



# City of Summerside Socio-Economic Projections and Statistical Data Updates

2016 Projections and Canadian Business Patterns Analysis

April 18, 2016

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# Contents

1	STATISTICAL PROJECTIONS FOR CITY OF SUMMERSIDE .....	1
1.1	POPULATION	1
1.2	POPULATION BY AGE	2
1.3	POPULATION BY VISIBLE MINORITY STATUS	3
1.4	POPULATION BY IMMIGRANT STATUS	4
1.5	POPULATION BY LANGUAGE SPOKEN	5
1.6	MEDIAN HOUSEHOLD INCOMES	6
1.7	HIGHEST LEVEL OF EDUCATION ATTAINED	7
1.8	EDUCATION BY MAJOR FIELD OF STUDY	8
1.9	COMMUTING PATTERNS AND USUAL PLACE OF WORK	9
1.10	TOTAL EXPERIENCED LABOUR FORCE BY OCCUPATION	10
1.11	EMPLOYMENT SHARE BY OCCUPATIONS	11
1.12	LABOUR FORCE INDICATORS	12
1.13	LABOUR FORCE BY INDUSTRY	13
1.14	OCCUPATIONAL CLASSES	14
1.15	LABOUR FORCE ACTIVITY BY POPULATION GROUP	15
1.16	OCCUPATIONS BY GENDER	16
1.17	CREATIVE OCCUPATIONS	17
1.18	SERVICE BASED OCCUPATIONS	18
1.19	WORKING CLASS OCCUPATIONS	19
1.20	AGRICULTURAL CLASS OCCUPATIONS	20
1.21	LABOUR FORCE BY INDUSTRY GROWTH AND DECLINE	21

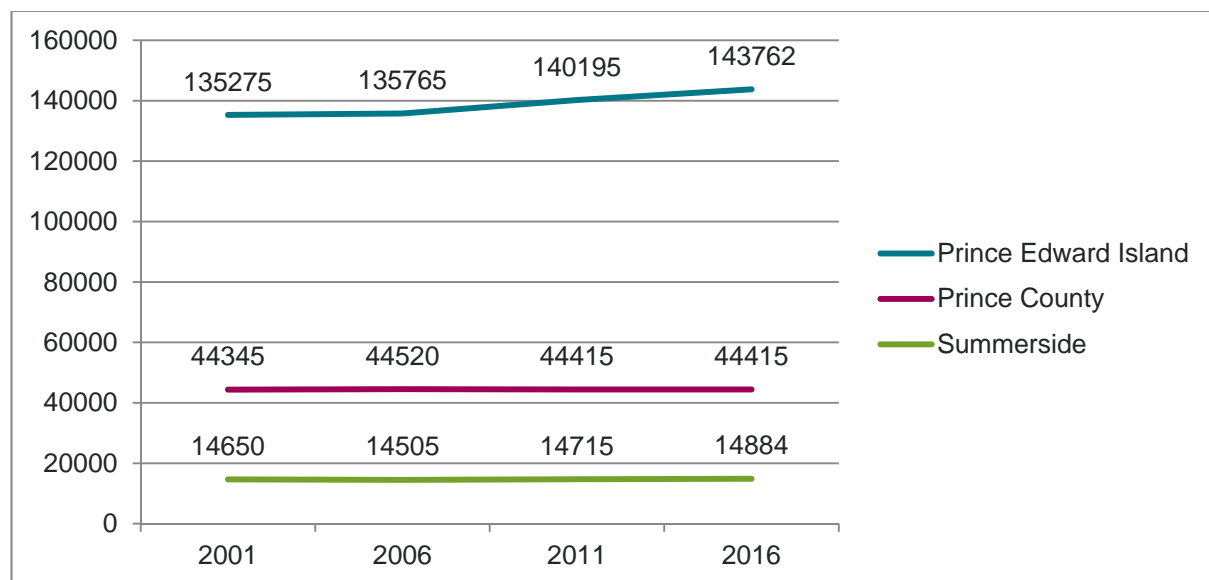


2	BUSINESS PATTERNS ASSESSMENT .....	22
2.1	<b>BUSINESS GROWTH AND DECLINE IN SUMMERSIDE, 2008-2013</b>	<b>23</b>
2.2	<b>BUSINESS GROWTH AND DECLINE IN SUMMERSIDE, 2014-2015</b>	<b>25</b>
2.3	<b>LOCATION QUOTIENTS FOR SUMMERSIDE, 2008 &amp; 2013</b>	<b>27</b>
2.4	<b>LOCATION QUOTIENTS FOR SUMMERSIDE, 2014 &amp; 2015</b>	<b>30</b>
2.5	<b>DISTRIBUTION OF BUSINESS ESTABLISHMENTS BY EMPLOYMENT SIZE, 2008-2013</b>	<b>32</b>
2.6	<b>DISTRIBUTION OF BUSINESS ESTABLISHMENTS BY EMPLOYMENT SIZE, 2014-2015</b>	<b>33</b>
2.7	<b>DISTRIBUTION OF BUSINESS ESTABLISHMENTS BY INDUSTRY SECTOR, 2008-2013</b>	<b>34</b>
2.8	<b>DISTRIBUTION OF BUSINESS ESTABLISHMENTS BY INDUSTRY SECTOR, 2014-2015</b>	<b>37</b>

# 1 Statistical Projections for City of Summerside

## 1.1 Population

FIGURE 1: POPULATION, 2001-2016



Source: 2011 National Household Survey, 2011 Community Profiles, Metro Economics 2016

The population of Prince Edward Island as a whole grew by an estimated 3,600 people between 2011 and 2016, a slightly slower pace than that achieved between 2006 and 2011 (up 4,400) but, faster than that occurring between 2001 and 2006 (500). The population of the province has increased by approximately 8,500 people since 2001.

However, Prince County and the City of Summerside have not shared in this growth. The population of the county as of 2016 is estimated at less than 100 people more than it was in 2001, while that of the city has increased by roughly 200 people over that span of time.

## 1.2 Population by Age

FIGURE 2: POPULATION BY AGE, 2001-2016

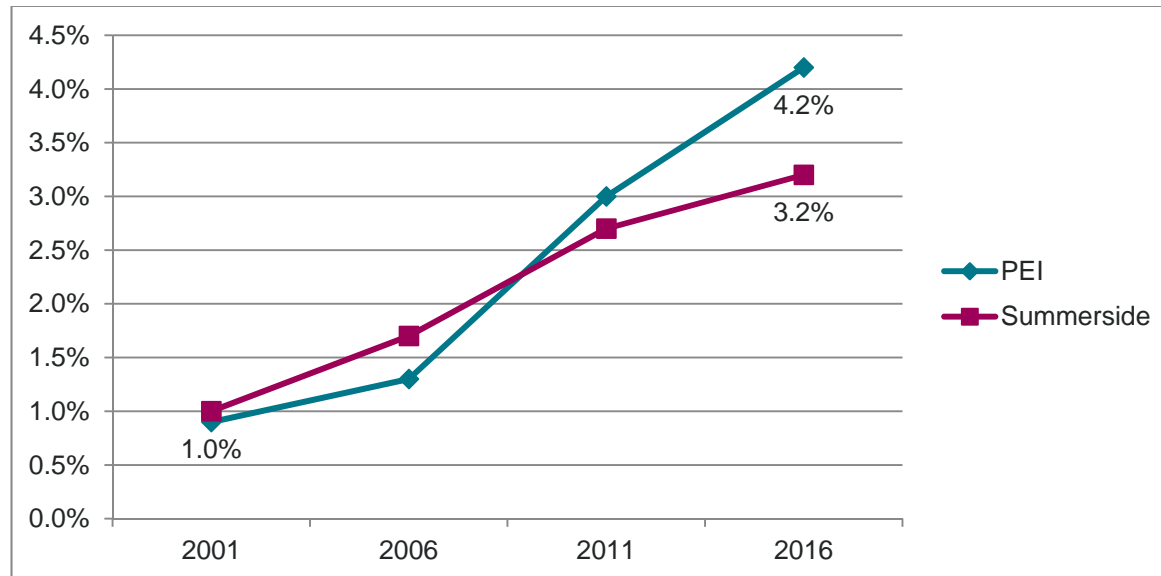


Source: 2011 National Household Survey, 2011 Community Profiles, Metro Economics 2016

As a result of an “aging-in-place” phenomenon, the share of the county’s and the city’s population accounted for by persons 65 and over is increasing at a faster rate than the province.

## 1.3 Population by Visible Minority Status

FIGURE 3: SHARE OF POPULATION BY VISIBLE MINORITY STATUS, 2001-2016

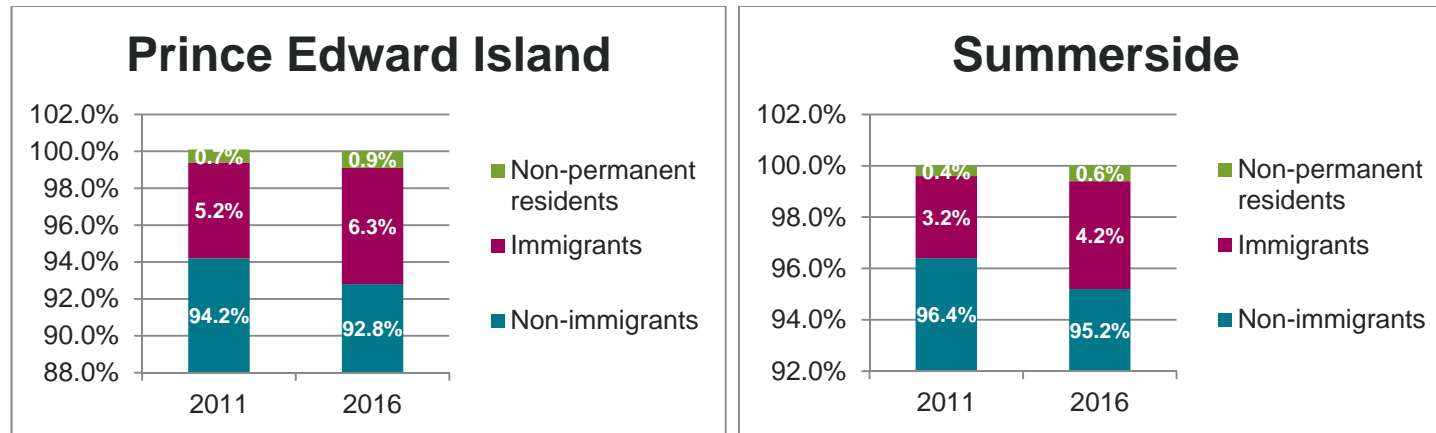


Source: 2011 National Household Survey, 2011 Community Profiles. Adapted by Metro Economics

The province's population growth is largely being driven by net in-migration including immigrants from abroad. As a result the visible minority share of the province's population has increased from 0.9 percent in 2001 to 4.2 percent in 2016. Because the population of Summerside is not growing, immigration to the City has been minimal. As a result the City's visible minority share over the same span increased from 1.0 percent to just 3.2 percent.

## 1.4 Population by Immigrant Status

FIGURE 4: SHARE OF POPULATION BY IMMIGRANT STATUS, 2011-2016

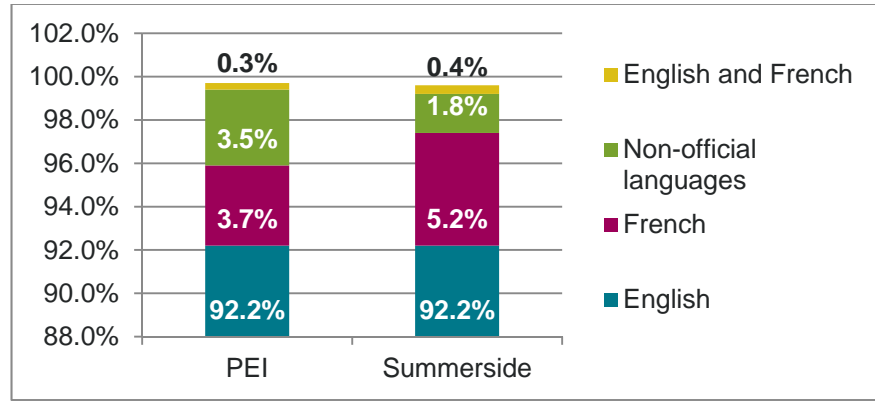


Source: 2011 National Household Survey, Metro Economics 2016

In view of the above the share of immigrants of the province's total population (6.3 percent in 2016) exceeds that of Summerside (4.2 percent) by a significant margin.

## 1.5 Population by Language Spoken

FIGURE 5: SHARE OF POPULATION BY LANGUAGE SPOKEN, 2016



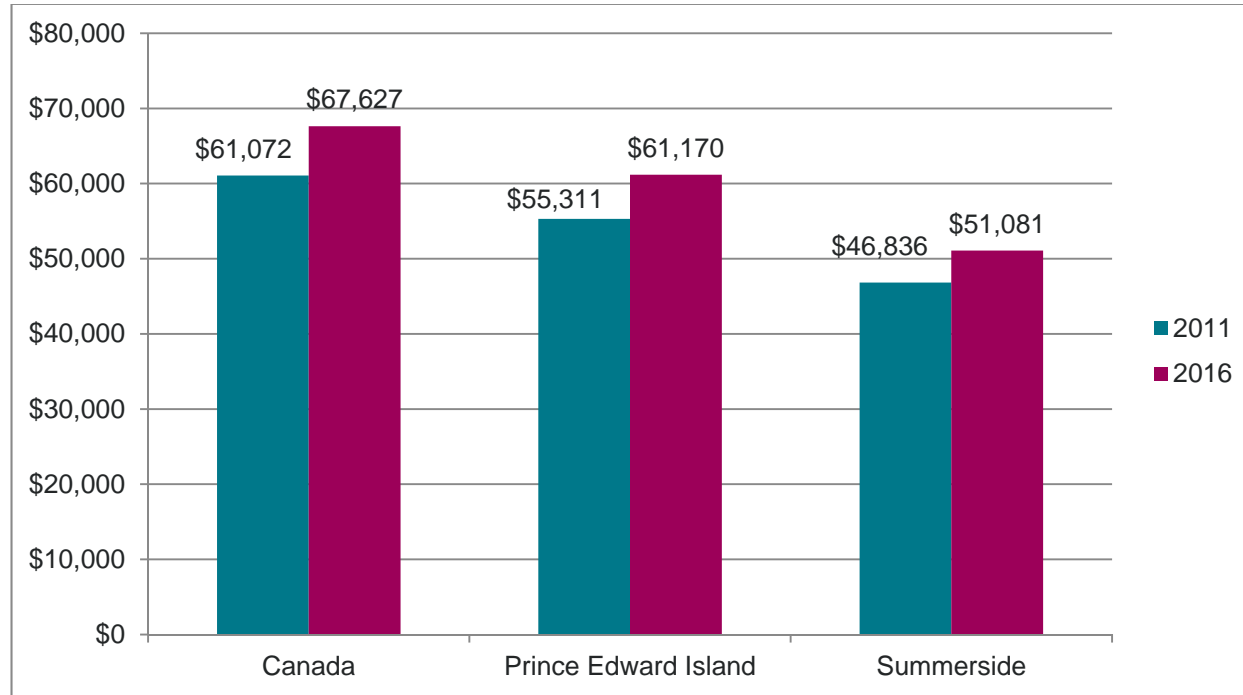
Source: 2011 National Household Survey, Metro Economics 2016

English remains the dominant language in both PEI and Summerside (spoken by 92.2 percent of all residents), while French is the second most prevalent language (3.7 percent in PEI and 5.2 percent in Summerside). Those speaking both official languages account for 0.3 percent of PEI's population and 0.4 percent of Summerside's. The share of the population speaking only a non-official language is greater province wide (3.5 percent) than in Summerside (1.8 percent) again reflecting the City's lower share of immigrant residents.



## 1.6 Median Household Incomes

FIGURE 6: MEDIAN HOUSEHOLD INCOME FOR CANADA, PRINCE EDWARD ISLAND, AND SUMMERSIDE,



Source: 2011 National Household Survey, Metro Economics 2016

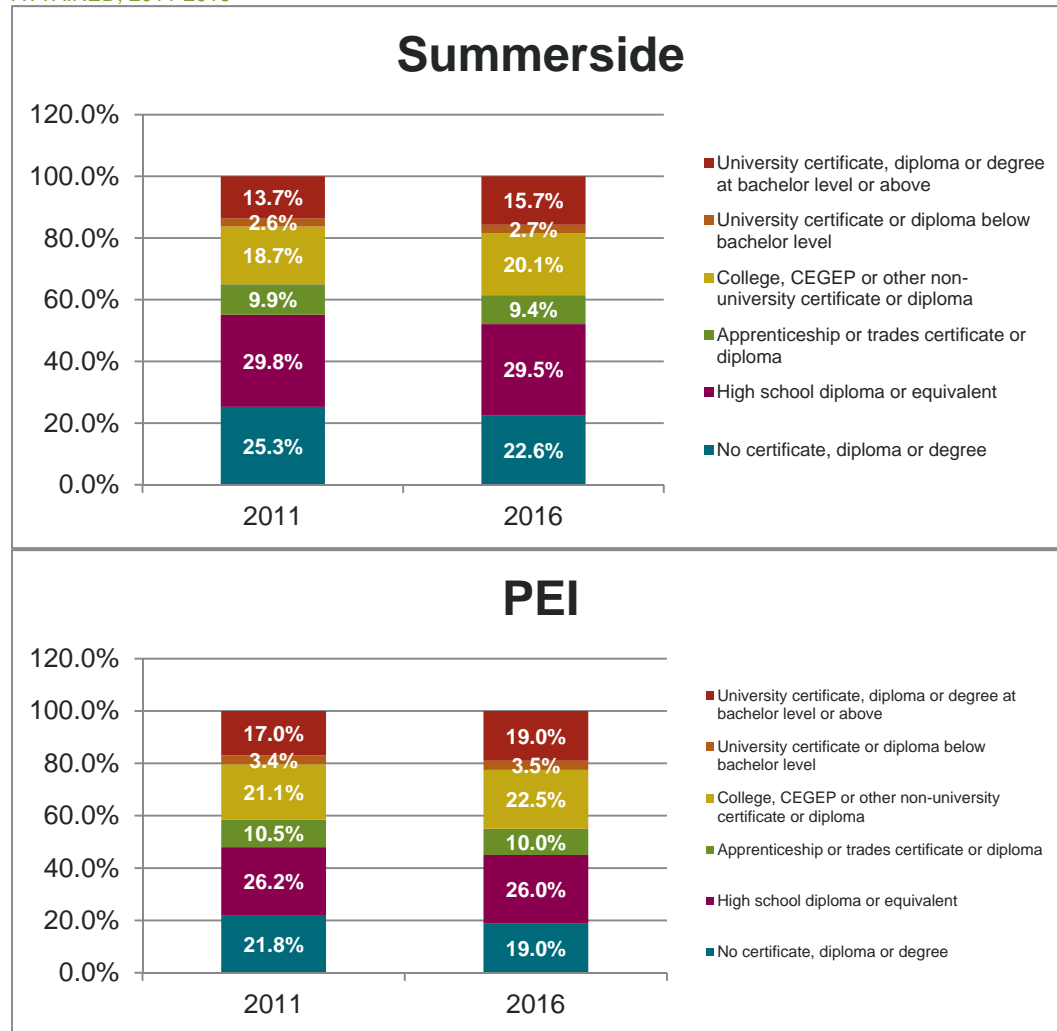
Average household incomes in Summerside are lower than the provincial and national averages by a significant margin (roughly one-quarter lower than the national average and 15 percent lower than the PEI average).

## 1.7 Highest Level of Education Attained

The share of Summerside's population with a post-secondary certificate, diploma or degree at an estimated 47.8 percent in 2016 falls short of the provincial average of 55.0 percent by a significant margin.

Summerside's share is lower than PEI's in all categories of the post-secondary group.

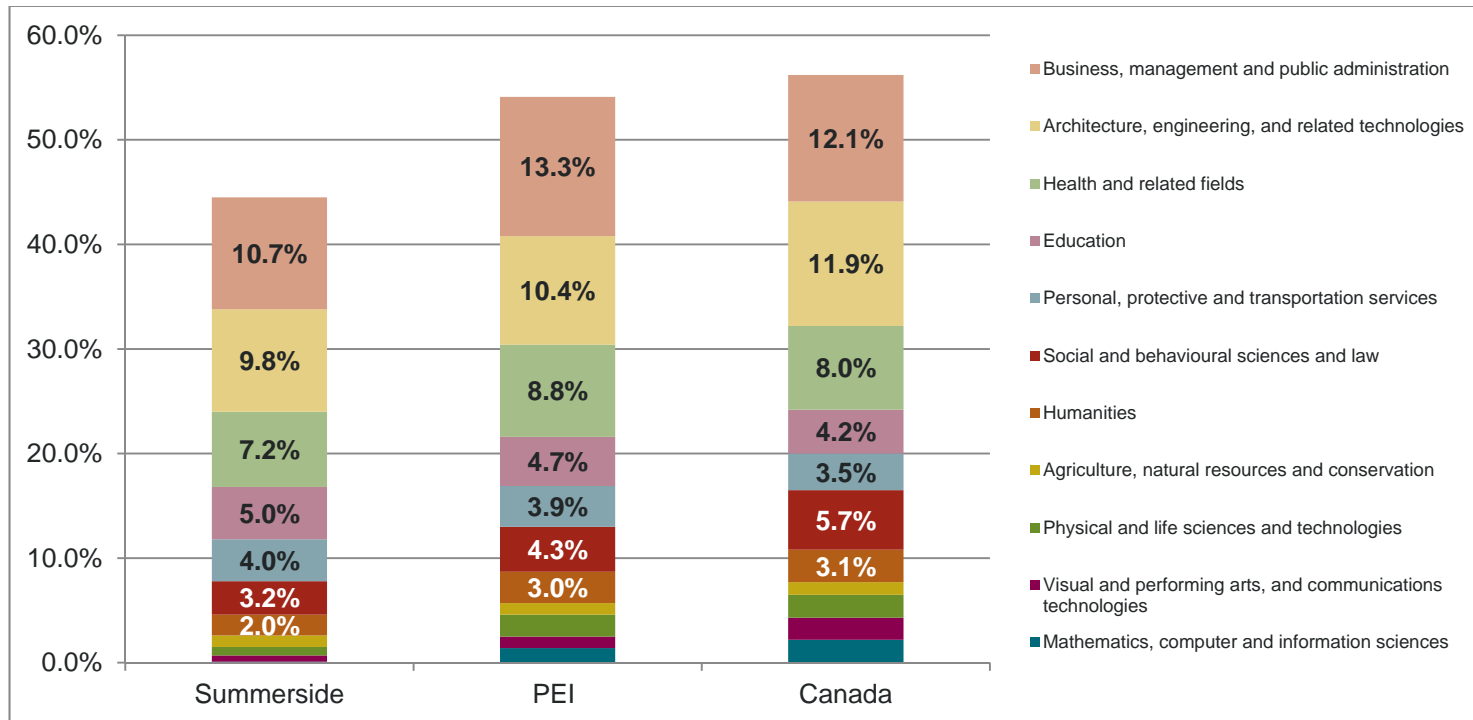
FIGURE 7: SHARE OF POPULATION IN PRINCE EDWARD ISLAND BY HIGHEST LEVEL OF EDUCATION ATTAINED, 2011-2016



Source: 2011 National Household Survey, Metro Economics 2016

## 1.8 Education by Major Field of Study

FIGURE 8: SHARE OF POPULATION AGED 15 AND OVER BY MAJOR FIELD OF STUDY, 2016



Source: 2011 National Household Survey, Metro Economics 2016

Among those with post-secondary educations in Summerside people with degrees, certificates or diplomas in business, management and public administration are found most frequently (10.7 percent among persons 15 and over in Summerside) followed by those educated in architecture, engineering and related technologies (9.8 percent), health and related fields (7.2 percent) and education (5.0 percent). The relative order of importance within Summerside tends to match that of PEI and Canada but the shares in Summerside, those increasing with time, fall short of the provincial and national shares.

## 1.9 Commuting Patterns and Usual Place of Work

FIGURE 9: COMMUTING PATTERNS AND USUAL PLACE OF WORK OF CITY OF SUMMERSIDE, 2016

	Summerside Commuting Labour Pool	Prince Edward Island
<b>Total Population 15 years and over</b>	103,178	117,359
<b>In the Labour Force</b>	69,813	79,259
<b>Employed</b>	62,249	70,189
<b>Unemployed</b>	7,564	9,069
<b>Not in the Labour Force</b>	33,364	38,100
<b>Participation Rate</b>	67.7%	67.5%
<b>Employment Rate</b>	60.3%	59.8%
<b>Unemployment Rate</b>	10.8%	11.4%

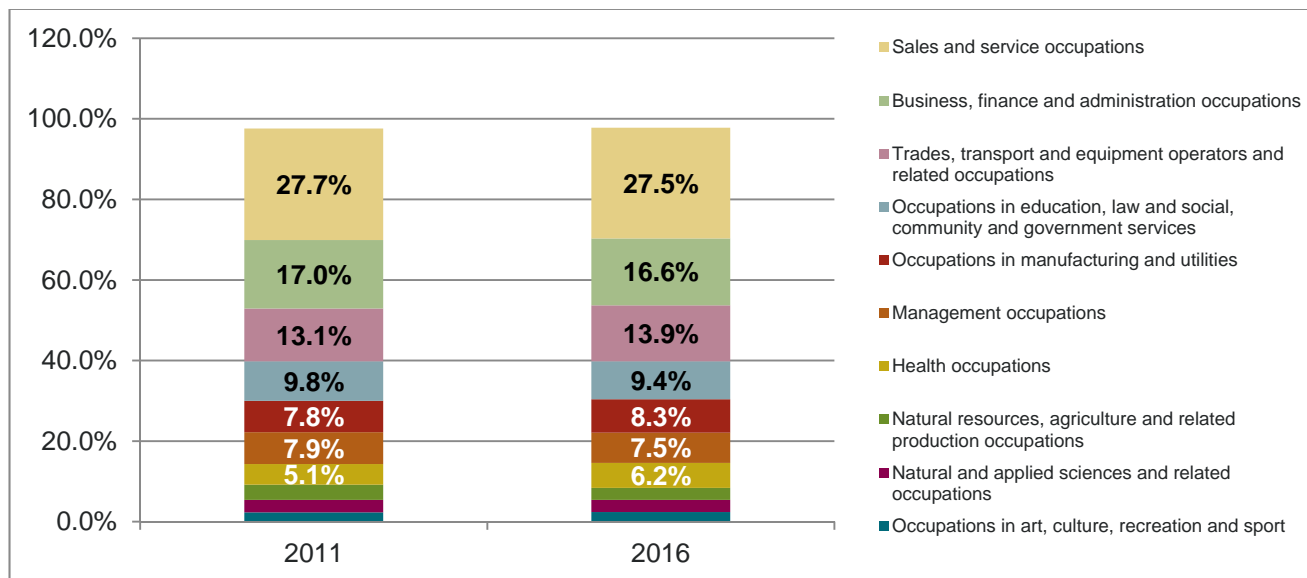
Source: 2011 National Household Survey, Metro Economics 2016

Summerside employers continue to draw workers not only from the City but also from the surrounding area. About 6,600 of Summerside's residents are employed, but, employers in Summerside provide jobs to roughly 8,400 workers. Thus the City is clearly a net importer of workers on a daily basis.

Summerside's location within the province means it can provide jobs for more than 90 percent of all of those who work in the province.

## 1.10 Total Experienced Labour Force by Occupation

FIGURE 10: TOTAL EXPERIENCED LABOUR FORCE, 15 YEARS AND OVER BY OCCUPATION OF THE CITY OF SUMMERSIDE, 2011-2016



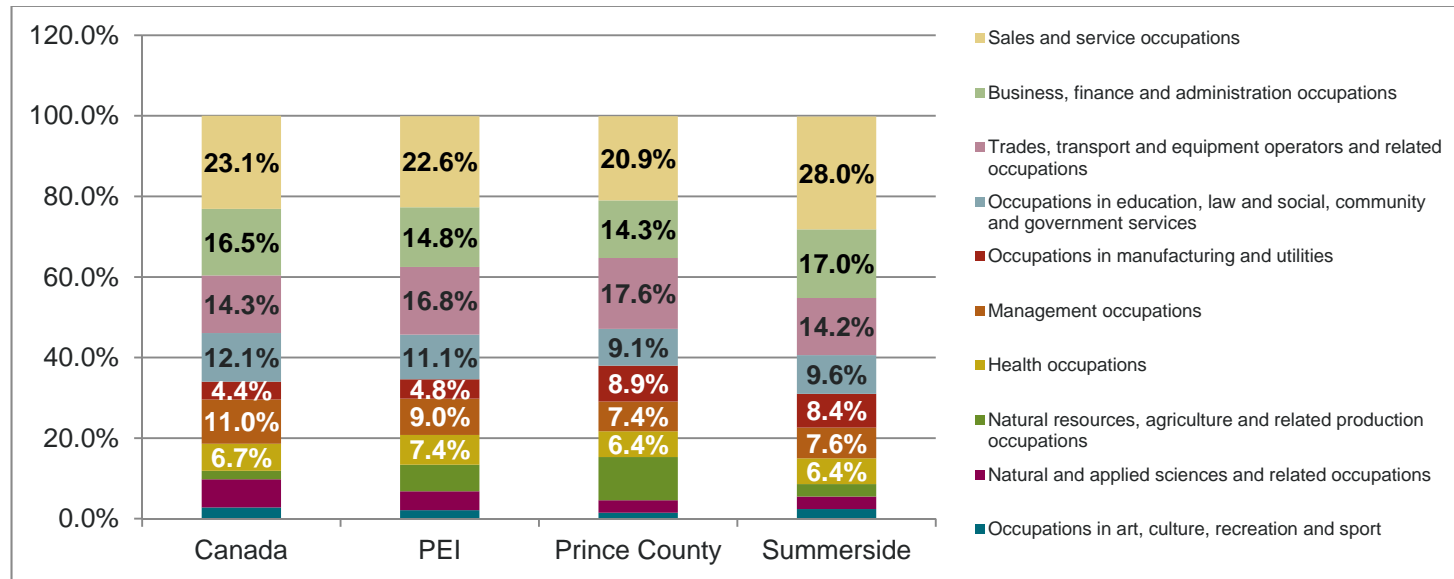
Source: 2011 National Household Survey, Metro Economics 2016

The experienced labour force in Summerside barely grew between 2011 and 2016. Jobs on a place of work basis in Summerside have held steady since 2001 but they have not been growing.

The occupational mix of the residents of the City who work changed slightly over the last five years with jobs in health occupations; trades, transport and equipment operators and related occupations; and occupations in manufacturing and utilities increasing slightly while those in most other major occupation groups held steady or declined slightly.

## 1.11 Employment Share by Occupations

FIGURE 11: SHARE OF EMPLOYMENT BY OCCUPATIONS OVER 15 YEARS OF AGE OF CANADA, PRINCE EDWARD ISLAND, PRINCE COUNTY, AND CITY OF SUMMERSIDE, 2016

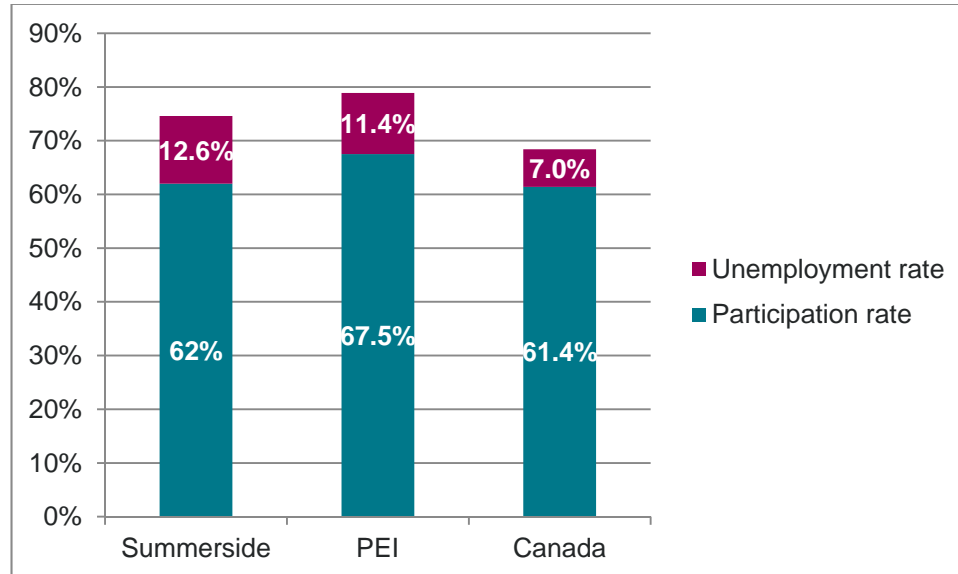


Source: 2011 National Household Survey, Metro Economics 2016

The shares of jobs in Summerside accounted for by sales and service occupations (28 percent) and by business, finance and administration occupations (17 percent) exceed the national, provincial and county shares; no doubt a reflection of the CRA's GST-HST processing centre in Summerside.

## 1.12 Labour Force Indicators

FIGURE 12: EMPLOYMENT INDICATORS FOR CANADA, PRINCE EDWARD ISLAND, AND CITY OF SUMMERSIDE, 2016

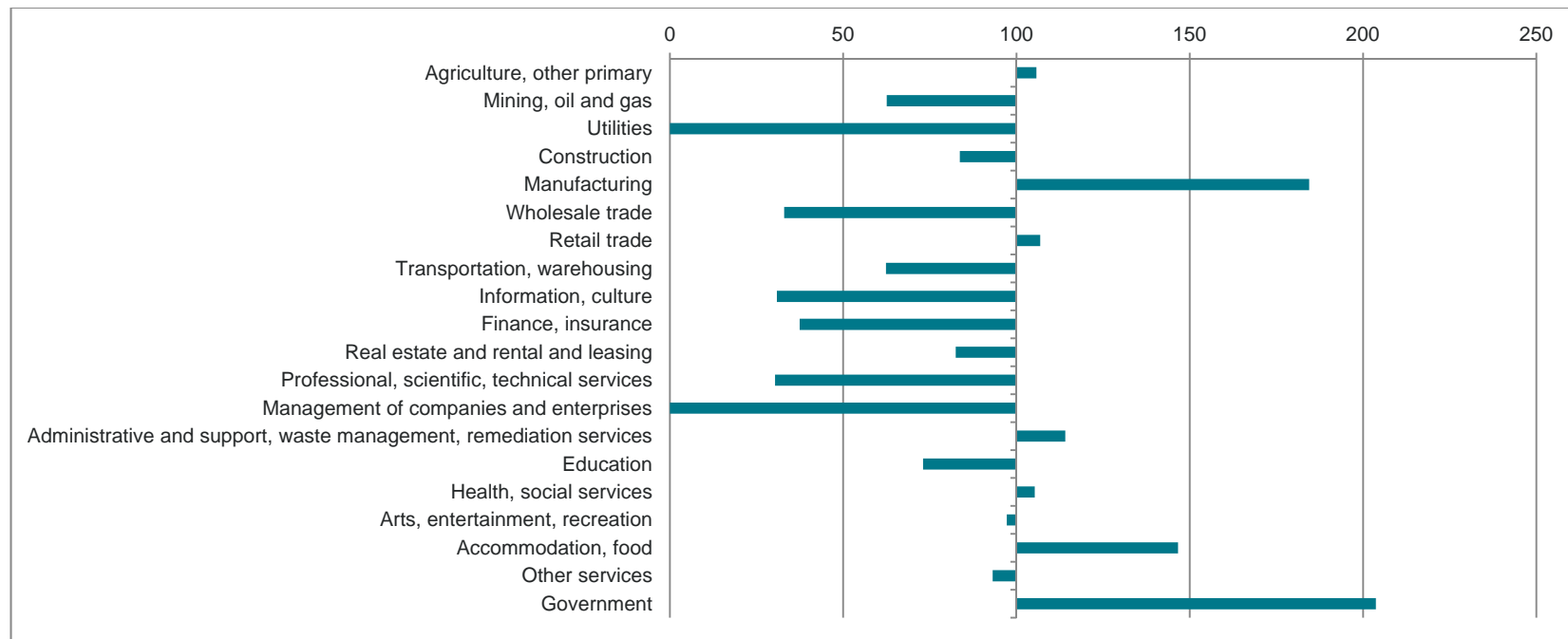


Source: 2011 National Household Survey, Metro Economics 2016

The labour force participation rate of PEI exceeds that of Canada in general while the participation rate in Summerside slightly exceeds the national average. The unemployment rate among residents of Summerside (currently estimated at 12.6 percent) exceeds the provincial (11.4) and national (7.0) averages.

## 1.13 Labour Force by Industry

FIGURE 13: INDICES OF RELATIVE INDUSTRY SHARES: SUMMERSIDE VS CANADA IN 2016



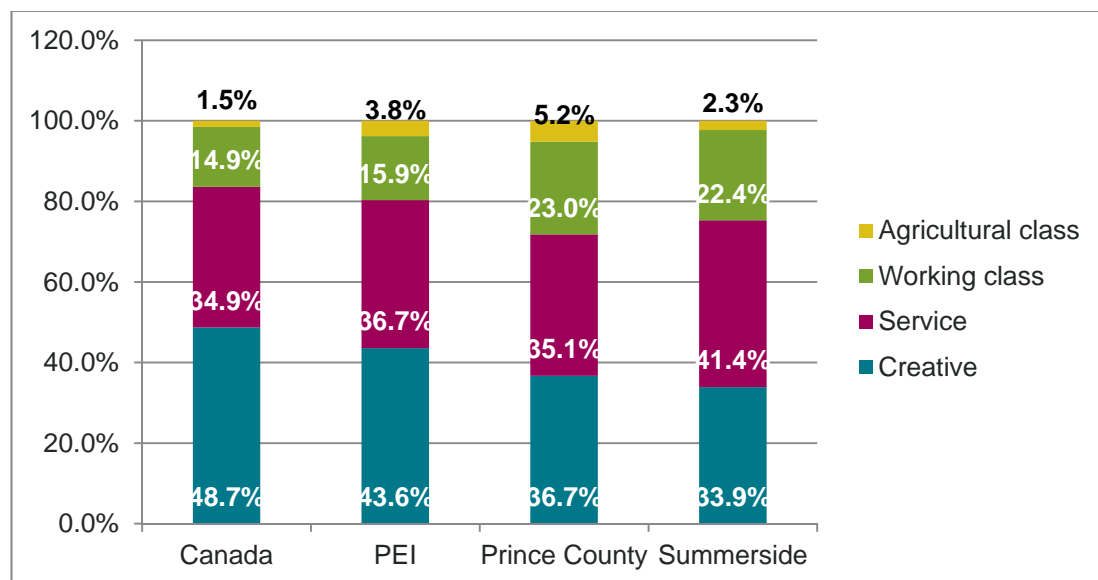
Source: 2011 National Household Survey, Metro Economics 2016

A comparison of Summerside’s employment by industry distribution to that of Canada as a whole reveals that the City’s economy is relatively more dependent than most communities on public administration (the CRA facility); manufacturing; accommodation, food, and retail trade (tourism); agriculture; and administrative support. Thus the City’s economy is widely diversified. However, because jobs in these industries in the area have not grown much in the last decade and a half, neither has the City’s nor the area’s population.



## 1.14 Occupational Classes<sup>1</sup>

FIGURE 14: OCCUPATIONAL CLASSES OF CANADA, CITY OF SUMMERSIDE (INCLUDING THE CENSUS METROPOLITAN AREA), AND PRINCE EDWARD ISLAND, 2016



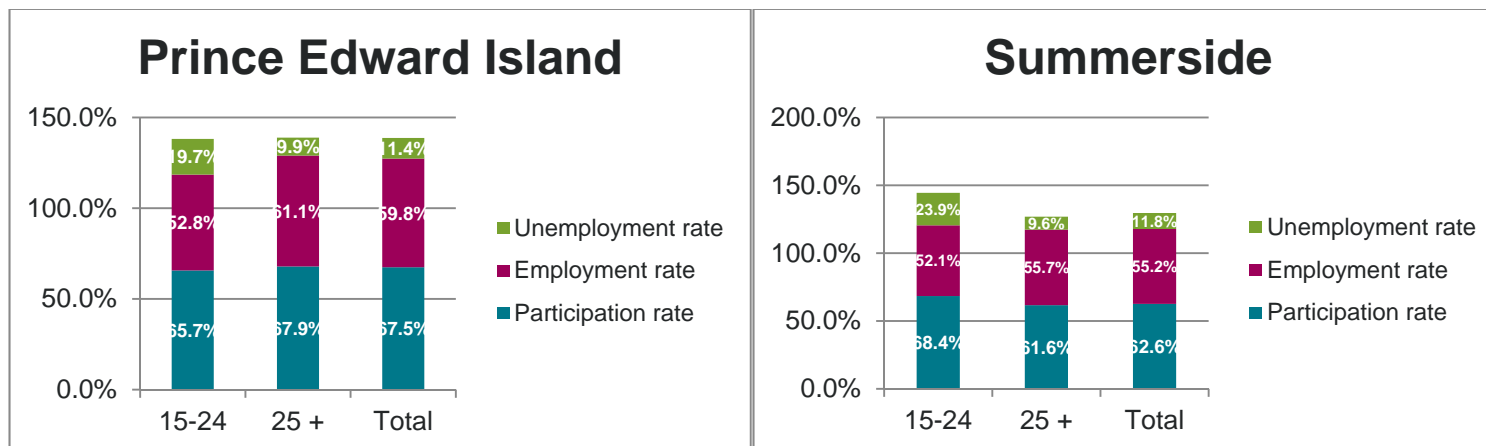
Source: 2011 National Household Survey, Metro Economics 2016

Creative jobs account for roughly 49 percent of all the jobs in Canada and roughly 44 percent of those in PEI in 2016, both estimated to be the same share as it was in 2011. However, the creative share of occupations is lower in Prince County (37 percent) and in Summerside (34 percent). Occupations in services, working class and agricultural class occupations account for higher shares in the county and the city than for PEI or Canada as a whole in 2016.

<sup>1</sup> Data adapted using the University of Toronto Martin Prosperity Institute Classification system

## 1.15 Labour Force Activity by Population Group

FIGURE 15: LABOUR FORCE ACTIVITY BY POPULATION GROUP OF PRINCE EDWARD ISLAND AND CITY OF SUMMERSIDE, 2016



Source: 2011 National Household Survey, Metro Economics 2016

Labour force participation rates among persons 15 to 24 are higher in Summerside than the province of PEI, but, are lower among those 25 and over. Across all age groups the participation rate is roughly five percentage points lower in Summerside than the province. The unemployment rate among those 15 to 24 is higher in Summerside (almost 24 percent) than it is for PEI (just under 20 percent) whereas the unemployment rate among those 25 and over is a bit lower in the City than the province (both are under 10 percent).

## 1.16 Occupations by Gender

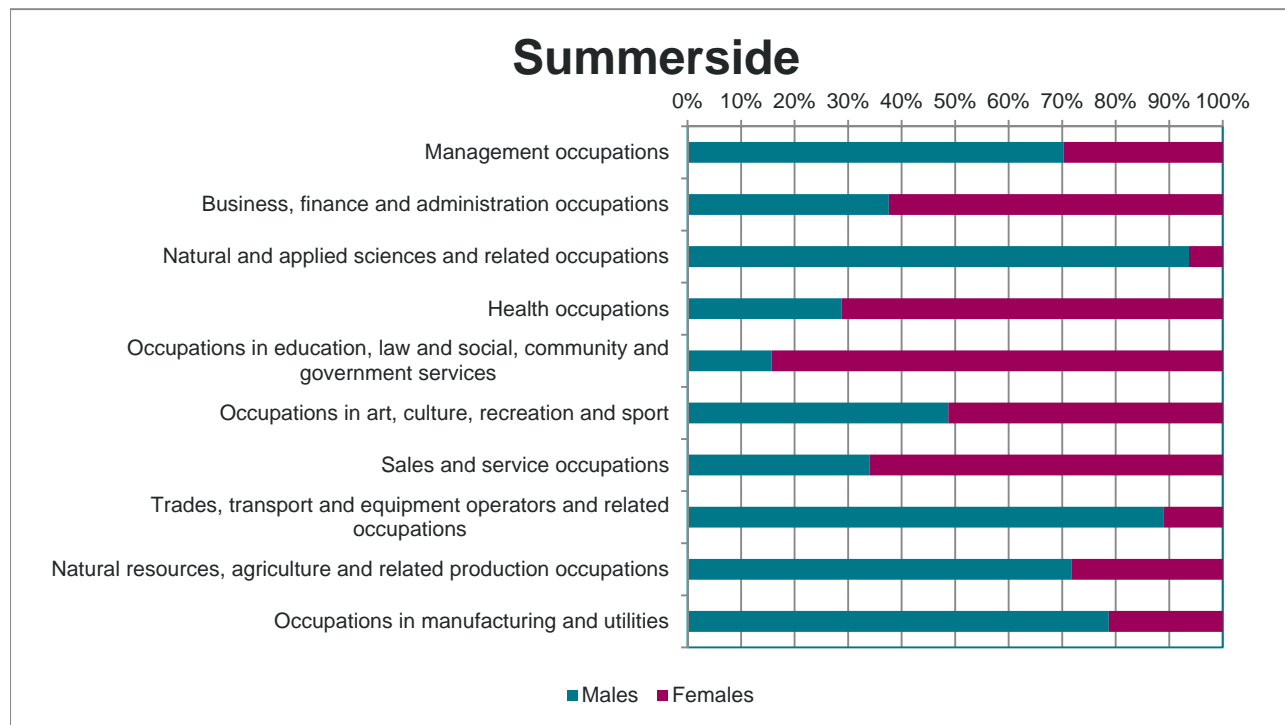
Employment among Summerside residents is split 50-50 between males and females across all major occupational groups.

Males dominate in: natural and applied sciences and related occupations; trades, transport and equipment operators and related occupations; occupations in manufacturing and utilities; natural resources, agricultural and related occupations; and management occupations.

While females dominate in: occupations in education, law and social, community and government services; health occupations; sales and service occupations; and business, finance and administration occupations.

The split among genders is even in occupations in art, culture, recreation and sports.

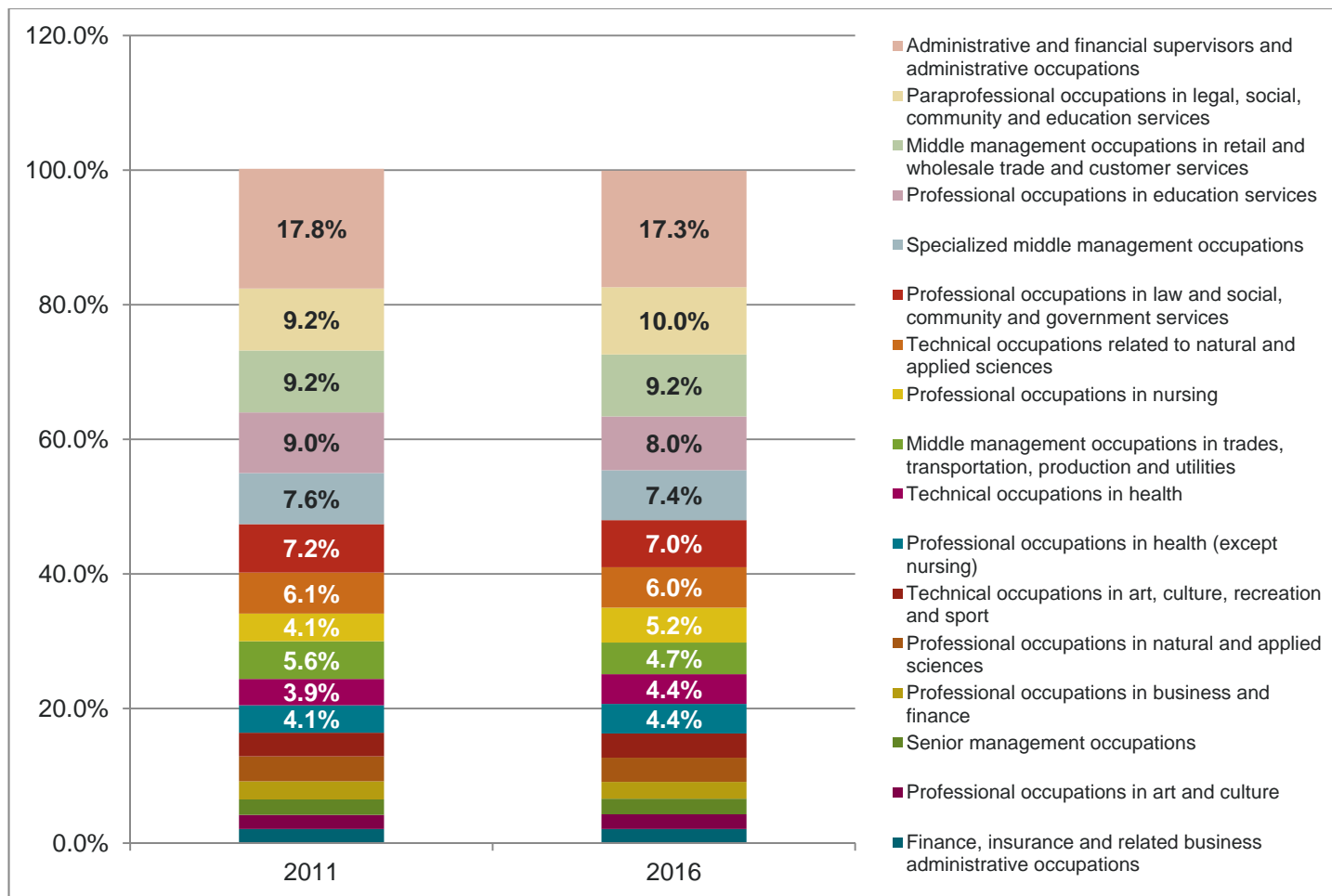
FIGURE 16: OCCUPATIONS BY GENDER OVER 15 YEARS OF AGE OF CITY OF SUMMERSIDE



Source: National Household Survey 2011, Statistics Canada Labour Force Survey 2011 to 2015, Metro Economics 2016

## 1.17 Creative Occupations

FIGURE 17: CREATIVE OCCUPATIONS OF CITY OF SUMMERSIDE, 2011-2016



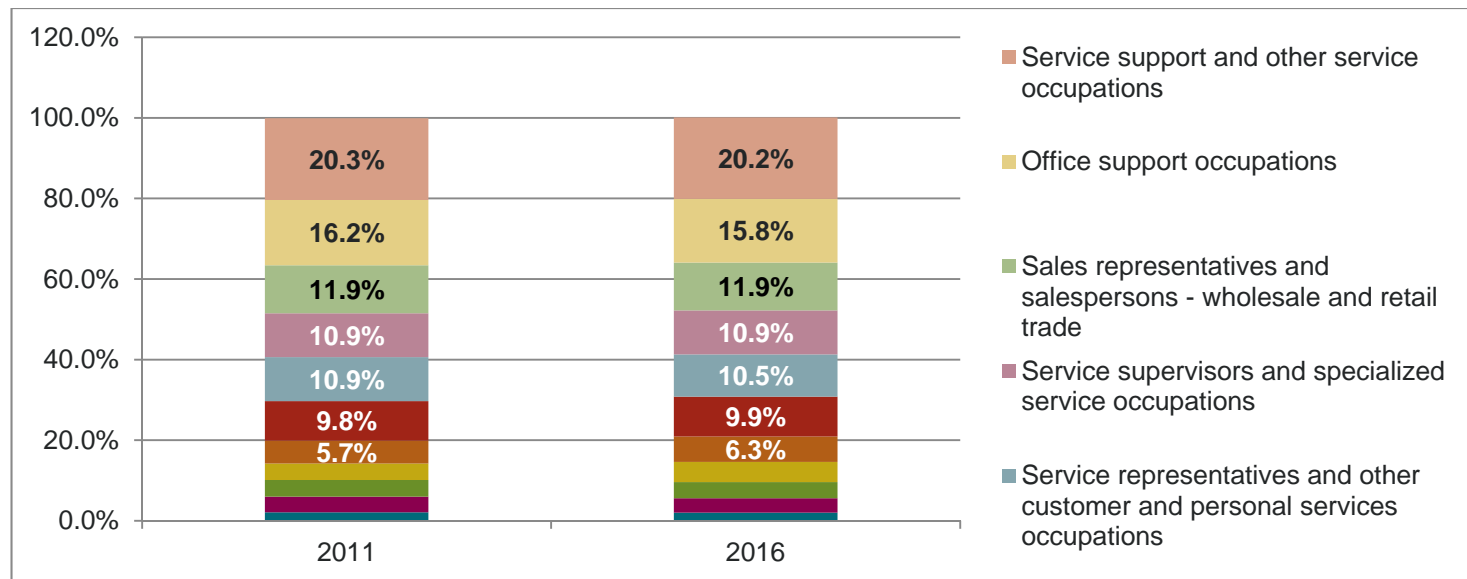
Source: 2011 National Household Survey, Metro Economics 2016

Among the occupations considered to be creative, the major occupations in Summerside (and similar to Prince County) are:

- Administrative and financial supervisors and administrative occupations (17 percent)
- Paraprofessional occupations in legal, social, community and education services (10 percent)
- Middle management occupations in retail and wholesale trade and customer services (9 percent)
- Professional occupations in education services (8 percent)
- Specialized middle management occupations (7 percent)

## 1.18 Service Based Occupations

FIGURE 18: SERVICE BASED OCCUPATIONS OF CITY OF SUMMERSIDE 2011-2016



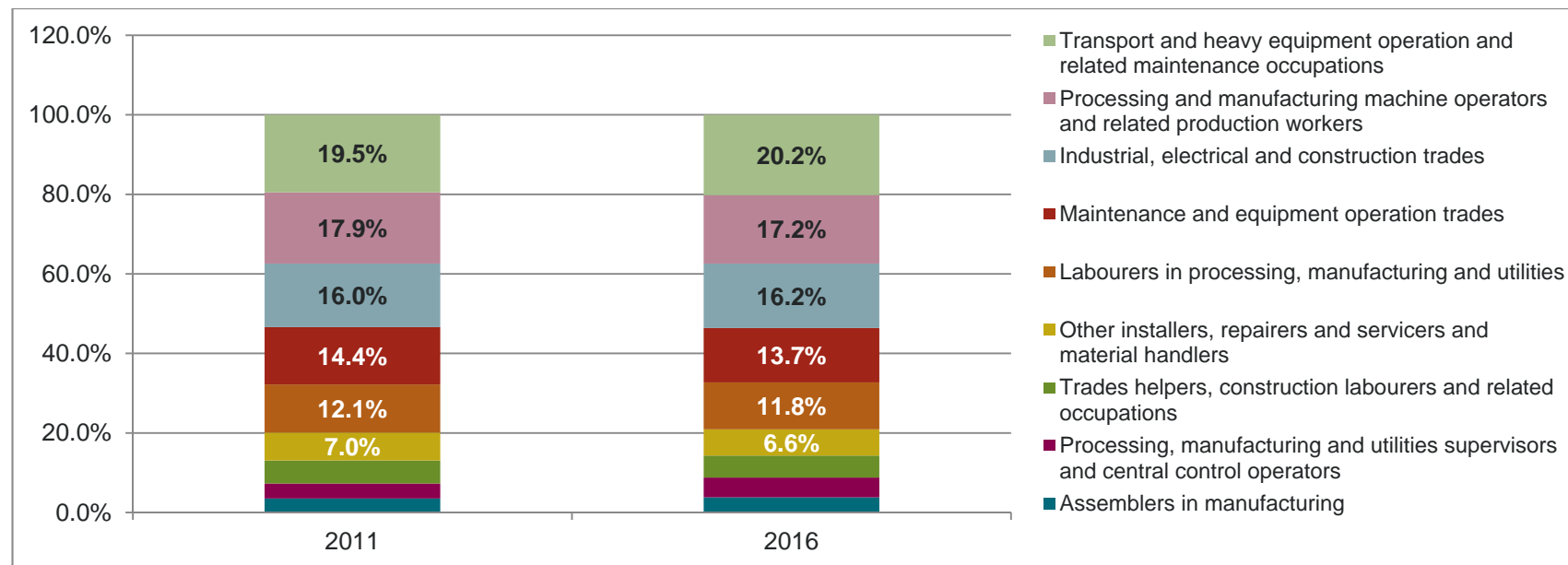
Source: 2011 National Household Survey, Metro Economics 2016

Among the occupations considered to be service based, the major occupations in Summerside (and similar to Prince County) are:

- The catch-all group service support and other service occupation (20 percent)
- Office support occupations (16 percent)
- Sales representatives and salespersons - wholesale and retail trade (12 percent)
- Service supervisors and specialized service occupations (11 percent)
- Service representatives and other customer and personal services occupations (11 percent)

## 1.19 Working Class Occupations

FIGURE 19: WORKING CLASS OCCUPATIONS OF CITY OF SUMMERSIDE, 2011-2016



Source: 2011 National Household Survey, Metro Economics 2016

Among the occupations considered to be working class, the major occupations in Summerside (and similar to Prince County) are:

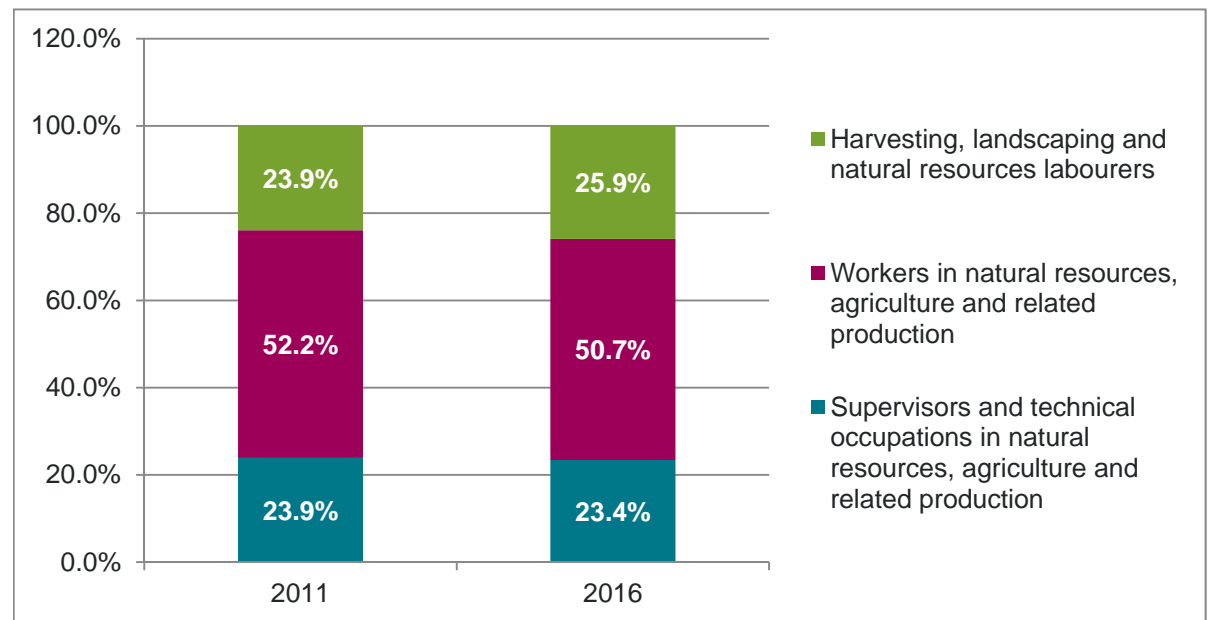
- Transport and heavy equipment operation and related maintenance occupations (20 percent)
- Processing and manufacturing machine operators and related production workers (17 percent)
- Industrial, electrical and construction trades (16 percent)
- Maintenance and equipment operation trades (14 percent)

## 1.20 Agricultural Class Occupations

FIGURE 20: AGRICULTURAL CLASS OCCUPATIONS OF CITY OF SUMMERSIDE. 2011-2016

Among the occupations considered to be agricultural class, the major occupations in Summerside (and similar to Prince County) are:

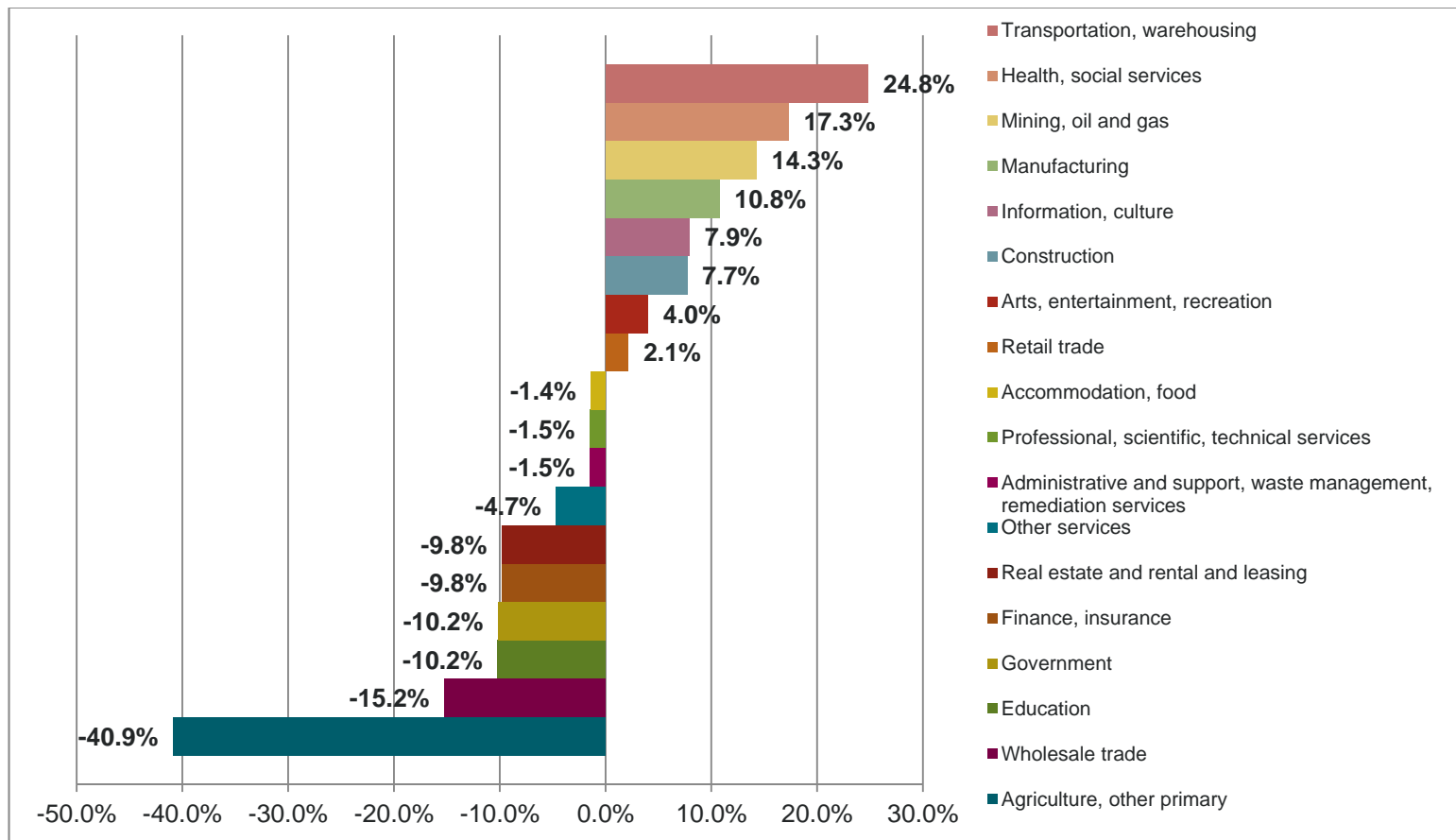
- Workers in natural resources, agriculture and related production (51 percent)
- Harvesting, landscaping and natural resources labourers (26 percent)
- Supervisors and technical occupations in natural resources, agriculture and related production (23 percent)



Source: 2011 National Household Survey, Metro Economics 2016

## 1.21 Labour Force by Industry Growth and Decline

FIGURE 21: LABOUR FORCE BY INDUSTRY GROWTH AND DECLINE OF CITY OF SUMMERSIDE, 2011-2016



Source: 2011 National Household Survey, Metro Economics 2016





Among those industries in the City of Summerside, the following industries had the greatest growth in terms of its labour force:

- Transportation and warehousing (25 percent)
- Health and social sciences (17 percent)
- Mining, oil, and gas (14 percent)

The following industries saw the greatest decline in terms of its labour force:

- Agriculture and other primary (- 41 percent)
- Wholesale Trade (-15 percent)
- Education, Government, Finance and insurance, Real estate and rental and leasing (-10 percent)

## 2 Business Patterns Assessment

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

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

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

## Key Business Characteristics

A detailed review of the business patterns data for the period between 2008 and 2013, and 2014 and 2015 for the City of Summerside provides an understanding of the growth or decline of businesses over the five year period to the current year over year period, and the key characteristics that define the municipality's business community. This business patterns information will assist in understanding the key industry opportunities for Summerside.

Understanding the trends in business growth in the community provides valuable insight into the direction that future growth and investment within Summerside might take. It also provides an indication of where the priorities of the municipality should lie, especially with regard to program development, delivery, and strategic planning.

## 2.1 Business Growth and Decline in Summerside, 2008-2013

In terms of business growth, the following industry sectors identified in Figure 22 exhibit the highest growth of business establishments in Summerside between 2008 and 2013:

- Information and Cultural Industries (117% increase in business establishments)
- Mining, Quarrying, and Oil and Gas Extraction (100% increase in business establishments)
- Accommodation and Food Services (15% increase in business establishments)
- Real Estate and Rental and Leasing (7% increase in business establishments)

In terms of business decline, the following industry sectors identified in Figure 22 exhibit the highest decline of business establishments in Summerside between 2008 and 2013:

- Agriculture, Forestry, Fishing and Hunting (48% decrease in business establishments)
- Wholesale Trade (37% decrease in business establishments)
- Transportation and Warehousing (33% decrease in business establishments)
- Educational Services (19% decrease in business establishments)

A cautionary note should be inserted here when examining the growth by percent change. It is always wise to look at absolute change in business counts as percentages can be deceiving. Although the growth in the Information and Cultural Industries is certainly encouraging, one must realize that it reflects a total increase of seven businesses. Further, it is also encouraging that the majority of these were employers (noted in the subtotal category).

FIGURE 22: GROWTH AND DECLINE OF BUSINESS IN SUMMERSIDE BY UNIT COUNT, 2008-2013

Industry (NAICS)	December 2008			December 2013			2008-2013
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	%Change Total
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	61	33	28	32	20	12	<b>-48%</b>
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0	0	0	1	0	1	<b>100%</b>
<b>22 Utilities</b>	3	1	2	3	1	2	<b>0%</b>
<b>23 Construction</b>	97	43	54	88	41	47	<b>-9%</b>
<b>31-33 Manufacturing</b>	33	7	26	31	5	26	<b>-6%</b>
<b>41 Wholesale Trade</b>	43	11	32	27	9	18	<b>-37%</b>
<b>44-45 Retail Trade</b>	162	35	127	148	24	124	<b>-9%</b>
<b>48-49 Transportation and Warehousing</b>	51	26	25	34	16	18	<b>-33%</b>
<b>51 Information and Cultural Industries</b>	6	1	5	13	3	10	<b>117%</b>
<b>52 Finance and Insurance</b>	64	36	28	63	34	29	<b>-2%</b>
<b>53 Real Estate and Rental and Leasing</b>	88	52	36	94	57	37	<b>7%</b>
<b>54 Professional, Scientific and Technical Services</b>	71	30	41	66	35	31	<b>-7%</b>
<b>55 Management of Companies and Enterprises</b>	40	35	5	34	30	4	<b>-15%</b>
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	36	17	19	32	16	16	<b>-11%</b>
<b>61 Educational Services</b>	16	6	10	13	5	8	<b>-19%</b>
<b>62 Health Care and Social Assistance</b>	71	15	56	74	20	54	<b>4%</b>

Industry (NAICS)	December 2008			December 2013			2008-2013
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	%Change Total
<b>71 Arts, Entertainment and Recreation</b>	18	6	12	15	5	10	<b>-17%</b>
<b>72 Accommodation and Food Services</b>	60	11	48	69	14	55	<b>15%</b>
<b>81 Other Services (except Public Administration)</b>	102	31	69	101	28	73	<b>-1%</b>
<b>91 Public Administration</b>	9	0	9	8	0	8	<b>-11%</b>
<b>Total Economy</b>	<b>1031</b>	<b>396</b>	<b>632</b>	<b>946</b>	<b>363</b>	<b>583</b>	<b>-8.0%</b>

Source: Canadian Business Patterns, December 2008 & 2013

## 2.2 Business Growth and Decline in Summerside, 2014-2015

In terms of business growth, the following industry sectors identified in Figure 23 exhibit the highest growth of business establishments in Summerside between 2014 and 2015:

- Arts, Entertainment and Recreation (12% increase in business establishments)
- Information and Cultural Industries (8% increase in business establishments)
- Health Care and Social Assistance (7% increase in business establishments)
- Accommodation and Food Services (4% increase in business establishments)

In terms of business decline, the following industry sectors identified in Figure 23 exhibit the highest decline of business establishments in Summerside between 2014 and 2015:

- Public Administration (17% decrease in business establishments)
- Real Estate and Rental and Leasing (10% decrease in business establishments)
- Administrative and Support, Waste Management and Remediation Services (10% decrease in business establishments)
- Wholesale Trade (6% decrease in business establishments)

FIGURE 23: GROWTH AND DECLINE OF BUSINESS IN SUMMERSIDE BY UNIT COUNT, 2014-2015

Industry (NAICS)	December 2014 <sup>2</sup>			December 2015 <sup>1</sup>			2014-2015 %Change Total
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	71	49	22	69	49	20	<b>-3%</b>
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0	0	0	0	0	0	<b>0%</b>
<b>22 Utilities</b>	3	1	2	3	1	2	<b>0%</b>
<b>23 Construction</b>	114	56	58	110	53	57	<b>-4%</b>
<b>31-33 Manufacturing</b>	34	7	27	35	7	28	<b>3%</b>
<b>41 Wholesale Trade</b>	31	9	22	29	8	21	<b>-6%</b>
<b>44-45 Retail Trade</b>	156	36	120	151	33	118	<b>-3%</b>
<b>48-49 Transportation and Warehousing</b>	49	30	19	49	30	19	<b>0%</b>
<b>51 Information and Cultural Industries</b>	13	4	9	14	5	9	<b>8%</b>
<b>52 Finance and Insurance</b>	73	49	24	74	49	25	<b>1%</b>
<b>53 Real Estate and Rental and Leasing</b>	195	162	33	176	146	30	<b>-10%</b>
<b>54 Professional, Scientific and Technical Services</b>	79	47	32	83	48	35	<b>5%</b>
<b>55 Management of Companies and Enterprises</b>	36	31	5	34	31	3	<b>-6%</b>
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	40	23	17	36	21	15	<b>-10%</b>

<sup>2</sup> Excludes a new NAICS (industry) category called "unclassified". This new category contains any businesses that satisfy conditions to be included but do not have a NAICS. Prior to December 2014 Statistics Canada did not include these. The counts of businesses without employees now cover all enterprises which meet one of the following criteria: is incorporated and/or shows a minimum of \$30,000 in revenue (non-taxable or taxable). This change affects businesses that did not have \$30,000 in taxable revenue in previous years but did have at least \$30,000 in overall (non-taxable and taxable) revenue. These businesses will now be included and represent approximately 600,000 units. Business counts in NAIC 53- Real Estate and rental and leasing and 62 - Health care and social assistance have the largest increases.

Industry (NAICS)	December 2014 <sup>2</sup>			December 2015 <sup>1</sup>			2014-2015
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	%Change Total
<b>61 Educational Services</b>	12	6	6	12	7	5	<b>0%</b>
<b>62 Health Care and Social Assistance</b>	107	52	55	115	58	57	<b>7%</b>
<b>71 Arts, Entertainment and Recreation</b>	17	5	12	19	8	11	<b>12%</b>
<b>72 Accommodation and Food Services</b>	78	24	54	81	24	57	<b>4%</b>
<b>81 Other Services (except Public Administration)</b>	127	52	75	128	51	77	<b>1%</b>
<b>91 Public Administration</b>	6	0	6	5	0	5	<b>-17%</b>
<b>Total Economy</b>	<b>1241</b>	<b>643</b>	<b>598</b>	<b>1223</b>	<b>629</b>	<b>594</b>	<b>-1%</b>

Source: Canadian Business Patterns, December 2014 & 2015

## 2.3 Location Quotients for Summerside, 2008 & 2013

Figure 24 below provides us the location quotient (LQ)<sup>3</sup> for Summerside in 2008 and 2013 which measures the concentration of business activity in a local area (i.e. Summerside) relative to an overarching area (i.e. Prince County and Prince Edward Island).

Between 2008 and 2013 the following sectors showed the greatest increase in local concentration of total businesses in Summerside when compared to Prince County:

- Information and Cultural Industries
- Mining, Quarrying, and Oil and Gas Extraction
- Educational Services

<sup>3</sup> Local Concentration by Location Quotient (LQ): An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

Between 2008 and 2013 the following sectors showed the greatest decline in local concentration of total businesses in Summerside when compared to Prince County:

- Transportation and Warehousing
- Wholesale Trade
- Administrative and Support, Waste Management and Remediation Services

FIGURE 24: LOCAL CONCENTRATION OF TOTAL BUSINESSES IN SUMMERSIDE BY LOCATION QUOTIENT, 2008 & 2013

Industry (NAICS)	2008 Summerside vs. Prince County		2013 Summerside vs. Prince County		2008 Summerside vs. P.E.I		2013 Summerside vs. P.E.I	
	LQ	Classification	LQ	Classification	LQ	Classification	LQ	Classification
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	0.21	Low	0.12	Low	0.27	Low	0.16	Low
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0.00	Low	0.90	Average	0.00	Low	<b>1.98</b>	<b>High</b>
<b>22 Utilities</b>	<b>1.53</b>	<b>High</b>	<b>1.79</b>	<b>High</b>	<b>2.17</b>	<b>High</b>	<b>2.97</b>	<b>High</b>
<b>23 Construction</b>	0.96	Average	1.00	Average	0.94	Average	0.89	Average
<b>31-33 Manufacturing</b>	0.79	Average	0.88	Average	0.94	Average	1.12	Average
<b>41 Wholesale Trade</b>	1.09	Average	0.92	Average	<b>1.43</b>	<b>High</b>	1.17	Average
<b>44-45 Retail Trade</b>	<b>1.56</b>	<b>High</b>	<b>1.61</b>	<b>High</b>	<b>1.66</b>	<b>High</b>	<b>1.71</b>	<b>High</b>
<b>48-49 Transportation and Warehousing</b>	1.11	Average	0.84	Average	1.17	Average	0.94	Average
<b>51 Information and Cultural Industries</b>	1.08	Average	<b>2.22</b>	<b>High</b>	0.63	Low	<b>1.50</b>	<b>High</b>
<b>52 Finance and Insurance</b>	<b>1.75</b>	<b>High</b>	<b>1.84</b>	<b>High</b>	<b>1.38</b>	<b>High</b>	<b>1.53</b>	<b>High</b>
<b>53 Real Estate and Rental and Leasing</b>	<b>1.50</b>	<b>High</b>	<b>1.35</b>	<b>High</b>	<b>1.34</b>	<b>High</b>	1.18	Average

Industry (NAICS)	2008 Summerside vs. Prince County		2013 Summerside vs. Prince County		2008 Summerside vs. P.E.I		2013 Summerside vs. P.E.I	
	LQ	Classification	LQ	Classification	LQ	Classification	LQ	Classification
<b>54 Professional, Scientific and Technical Services</b>	1.72	High	1.67	High	1.18	Average	1.04	Average
<b>55 Management of Companies and Enterprises</b>	1.35	High	1.42	High	1.04	Average	1.11	Average
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	1.56	High	1.38	High	1.34	High	1.26	High
<b>61 Educational Services</b>	1.44	High	2.33	High	1.38	High	1.58	High
<b>62 Health Care and Social Assistance</b>	1.79	High	2.00	High	1.60	High	1.65	High
<b>71 Arts, Entertainment and Recreation</b>	1.04	Average	1.00	Average	0.95	Average	0.87	Average
<b>72 Accommodation and Food Services</b>	1.29	High	1.46	High	1.10	Average	1.36	High
<b>81 Other Services (except Public Administration)</b>	1.15	Average	1.22	Average	1.20	Average	1.25	High
<b>91 Public Administration</b>	0.63	Low	1.03	Average	0.26	Low	0.31	Low

Source: Canadian Business Patterns, December 2008 & 2013. Adapted by MDB Insight Inc.

Between 2008 and 2013 the following sectors showed the greatest increase in local concentration of total businesses in Summerside when compared to Prince Edward Island:

- Mining, Quarrying, and Oil and Gas Extraction
- Information and Cultural Industries
- Utilities

Between 2008 and 2013 the following sectors showed the greatest decline in local concentration of total businesses in Summerside when compared to Prince Edward Island:



- Wholesale Trade
- Transportation and Warehousing
- Real Estate and Rental and Leasing

## 2.4 Location Quotients for Summerside, 2014 & 2015

Figure 25 below provides us the location quotient (LQ)<sup>4</sup> for Summerside in 2014 and 2015 which measures the concentration of business activity in a local area (i.e. Summerside) relative to an overarching area (i.e. Prince County and Prince Edward Island).

Between 2014 and 2015 the following sectors showed the greatest increase in local concentration of total businesses in Summerside when compared to Prince County:

- Educational Services
- Arts, Recreation and Entertainment
- Accommodation and Food Services

Between 2014 and 2015 the following sectors showed the greatest decline in local concentration of total businesses in Summerside when compared to Prince County:

- Utilities
- Public Administration
- Real Estate and Rental and Leasing

Between 2014 and 2015 the following sectors showed the greatest increase in local concentration of total businesses in Summerside when compared to Prince Edward Island:

- Information and Cultural Industries
- Educational Services
- Arts, Entertainment and Recreation

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<sup>4</sup> Local Concentration by Location Quotient (LQ): An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a labour force perspective, LQs may offer insight into where local concentrations of industry-relevant skills may exist.

Between 2014 and 2015 the following sectors showed the greatest decline in local concentration of total businesses in Summerside when compared to Prince Edward Island:

- Utilities
- Real Estate and Rental and Leasing
- Administrative and Support, Waste Management and Remediation Services

FIGURE 25: LOCAL CONCENTRATION OF TOTAL BUSINESSES IN SUMMERSIDE BY LOCATION QUOTIENT, 2014 & 2015

Industry (NAICS)	2014 Summerside vs. Prince County		2015 Summerside vs. Prince County		2014 Summerside vs. P.E.I		2015 Summerside vs. P.E.I	
	LQ	Classification	LQ	Classification	LQ	Classification	LQ	Classification
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	0.18	Low	0.18	Low	0.26	Low	0.25	Low
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0.00	Low	0.00	Low	0.00	Low	0.00	Low
<b>22 Utilities</b>	<b>1.72</b>	<b>High</b>	<b>1.31</b>	<b>High</b>	<b>3.36</b>	<b>High</b>	<b>2.30</b>	<b>High</b>
<b>23 Construction</b>	1.04	Average	1.06	Average	0.97	Average	0.98	Average
<b>31-33 Manufacturing</b>	0.92	Average	0.99	Average	1.14	Average	1.23	Average
<b>41 Wholesale Trade</b>	0.98	Average	0.96	Average	1.14	Average	1.09	Average
<b>44-45 Retail Trade</b>	<b>1.52</b>	<b>High</b>	<b>1.53</b>	<b>High</b>	<b>1.59</b>	<b>High</b>	<b>1.59</b>	<b>High</b>
<b>48-49 Transportation and Warehousing</b>	0.92	Average	0.95	Average	1.04	Average	1.07	Average
<b>51 Information and Cultural Industries</b>	<b>2.03</b>	<b>High</b>	<b>2.04</b>	<b>High</b>	1.08	Average	<b>1.33</b>	<b>High</b>
<b>52 Finance and Insurance</b>	<b>1.71</b>	<b>High</b>	<b>1.71</b>	<b>High</b>	<b>1.35</b>	<b>High</b>	<b>1.39</b>	<b>High</b>
<b>53 Real Estate and Rental and Leasing</b>	<b>1.45</b>	<b>High</b>	<b>1.42</b>	<b>High</b>	1.24	Average	1.16	Average
<b>54 Professional, Scientific and Technical Services</b>	<b>1.63</b>	<b>High</b>	<b>1.64</b>	<b>High</b>	0.97	Average	1.00	Average

Industry (NAICS)	2014 Summerside vs. Prince County		2015 Summerside vs. Prince County		2014 Summerside vs. P.E.I.		2015 Summerside vs. P.E.I.	
	LQ	Classification	LQ	Classification	LQ	Classification	LQ	Classification
<b>55 Management of Companies and Enterprises</b>	1.45	High	1.43	High	1.14	Average	1.14	Average
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	1.56	High	1.61	High	1.20	Average	1.14	Average
<b>61 Educational Services</b>	1.96	High	2.33	High	1.20	Average	1.31	High
<b>62 Health Care and Social Assistance</b>	2.05	High	2.15	High	1.62	High	1.71	High
<b>71 Arts, Entertainment and Recreation</b>	0.97	Average	1.14	Average	0.77	Average	0.86	Average
<b>72 Accommodation and Food Services</b>	1.49	High	1.58	High	1.35	High	1.41	High
<b>81 Other Services (except Public Administration)</b>	1.29	High	1.27	High	1.33	High	1.34	High
<b>91 Public Administration</b>	0.71	Low	0.58	Low	0.22	Low	0.18	Low

Source: Canadian Business Patterns, December 2014 & 2015. Adapted by MDB Insight Inc.

## 2.5 Distribution of Business Establishments by Employment Size, 2008-2013

Figure 26 highlights the distribution of business establishments within Summerside between 2008 and 2013 based on the number of employees hired by those establishments, including those that are self-employed. As Figure 26 illustrates, the only employee category to see an increase in businesses was the 100+ employee category, where one employer was added.

Overall, between 2008 and 2013 there has been considerably decline in the number of small and medium size employers in Summerside, where business establishments that hire less than 20 people and the self-employed have seen the greatest decline in business counts.

FIGURE 26: BUSINESS ESTABLISHMENTS IN SUMMERSIDE BY EMPLOYMENT SIZE, 2008 – 2013

Employee Count	2008 Total Business	Share of 2008 Total	2013 Total Business	Share of 2013 Total	Absolute Change 2008-2013	Percentage Change 2008-2013
1 - 4	291	28%	257	27%	-34	-12%
5 - 9	143	14%	136	14%	-7	-5%
10 - 19	94	9%	88	9%	-6	-6%
20 - 49	69	7%	67	7%	-2	-3%
50 - 99	21	2%	20	2%	-1	-5%
100+	14	1%	15	2%	1	7%
Indeterminate	396	38%	363	38%	-33	-8%
<b>Total</b>	<b>1028</b>	<b>100%</b>	<b>946</b>	<b>100%</b>	<b>-82</b>	<b>-8%</b>

Source: Canadian Business Patterns, December 2008 & 2013. Adapted by MDB Insight Inc.

## 2.6 Distribution of Business Establishments by Employment Size, 2014-2015

Figure 27 highlights the distribution of business establishments within Summerside between 2014 and 2015 based on the number of employees hired by those establishments, including those that are self-employed. As Figure 27 illustrates, Summerside has seen much less decline in its small and medium size business when compared to the previous 2008 and 2013 time period, where both establishments that hire between five to nine and 20 to 49 employees have seen absolute increase and increases in its share of total businesses.

FIGURE 27: BUSINESS ESTABLISHMENTS IN SUMMERSIDE BY EMPLOYMENT SIZE, 2014–2015

Employee Count	2014 Total Business	Share of 2014 Total	2015 Total Business	Share of 2015 Total	Absolute Change 2014-2015	Percentage Change 2014-2015
1 - 4	265	21%	255	21%	-10	-4%
5 - 9	139	11%	154	13%	15	11%
10 - 19	94	8%	83	7%	-11	-12%
20 - 49	68	5%	72	6%	4	6%
50 - 99	19	2%	18	1%	-1	-5%
100+	13	1%	12	1%	-1	-8%
Indeterminate	643	52%	629	51%	-14	-2%
<b>Total</b>	<b>1241</b>	<b>100%</b>	<b>1223</b>	<b>100%</b>	<b>-18</b>	<b>-1%</b>

Source: Canadian Business Patterns, December 2014 & 2015. Adapted by MDB Insight Inc.

Overall, between 2014 and 2015 there have been considerably less decline and some increases in the number of small and medium size employers in Summerside, where business establishments that hire between five and nine people and those that hire between 20 and 49 people have seen the only increases in business counts.

## 2.7 Distribution of Business Establishments by Industry Sector, 2008-2013

Figure 28 highlights the distribution of business establishments within Summerside between 2008 and 2013 based on the industry sector. As Figure 28 highlights, the industry sectors that had the highest share of total business were:

## 2008

- Retail Trade (16% of total businesses in Summerside)
- Other Services, except Public Administration (10% of total businesses in Summerside)
- Construction (9% of total businesses in Summerside)

## 2013

- Retail Trade (16% of total businesses in Summerside)
- Other Services, except Public Administration (11% of total businesses in Summerside)
- Real Estate and Rental and Leasing (10% of total businesses in Summerside)

FIGURE 28: DISTRIBUTION OF BUSINESS ESTABLISHMENTS IN SUMMERSIDE BY INDUSTRY SECTOR, 2008-2013

Industry (NAICS)	2008 Total Business	Share of 2008 Total	2013 Total Business	Share of 2013 Total
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	61	<b>5.9%</b>	32	<b>3.4%</b>
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0	<b>0.0%</b>	1	<b>0.1%</b>
<b>22 Utilities</b>	3	<b>0.3%</b>	3	<b>0.3%</b>
<b>23 Construction</b>	97	<b>9.4%</b>	88	<b>9.3%</b>
<b>31-33 Manufacturing</b>	33	<b>3.2%</b>	31	<b>3.3%</b>
<b>41 Wholesale Trade</b>	43	<b>4.2%</b>	27	<b>2.9%</b>
<b>44-45 Retail Trade</b>	162	<b>15.7%</b>	148	<b>15.6%</b>
<b>48-49 Transportation and Warehousing</b>	51	<b>4.9%</b>	34	<b>3.6%</b>
<b>51 Information and Cultural Industries</b>	6	<b>0.6%</b>	13	<b>1.4%</b>

Industry (NAICS)	2008 Total Business	Share of 2008 Total	2013 Total Business	Share of 2013 Total
<b>52 Finance and Insurance</b>	64	<b>6.2%</b>	63	<b>6.7%</b>
<b>53 Real Estate and Rental and Leasing</b>	88	<b>8.5%</b>	94	<b>9.9%</b>
<b>54 Professional, Scientific and Technical Services</b>	71	<b>6.9%</b>	66	<b>7.0%</b>
<b>55 Management of Companies and Enterprises</b>	40	<b>3.9%</b>	34	<b>3.6%</b>
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	36	<b>3.5%</b>	32	<b>3.4%</b>
<b>61 Educational Services</b>	16	<b>1.6%</b>	13	<b>1.4%</b>
<b>62 Health Care and Social Assistance</b>	71	<b>6.9%</b>	74	<b>7.8%</b>
<b>71 Arts, Entertainment and Recreation</b>	18	<b>1.7%</b>	15	<b>1.6%</b>
<b>72 Accommodation and Food Services</b>	60	<b>5.8%</b>	69	<b>7.3%</b>
<b>81 Other Services (except Public Administration)</b>	102	<b>9.9%</b>	101	<b>10.7%</b>
<b>91 Public Administration</b>	9	<b>0.9%</b>	8	<b>0.8%</b>
<b>Total Economy</b>	<b>1031</b>	<b>100.0%</b>	<b>946</b>	<b>100.0%</b>

Source: Canadian Business Patterns, December 2008 & 2013. Adapted by MDB Insight Inc.

The following industry sectors saw the greatest increase of new business establishments between 2008 and 2013:

- Accommodation and Food Services (9 new business establishments)
- Information and Cultural Industries (7 new business establishments)
- Real Estate and Rental and Leasing (6 new business establishments)
- Health Care and Social Assistance (3 new business establishments)

## 2.8 Distribution of Business Establishments by Industry Sector, 2014-2015

Figure 29 contains the distribution of business establishments within Summerside between 2014 and 2015 based on the industry sector. As Figure 29 highlights, the industry sectors that had the highest share of total business were:

### 2014

- Real Estate and Rental and Leasing (16% of total businesses in Summerside)
- Retail Trade (13% of total businesses in Summerside)
- Other Services, except Public Administration (10% of total businesses in Summerside)

### 2015

- Real Estate and Rental and Leasing (14% of total businesses in Summerside)
- Retail Trade (12% of total businesses in Summerside)
- Other Services, except Public Administration (11% of total businesses in Summerside)



FIGURE 29: DISTRIBUTION OF BUSINESS ESTABLISHMENTS IN SUMMERSIDE BY INDUSTRY SECTOR, 2014-2015

Industry (NAICS)	2014 Total Business	Share of 2014 Total	2015 Total Business	Share of 2015 Total
<b>11 Agriculture, Forestry, Fishing and Hunting</b>	71	<b>5.7%</b>	69	<b>5.6%</b>
<b>21 Mining, Quarrying, and Oil and Gas Extraction</b>	0	<b>0.0%</b>	0	<b>0.0%</b>
<b>22 Utilities</b>	3	<b>0.2%</b>	3	<b>0.2%</b>
<b>23 Construction</b>	114	<b>9.2%</b>	110	<b>9.0%</b>
<b>31-33 Manufacturing</b>	34	<b>2.7%</b>	35	<b>2.9%</b>
<b>41 Wholesale Trade</b>	31	<b>2.5%</b>	29	<b>2.4%</b>
<b>44-45 Retail Trade</b>	156	<b>12.6%</b>	151	<b>12.3%</b>
<b>48-49 Transportation and Warehousing</b>	49	<b>3.9%</b>	49	<b>4.0%</b>
<b>51 Information and Cultural Industries</b>	13	<b>1.0%</b>	14	<b>1.1%</b>
<b>52 Finance and Insurance</b>	73	<b>5.9%</b>	74	<b>6.1%</b>
<b>53 Real Estate and Rental and Leasing</b>	195	<b>15.7%</b>	176	<b>14.4%</b>
<b>54 Professional, Scientific and Technical Services</b>	79	<b>6.4%</b>	83	<b>6.8%</b>
<b>55 Management of Companies and Enterprises</b>	36	<b>2.9%</b>	34	<b>2.8%</b>

Industry (NAICS)	2014 Total Business	Share of 2014 Total	2015 Total Business	Share of 2015 Total
<b>56 Administrative and Support, Waste Management and Remediation Services</b>	40	<b>3.2%</b>	36	<b>2.9%</b>
<b>61 Educational Services</b>	12	<b>1.0%</b>	12	<b>1.0%</b>
<b>62 Health Care and Social Assistance</b>	107	<b>8.6%</b>	115	<b>9.4%</b>
<b>71 Arts, Entertainment and Recreation</b>	17	<b>1.4%</b>	19	<b>1.6%</b>
<b>72 Accommodation and Food Services</b>	78	<b>6.3%</b>	81	<b>6.6%</b>
<b>81 Other Services (except Public Administration)</b>	127	<b>10.2%</b>	128	<b>10.5%</b>
<b>91 Public Administration</b>	6	<b>0.5%</b>	5	<b>0.4%</b>
<b>Total Economy</b>	<b>1241</b>	<b>100.0%</b>	<b>1223</b>	<b>100.0%</b>

Source: Canadian Business Patterns, December 2014 & 2015. Adapted by MDB Insight Inc.

The following industry sectors saw the greatest increase of new business establishments between 2014 and 2015:

- Health Care and Social Assistance (8 new business establishments)
- Professional, Scientific and Technical Services (4 new business establishments)
- Accommodation and Food Services (3 new business establishments)