, the proportion of total employment attributable to these categories increased from 3.0% and 1.4% in 2004 to 6.1% and 3.4%, respectively, in 2009.

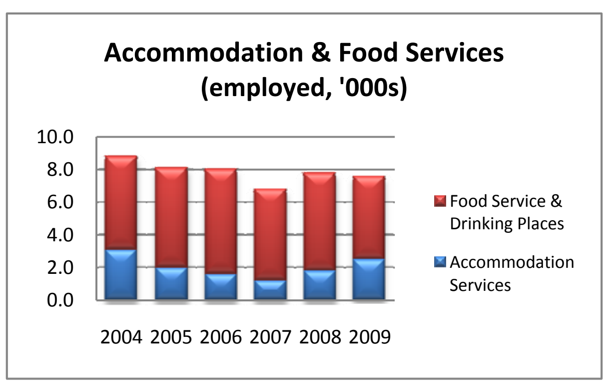


Manufacturing

Employment in *Manufacturing* grew steadily between 2005 and 2007 before declining sharply in 2008 and 2009. The majority of the decline occurred in Wood Products, the largest category in this sector; Wood Products Manufacturing declined 51.7% overall between 2004 and 2009, mainly due to the sharp drop over the final two years. Employment in Other Manufacturing activities declined 37.9% over the same period while Paper Manufacturing remained more stable, declining only 8.7%. The proportion of total employment attributed to this sector dropped from 19.8% in 2004 to 11.6% in 2009.

Accommodation & Food Services

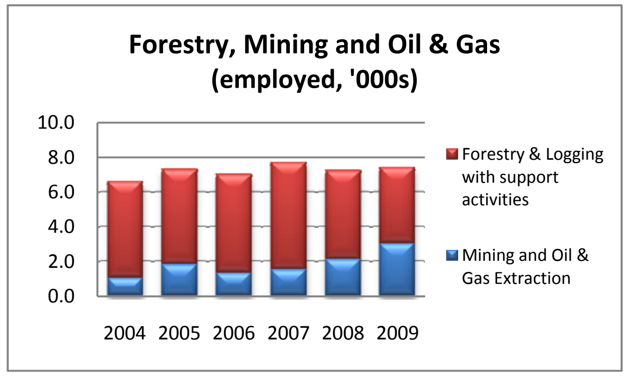
Employment in this sector declined 13.6% between 2004 and 2009. By number of persons, the decline was shared equally between both of the sector's categories, although the largest category, Food Service & Drinking Places, declined 10.5% while employment in Accommodation Services declined by 19.4%. These categories accounted for 5.4% and 2.6% of the region's total employment, respectively, in 2009, down from 5.7% and 3.1% in 2004.



Largest Sectors by Employment (detailed analysis)

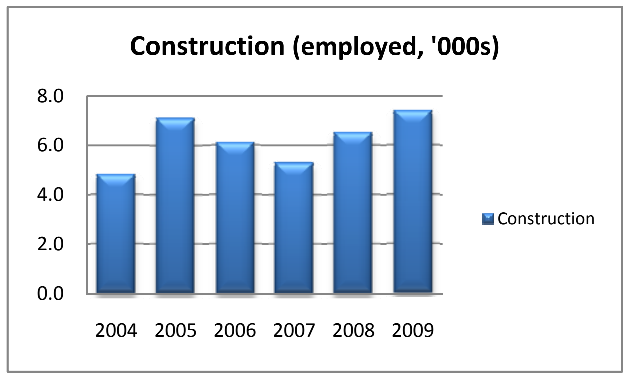
Forestry, Mining, Oil & Gas[4]

Forestry and Logging activities account for the greatest portion of the employment in this sector, although Mining and Oil & Gas Extraction employment has increased significantly in recent years. Total employment in this sector increased by 12.1% overall between 2004 and 2009, due entirely to a 200.0% increase in Mining and Oil & Gas Extraction; employment in Forestry and Logging declined by 21.4% over this period. Given this, the proportion of total employment attributed to Mining and Oil & Gas activities increased from 1.0% to 3.2% over this period while the proportion attributed to Forestry declined from 5.6% to 4.7%.



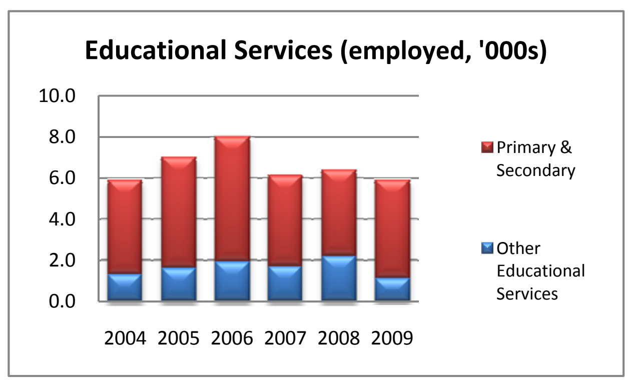
Construction

Employment in the *Construction* sector increased 54.2% between 2004 and 2009. The share of total employment attributed to this sector increased from 4.8% to 7.8% of total employment in the region over this period. The data does not allow for further detail, but employment in this sector includes activities related to Construction of Buildings, Heavy and Civil Engineering Construction and Specialty Trade Contractors.



Educational Services

Educational Services employment fluctuated in the years between 2004 and 2009; despite increases in three of these years and average annual growth of 1.3% over the period, the employment level in 2009 had returned to the same level as in 2004. However, the proportion of total employment attributed to this industry was 6.2% in 2009, compared to 5.9% in 2004. Employment in Primary & Secondary Education was 4.3% higher in 2009 than in 2004, while employment in Other Educational Services declined 15.4% over this interval.



Source: Statistics Canada *Labour Force Survey*

[4] Technically this sector is called *Forestry, Fishing, Mining and Oil & Gas*. As fishing, hunting and trapping are not significant sources of employment in the region, the sector has been renamed for clarity in this report.

Recent Trends and Patterns (employment growth and decline)

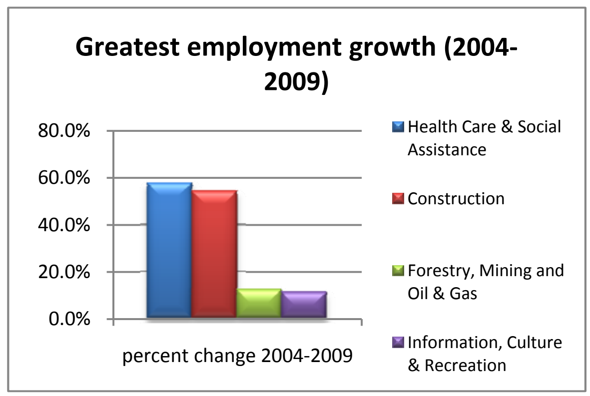
Description and Analysis

Employment growth and decline is measured by the percentage change in the number of persons employed in each sector in the Cariboo and Nechako Development Regions, combined, between 2004 and 2009.

Sectors with employment growth

Unsurprisingly, given the overall decline in employment between 2004 and 2009, the sectors with the highest rates of growth over this five year period also increased in proportion of total employment. Employment increases were the most significant in *Health Care & Social Assistance* and *Construction*; these sectors grew by 4,600 persons and 2,600 persons (57.5% and 54.2%), respectively. *Forestry, Mining and Oil & Gas* employment grew by 12.1% (800 persons) over this period, and employment in *Information, Culture & Recreation* increased by 11.1% (400 persons), increasing the proportion of total employment attributed to this sector from 3.6% in 2004 to 4.2% in 2009.

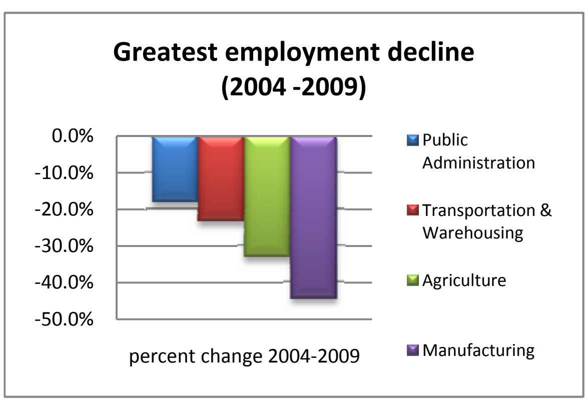
Growth in *Health Care & Social Assistance* employment is attributed to increases in Ambulatory Health Care Services, Hospitals and Social Assistance. In Nursing & Residential Care Facilities, the smallest category in this sector, employment declined by 30.8% over this period. The employment increase in *Forestry, Mining and Oil & Gas* is attributed to growth in Mining and Oil & Gas activities, and growth in *Information, Culture & Recreation* was due entirely to employment in Performing Arts, Spectator Sports & Related Industries; employment in this category increased by 47.1% between 2004 and 2009 while employment in Information and Cultural Industries declined by 21.1%. The data does not allow for a detailed analysis of the *Construction* sector.



Source: Statistics Canada *Labour Force Survey*

Sectors with employment decline

The sectors with the highest rates of employment decline over the last five years also decreased in their share of total regional employment over this period; the declines in these sectors exceeded the overall rate of decline for all industries. The 18.4% decline in *Public Administration* (900 persons) was shared among Federal, Provincial and Local governments (38.5%, 6.3% and 15.0%, respectively). The employment decline in *Manufacturing* was also shared among all of the categories, although Wood Products Manufacturing accounted for 85.4% of the total employment decline in this sector. The data does not allow for a detailed analysis of the 33.3% decline in *Agriculture* employment, nor does it allow for a detailed analysis of the 23.5% employment decline in the *Transportation & Warehousing* sector; as most of the categories in this sector employ less than 1,500 persons, the data have been suppressed.



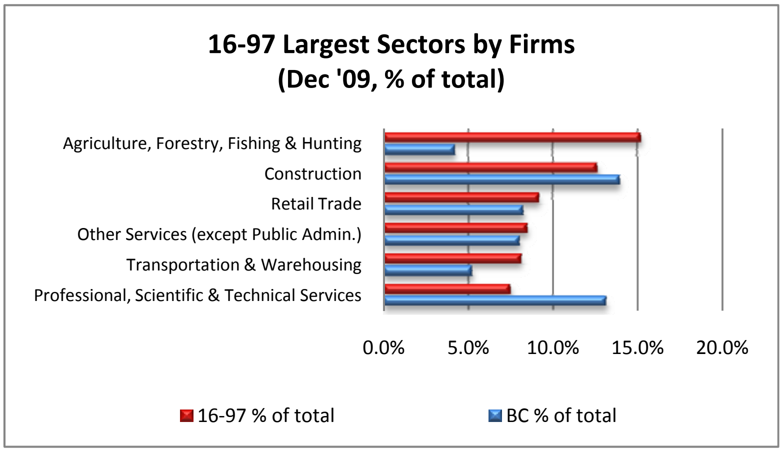
Source: Statistics Canada *Labour Force Survey*

Firms by Industry: Largest Sectors (December 2009, BC comparison)

Description and Analysis

This measure reports the largest sectors, ranked by proportion of total firms, in the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, combined. The proportions for these sectors are compared to the proportions in these sectors for the province as a whole.

A comparison of the region's largest sectors, ranked by the number of firms, with these sectors for the province as a whole illustrates some significant differences between the main economic activities in the region and BC overall. The greater proportions of total firms in *Agriculture, Forestry, Fishing & Hunting* and *Transportation & Warehousing* in the 16-97 region are a reflection of the traditional economic activities that have developed from the resources, geography and infrastructure in the region.

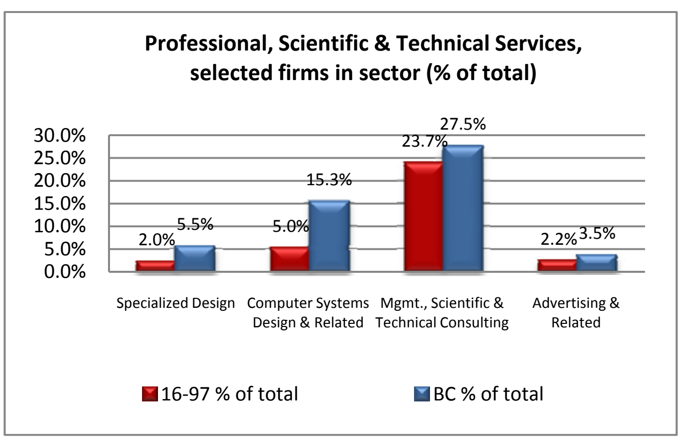


Source: Statistics Canada *Business Register*

Agriculture, Forestry, Fishing & Hunting firms account for 15.2% of total firms in the region, but only 4.2% of total firms across the province. The largest components of this sector include Logging and Support Activities for Forestry, which make up 53.1% and 17.7% of total regional firms in this sector, respectively, compared to 28.0% and 8.6% across BC. Animal Production firms account for 21.6% of the total regional firms in this sector, with Cattle production accounting for the majority (73.0%) of Animal Production operations. Provincially, Animal Production accounts for 25.0% of total firms in this sector with Cattle Production making up just over half.

Transportation & Warehousing firms make up 5.3% of total firms across BC, and 8.2% of the total firms in the region. General Freight Trucking and Specialized Freight Trucking make up the majority of firms in this sector across the region, with 25.1% and 44.2% of total firms in the sector, respectively, compared to 33.4% and 19.7% across BC.

The region's relatively lower proportion of *Professional, Scientific & Technical Services* firms (7.5% of total firms, compared to 13.2% in the province) is reflective of comparatively fewer firms in specialized professional services. While the region has a higher proportion of firms involved in legal, accounting and engineering services (14.1%, 17.5% and 19.7% of the firms in this sector in the region, compared to 11.8%, 12.2% and 14.7%, respectively, across BC), firms engaged in specialized design, computer systems design, scientific & technical consulting and advertising are better represented in the province as a whole. Scientific Research & Development firms are represented fairly equally in the region and the province (1.9% and 1.8% of the total firms in this sector, respectively).



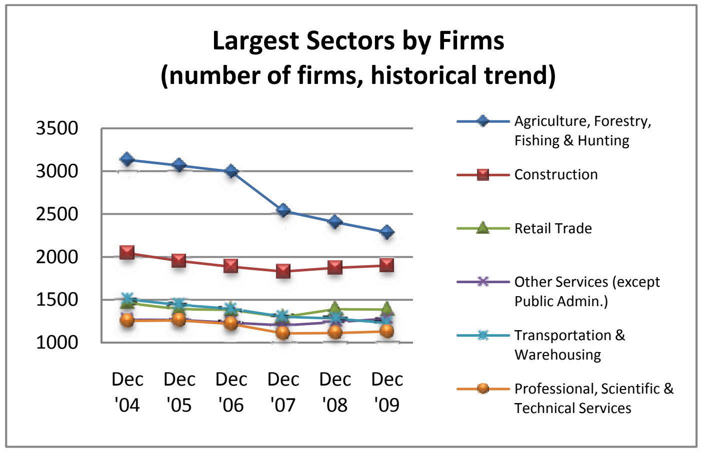
Source: Statistics Canada *Business Register*

Largest Sectors by Firms (historical trend)

Description and Analysis

This measure reports the trend in number of firms in the largest sectors, ranked by proportion of total firms, in the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, combined.

There was no change in the sectors that rank as the largest, by proportion of firms, between 2004 and 2009, although *Transportation & Warehousing* moved from third largest to fifth over this period. The proportion of total firms attributed to *Agriculture, Forestry, Fishing & Hunting*, *Transportation & Warehousing* and *Professional, Scientific & Technical Services* declined over this period, as a result of larger percentage declines in the number of firms in these sectors than in the number of firms in the region overall.



Source: Statistics Canada *Business Register*

Despite declines in the number of firms in *Construction* and *Retail Trade*, these sectors increased their proportion of total firms; the percentage decline in firms was less than the decline in firms overall. The *Other Services* sector increased in the number of firms over this period, leading this sector's share of total employment to increase from 7.7% in December 2004 to 8.5% in December 2009.

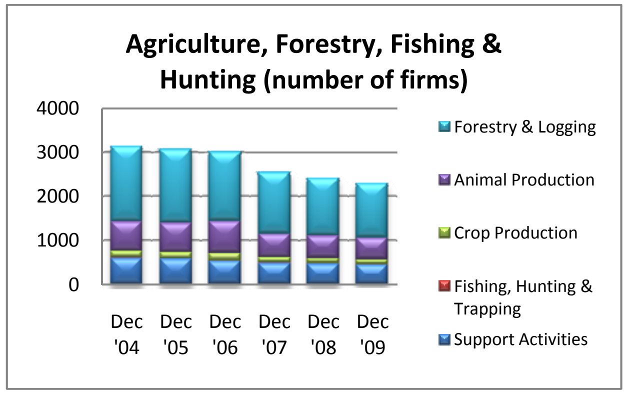
Source: Statistics Canada *Business Register*

The decline in the number of firms in the largest sectors (combined) accounts for 93.1% of the total decline in firms in the region between December 2004 and December 2009. *Agriculture, Forestry, Fishing & Hunting* accounts for 54.3% of the total decline, with 847 fewer firms; nearly all of this decline (776 firms) occurred in the '0-4 employees' size range. *Transportation & Warehousing* accounted for 17.7% of the total decline in firms in the region over this period (276 firms), also due to a decrease in the number of firms with fewer than 5 employees.

Largest Sectors by Firms (detailed analysis)

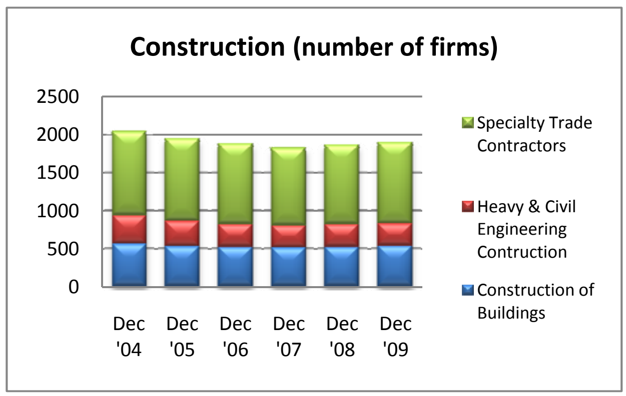
Agriculture, Forestry, Fishing & Hunting

Firms engaged in activities related to Forestry & Logging make up the largest proportion of firms in this sector (54.1%), but the number of firms has declined in recent years (from 1,710 in 2004 to 1,237 in 2009), in line with a steady decline in the number of firms engaged in Support Activities (25.2% fewer firms over this period). Firms in Animal and Crop Production also make up a significant proportion of firms (26.5%), although the number of firms in these categories declined between 2004 and 2009, resulting in a decline of 187 and 33 firms (27.5% and 22.8%), respectively, with most of the decline occurring in 2007.



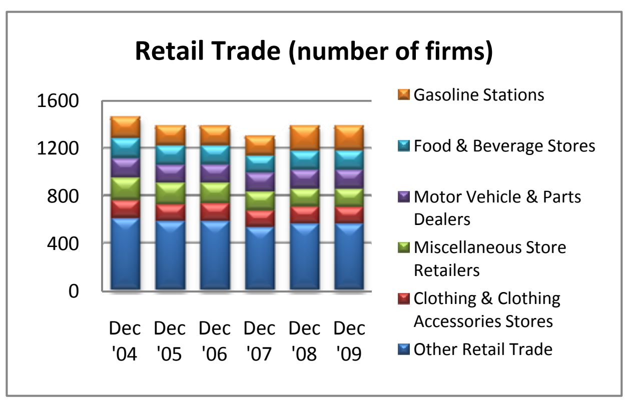
Construction

The number of *Construction* firms decreased steadily between 2004 and 2007, before increasing again in 2008 and 2009. Despite an upward trend over the last two years of this period, the number of firms in this sector declined by 7.1% overall between 2004 and 2009. This was due largely to a decline in the number of firms in Heavy & Civil Engineering Construction, the smallest category in this sector; there were 83 fewer firms (22.0%) in this category in 2009 than in 2004, accounting for 57.2% of the overall decline in this sector. Specialty Trade Contractors and firms engaged in Construction of Buildings declined by 3.7% and 3.8%, respectively, over this five year period.



Retail Trade

The number of firms engaged in *Retail Trade* declined by 5.1% overall between 2004 and 2009, with most of the decline occurring prior to 2008 after which most of the categories experienced growth. The largest declines occurred in Miscellaneous and Sporting Goods, Hobby, Book & Music Store Retailers (16.7% and 22.5% between 2004 and 2009, respectively). The number of Building Material & Garden Equipment retailers in the region increased 20.2% (19 firms) over this period.[5] Gasoline Stations also increased significantly, with 26 more firms (14.4%) in 2009 than in 2004.

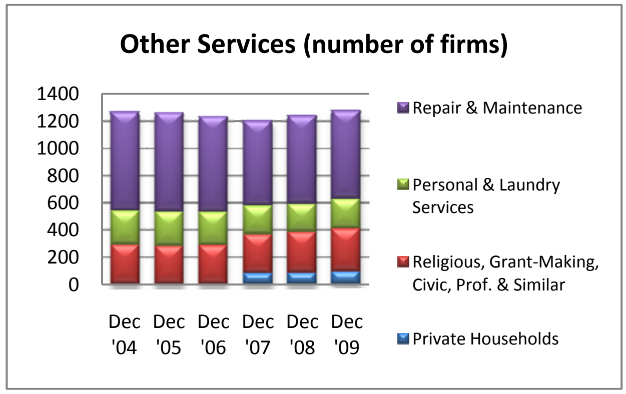


[5] Sporting Goods, Hobby, Book & Music Store and Building Material & Garden Equipment retailers are graphically represented within Other Retail Trade. This grouping also includes Non-store retailers, Health, Electronics, Furniture and General Merchandise stores and, combined, make up nearly 30% of the firms in the *Retail Trade* sector.

Largest Sectors by Firms (detailed analysis)

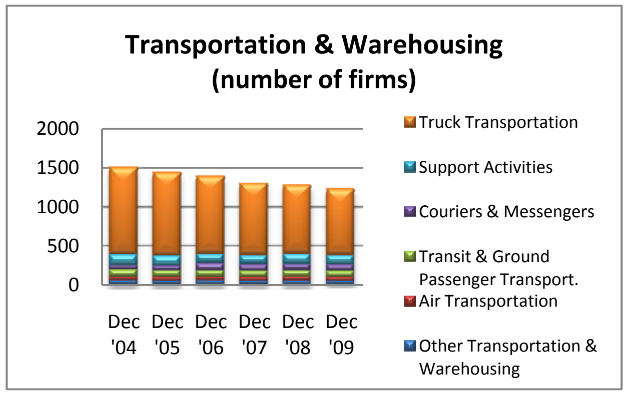
Other Services

The number of firms engaged in *Other Services* increased 0.9% overall between 2004 and 2009, a result of growth over 2008 and 2009. Growth was mainly centred in the Religious, Grant-Making, Civic, Professional & Similar Organizations category, with 24 more firms (8.2%) in 2009 than there had been in 2004. Firms engaged in Repair & Maintenance and Personal Laundry Services were 10.5% and 12.4% fewer in 2009 than five years previous, although most of this decrease can be assumed to be reflected in the 95 firm increase in the number of firms in the Private Households category.[6]



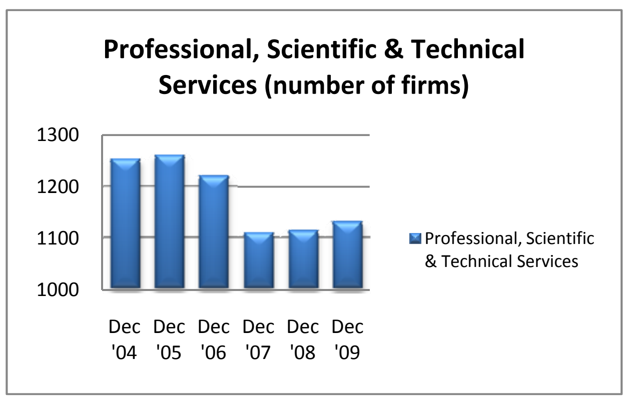
Transportation & Warehousing

Firms engaged in Truck Transportation activities make up the largest proportion (69.3%) of the firms in this sector, and account for almost the entire decline in the number of firms in the sector between 2004 and 2009 (269 of 276 firms). Of the larger categories in this sector, only Air Transportation and Couriers & Messengers experienced growth over this period (8 and 27 firms; 19.5% and 48.2%, respectively). Firms also increased in Scenic & Sightseeing Transportation and Warehousing & Storage (2 and 4 firms; 25.0% and 22.2%, respectively).[7]



Professional, Scientific and Technical Services

The number of firms engaged in *Professional, Scientific & Technical Services* has fluctuated in the last few years, declining significantly in 2007 but increasing slightly in the following years. The current data does not allow for a further breakdown of activity in the categories in this sector. The types of firms in this category may include Legal, Accounting, Architectural, Specialized and Computer Systems Design, Consulting and Research services.



Source: Statistics Canada *Business Register*

[6] The number of firms in the Private Households category was reported as zero prior to 2007; the 95 new firms in this category likely reflect changes in the data reporting method and likely account for most of the decline in firms in the Personal and Laundry Services and Repair and Maintenance categories.

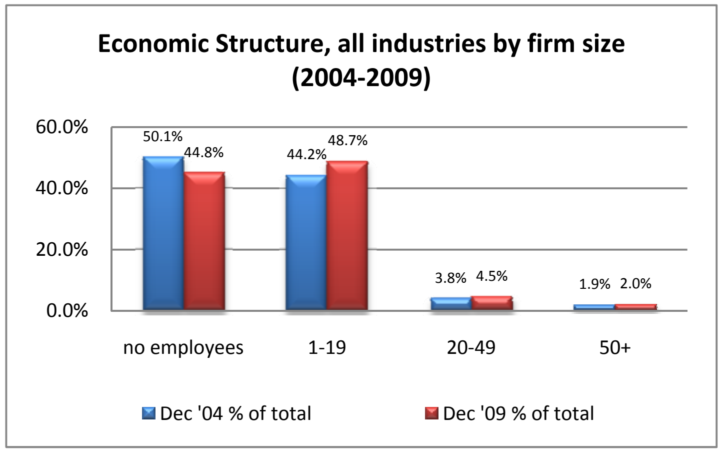
[7] Air Transportation, Scenic & Sightseeing and Warehousing & Storage firms are graphically represented within the Other Transportation & Warehousing group. This group also includes Postal Service, Rail, Pipeline and Water Transportation and comprises 3.7% of firms in this sector.

Economic Structure, by Firm size

Description and Analysis

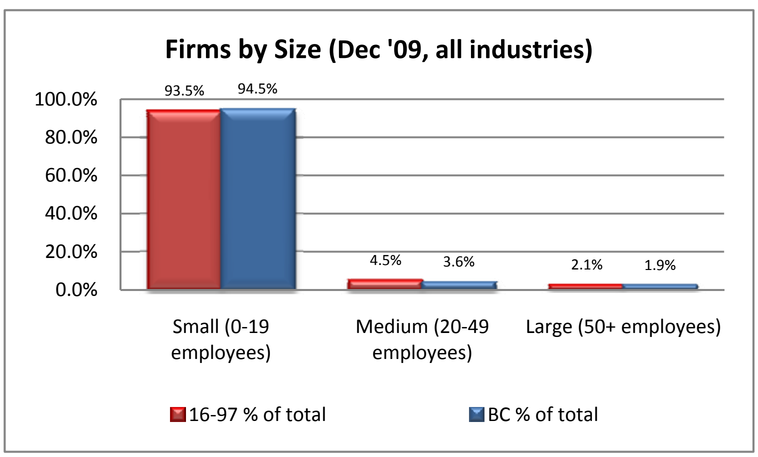
This is a breakdown of the proportion of total firms of various size ranges (categorized by the number of employees in each firm), for all sectors, in the 16-97 region. Data has been compiled for the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts.

Small firms (those with fewer than 20 employees) clearly dominate in the region, although the proportion of total firms attributed to small firms in the region declined from 94.3% in 2004 to 93.5% in 2009. Over this period, the proportion of medium-sized firms (those with 20-49 employees) increased in the region by nearly the same rate as the decline in small firms; the 6.3% increase in the number of medium-sized firms alongside an overall decline in firms of 9.4% may be an indication of consolidation among smaller firms.



Source: Statistics Canada *Business Register*

The decline in the total number of firms in the region over the 2004-2009 period can be attributed almost entirely to the decline in the number of small firms, specifically those in the self-employed category. During the period between 2004 and 2009, the number of firms with no employees declined steadily, decreasing by an annual average of 4.1% each year, for an overall decline of 18.9% in the number of self-employed firms.



Source: Statistics Canada *Business Register*

Despite differences in the industry composition between the 16-97 region and BC, the size structure of total firms is very similar, reflecting the dominance of small business across the province.

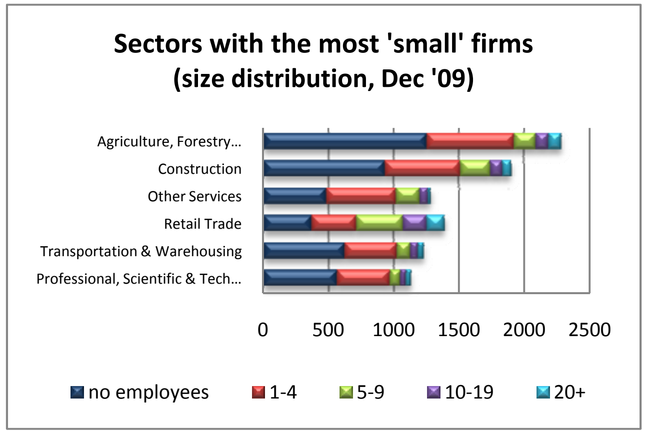
Sectors with the largest number of 'small' firms

Description and Analysis

This measure provides a breakdown of the firm size distribution in the sectors with the largest number of 'small' firms (firms with fewer than 20 employees) in the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, combined. These sectors are also the sectors with the largest number of firms overall, reflecting the dominance of small business in the region.

Agriculture, Forestry, Fishing and Hunting

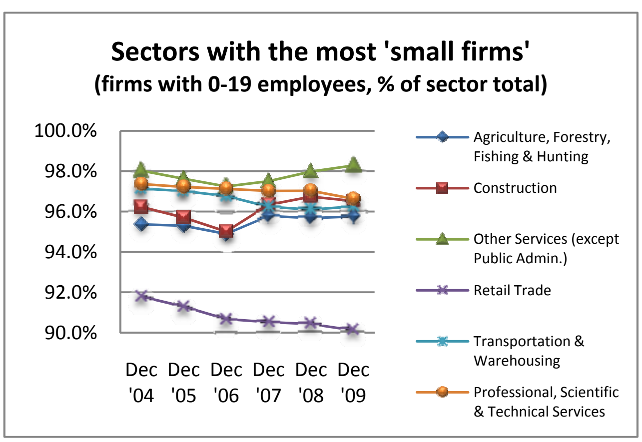
Nearly 96.0% of the firms in this sector have fewer than 20 employees. Accordingly, the 27.0% decline in firms between 2004 and 2009 can be attributed mostly to a decline in the number of smaller firms, specifically those with fewer than 5 employees. Firms in this size range accounted for 91.6% of the overall decline in firms in this sector over this period. Forestry & Logging accounts for 55.8% of the decline in firms in this sector (mostly in firms with 0-4 employees, although there were declines in the number of firms in all size ranges). The same trend is observed in Support Activities for Agriculture & Forestry, Crop Production and Animal Production, with the number of firms declining 25.2%, 22.8% and 27.5%, respectively between 2004 and 2009.



Source: Statistics Canada *Business Register*

Construction

Given that only 3.5% of firms in this sector had more than 20 employees in 2009, it is not surprising that most of the 7.1% decline in the total number of firms in the interval following 2004 was due to a decline in the number of small firms, specifically those with fewer than 5 employees. There were 14.8% fewer firms in 2009 than in 2004 with less than 5 employees. However, firms in the 5-9 employees size range increased by 93.9% (111 firms) over this period, which may be an indication of consolidation. While the number of firms with fewer than 5 employees in Construction of Buildings and Specialty Trade Contractors has declined (14.5% and 11.6%, respectively), the number of firms in these categories with 5-19 employees has increased (106.4% and 75.0%, respectively). The 24.8% decline in the number of Heavy & Civil Engineering Construction firms with fewer than five employees was not accompanied by a significant increase in firms in larger size ranges.



Source: Statistics Canada *Business Register*

Other Services

93.4% of the firms in this sector have fewer than 10 employees; 98.3% have fewer than 20. The number of firms in this sector grew steadily between 2006 and 2009, resulting in an overall increase in firms between 2004 and 2009. The increase was due to growth among firms with employees, but with fewer than 10; there was an 11.6% decline (11 firms) in the number of firms with more than 10 employees and the number of firms with no employees declined by 13.1% (72 firms). At the same time, the number of firms with 1-9 employees increased by 15.2% (95 firms), which suggests expansion of self-employed firms to include employees.

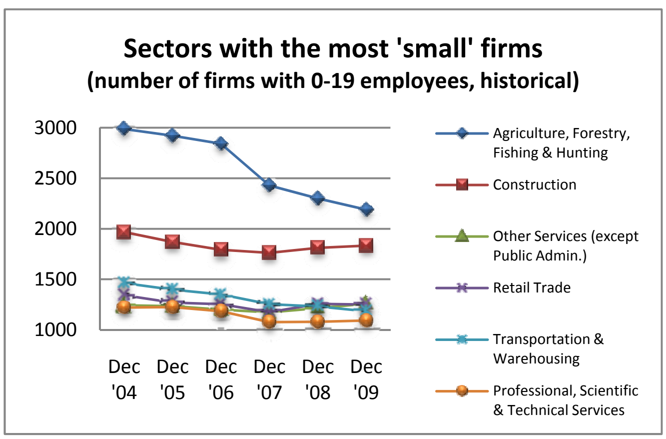
Sectors with the largest number of 'small' firms

Retail Trade

90.1% of the firms in this sector have fewer than 20 employees. While the 5.1% decline in total number of firms in this sector between 2004 and 2009 was due entirely to the decline in small firms, the data reveals that while the number of firms with fewer than 5 employees declined by 24.9% over this period, the number with 5-19 employees and more than 20 grew by 35.9% and 14.2%, respectively, which suggests consolidation or expansion among smaller firms. While most categories in this sector saw a decline in the total number of firms over this period, those which increased in firms did so mainly as a result of firms with fewer than 10 employees. The increase in Gasoline Stations was due entirely to firms with 0-9 employees; 10 of 19 new Building Material & Garden Equipment and Supplies Dealers and 4 of 5 new Furniture & Home Furnishings Stores were within this size range.

Transportation and Warehousing

Small firms make up 96.3% of firms in this sector. Accordingly, most of the 18.3% decline in the number of firms in this sector between 2004 and 2009 was attributable to a decline in small firms, specifically those with fewer than 5 employees (a decline of 22.6% over this period). This decline was accompanied by increases in the number of firms with 5-19 employees and more than 20 employees (14.4% and 3.7%; 20 and 3 firms, respectively), although these increases were not significant enough to offset the decline in smaller firms. The decline in firms with fewer than 5 employees in Truck Transportation (25.7%; 256 businesses), the largest category in this sector, was not offset by any increase in the number of larger firms involved in these activities. As with the *Retail Trade* sector, the few categories which increased in firms did so mainly as a result of firms with fewer than 10 employees. Of the 41 new firms in Air Transportation, Scenic & Sightseeing Transportation, Couriers & Messengers and Warehousing & Storage, 37 of them had between 0 and 9 employees.



Source: Statistics Canada *Business Register*

Professional, Scientific and Technical Services

The number of firms in this sector declined by 9.8% between 2004 and 2009, mostly due to a decrease in firms with no employees. The number of firms with no employees declined by 18.6% (129 firms) over this period; the number of firms with 1 to 4 and more than 20 employees grew by 1.8% and 15.2% (7 and 5 firms, respectively) over this period. The number of firms in the 5-19 employee range was reduced by 6 (4.6%).

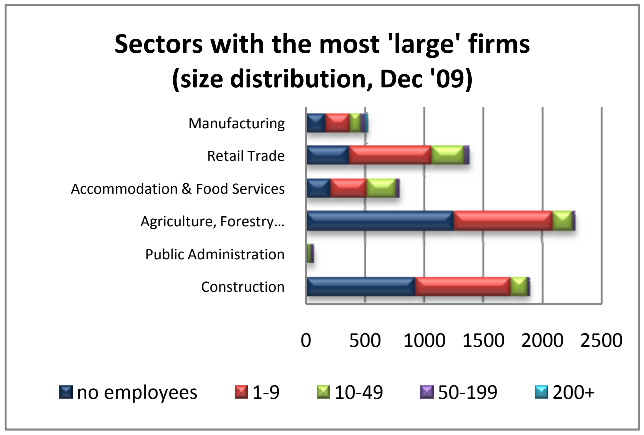
Sectors with the largest number of 'large' firms

Description and Analysis

This measure provides a breakdown of the firm size distribution in the sectors that have the largest number of 'large' firms (firms with more than 50 employees) in the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, combined. Three of the sectors that have the largest number of 'large' firms are also among the sectors with the largest number of 'small' firms (*Agriculture, Forestry, Fishing & Hunting*, *Construction* and *Retail Trade*), which is reflective of both the distribution of these sectors in the economy and the fact that small firms dominate in the region. The number of firms with more than 50 employees accounts for only 3.0% of the total firms in these sectors, combined.

Manufacturing

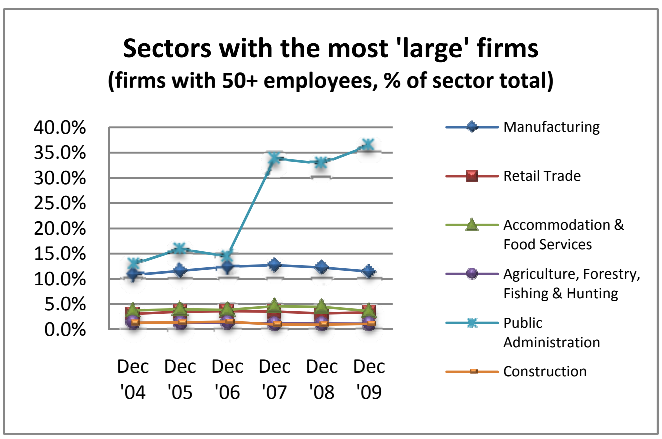
This sector has the greatest number and the second highest concentration of large firms among all sectors (11.5% of *Manufacturing* firms have more than 50 employees). 47 of the 60 large firms in this sector are involved in Wood Product Manufacturing; 7 are involved in Paper Manufacturing. Although the total number of firms involved in *Manufacturing* activities declined by 13.3% between 2004 and 2009, the number of large firms decreased by only 7.7% (5 firms) over this period.



Source: Statistics Canada *Business Register*

Retail Trade

This sector has the second highest number of large firms (47), and the sixth highest concentration among all sectors (3.4% of *Retail Trade* firms have more than 50 employees). The majority of the large firms are Food and Beverage Stores (20), with General Merchandise Stores having the second highest number (9). While the total number of firms in this sector declined by 5.1% overall between 2004 and 2009, the number of large firms increased by 4.4% (2 firms) over this period.



Source: Statistics Canada *Business Register*

Accommodation and Food Services

This sector has the third highest number and the fifth highest concentration of large firms in the region overall (29 firms; 3.6% of total firms in this sector are large firms). The majority of these large firms are Food Service & Drinking Places (22), and the remaining firms are in Accommodation Services. The number of large Accommodation and Food Services firms declined by 14.7% (5 firms) between 2004 and 2009, in line with an overall decline of 11.9% in the total number of firms, of all sizes, in this sector.

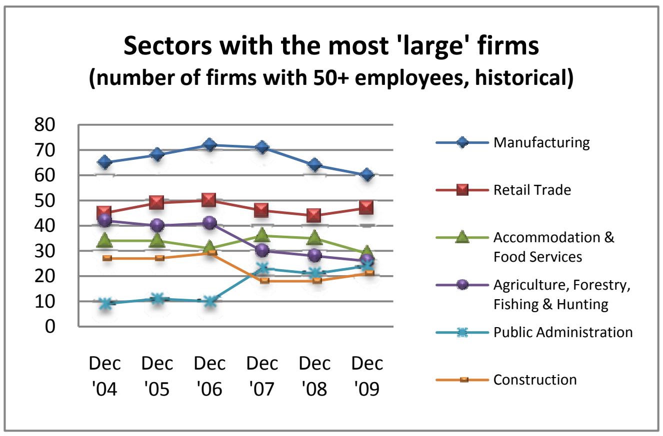
Sectors with the largest number of 'large' firms

Agriculture, Forestry, Fishing and Hunting

This sector has the fourth highest number of large firms (26), but is among the sectors with the smallest concentration of large firms, with only 1.1% of the total firms in this sector having more than 50 employees. This reflects the dominance of small firms in this sector. The majority of the large firms in this sector are in activities related to Forestry, with 11 and 12 large firms engaged in Forestry & Logging and Support Activities for Agriculture & Forestry, respectively. The number of large firms in this sector declined by 38.1% between 2004 and 2009, in line with the overall decline of 27.0% in firms of all sizes over this period. Most of the decline in large firms, and in total firms, is attributable to Forestry & Logging firms (56.0% fewer large firms and 27.7% fewer total firms, respectively).

Public Administration

This sector has the highest concentration of large firms (24 of 66 firms have more than 50 employees). While the total number of *Public Administration* establishments declined between 2004 and 2009 (4 firms, or 5.7%), the number of large establishments increased significantly, from 9 to 24; this increase is due almost entirely to the Aboriginal Public Administration category. The total number of Aboriginal Public Administration firms grew by only 2 firms over the five year interval, but the number of large firms increased from 2 in 2004 to 14 in 2009, which suggests increases in staffing capacity among existing organizations.



Source: Statistics Canada *Business Register*

Construction

The *Construction* sector has one of the smallest concentrations of large firms (1.1%); only 21 of the sector's 1,899 firms have more than 50 employees. The number of large firms in this sector declined by 22.2% (6 firms) between 2004 and 2009, due to declines in Specialty Trade Contractors and firms engaged in the Construction of Buildings (2 and 4 firms; declines of 18.2% and 44.4%, respectively). The number of large Heavy & Civil Engineering Construction firms was unchanged over this period.

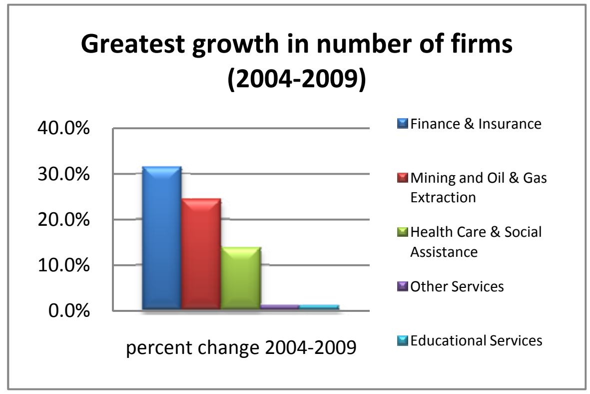
Recent Trends and Patterns (firm growth and decline)

Description and Analysis

Growth and decline in firms is measured by the percentage change in the number of firms in each industry sector in the Bulkley-Nechako, Cariboo and Fraser-Fort George Regional Districts, combined between December 2004 and December 2009.

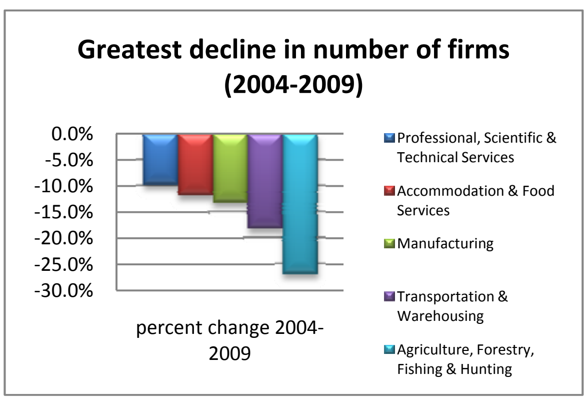
Sectors with growth in number of firms

Due to the overall decline in the number of firms in the region, each of the sectors seeing growth in firms has increased its relative proportion of total firms. *Mining and Oil & Gas Extraction* and *Educational Services* increased their share of total firms by 0.1% over this period but each still accounted for less than 1.0% of total firms in the region in 2009 (0.5% and 0.7%, respectively). *Finance & Insurance*, *Health Care & Social Assistance* and *Other Services* firms increased their share by 1.1%, 1.0% and 0.9% (to 3.5%, 5.0% and 8.5% of total firms, respectively).



Source: Statistics Canada *Business Register*

The growth in *Finance & Insurance* (124 firms) was distributed among Credit Intermediation & Related Activities, Securities, Commodity Contracts, and Other Financial Investment & Related Activities and Insurance Carriers & Related Activities (34, 75 and 18 firms, respectively). The growth in *Mining and Oil & Gas Extraction* (15 firms) was due entirely to an increase in firms involved in Support Activities for Mining and Oil & Gas Extraction (23 firms). Growth in *Health Care & Social Assistance* (90 firms) resulted from increases in the number of Ambulatory Health Care Services, Nursing & Residential Care Facilities and Social Assistance firms (68, 12 and 10, respectively). Due to changes in the categorization of firms, it is difficult to identify the increase in firms engaged in *Other Services* (12 firms), and the data does not provide detail of the growth in *Educational Services* (1 firm).



Source: Statistics Canada *Business Register*

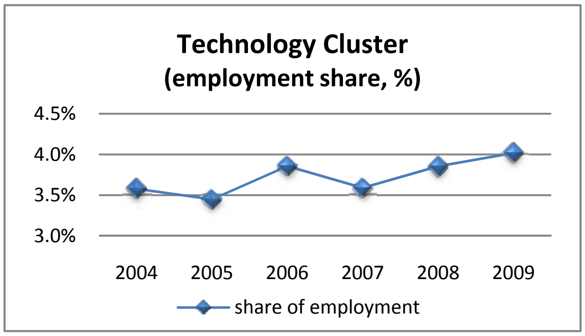
Sectors with decline in number of firms

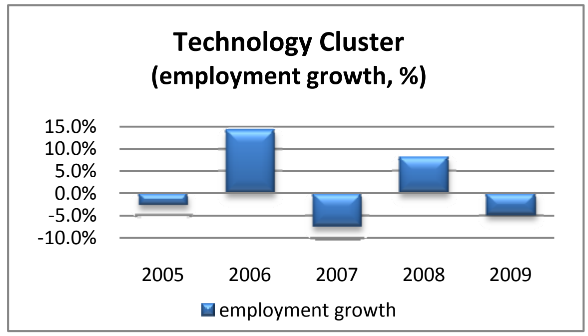
Each of the sectors with the greatest declines in number of firms also declined in its relative proportion of total firms between 2004 and 2009, reflecting the fact that the decline in firms for these sectors, combined, accounted for 91.9% of the total decline in firms in the 16-97 region.

Both *Accommodation & Food Services* categories declined in firms, with Food Service & Drinking Places accounting for the greatest portion of the decline (76 of 108 fewer firms in this sector). Declines in Wood Products Manufacturing, Fabricated Metal Product Manufacturing and Machinery Manufacturing made up most of the 80 firm decline in *Manufacturing* (17, 30 and 18 firms, respectively). The number of firms in *Transportation & Warehousing* declined by 276 between 2004 and 2009, mainly due to a 269 firm decline in Truck Transportation over this period. The decline in firms engaged in *Agriculture, Forestry, Fishing & Hunting* (847 firms) occurred in all categories, but the greatest declines were seen in Forestry and Logging (473 firms), Animal Production (187 firms) and Support Activities for Agriculture & Forestry (148 firms). The data does not allow for a detailed analysis of the 9.8% decline in firms in *Professional, Scientific & Technical Services* (123 firms).

Technology

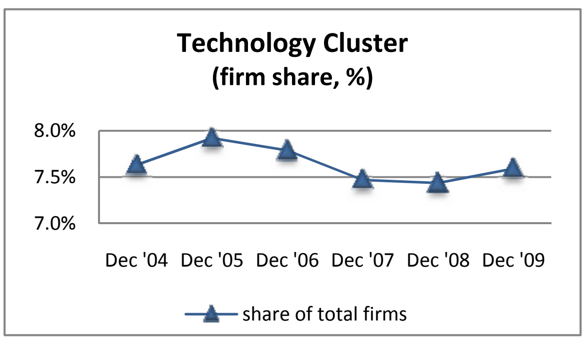
The 2007 16-97 Alliance Cluster Initiative identified *Technology* as being in the 'pre-cluster' stage of its lifecycle. The 'pre-cluster' stage is characterized by slow employment growth and limited potential to develop into a cluster, without the necessary supports and resources to act as catalysts for growth.

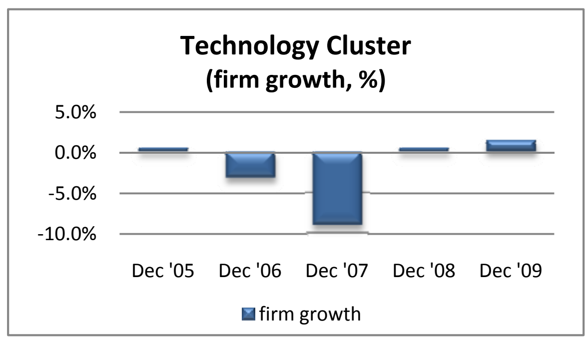




Source: Statistics Canada *Labour Force Survey*

The sectors comprising the *Technology* cluster in the region accounted for 4.0% of total employment in 2009, with approximately 3,800 persons employed. The majority of employment in this cluster was in Professional, Scientific & Technical Services; Computer & Electronic Product Manufacturing employed fewer than 1,500 persons thus the data reported a zero employment value. While employment in this cluster has fluctuated in recent years, the average annual growth rate for the 2004-2009 period was 1.4%, with overall growth of 5.6% over this interval.



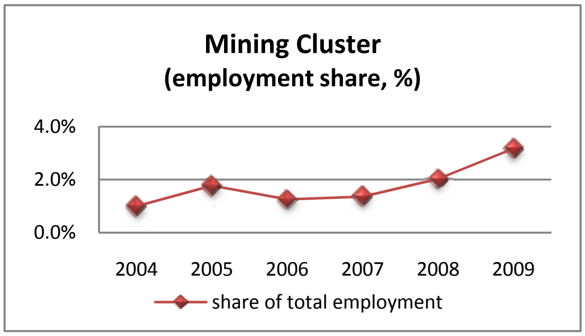


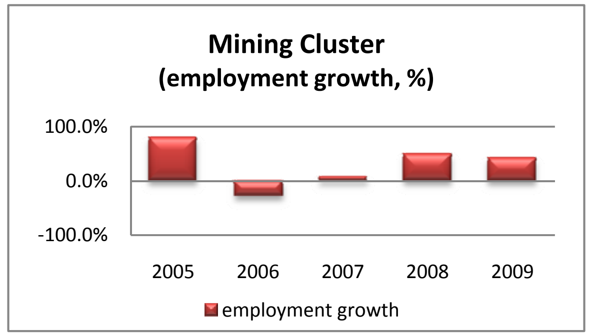
Source: Statistics Canada *Business Register*

The number of firms in this cluster declined by 9.9% overall between 2004 and 2009, due to some of the larger categories. Accounting, Tax Preparation, Bookkeeping & Payroll Services, Architectural, Engineering & Related Services and Management, Scientific & Technical Consulting Services declined by 8.8%, 15.8% and 19.0%; 19, 42 and 63 firms, respectively, over this period. Computer Systems Design Services, one of the smaller categories in this cluster with 5.0% of total firms, declined by 23 firms (28.8%). At the same time, the number of Legal Services firms increased by 30 (23.3%) and Scientific Research & Development firms increased by 29.4% (5 firms). The 1,138 firms in this cluster made up 7.6% of the total firms in the region in 2009.

Mining and Oil & Gas

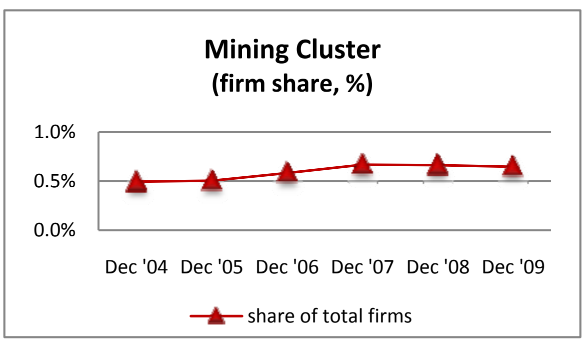
The 2007 16-97 Alliance Cluster Initiative identified *Mining and Oil & Gas* as being in the 'emerging cluster' stage of its lifecycle. The 'emerging cluster' stage is characterized by mid to high growth, with high potential to become an economic driver.

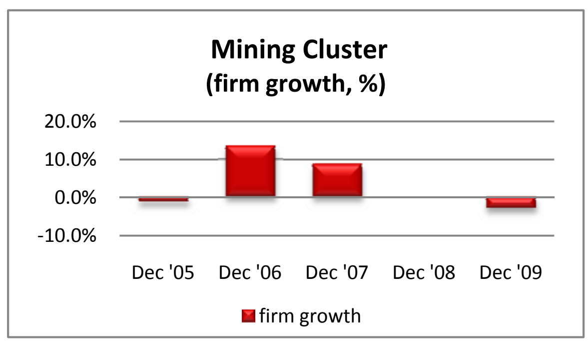




Source: Statistics Canada *Labour Force Survey*

The sectors comprising the *Mining and Oil & Gas* cluster in the region accounted for 3.2% of total employment in 2009, with approximately 3,000 persons employed. The majority of employment in this cluster is in Mining and Oil & Gas Extraction; there are fewer than 1,500 persons employed in Utilities, thus the data reports a zero employment value. The level of employment in this cluster fluctuated between 2004 and 2006, but since then has grown steadily, averaging 30.6% per year between 2004 and 2009. The level of employment in this cluster increased 200.0% overall over this period.



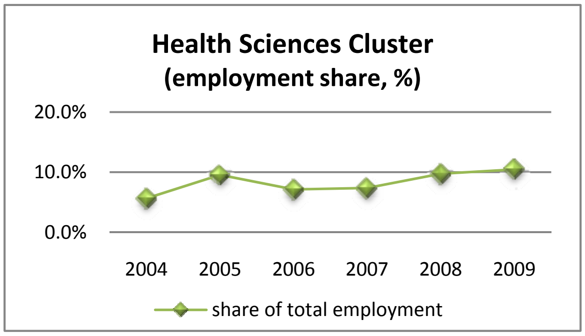


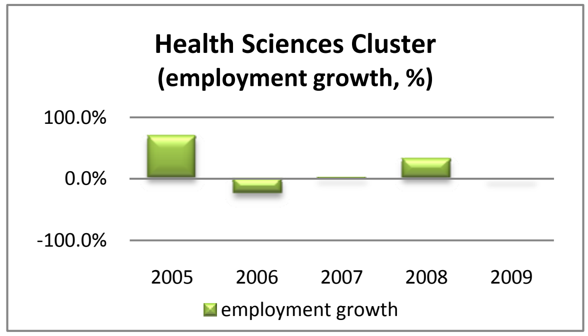
Source: Statistics Canada *Business Register*

The number of firms in this cluster increased by 18.3% overall between 2004 and 2009, averaging 3.6% growth annually over this period. The proportion of total firms in the region attributed to this cluster increased slightly over this period; the 97 firms in this cluster made up 0.6% of the total firms in the region in 2009, compared to 0.5% in 2004.The largest category in this cluster is Support Activities for Mining and Oil & Gas Extraction, with 62.9% of the total firms in this cluster. The number of firms engaged in Support Activities increased by 60.5% (23 firms) between 2004 and 2009; growth was very steady each year, averaging 10.1% per year over this period. The number of firms involved in Metal Ore Mining and Non-Metallic Mineral Mining & Quarrying decreased by 50.0% and 14.3%, respectively (7 firms and 1 firm), and the number of firms involved in Oil & Gas Extraction was unchanged (at 3 firms) over this period.

Health Sciences

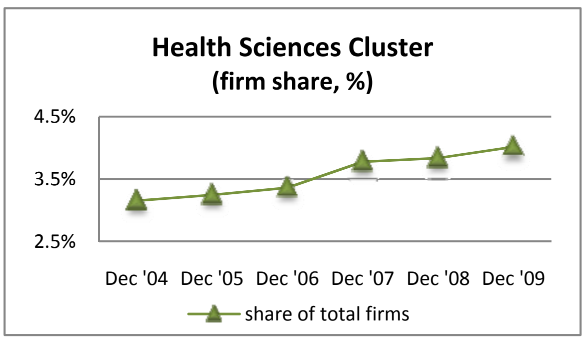
The 2007 16-97 Alliance Cluster Initiative identified *Health Sciences* as an 'emerging cluster,' characterized by mid to high growth with a high potential to become an economic driver.

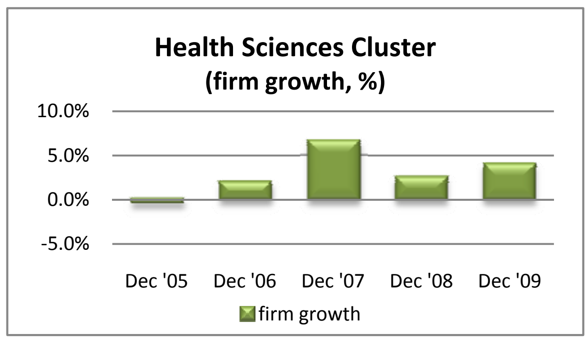




Source: Statistics Canada *Labour Force Survey*

The sectors comprising the *Health Sciences* cluster accounted for 10.5% of total employment in the region in 2009, with approximately 9,900 persons employed. Although the growth rate fluctuated between 2004 and 2009, employment in this cluster increased 73.7% overall during that period, averaging 16.0% growth each year. The majority of employment in this cluster is in Hospitals (58.6%) and Ambulatory Health Care Services (32.3%); employment in these sectors grew by 93.3% and 128.6%, respectively, over the five year period.



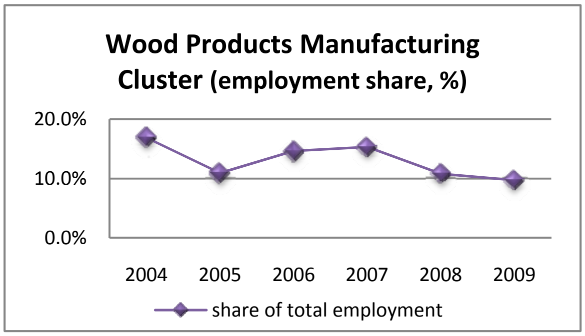


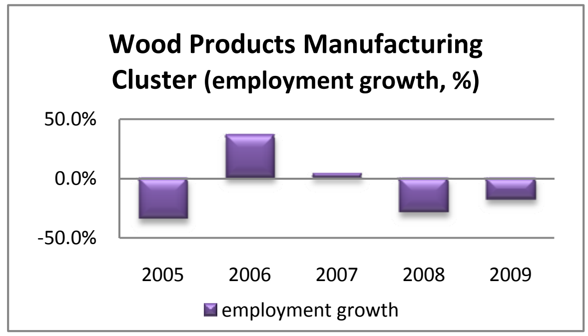
Source: Statistics Canada *Business Register*

The number of firms in this cluster increased by 15.3% (80 firms) between 2004 and 2009 mainly due to growth in Ambulatory Health Care Services (15.6%; 68 firms). Growth was fairly steady in the categories in this sector, with Offices of Physicians, Dentists and Other Health Practitioners growing by 11.8% (28 firms), 4.9% (4 firms) and 27.5% (19 firms) over this period. Out-Patient Care Centres increased by 18 (56.3%) over the same interval. There was also an increase in the number of Nursing and Residential Care Facilities in the region over this period (18.2%; 12 firms). The total number of firms in this cluster was 602 in 2009, accounting for 4.0% of the total firms in the region.

Wood Products Manufacturing

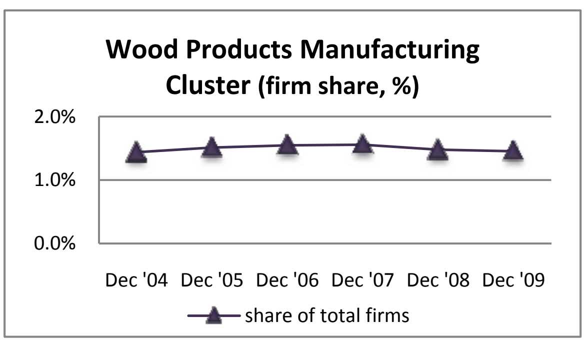
The 2007 16-97 Alliance Cluster Initiative identified *Wood Products Manufacturing* as being in the 'transforming' stage of its lifecycle. A 'transforming' cluster is defined as being an historic driver of the economy, but characterized by slow to negative employment growth.





Source: Statistics Canada *Labour Force Survey*

There was a steady downward trend in this cluster's share of total employment between 2004 and 2009, for an overall decrease of 45.9% in the number of persons employed. The cluster accounted for 9.7% of total employment in the region in 2009, with 9,200 persons employed, down from 16.9% of total employment and 17,000 persons employed in 2004. The largest share of the employment decline in this cluster is attributed to Wood Product Manufacturing, the largest sector in the cluster (77.2% of total employment in 2009); this sector accounted for 97.4% of the total employment decline in the cluster, declining by 51.7% (7,600 persons) over this period. Paper Manufacturing, accounting for the remaining employment in this cluster, declined by 8.7% (200 persons) between 2004 and 2009.

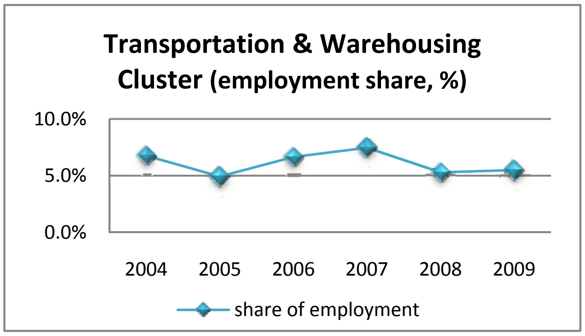


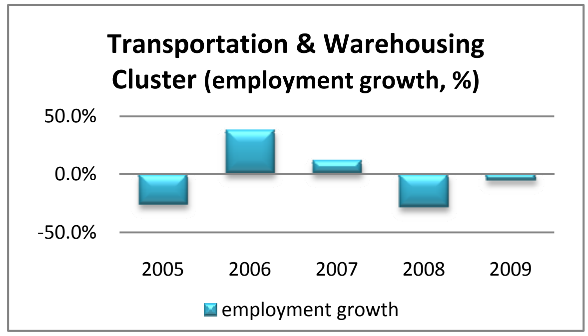
Source: Statistics Canada *Business Register*

The total number of firms in this cluster was 218 in 2009, accounting for 1.5% of the total firms in the region. The cluster's share of total firms remained relatively stable between 2004 and 2009, despite the fact that the number of firms declined by 8.4% over that period; the annual average decline in firms in this cluster was very similar to the average annual decline in firms in the region overall (1.7% compared to 1.9%). Most of the decline in firms in this cluster occurred among Sawmills & Wood Preservation firms; this category declined by 19 firms (14.0%) over this period. Veneer, Plywood & Engineered Wood Product Manufacturing firms declined by 25.0% (4 firms), while firms engaged in Other Wood Product Manufacturing activities increased by 10.9% (6 firms) over this period. The number of Pulp, Paper & Paperboard Mills in the region was unchanged from 2004 levels, with 8 firms in 2009.

Transportation & Warehousing

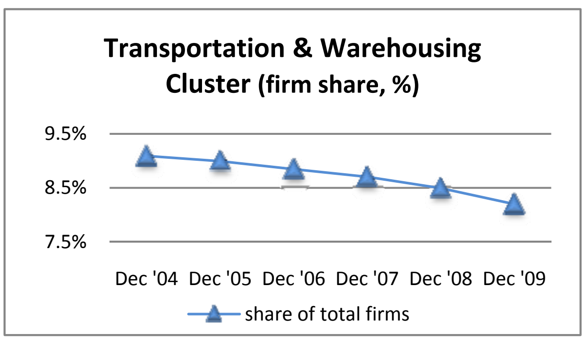
The 2007 16-97 Alliance Cluster Initiative identified *Transportation & Warehousing* as a ‘transforming’ cluster; an historic driver of the economy, with slow to negative employment growth.

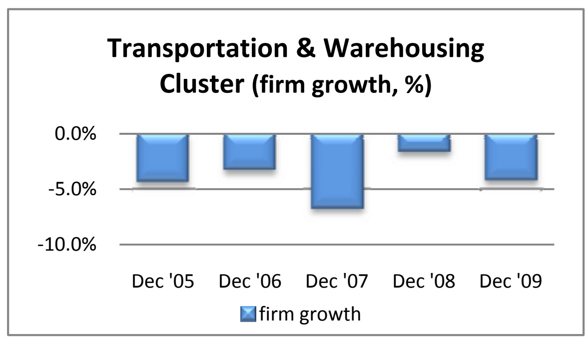




Source: Statistics Canada *Labour Force Survey*

Employment in this cluster accounted for 5.5% of total employment in the region in 2009, down from 6.8% in 2004 after declining by 23.5% (1,600 persons) over the five year period. Truck Transportation was the main source of the decline over this period, declining by 43.3% (1,300 persons) and accounting for 81.3% of the total employment decline in this cluster. The remaining areas of decline are difficult to identify as the remaining categories in this cluster employ fewer than 1,500 persons and thus report a value of zero.



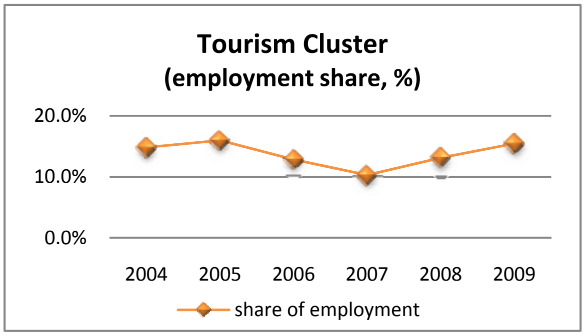


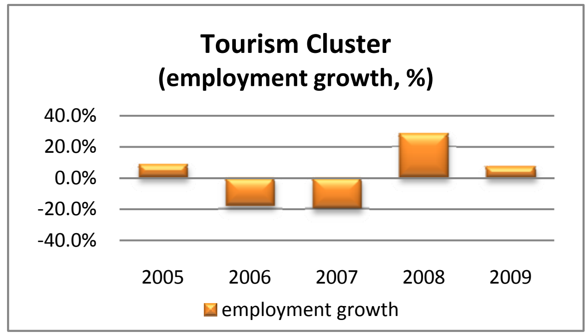
Source: Statistics Canada *Business Register*

The total number of firms in this cluster was 1,229 in 2009, accounting for 8.2% of the total firms in the region. This cluster’s share of firms has declined steadily in recent years as a result of a declining number of firms. There were 18.3% fewer firms in this cluster in 2004 than in 2009, a result of an average decline of 4.0% each year over this period. Truck Transportation accounted for nearly the entire decline in firms in this cluster (269 of 276 firms); the number of firms engaged in General Freight Trucking and Specialized Freight Trucking declined by 24.1% and 23.9%, respectively, over this period. Categories seeing growth within this cluster include Air Transportation, Couriers & Messengers and Warehousing & Storage (19.5%, 48.2% and 22.2%; 8, 27 and 4 firms, respectively).

Tourism

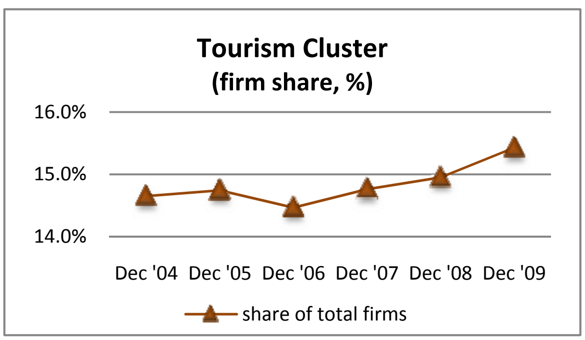
Tourism was identified in the 2007 16-97 Alliance Cluster Initiative as a 'transforming' cluster; an historic driver of the economy, characterized by slow to negative relative employment growth.

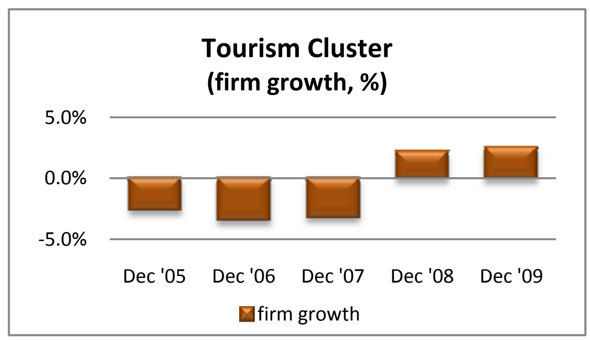




Source: Statistics Canada *Labour Force Survey*

Employment in this cluster accounted for 15.4% of total employment in the region in 2009, with 14,600 persons employed. Employment fluctuated considerably between 2004 and 2009 but declined only 2.0% overall (300 persons) over this period. Accommodation Services and Food Service & Drinking Places were the main sources of the decline in this cluster, with 19.4% and 10.5% fewer persons employed, respectively, in 2009 than in 2004. Employment in Performing Arts, Spectator Sports & Related Industries increased by 47.1% (800 persons) over this period, which moderated the impact of the decline in Accommodation and Food Services.



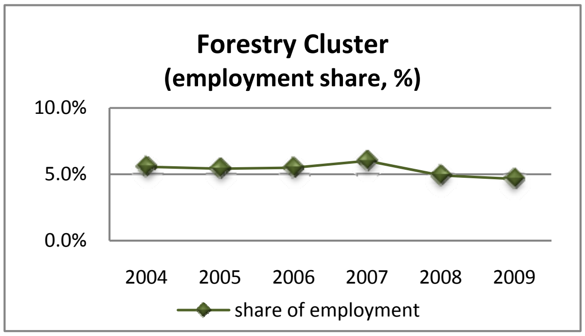


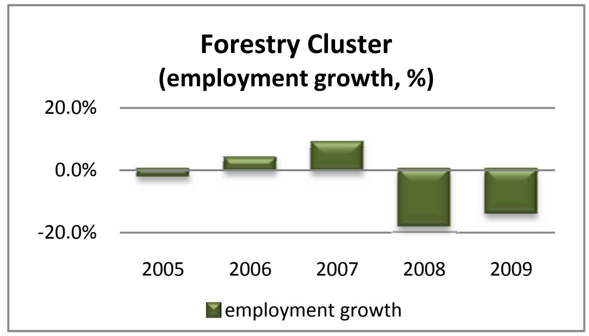
Source: Statistics Canada *Business Register*

This cluster's share of total firms increased from 14.6% to 15.4% between 2004 and 2009, despite a 4.6% decline in the number of firms (112). Firms declined across nearly every category, with the exception of Religious, Grant-Making, Civic, and Professional and Similar Organizations and Private Households (24 and 95 more firms, respectively), although the increase in the Private Households category likely accounts for most of the decline in the Repair & Maintenance and Personal & Laundry Services categories (76 and 31 firms, respectively). The majority of the decline in this cluster can be attributed to Accommodation Services and Food Service & Drinking Places (declines of 9.0% and 13.8%; 32 and 76 firms, respectively). The greatest decline in these sectors occurred in Traveller Accommodation (7.4%; 17 firms), RV Parks and Recreational Camps (15.0%; 18 firms), Full Service Restaurants (12.4%; 30 firms) and Limited Service Eating Places (14.9%; 30 firms).

Forestry

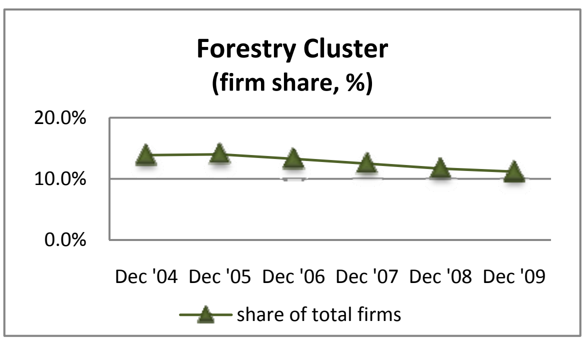
The 2007 16-97 Alliance Cluster Initiative identified *Forestry* as being in the 'performing cluster' stage of its lifecycle. Performing clusters are characterized by rapid employment growth and are considered to be drivers of innovation and growth.

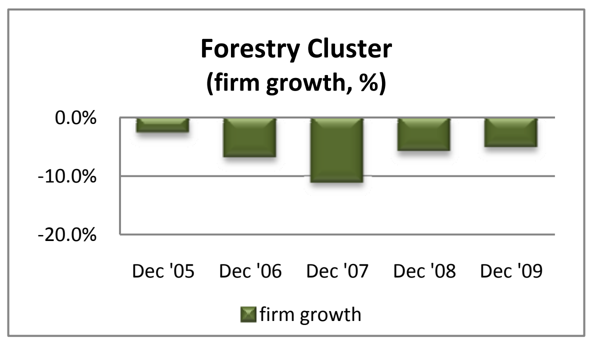




Source: Statistics Canada *Labour Force Survey*

Employment in the *Forestry* cluster declined steadily after 2007, resulting in an overall decline of 21.4% (1,200 persons) between 2004 and 2009. Consequently, the cluster's share of total employment declined from 5.6% to 4.7% over this period. The data does not allow for a detailed analysis of where the majority of the decline occurred.





Source: Statistics Canada *Business Register*

This cluster's share of total firms in the region declined steadily between 2004 and 2009, dropping from 13.9% to 11.2% over this period, in line with a steady decline in the number of firms (27.0% overall between 2004 and 2009). Firms specific to Logging operations accounted for the majority of the decline in this sector (467 of 621 fewer firms); the number of firms in this category declined by 27.8%. The number of firms engaged in Support Activities for Forestry declined by 26.4% (145 firms) over this period. Firms engaged in Timber Tract Operations and Forest Nurseries & Gathering of Forest Products do not make up a significant proportion of the firms in this cluster; as such, respective declines of 10.5% and 36.4% in these categories resulted in a total decline of only 6 firms over the five year period.

Appendix A Industry Structure, by Employment (2004-2009)

NAICS category	**Persons employed (thousands)**					
	2004	**2005**	**2006**	**2007**	**2008**	**2009**
Agriculture	2.1	3.9	2.2	3.6	2.4	1.4
Forestry, Fishing, Mining and Oil & Gas	6.6	7.3	7.0	7.7	7.4	7.4
Utilities	0.2	0.5	0.5	0.2	0.6	0.4
Construction	4.8	7.1	6.1	5.3	6.5	7.4
Manufacturing	19.9	13.3	17.1	17.9	13.7	11.0
Wholesale and Retail Trade	14.7	14.2	15.8	16.6	16.0	13.8
Transportation & Warehousing	6.8	5.0	6.9	7.7	5.5	5.2
Finance, Insurance, Real Estate & Leasing	3.9	4.5	3.9	3.4	3.7	3.2
Professional, Scientific & Technical Services	3.6	3.5	4.0	3.7	4.0	3.8
Business, Building & Other Support Services	2.4	2.8	2.7	3.1	3.6	2.4
Educational Services	5.9	7.0	8.0	6.1	6.4	5.9
Health Care & Social Assistance	8.0	11.8	10.9	10.9	13.6	12.6
Information, Culture & Recreation	3.6	3.5	3.3	2.4	3.2	4.0
Accommodation & Food Services	8.8	8.1	8.1	6.8	7.8	7.6
Other Services	4.4	5.5	3.4	3.8	4.1	4.5
Public Administration	4.9	3.5	3.8	3.9	5.3	4.0
All Industries	**100.6**	**101.5**	**103.7**	**103.1**	**103.8**	**94.6**

Source: Statistics Canada *Labour Force Survey*
Note: Values less than 1,500 are suppressed and have been estimated

Appendix B Industry Structure, by Firms (2004-2009)

NAICS category	Number of Firms					
	Dec-04	**Dec-05**	**Dec-06**	**Dec-07**	**Dec-08**	**Dec-09**
Agriculture, Forestry, Fishing & Hunting	3,133	3,065	2,995	2,536	2,405	2,286
Mining and Oil & Gas Extraction	62	62	72	78	81	77
Utilities	20	19	20	22	19	20
Construction	2,044	1,953	1,886	1,829	1,872	1,899
Manufacturing	603	586	580	558	522	523
Wholesale Trade	554	528	534	490	541	528
Retail Trade	1,462	1,390	1,383	1,298	1,390	1,387
Transportation & Warehousing	1,505	1,441	1,395	1,302	1,282	1,229
Information & Cultural Industries	123	115	106	104	109	111
Finance & Insurance	394	451	436	494	528	518
Real Estate and Rental & Leasing	1,096	1,057	1,088	1,084	1,093	1,062
Professional, Scientific & Technical Services	1,253	1,260	1,219	1,109	1,113	1,130
Management of Companies & Enterprises	471	347	361	458	465	464
Admin & Support, Waste Mgmt & Remediation Services	576	550	564	505	522	526
Educational Services	106	113	112	109	101	107
Health Care & Social Assistance	656	654	667	705	727	746
Arts, Entertainment & Recreation	252	246	242	223	233	236
Accommodation & Food Services	905	851	805	783	784	797
Other Services (except Public Administration)	1,268	1,265	1,234	1,202	1,239	1,280
Public Administration	70	69	69	68	64	66
Total	**16,553**	**16,022**	**15,768**	**14,957**	**15,090**	**14,992**

Source: Statistics Canada *Business Register*

Appendix C Industry Structure, by Firm size (2009)

	Firms with no employees	Firms with Employees						
		1-9	10-19	20-49	50-99	100-199	200 +	Total
Agriculture, Forestry, Fishing & Hunting	1,255	838	96	71	18	7	1	2,286
Mining and Oil & Gas Extraction	29	31	6	3	4	2	2	77
Utilities	8	9	1	2	0	0	0	20
Construction	928	811	94	45	13	6	2	1,899
Manufacturing	167	204	47	45	19	17	24	523
Wholesale Trade	166	253	55	48	6	0	0	528
Retail Trade	368	699	183	90	22	17	8	1,387
Transportation & Warehousing	623	503	57	32	6	5	3	1,229
Information & Cultural Industries	37	53	12	5	3	1	0	111
Finance & Insurance	271	163	29	42	11	2	0	518
Real Estate and Rental & Leasing	785	231	40	3	1	0	2	1,062
Professional, Scientific & Technical Services	564	486	42	30	5	2	1	1,130
Management of Companies & Enterprises	374	74	11	4	0	0	1	464
Admin & Support, Waste Mgmt & Remediation Services	213	232	44	22	11	3	1	526
Educational Services	42	40	10	7	1	0	7	107
Health Care & Social Assistance	106	482	88	53	10	2	5	746
Arts, Entertainment & Recreation	95	97	21	20	2	0	1	236
Accommodation & Food Services	208	312	139	109	25	4	0	797
Other Services (except Public Administration)	478	718	62	21	0	0	1	1,280
Public Administration	1	15	6	20	18	5	1	66
Total	**6,718**	**6,251**	**1,043**	**672**	**175**	**73**	**60**	**1,4992**

Source: Statistics Canada *Business Register*

Appendix D Industry Cluster Employment (persons employed, 2004-2009)

Cluster and NAICS Categories	2004	2005	2006	2007	2008	2009
Technology	**3,600 < 5,100**	**3,500 < 5,000**	**4,000 < 5,500**	**3,700 < 5,200**	**4,000 < 5,500**	**3,800 < 5,300**
3341 - 3346 Computer & Electronic Product Manufacturing	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500
5411 - 5419 Professional, Scientific & Technical Services	3,600	3,500	4,000	3,700	4,000	3,800
Mining and Oil & Gas	**1,000 < 1,500**	**1,800 < 3,300**	**1300 < 1,800**	**1,400 < 2,900**	**2,100 < 3,600**	**3,000 < 4,500**
2100 - 2131 Mining and Oil & Gas Extraction	1,000	1,800	1,300	1,400	2,100	3,000
2211 - 2213 Utilities	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500
Health Sciences	**5,700**	**9,700**	**7,400**	**7,600**	**10,100**	**9,900**
6211 - 6219 Ambulatory Health Care Services	1,400	2,600	1,900	2,300	3,800	3,200
6220 Hospitals	3,000	5,000	3,600	4,100	4,500	5,800
6230 Nursing & Residential Care Facilities	1,300	2,100	1,900	1,200	1,800	900
Wood Products Manufacturing	**17,000 < 18,500**	**11,100 < 12,600**	**15,200 < 16,700**	**15,800 < 17,300**	**11,200 < 12,700**	**9,200 < 10,700**
3211 - 3219 Wood Product Manufacturing	14,700	9,600	12,800	14,100	9,400	7,100
3221 - 3222 Paper Manufacturing	2,300	1,500	2,400	1,700	1,800	2,100
3231 Printing & Related Support Activities	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500
Transportation and Warehousing	**6,800**	**5,000**	**6,900**	**7,700**	**5,500**	**5,200**
4811 - 4812 Air Transportation	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500
4841 - 4842 Truck Transportation	3,000	2,400	2,800	3,100	2,600	1,700
4851 - 4859; 4871 - 4879 Transit, Ground Passenger; Scenic & Sightseeing Transp.	1,700	< 1,500	1,700	1,600	< 1,500	< 1,500
4911, 4921 - 4922 Postal and Courier Services	< 1,500	< 1,500	< 1,500	1,700	< 1,500	< 1,500
4821 - 4832; 4861 - 4869; 4881 - 4889; 4931 Other Transportation & Storage	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500	< 1,500
Tourism	**14,900**	**16,200**	**13,300**	**10,600 < 12,100**	**13,600**	**14,600**
7111 - 7139 Performing Arts, Spectator Sports & Related Ind.	1,700	2,600	1,900	< 1,500	1,700	2,500
7211 - 7213 Accommodation Services	3,100	2,000	1,600	1,200	1,800	2,500
7221 - 7224 Food Service & Drinking Places	5,700	6,100	6,400	5,600	6,000	5,100
8111 - 8114 Repair & Maintenance	2,100	3,100	1,800	1,500	2,200	2,100
8121 - 8141 Remaining Other Services	2,300	2,400	1,600	2,300	1,900	2,400
Forestry	**5,600**	**5,500**	**5,700**	**6,200**	**5,100**	**4,400**
1131 - 1133, 1153 Forestry & Logging with Support Activities	5,600	5,500	5,700	6,200	5,100	4,400

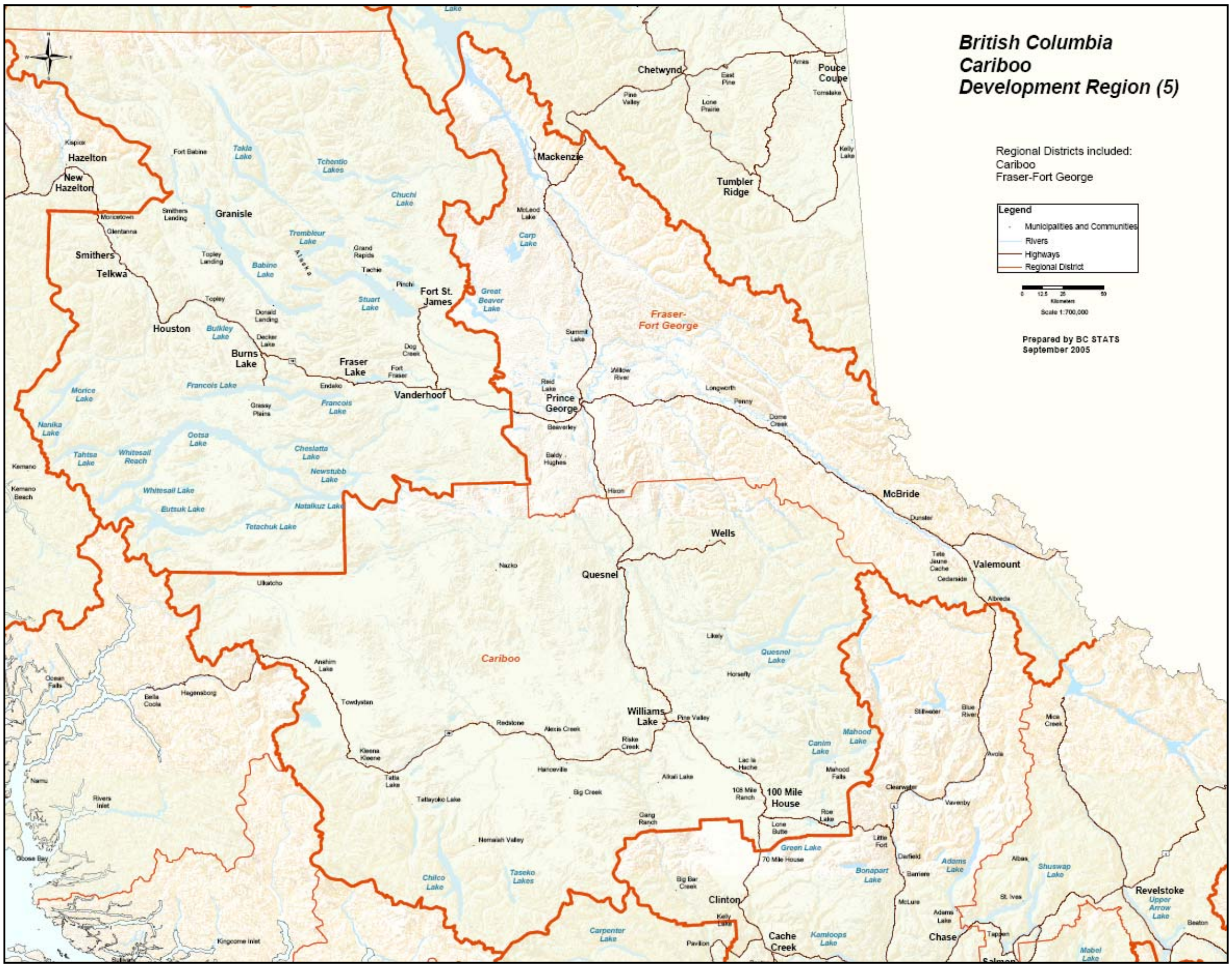
Source: Statistics Canada *Labour Force Survey*
Note: Values less than 1,500 are suppressed by Statistics Canada but have been estimated where possible

Appendix E Industry Cluster Firms (number of firms, 2004-2009)

Cluster and NAICS Categories		December 2004	December 2005	December 2006	December 2007	December 2008	December 2009
Technology		**1,263**	**1,269**	**1,228**	**1,117**	**1,122**	**1,138**
334	Computer & Electronic Product Manufacturing	10	9	9	8	9	8
541	Professional, Scientific & Technical Services	1,253	1,260	1,219	1,109	1,113	1,130
Mining and Oil & Gas		**82**	**81**	**92**	**100**	**100**	**97**
211	Oil and Gas Extraction	3	2	3	4	4	3
212	Mining (except Oil and Gas)	21	21	26	28	22	13
213	Support Activities for Mining and Oil & Gas	38	39	43	46	55	61
221	Utilities	20	19	20	22	19	20
Health Sciences		**522**	**520**	**530**	**565**	**579**	**602**
621	Ambulatory Health Care Services	437	435	447	485	491	505
622	Hospitals	19	18	18	17	17	19
623	Nursing and Residential Care Facilities	66	67	65	63	71	78
Wood Products Manufacturing		**238**	**242**	**244**	**233**	**223**	**218**
321	Wood Product Manufacturing	207	210	215	205	198	190
322	Paper Manufacturing	9	10	9	10	6	8
323	Printing and Related Support Activities	22	22	20	18	19	20
Transportation and Warehousing		**1,505**	**1,441**	**1,395**	**1,302**	**1,282**	**1,229**
481	Air Transportation	41	44	41	46	56	49
482	Rail Transportation	5	2	2	2	3	1
483	Water Transportation	12	11	9	7	6	5
484	Truck Transportation	1,121	1,071	1,003	924	889	852
485	Transit & Ground Passenger Transportation	100	94	91	84	79	83
486	Pipeline Transportation	1	0	0	0	1	1
487	Scenic and Sightseeing Transportation	8	7	11	9	10	10
488	Support Activities for Transportation	135	127	123	122	127	117
491	Postal Service	8	6	5	5	4	6
492	Couriers and Messengers	56	60	89	79	83	83
493	Warehousing and Storage	18	19	21	24	24	22
Tourism		**2,425**	**2,362**	**2,281**	**2,208**	**2,256**	**2,313**
711	Performing Arts, Spectator Sports & Related Ind.	50	50	42	37	41	36
712	Heritage Institutions	22	21	23	18	17	21
713	Amusement, Gambling & Recreation Industries	180	175	177	168	175	179
721	Accommodation Services	355	337	329	324	319	323
722	Food Services and Drinking Places	550	514	476	459	465	474
811	Repair and Maintenance	726	727	704	623	647	650
812	Personal and Laundry Services	251	254	245	211	206	220
813	Religious, Grant-Making, Civic, Professional & Sim.	291	284	285	286	301	315
814	Private Households	0	0	0	82	85	95
Forestry		**2,297**	**2,242**	**2,094**	**1,866**	**1,762**	**1,676**
113	Forestry and Logging	1,710	1,672	1,570	1,390	1,303	1,237
115	Support Activities for Agriculture & Forestry	587	570	524	476	459	439

Source: Statistics Canada *Business Register*

Appendix F Cariboo Development Region



Source: BC Stats

Appendix G Nechako Development Region

Source: BC Stats