



**City of Dryden
Dryden Regional
Airport Strategic
Plan 2021**

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Appendix A: Community Survey

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1.0 Executive Summary

The Loomex Group is the service provider managing the Dryden Regional Airport (Airport). As part of the value-added service, the Airport's Strategic Plan was developed for the City of Dryden (City). This plan aims to identify the Airport's socioeconomic impact, assess the existing infrastructure and facilities, and provide recommendations for viable growth and development opportunities to improve the Airport's influence as an economic driver for the City.

The Loomex Group launched a comprehensive business review of the current Airport operations to determine future strategic plans. The review included:

- Collecting and reviewing relevant background information
- Stakeholder consultations and a public survey
- Regional economic review and economic impact assessment
- Infrastructure and commercial inventory review
- Review of current and potential governance options
- Foreign investment review
- Opportunities, value-adds, and strategic positioning
- Passenger activity forecasts and growth projections
- Exploring future development opportunities

Stakeholder consultations formed part of the preparation of the economic impact and infrastructure review. The Loomex Group's consultation process included group and individual meetings, held virtually and by telephone, with local and regional governments, elected officials, economic development representatives, businesses and groups in the community, and the aviation community. The stakeholder meetings' consensus revealed a renewed desire to fully utilize and leverage the Airport's potential as an alternate transportation mode and a vital component for regional economic development.

Engagement also included an online survey to obtain valuable information from community residents. Approximately 75% of respondents believe that the Airport supports the local economy.

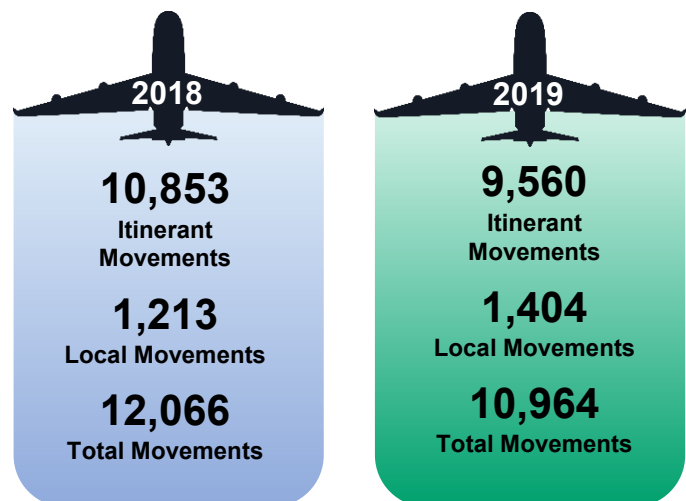


Figure 1: Airport Movements in 2018 and 2019

The Airport handles approximately 10,000 to 12,000 aircraft movements annually and supports various activities: from aerial firefighting, general aviation, corporate charters, scheduled passenger service, search and rescue operations, and medevac flights. The Airport's economic impact is estimated to be \$22.9 million per year, with 347 full-time equivalents (FTE's) where 228 of the FTE's are directly attributable to airport tenants.

The Airport's economic impact is estimated to be \$22.9M per year.

This report summarizes the information analyzed from the review process, evaluates the Airport facilities against industry norms, and provides recommendations on development opportunities to contribute to both the Airport and the City's economic stability. The recommendations accumulated to form the ten strategic priorities that will guide the future of the Airport.

Strategic Plan Goal

The strategic plan's goal is to establish the DRA as a sustainable operation to become a catalyst for economic development in the Kenora District. Ten identified strategic priorities resulting from the analysis, broken down by short-, medium-, and long-term timelines, bring about the five-year strategic plan's success. Appendix B outlines the Key Performance Indicators (KPI) linked with strategic priorities.

Strategic Priorities

S: Short-Term (2021-2022) M: Medium-Term (2022-2023) L: Long-Term (2024-2025)

| Strategic Priorities | Term |
|---|------|
| 1. > Financially Sustainable Airport System* | M |
| 2. > Engaging with Scheduled Service Providers | S |
| 3. > Partnership(s) with Northern Communities | S |
| 4. > Non-Aeronautical Land Development | M |
| 5. > Hangar and Facility Development and Activity Growth | M |
| 6. > Airport Branding and Marketing | S |
| 7. > Transportation/Evacuation Hubs | M |
| 8. > Securing Potential Government Grants and Subsidies | S |
| 9. > Reviewing Fee Structure for Provincial Airport Use | S |
| 10. > Review Airport Operations including Staffing & Hours of Operation | S |

Note: *could be affected by COVID-19 Pandemic

2.0 Dryden Regional Airport Background

The City of Dryden is in the Kenora District of Northwestern Ontario at Wabigoon and Thunder Lakes. The City has a population of 7,749, with 64% of the population falling within the age of 15 to 64 categories (Statistics Canada, 2017). The Airport is approximately 6 km northeast of the City. It occupies 815 acres, with a reference point at 412 meters (1,353 ft) above sea level and provides an environment for excellent flying conditions. There are four full-time municipal employees to support the operations, with one seasonal employee during the winter months.

Development of the Airport commenced in 1969 when the City purchased 614 acres of land utilizing financial assistance from the Federal Government through the Ministry of Transport, now referred to as Transport Canada. Initially, the Ministry of Transport constructed a gravel 3,600-foot runway, short connecting taxiway, and small apron. The runway was to measure 3,600 by 100 feet; however, partway into construction, it was revised to be 5,000 feet long by 100 feet wide in addition to a 2,000 by 75-foot crosswind runway. The City and the Province of Ontario jointly financed the extension cost. A small terminal was constructed and later expanded in 1973 and 1974, which increased the terminal building's footprint to 3,312 square feet.

In 1970, the Ministry of Transport decided to pave the longer runway due to rutting on the gravel surface. The Ontario Ministry of Natural Resources (MNR), now referred to as the Ministry of Natural Resources and Forestry (MNRF), received approval to construct a water bomber base at the Dryden Airport. By the end of 1970, the Airport consisted of a paved runway 11-29, a taxiway and main terminal apron, and an MNR taxiway and apron south of the end of runway 29. In 1971, Transair requested permission to operate Boeing 737 aircraft services into Dryden, and as a result, the runway width was expanded to 150 feet in width to accommodate the size of the aircraft.

From the 1960s through to the 1980s, the Canadian Air Transportation Administration (CATA), a Transport Canada division, managed and operated Canadian airports. Investments in runways, terminals, and other buildings came from the Treasury Board capital fund. Revenues derived from landing fees, terminal charges and ticket tax went to the Consolidated Revenue Fund. There was no requirement for airports to be self-financed or to break even. Airport capacity decisions were made at the national level and did not necessarily reflect an individual airport's role and importance in its region. The first federal policy that considered reforming airports' management and operation was issued in 1987 and was called A Future Framework for Airports in Canada (Library of Parliament, 2017).

In 1992, Transport Canada transferred major Canadian airports to local authorities to operate in a more "commercial and cost-efficient manner." In 1994, a National Airports Policy (NAP) was announced, which called for Canada's 26 largest airports' commercialization; furthermore, "the same policy also established Nav Canada as the not-for-profit, non-share Capital Corporation that operates Canada's air navigation system...at the same time the government divested itself of the vast majority of smaller, federally-owned airports, in most cases selling them to provincial, territorial, or local authorities for a nominal fee, and providing lump-sum funding for near-term safety needs" (CAPA Centre for Aviation, 2016).

NAP classifies airports in Canada as either:

- Part of the National Airports System, including facilities in national, provincial and territorial capitals, and airports that serve over 200,000 passengers each year;
- Local and regional airports that serve less than 200,000 passengers each year; or
- Small, remote, and arctic airports (Transport Canada, 2004).

On January 31, 1996, the Federal Government transferred ownership of the Dryden Regional Airport to the City. Since then, the City has retained sole ownership and operations.

3.0 Stakeholder Consultation

The stakeholder consultation sessions took place between October 5 and November 18, 2020. The Loomex Group identified a list of key stakeholders to participate in the sessions to explore and to gain feedback on the Airport's economic impact on the region. Organized by sector and/or related services, participants received email invitations for the virtual meetings instead of traditional in-person interviews due to the COVID-19 pandemic restrictions. The groupings included the following:

- Local Government Representatives (City, First Nation Communities)
- City of Dryden Economic Development
- Emergency Services
- Aviation Businesses
- Community Organizations
- School Boards
- Business Community
- Airline Representatives

The Loomex Group team recognizes the importance of open and transparent engagement between the Airport and key internal and external stakeholders. During the sessions, the team provided an update on the project and listened to participants' feedback and suggestions. Furthermore, probing questions were asked to gain perceptions and realities from participants about the Airport, including community members' current use and leverage with economic development and tourism agencies. The tables below highlight the participants in the stakeholder sessions and do not include those invited to attend.

Table 1: Session Participants by Group

| Group | Attendees |
|--------------------|--|
| City | Council CAO and Senior Management Economic Development Manager |
| Local Government | Ontario Justice System Township of Ear Falls Township of Ignace |
| Emergency Services | Dryden Fire Services Northwest EMS Dryden Regional Health Centre Dryden Police Service Ontario Provincial Police |

| Group | Attendees |
|------------------------------------|---|
| Aviation Community | North Star Air Northern Youth Programs Hydro One Ministry of Natural Resources and Forestry |
| Businesses | Hydro One Treasury Metals Enbridge TBaytel Ontario's Sunset Country Travel Association Government of Ontario |
| Community Groups and School Boards | Keewatin-Patricia District School Board Conseil scolaire de district catholique des Aurores boréales Kenora District Services Board |

Note: The table only notes participants who responded to the invitation and not the actual invitees' list.

3.1 Stakeholder Session Responses

The following highlights the participants' responses from the stakeholder engagement sessions listed according to their grouping.

3.1.1 Local Government (Internal)

The internal stakeholder consultations involved the Mayor and the CAO of the City. The Airport was determined to be an essential economic driver for the region, as it supports multiple businesses, including the MNR Fire Management Centre, air ambulances, scheduled service, and general aviation. The group also discussed that the Airport could play a significant role in connecting with Northern Communities and discussed current scheduled service status.

The Airport could also be a "hub" for tourism operators in the region, supporting tourism activities in the area. Many sports teams visit the City for tournaments (hockey, broomball, etc.), and some of these sports teams arrive by scheduled flight service or charter service to the Airport.

Other items discussed included:

- Making the Airport self-sustainable
- Soliciting Provincial and Federal Government for funding or subsidies
- East/West scheduled flights from the Airport
- Encouraging residents to fly out of the Airport
- Need for affordable, reliable airline schedules with connections
- Airport's hours of operations

Additionally, the group discussed the Nuclear Waste Management Organization's (NWMO) proposed \$23 billion nuclear waste repository project. A decision on the host site is expected by 2023. The Town of Ignace is one of two sites considered as hosts, and if selected, the economic spinoff could mean a dramatic increase in industry traffic and opportunities for the Airport.

3.1.2 Local Government (External)

Township of Ignace: Dryden Regional Airport is the closest certified airport to the Township of Ignace. The potential NWMO Waste Management site is nearby the Airport. Flight cost from Dryden Regional Airport is the biggest concern for residents, although there are no concerns with the current schedule.

Township of Ear Falls: Dryden needs to maintain the Regional Airport, as it is essential for workers from various industries that need to fly in and out for work and the tourists who travel to Northwestern Ontario. The Airport could support provincial, national, and international visitors to the areas for fishing, hunting, festivals, and events. It could be beneficial to offer more flights from Dryden Regional Airport during the busy seasons.

3.1.3 Emergency Service Providers

Dryden Regional Health Centre: The Airport is vital for transporting patients from Dryden to larger health centres or cities for urgent medical care. The Dryden Regional Health Centre relies on the Airport to bring surgeons and other specialists into the community for patient treatments.

EMS: Without the Airport, EMS does not have the capacity to transfer patients to other airports. There is no helipad at the hospital due to the City's location and lack of corridors.

OPP: The Airport is not pivotal for the organization, as they use Red Lake and Sioux Lookout airport mostly.

Fire Department: The need was discussed for more water supply at the Airport for emergency purposes, as the City water supply does not service the Airport. The Fire Department would like to better understand water supply capacity during after-hours and additional information regarding access to the Airport buildings to manage potential after-hours emergencies.

Scheduled Service: Due to the high cost of flights from Dryden, most of the stakeholder participant agencies confirmed that their employees would drive either to Thunder Bay or Winnipeg for business travel. Almost all participants expressed their desire for a direct flight to Toronto or a flight from Dryden to Toronto via Thunder Bay or Winnipeg but with better connection times.

3.1.4 Businesses

Enbridge: Overall, the Airport is important for Enbridge operations. It offers many advantages like urgent connectivity and is a timesaver for critical repairs. The Airport helps the company bring technicians in from other regions to deal with large outages and improves their response time.

City of Dryden, Economic Development Department: The Airport is very important for the region for future development. The Airport is witnessing continued growth by attracting new businesses.

Treasury Metals: The Airport is essential to their business and future growth as their executives, employees and consultants would regularly come to the area.

Sunset Country: The Airport has potential to become a regional hub for the Sunset Country to attract visitors and tourists. It would be great to have a customs service at the Airport to process international flights. Currently, these flights have to clear customs at other airports before arriving in Dryden. Approximately 90% of the lodge travellers in the area come from the United States. The Airport should explore a summer charter operator to attract more US tourists.

Ministry of Energy, Northern Development and Mines: The Airport is an important asset. Guests and visitors arrive in the area by scheduled service.

3.1.5 Aviation

Hydro One: Hydro One has maintained services at the Airport for more than 15 years, and it is a critical base for their operations. The company expects to go through a Fleet Renewal Program and currently has one helicopter stationed at the Airport. Their biggest challenge is finding hangar space on-site.

Northern Youth Programs (NYP): Initially, the program had a water base in 1978 but later moved to the Airport. NYP plans to be at the Airport for the foreseeable future and just completed a new hangar construction. NYP has highlighted the need for fibre optic and customs services at the Airport.

MNRF: The Airport has been their base for more than 25 years, 15 of which as a Regional Fire Management Centre. With their recent capital investments, the MNRF will continue at the Airport for at least another 20-30 years. MNRF depends on Airport terminal space when fire season escalates. They want the runways maintained in good shape. Also, they do not want encroachment on their apron space to support their operations. MNRF is not satisfied with the current scheduled service as it is not convenient for their staff that travel to Sault Ste. Marie and Sudbury on weekends for work.

4.0 Community Survey Results

Community feedback is essential and provides perspective and new information to consider when developing a Strategic Plan. The results provide valuable information to help the City confidently make decisions and deliberately plan for the Airport.

A community survey (Appendix A) was available online through smartphone, tablet, or computer and contained 19 questions, including the option to provide suggestions or comments. It was confidential, anonymous, and did not ask participants for personal information. Outlined below are the questions posed, and depending on the type of questions, participants could select from options, answer yes or no, and had the opportunity to provide their own written response.

General Questions:

- Are you aware there is an airport located in Dryden?
- Before the COVID-19 pandemic (March 2020), when was the last time you visited the Dryden Regional Airport?
- Do you think the activity at the Dryden Regional Airport supports the local economy?
- What do you consider to be the most desirable draw to the Dryden Regional Airport?
- Do you think the Dryden Regional Airport could be a gateway for tourism traffic?

Passenger Flight Questions:

- Have you flown from Dryden for travel purposes?
- Are you satisfied with the current schedules for passenger service from the Dryden Regional Airport?
- What destinations would you like to see available from the Dryden Regional Airport?
- What remote northern communities would you like to see available from the Dryden Regional Airport?
- How often do you travel to these locations? (Thunder Bay or Winnipeg)

What is the likelihood that you would use the Dryden Regional Airport to travel to these locations? (Thunder Bay or Winnipeg)

- What is the likelihood that you would use the Dryden Regional Airport if the flight included connections to other destinations?
- How likely would you use the Dryden Regional Airport if certain options were offered?
- How important is the price when choosing your mode of transportation?

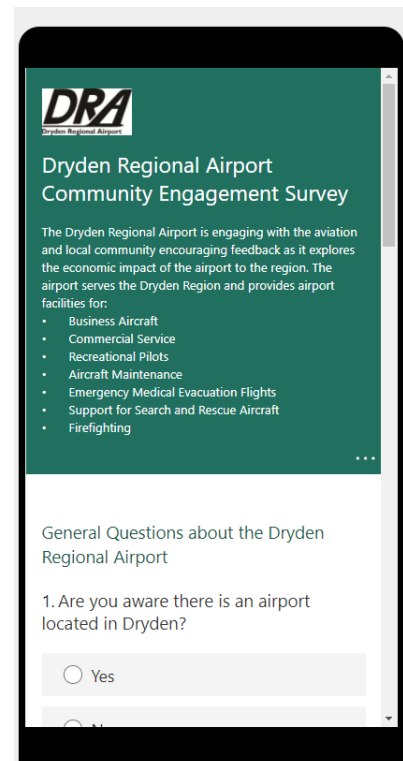


Figure 2: Image of Survey on Smartphone Device

- Approximately how much would you consider paying for a return flight from Dryden to Thunder Bay?
- Approximately how much would you consider paying for a return flight from Dryden to Winnipeg?
- Do you have any additional comments on scheduled passenger service?
- What are the reasons you choose other modes of transportation?

Links to the online survey were provided to the City for distribution through their social media. The Loomex Group also issued the link to everyone that took part in the stakeholder sessions or was invited but did not attend.

Some of the respondent results are shown below in Figure 3 and Figure 4.

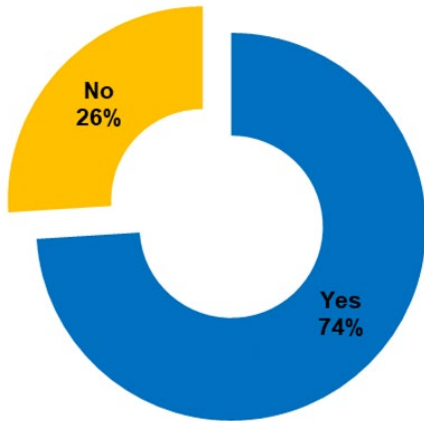


Figure 3: 74% of respondents have flown from the Airport.

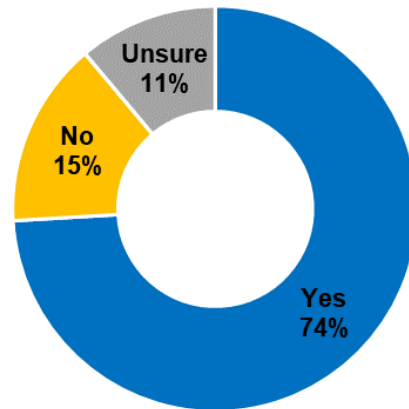


Figure 4: 74% of respondents believe the Airport contributes to the economy

Figure 5 outlines the various reasons people chose other forms of transportation over the Airport. Respondents that selected "other" included some context to their choice, including:

- Mostly cost, but the others apply as well, as does the flexibility of destination, choice of travel companions, and accessibility
- Dislike of small planes
- Cost and flexibility
- Cost, schedule, and space are all reasons
- The safety performance of small airlines

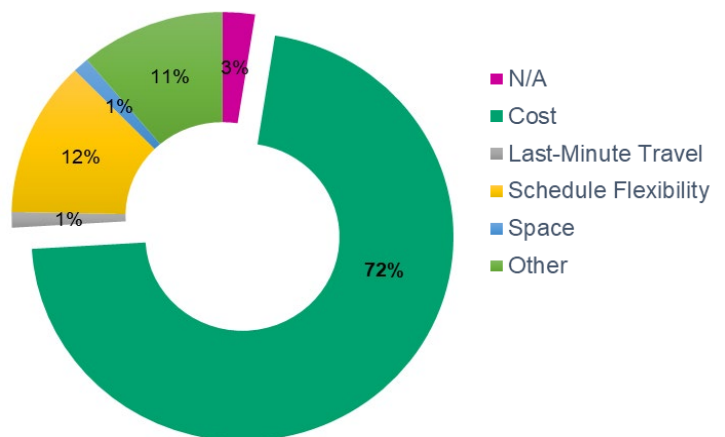


Figure 5: Pie Chart of Reasons Other Transportation Is Chosen

5.0 Strengths, Weaknesses, Opportunities, Threats (SWOT) Analysis

A SWOT Analysis is a strategic planning technique to identify a business' strengths, weaknesses, opportunities, and threats. The Loomex Group developed a SWOT Analysis based on the feedback received from the stakeholder consultations and discussions with municipal staff and through touring the Airport facilities. The SWOT Analysis helps to identify the Airport's priority areas, the areas that work well in the current state, and areas for improvement.



Figure 6: SWOT Graphic

Strengths

- Dryden's location is a midpoint between Winnipeg and Thunder Bay
- Directly on the Trans Canada Highway for easy cargo and good shipment
- No half load on Highway 601 leading to the Airport
- Service retailers, big box stores in Dryden area
- The railway is a resource
- MNRF investment
- Strength in Airport tenant base
- Large helicopter companies relocating to the Airport
- Land available on-site
- Instrument Landing System (ILS) approach
- Infrastructure is in good condition
- Good governance structure
- Most value for dollar Airport based on cost analysis
- Federal and Provincial Government offices in Dryden
- Resources: transportation, logistics companies in the region (Purolator etc.)
- Mining (gold and other) operations and exploration in the region
- The region has an extensive summer tourism base
- Hydro One projects (transmission lines)
- College facility in Dryden, water treatment facility training
- Medevac Operations

Weaknesses

- Competing with other City strategic priorities
- Lack of engagement with Northern Communities
- No sightseeing flights
- Lack of promotion and public education about the Airport
- No economic impact statistics about the Airport
- Sole air service provider
- No Canadian Border Service Agency (CBSA)

Opportunities

- Students from Northern Communities travelling to Dryden for high school – potential for scheduled flights for this purpose
- Hydro One transmission projects and the potential need for a hangar
- Get creative with community involvement
- Relationship with Thunder Bay, Waterloo, and Hamilton airports
- Tourism promotion funding
- Weekly Charter from Toronto to Dryden
- Business Travel – fractional ownership
- Lone Eagles – people who work remotely
- Mining and exploration companies developing in areas
- NWMO potential project site in Ignace
- Hunting and fly-in camps
- Cargo hub for Northern shipping
- Hydroponic – food insecurity
- Aviation events
- Evacuation

Threats

- Fiber-Optic Connectivity
- Little education and awareness of air carrier services
- Affordable seat pricing by air carriers
- Flight schedules do not meet the needs of the community
- Efflux of the population for work or moving to larger cities.
- Challenging to retain youth in the region
- Impact of the COVID-19 pandemic

6.0 Airside Infrastructure Development

The Loomex Group assessed and evaluated the condition of existing buildings, equipment, infrastructure, technology, and utilities at the Airport to determine current and future needs. The purpose of visually inspecting the Airport's infrastructure is to:

- Assess the existing conditions;
- Ensure regulatory compliance;
- Assess the efficiency and appropriateness based on industry best practices; and
- Identify any airfield safety risks.

6.1 Runway

Based on Transport Canada's TP312 - Aerodromes Standards and Recommended Practices 3rd Edition (Transport Canada, 1990) Airport has one operational runway, 12-30, 5,993 feet long and 148 feet wide, classified as a Code 3C runway. The runway has an Aircraft Group Number (AGN) of IV. An extensive rehabilitation project in 2005 included the reconstruction of the runway. It is in reasonably good condition, with crack filling and maintenance activities performed regularly.

6.2 Critical Design Aircraft

Confirmation of aircraft design for the future is essential in developing the Airport's Strategic Plan. The Airport's current design aircraft is the AGN IV classifications and is the Bombardier Dash 8 – Q400 (Bombardier, 2020) and Boeing 737-800 series (Boeing, 2020). Figure 7 and Figure 8 outline the physical dimensions of the aircraft.

These aircraft can use the Airport's existing infrastructure, as they share a standard Aircraft Group Number (AGN) according to TP312 -Aerodromes Standards and Recommended Practices - 5th Edition by Transport Canada (Transport Canada, 2015).

Figure 7: Bombardier Aerospace Dash 8 – Q400 Dimensions (Boeing, 2020)

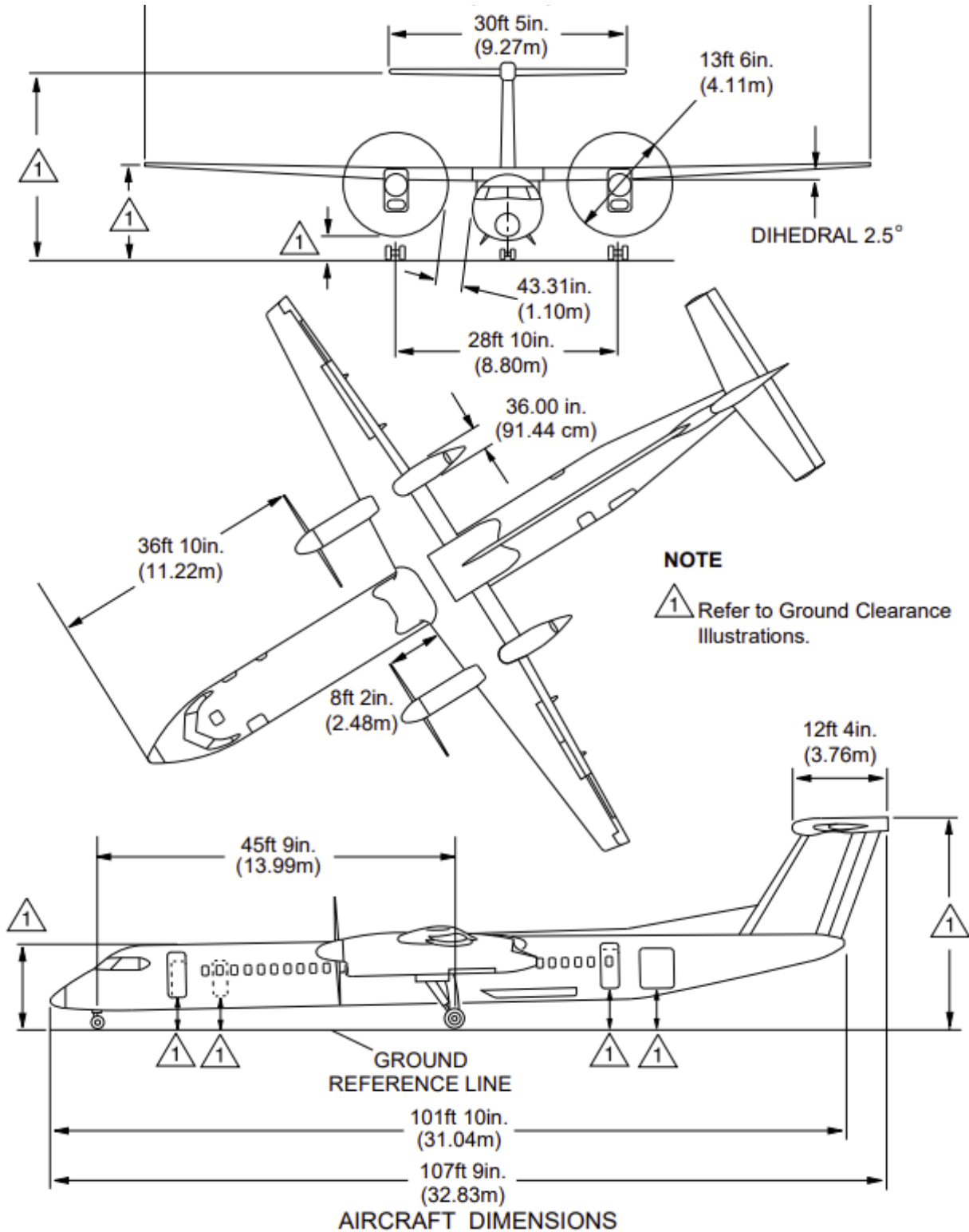
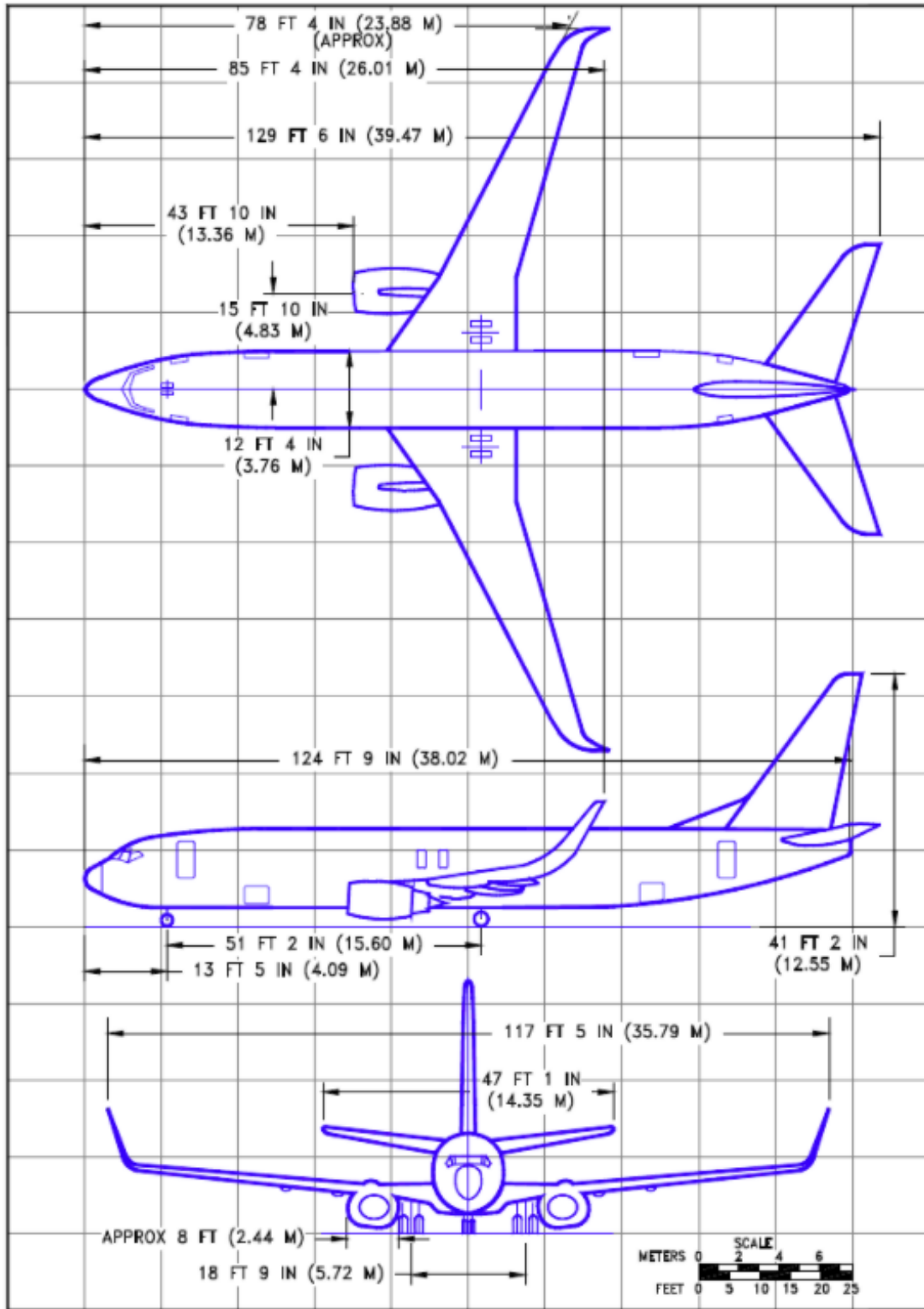


Figure 8: Boeing 737 - 800 Dimensions from the Manufacturers Website (Boeing, 2020)



6.3 Taxiways

The Airport has three taxiways, designated Alpha, Bravo, and Charlie, that provide efficient aircraft taxi routes to and from the parking aprons and the runway. Taxiway Alpha offers direct access to the public apron and the terminal building. Taxiway Bravo leads to the MNRF Fire Management Centre's private apron. Taxiway Charlie connects the public apron with the MNRF's private apron.

All taxiways are 75 ft wide with medium intensity lighting and an Aircraft Group Number (AGN) IV. The taxiways are asphalt paved, except for Taxiway Charlie, a gravel surface, and all seem to be in good/fair condition.

6.4 Aprons

Table 2: Airport apron numbers, details, and condition details.

| Apron | Details | Condition |
|-------|--|--|
| I | Considered the Main Apron Adjacent to the terminal building Paved surface 300 ft x 400 ft Can support B737 (115,000 lbs) type aircraft | Based on visual observation, the pavement appears to be in good condition. |
| II | A private apron of the MNR Paved surface 200 ft x 440 ft | Based on visual observation of the pavement, it appears to be in good condition. Rehabilitated in 2007. |
| III | Private apron for Mag Aerospace Irregular concrete pad 82 ft x 102 ft Asphalt 46 ft x 144ft | No issues reported for Mag Aerospace's apron |
| IV | A private apron of NYP Located close to the terminal building Concrete Surface 82 ft x 138 ft | Good Condition. Recently constructed. |

6.5 Wind Direction Indicators

Wind direction indicators help pilots estimate wind velocity and the gust factor. The Airport has three illuminated windsocks: one serving each end of Runway 12/30, and the third located midfield between runways 12 and 30.

6.6 Fuel and De-icing Services

Morgan Fuels provides an into-plane service for both Avgas and Jet A-1 fuel at the Airport. Their fuel tank capacity for Jet A-1 is approximately 80,000 litres stored in two underground tanks. Their truck capacity is around 17,000 per unit for Jet A-1, and their Av gas trucks are roughly 10,000 and 12,000 litres, respectively. Morgan Fuels does not have Avgas storage on-site other than a sample recovery tank (2000L).

De-icing services are also available at the Airport. Only Type 1 Fluid is available, which is used by both Bearskin Airlines and Perimeter Aviation. The amount of fluid used varies depending on icing conditions. The table below shows a breakdown of fluid utilization measured in gallons at the Airport for four years.

Table 3: Breakdown of De-icing Utilization from 2016 to 2019

| Year | Bearskin/Perimeter | Other Carriers | Total Gallons |
|------|--------------------|----------------|---------------|
| 2016 | 103 gal | 98 gal | 201 gal |
| 2017 | 159 gal | 96 gal | 255 gal |
| 2018 | 101 gal | 31 gal | 132 gal |
| 2019 | 164 gal | 39 gal | 203 gal |

6.7 Runway Lighting

Runway 12/30 has a high-intensity edge and threshold lighting. Upgrades to the airfield lighting were completed in 2005 during the major rehabilitation of the runway and taxiway Alpha. Runway 12 also has a Runway Identification Lighting System (RILS).

6.8 Precision Approach Path Indicator

Both ends of Runway 12/30 have Precision Approach Path Indicators (PAPI). The upgrades to the PAPI light units were completed in 2000 during the airfield lighting upgrade under the Airport Capital Assistance Program (ACAP). The PAPI light units are inspected daily, and their level check is completed at least twice a year in spring and fall.

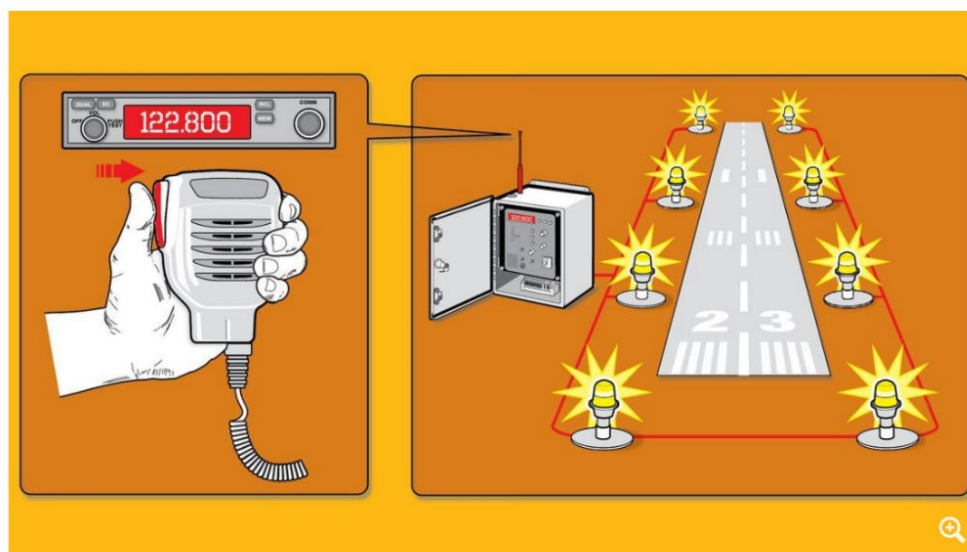
6.9 Airfield Guidance Signs

Airfield guidance signs allow pilots in aircraft who are taxiing to know information such as where they are, when to stop or hold for clearance, and in what direction to find taxiways or other locations. All the guidance signs at the Airport are fibre-optic illuminated and are constructed and installed per TP312 Aerodromes Standards and Recommended Practices - 4th Edition (Transport Canada, 2015).

6.10 Airfield Lighting Controls

Aircraft radio control of aerodrome lighting (ARCAL) is a system that allows aircraft pilots to control the lighting of an airport or airfield's approach lights, edge lights, and taxiways via radio (Hirschman, 2017). The airfield lighting at the Airport is controlled by ARCAL Type K, which is initially activated by queuing the microphone seven times within five seconds. Once activated, the intensity of type K systems may then be turned to low, medium, or high-intensity settings by keying the microphone three, five, or seven times within five seconds, respectively.

Figure 9: Diagram of ARCAL System (Hirschman, 2017)



When it receives a series of electrical pulses within a five-second period, a decoder energizes one, two, or three relays to activate pilot-controlled lighting. The first pulse from a microphone click starts the five-second window, and the relays are de-energized after 15 minutes.

6.11 Approach Procedures

There are two primary approaches - Visual Flight Rules (VFR) and Instrument Flight Rules (IFR). Depending on the weather conditions, a pilot may require the IFR approach. During VFR approaches, the pilot is responsible for seeing other aircraft and avoiding a collision with minimum horizontal visibility. Depending on the altitude of flying, that is between 5 km and 8 km. Flying under VFR allows the pilot to choose their preferred flight path, which could simply be a straight line between origin and destination. On the other hand, Instrument Flight Rules implies that the flight may operate in instrument meteorological conditions (IMC, meaning cloudy or otherwise adverse weather conditions).

The Airport operates 24-hours per day, seven days per week, and can support both day and night operations to Non-Precision approach limits and Instrument Flight Rules (IFR) departures visibility down to $\frac{1}{2}$ of a statute mile. The Airport is the only one in the region with an Instrument Landing System (ILS) approach. The current approach minima for the ILS approach for Runway 12 is 250 ft with Runway Visual Range (RVR) of 4,000 ft or $\frac{3}{4}$ mile.

The Airport is also served by GPS-based RNAV (GNSS) approaches to both runway ends. The current approach minima for Localizer Performance with Vertical Guidance (LPV) approach for Runway 30 is 427 ft. with $1\frac{1}{4}$ mile visibility, and for Runway 12 is 276 ft with 1-mile visibility.

There is no dedicated helicopter Final Approach and Takeoff (FATO) areas or apron parking areas for public use at the Dryden Regional Airport.

6.12 Air-to-Ground Communications

The Nav Canada Sioux Lookout Flight Service Station (FSS) operates the Remote Communications Outlet (RCO) for the Airport and provides Flight Service Station (FSS) service.

6.13 Runway Approach Surface

Objects penetrating the Obstacle Limitation Surfaces (OLS) may affect airport operations and the Airport's certification status. An Obstacle Limitation Surface Assessment Survey was completed in the fall of 2020, and during consultation with the Airport Manager, it was determined that there are currently no OLS violations at the Airport.

6.14 Airside Security

A security pass control system is not required or available at the Airport. There is security fencing installed around the aprons' perimeter in the Airport Terminal Building (ATB), Fixed Base Operations (FBO), MAG Aerospace vicinity, and from the maintenance building and water plants to the MNRF Fire Centre. Fencing is required to separate the groundside from airside operations and provides perimeter security to keep people and wildlife from entering the area and endangering themselves or posing a threat to aircraft.

Pedestrian control at the Airport Terminal Building (ATB) and respective apron is monitored by the air carrier(s) for charter and commercial flights and by the private pilot for passengers flying in their aircraft. Otherwise, the use of gates and signage provided by the Airport Manager and Staff are the means for pedestrian access and control on the apron.

Access to the itinerant and private aircraft parking area(s) is restricted to the operators and passengers of these aircraft and/or with the Airport Manager and/or designate's approval.

6.15 Roadways and Vehicle Parking

The paved vehicle parking area is located directly to ATB's groundside, providing adequate space to park approximately 30 vehicles, including two accessible parking stalls.

There is no controlled parking program at the Airport, but the City is implementing a parking system for the entire municipality, which includes the Airport. Currently, the allocated parking space is as follows:

- 6 parking spots for MNRF
- 6 parking spots for National Car Rental
- 18 general and visitor parking stalls

6.16 Storm Drainage

As stated in the Environmental Assessment Screening Report (Stantec, 2008), the topography of the main airport complex is level, and the mid-point of the runway sits at 413m above sea level (ASL). Drainage is northwesterly toward Kaiaskomin Lake and southeasterly toward the wetland below the esker. Elevation on the north side of the Airport property drops to about 373 m ASL along the south shoreline of Kaiaskomin Lake. The elevation of the wetland southwest of the Airport is about 382 m ASL.

Assumptions: the overall site drainage was observed to be in 'good' condition.

6.17 Sanitary Sewage

According to the Master Plan (Airports Planning Central Region, 1975), the Airport has an on-site wastewater treatment system (septic disposal field). There are independent disposal fields for landside sewage, but when an expansion is undertaken, sewage will-be handled through a collection and central treatment system complying with the Federal and Provincial health and environmental standards.

Also noted in the Environmental Assessment Screening Report (Stantec, 2008), the Maintenance Garage's wastewater is collected by a septic tank southeast of the building. The ATB terminal septic field is south of the building. Any future development on the Airport property will require a review of the wastewater treatment system.

6.18 Groundwater Supply System

As per the Engineer's Report for Waterworks (Wardrop Engineering Inc., 2001), the Airport Supply Treatment/Storage Works (STSW) services several buildings at and near the Airport, providing water for approximately 180 people daily. The STSW is designed to meet the water requirements of the MNRF regional forest fire fighting operations. The plant currently treats an average of 4,250 L/day of groundwater (averaged from January to May 2001), using chlorination for domestic consumption by patrons and workers at the Airport, MNR and surrounding businesses. The facility can also provide 1,370,000 L/day for fire fighting, should the need arise.

A deep drilled well, at approximately 150 mm in diameter and 76.2 m deep, is located at the corner of Ghost Lake Road and Airport Road, Lot 18, Concession 8, in the Unorganized Township of Zealand, in the District of Kenora (UTM Zone 15, 0518380m E, 5519074m N). It is equipped with a submersible deep well pump (15 hp 6 stage Franklin pump), set at a depth of approximately 45 m, rated at approximately 950 L/min, but operated at 510 L/min, with a 100 mm diameter discharge line, running under Ghost Lake Road connected to Pumphouse #1 (described below), located 60 m North from the well. The well is capped with a metal casing, which extends approximately 450 mm above the ground and appears to be in good condition.

6.19 Pumphouse and Water Reservoir

The Environmental Assessment Screening Report (Stantec, 2008) notes the water supply is provided from a well with a capacity of 138 gallons per minute installed in 1974. The water feeds to a compressor station from the pumping station, which boosts the pressure into the distribution system and an emergency holding tank. A 6" line feeds the ATB and associated facilities, and a 6" line also feeds the MNRF site.

Pumphouse and Water Reservoir buildings are located at the junction of Highway 601 and the Ghost Lake Road. The water treatment plant contains equipment designed to take water from a groundwater well located south of Ghost Lake Road. The pumphouse is equipped with a flowmeter, chlorine disinfection system, and a 7.2m³ pressurized contact tank. Flow exits the primary pumphouse, is split, sending part of the flow to one part of the distribution system and the remainder to a secondary pumphouse. The second pumphouse includes a flow meter, an exterior 200m³ reservoir, two distribution pumps, five pressure tanks and a fire pump.

The Engineer's Report on the Waterworks (Stantec, 2008), notes a 200 m³ water storage reservoir, capable of storing receiving water from the 100 mm water line originating from Pumphouse #1 that measures 8.1m in length, 8 m in width, and 3.1 m in height.

The reservoir holds a volume of approximately 142 m³ of water and is fitted with a major brand pressure differential detector/level indicator, equipped with relays to turn flow into the reservoir on and off according to the level by way of an electrically actuated butterfly valve.

6.20 Electrical Supply

Hydro One supplies electrical power to the Airport. The existing supply is understood to be adequate for the Airport. Unlimited power (3 Phase) is available when needed for future expansion.

6.21 Natural Gas Supply

Enbridge Gas provides natural gas supply to the Airport. A 2" (60.3mm) natural gas main is located at the Airport with a pressure of 40 psi to support future development.

7.0 Airport Ownership and Governance

Although various governance models are available for airports, the model approaches vary in size, role, and airfield activities. Airport owners have options that range from ceasing to operate to the development of airport authorities. For each option, there are different operating configurations.

Airports are typically managed and operated by municipal, provincial, or federal agencies; an Airport Board or Commissions appointed by any of these agencies can also control the operations. Owners can also contract a third-party to be responsible for the management and operations. They can report to an employee of the airport owner, commission or committee.

An airport's governance model structure's success is measured by its executed planning, marketing, and development accomplishments. There is a broad spectrum of governance structures, and an airport can fall into any one of the categories listed below or a variation/hybrid of multiple systems.

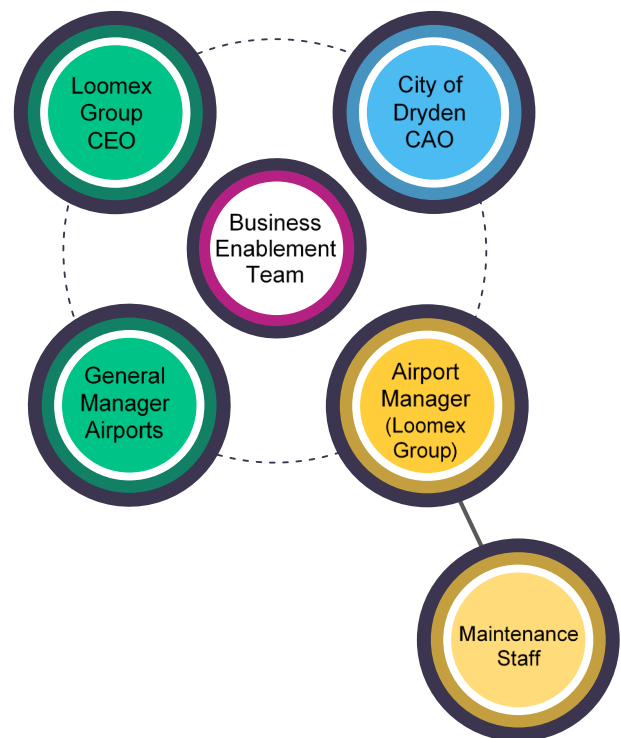
7.1 Current Governance Model

As noted in Section 2.0, the City attained the Airport's ownership and operations from the Federal Government in January 1996. In December 2019, the City entered into a five-year contract with The Loomex Group, supported and approved by Council, to provide an Airport Manager responsible for airport management and oversight of operations, in addition to working with the existing City operations staff.

Under the current agreement, the contract Airport Manager through The Loomex Group is responsible for overseeing the administrative, operation and maintenance processes and procedures, including:

- Safety and Regulatory Compliance;
- Marketing and Promotion;
- Office Administration;
- Budget and Financial Management; and
- General Maintenance Tasks.

Figure 10: Current Organizational Structure



The City is responsible for:

- Monitoring and evaluating the performance of the Contractor;
- Airport marketing and business development costs,
- New service development costs;
- Final authority over the Airport's financial, human resources, operating and capital budgets; and
- Provisional use of ATB to support airport operations.

8.0 Economic Review

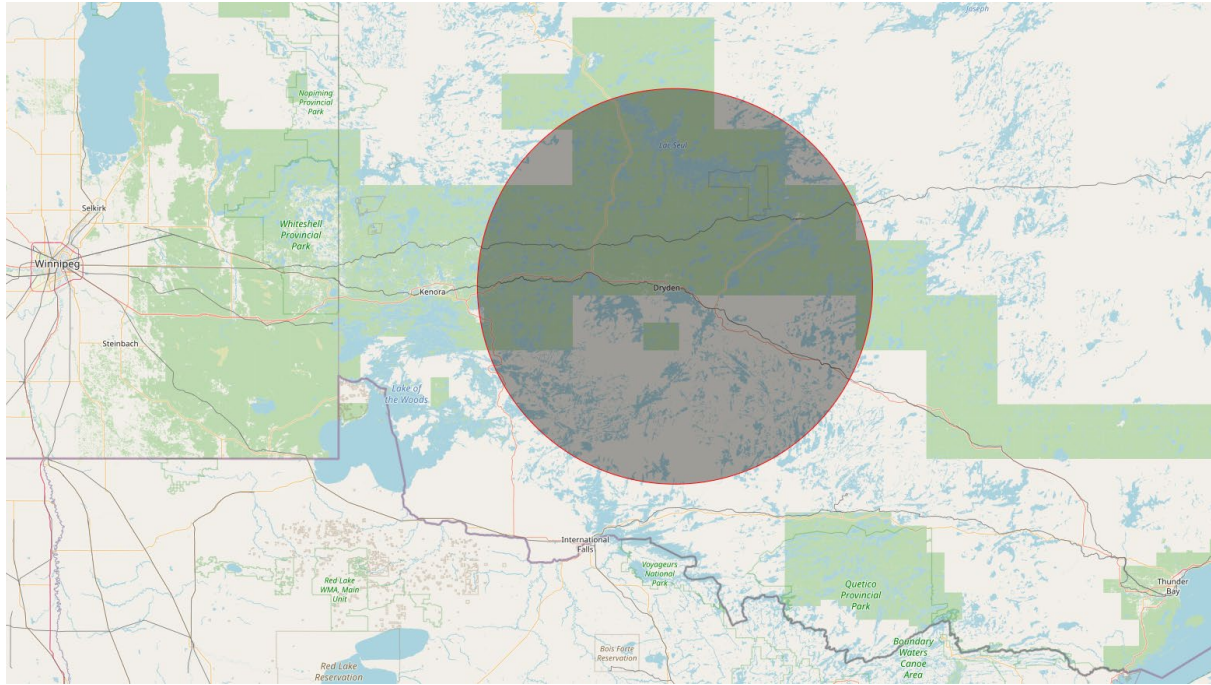
8.1 Regional Profile and Catchment Area

The regional portrait aims to assess the current state of the airport's economic environment, its surrounding communities, and those who are benefiting from the Airport's presence and economic impacts. This regional profile/socioeconomic portrait measures regional differences between the City and its surrounding areas. Due to the vast remoteness that surrounds the City, this exercise takes into consideration three specific jurisdictions, which include Kenora (138 km to the west), Red Lake (216 km to the north) and Sioux Lookout (98 km to the northeast). This exercise allows us to identify potential market differentiators and strengths that could support or facilitate innovative growth ideas and concepts at the Airport.

The catchment area is defined as the geographic area and population from which an airport attracts its customers/users. The Airport has a 100-kilometre catchment area (see Figure 11), extending west (almost to Kenora), north to Ear Falls, northeast beyond Sioux Lookout, southeast beyond Ignace, and south to Otukamamoan Lake. For reference, the City of Winnipeg is 359 kilometres west of City of Dryden, the City of Thunder Bay is 351 kilometres to the southwest and the International Bridge in Fort Francis is 200 kilometres to the south. The 100-kilometre catchment is home to approximately 16,841 individuals (Free Map Tools, 2020), with the City as the regional centre. The following summary breaks down the population counts for every 50-kilometres travelled away from the airport.

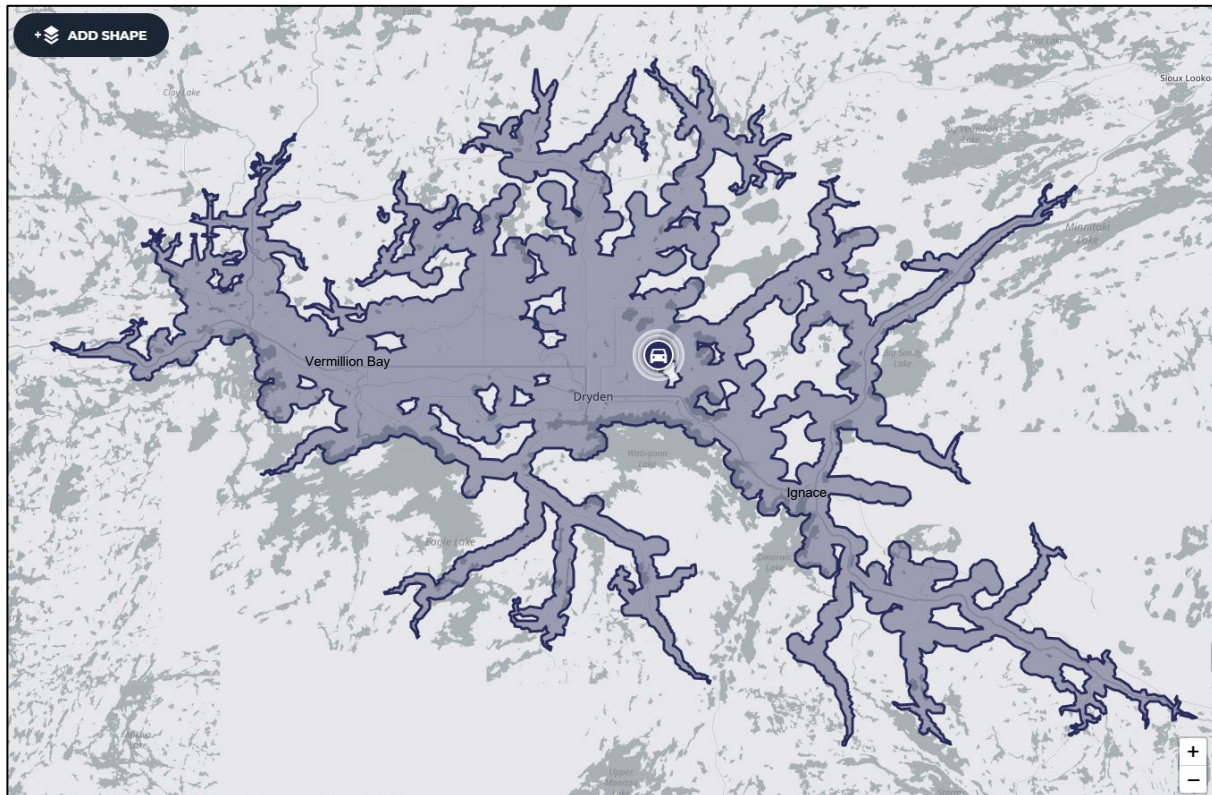
- 50 km population radius - 9,683
- 100 km population radius - 16,841
- 150 km population radius - 64,781
- 200 km population - 84,871

Figure 11: 100-kilometre radius around Dryden Regional Airport



Compared to the 100-kilometre radius above, Figure 12 presents the catchment area from the perspective of being attainable within a 60-minute driving radius by vehicle, which surrounds the City.

Figure 12: 60-Minute Driving Radius from Dryden Regional Airport



For the remainder of this section, most of the data presented in the socioeconomic portrait stem from Statistics Canada and the 2016 Census datasets (Statistics Canada, 2017). The comparison seeks to isolate the City and compares the key municipalities, including Kenora, Red Lake, and Sioux Lookout. When applicable, provincial figures are included for comparison purposes.

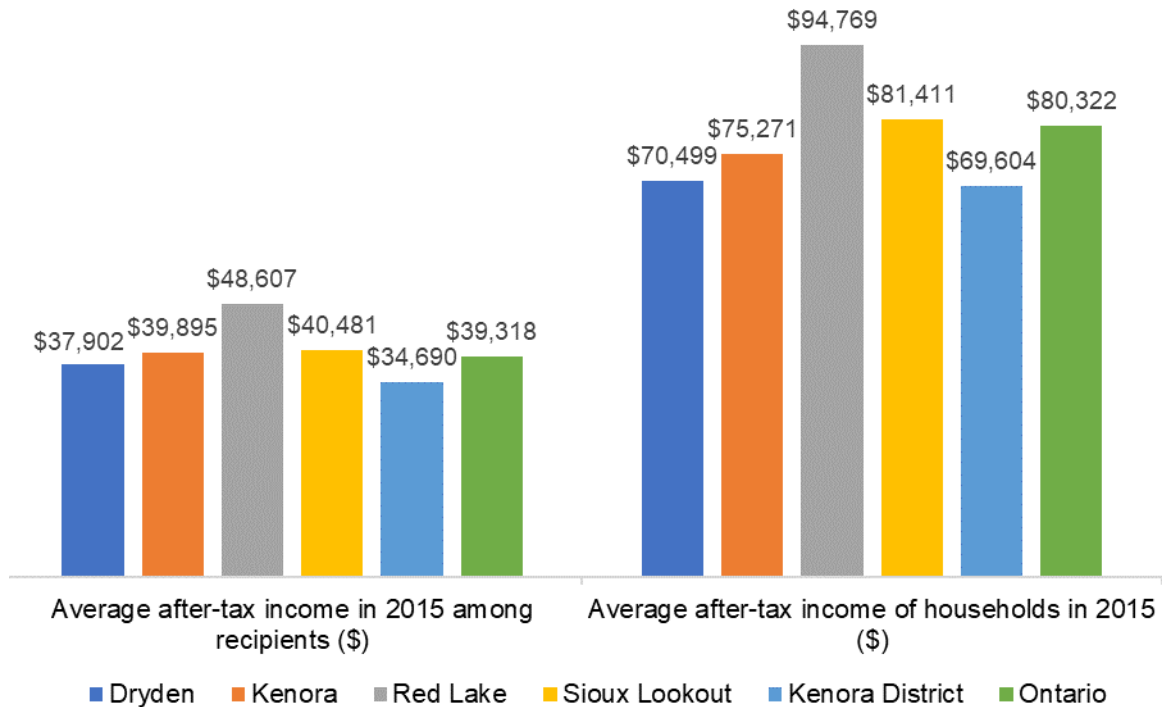
8.1.1 Income – Individual vs. Household

It is important to analyze each region separately to obtain a complete economic spectrum of the population distribution in the comparable regions. Demographics vary between areas, and it is essential to break down the information regionally.

After-tax income is one of the key economic indicators analyzed. Individual and household after-tax income is one of the most common metrics used when analyzing the purchasing power of a population. It shows that average after-tax income is relatively uniform at the individual level between Dryden, the three other municipalities, Kenora District, and the Province of Ontario with a spread of \$5,791. When compared to the average income reported within Kenora District, the City of Dryden reports a higher income by \$3,212 (6.4%), and when compared to the provincial average, the City of Dryden falls short by \$1,416 (3.7%).

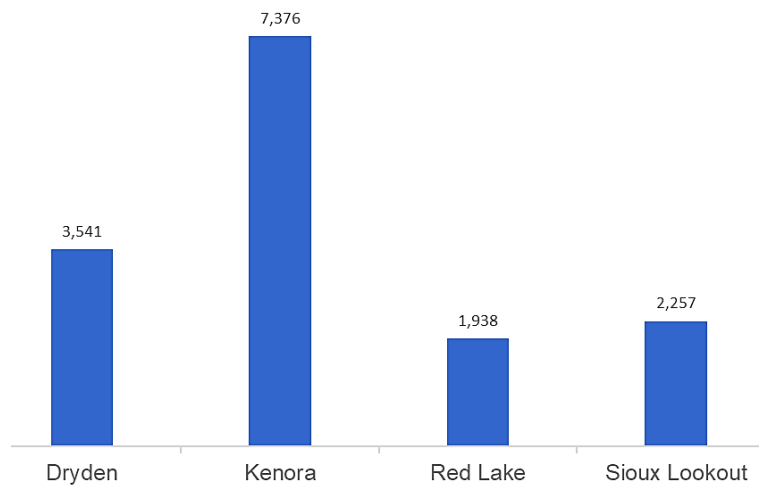
A similar pattern exists when considering after-tax household income, except for Red Lake. Dryden and the three other municipalities spread over a range that differs by \$25,165. Compared to the Kenora District's reported average household income, the City of Dryden reports a higher household income by \$895 (1.3%). When compared to the provincial average, the City falls short by \$9,823 (13.9%).

Figure 13: Average Individual vs Households After-tax Income 2015



In terms of the number of private households by jurisdiction, Kenora is the highest with 7,376 households as shown in Figure 14, followed by Dryden, Sioux Lookout and Red Lake with 3,541, 2,257 and 1,938, respectively. The City of Dryden alone contains 23.4% of the private dwellings situated within these four municipalities.

Figure 14: Total Private Dwellings by Region (2016)



8.1.2 Population by Municipality

Figure 15 represents a breakdown of the municipal populations per the 2011 and 2016 census periods. Based on 2016 census data, the City of Dryden represents 24% of all four municipalities' combined population.

Figure 16 illustrates the population percent changes between 2011 and 2016 of each municipality. Using Ontario as the baseline, which experienced an increase in population by 4.6% during this period, Sioux Lookout experienced a slightly higher increase at 4.7%, and Dryden experienced nominal growth of 1.7%. Conversely, Kenora's population declined by 1.6%, and Red Lake experienced the most significant population decline by 12.1%.

Figure 15: Population by Municipality (2011-2016)

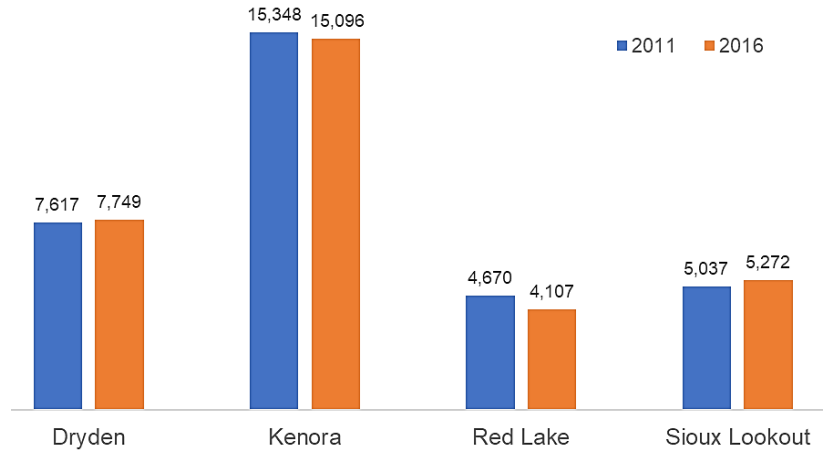
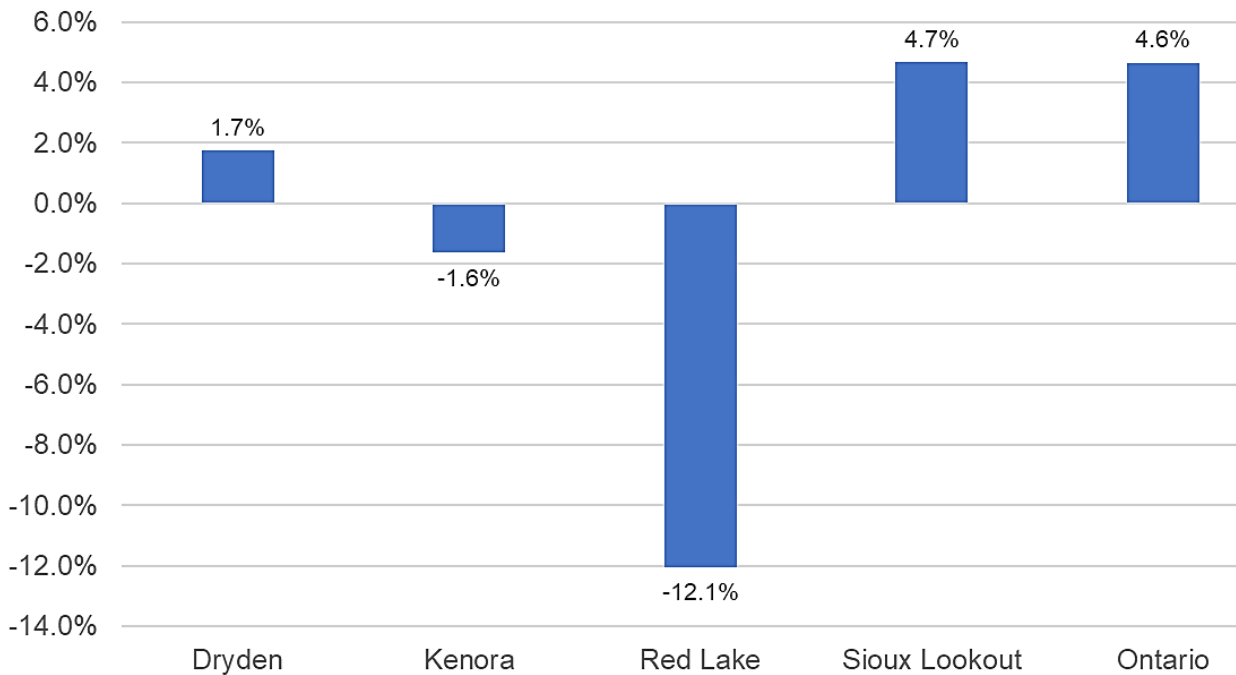


Figure 16: Percent Change in Population by Municipality (2011- 2016)



8.1.3 Employment

The City of Dryden, including the three other comparable municipalities and the Province of Ontario, boasts an employment rate ranging between 57.0% and 69.1%. In this spectrum, Red Lake maintains the highest employment rate of 69.1%, followed by Sioux Lookout, Kenora and Dryden with 66.9%, 60.7% and 57.0%. The Province of Ontario rests at 59.9%, which is 2.9% greater than reported within the City. When considering the unemployment rates, Dryden is the highest with 7.7%, slightly above the provincial average of 7.4%. Red Lake has the lowest unemployment rate of 5.2%.

Figure 17: Labour Force Participation Rates by Region

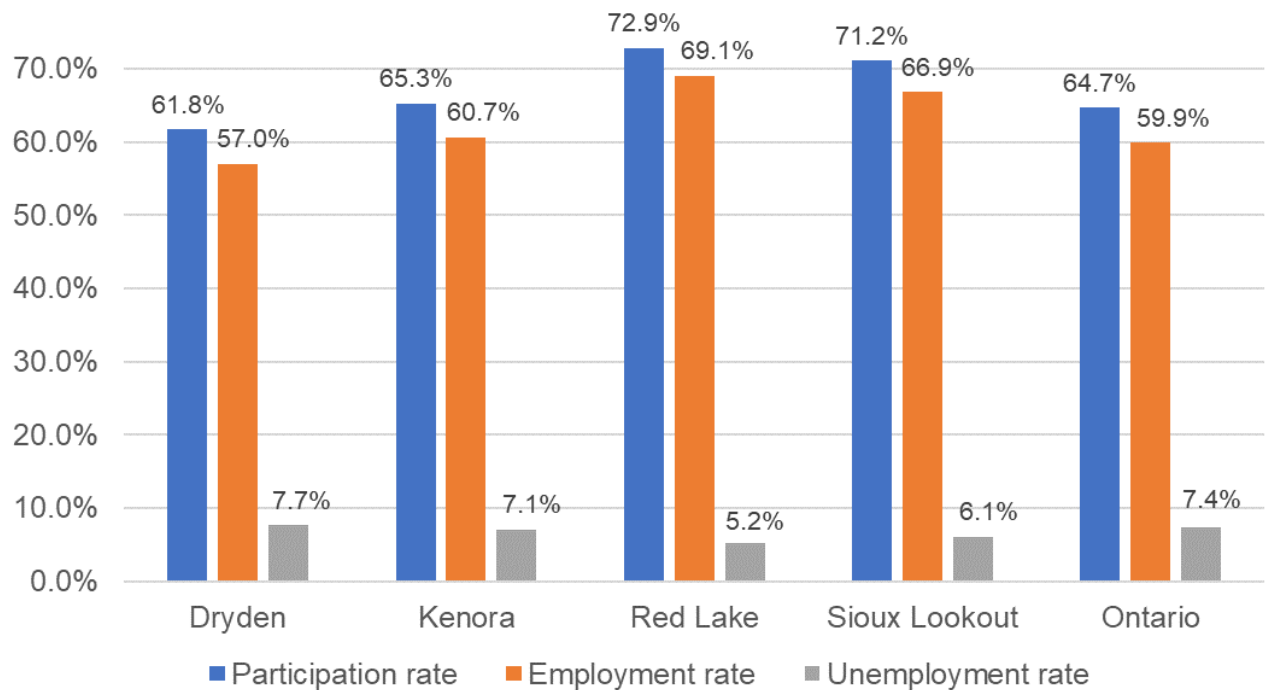


Figure 18 illustrates the percent of each comparable municipalities' workforce self-employed and compares those figures to the provincial average. While the Province of Ontario identified 11.5% of its workforce as self-employed, Kenora has the second-highest rate of 8.7%, followed by Red Lake at 7.7% and Dryden with 7.2%. Sioux Lookout came in at the lowest with a self-employed rate of 5.7%.

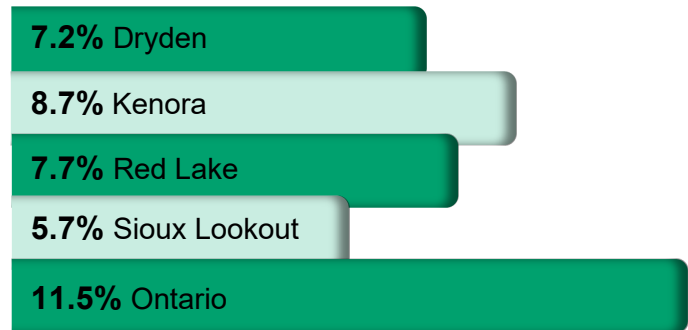


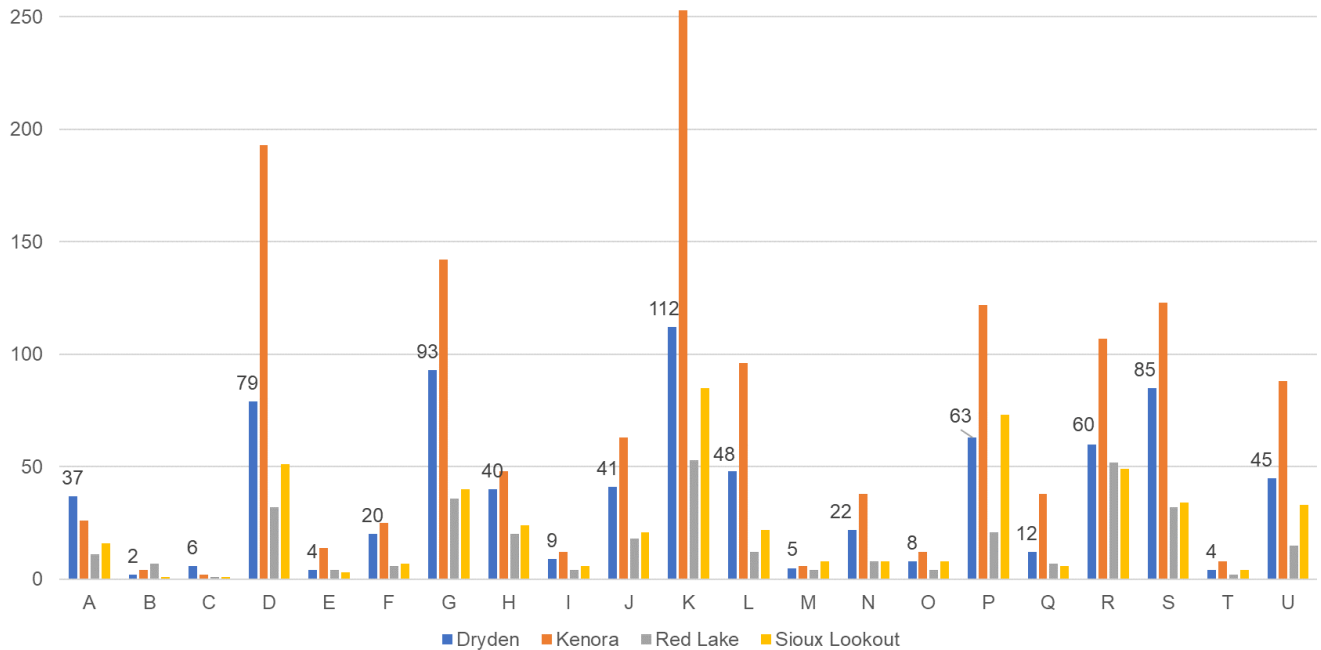
Figure 18: Percent Self-Employed by Region

8.1.4 Main Business Sectors

Figure 19 illustrates the number of businesses by NAICS classification code in 2019 situated throughout the City of Dryden and compares those figures to Kenora, Red Lake and Sioux Lookout. Due to its size, Kenora has the prevailing number of businesses by NAICS classification, but in agriculture, forestry, fishing and hunting, Dryden maintains the predominant share of those businesses.

The predominant share of Dryden businesses is tied to real estate, rental and leasing, retail trade, construction, health care and social assistance, and accommodation and food services. The category of other services (except public administration) fell behind retail trade, but it is not easy to ascertain which industry this category most closely resembles.

Figure 19: Number of Businesses by Industry by Jurisdiction (2019)



| | | | | | |
|---|---|---|--|---|---------------------------------------|
| A | Ag. / forestry / fishing / hunting | I | Information and Cultural Industries | P | Health Care and Social Assistance |
| B | Mining / Quarrying / Oil-Gas Extraction | J | Finance and Insurance | Q | Arts, Entertainment, and Recreation |
| C | Utilities | K | Real Estate and Rental and Leasing | R | Accommodation and Food Services |
| D | Construction | L | Professional, Scientific, and Technical Services | S | Other Services (Except Public Admin.) |
| E | Manufacturing | M | Mgmt of Companies and Enterprises | T | Public Administration |
| F | Wholesale Trade | N | Administrative and Support, Waste | U | Unclassified |
| G | Retail Trade | O | Educational Services | | |
| H | Transportation and Warehousing | | | | |

Another way to understand the predominant business activity by industry (or NAICS classification code) in the area is to total the number of business counts based on the four cities of Dryden, Kenora, Red Lake and Sioux Lookout, as presented in Figure 20. For the four cities as a whole, it is now more evident that the prevailing industries entail:

1. Real estate and rental and leasing
2. Construction
3. Retail trade
4. Health care and social assistance
5. Other services (except public admin.)
6. Accommodation and food services
7. Unclassified
8. Professional, scientific and technical services
9. Unclassified
10. Transportation and warehousing

Figure 20: 4-Region Total Number of Businesses by Industry (2019)

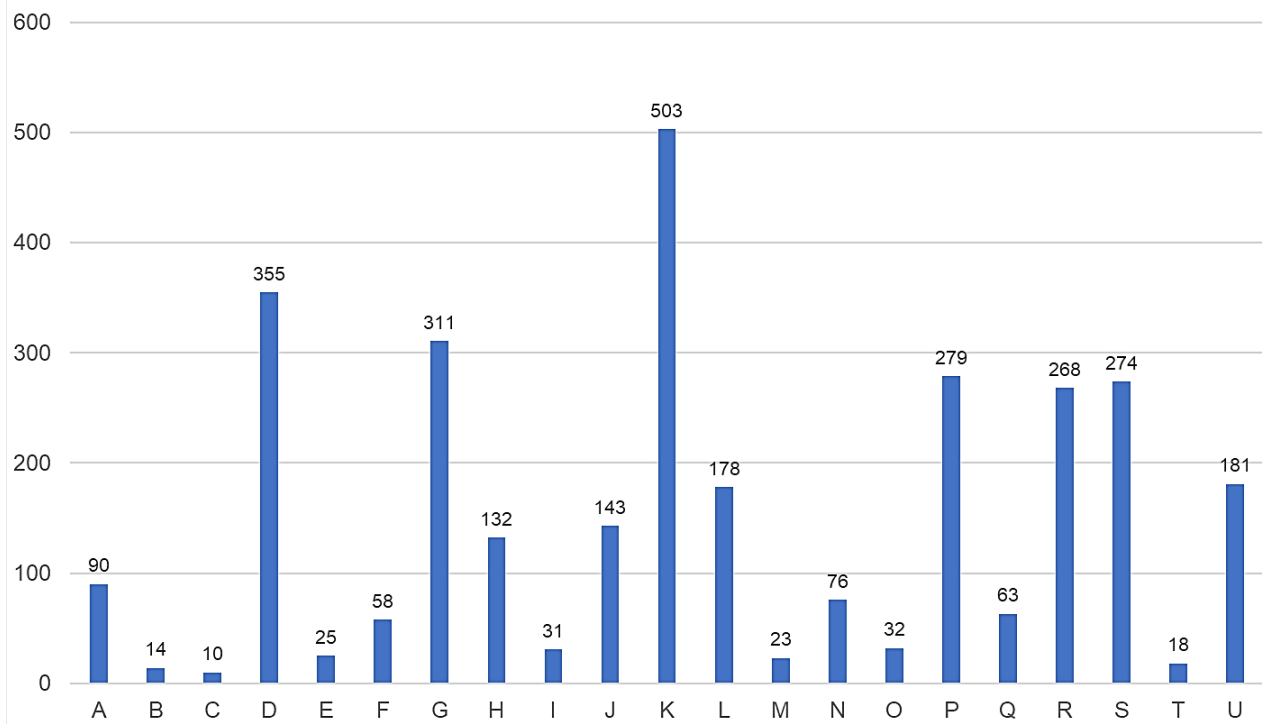
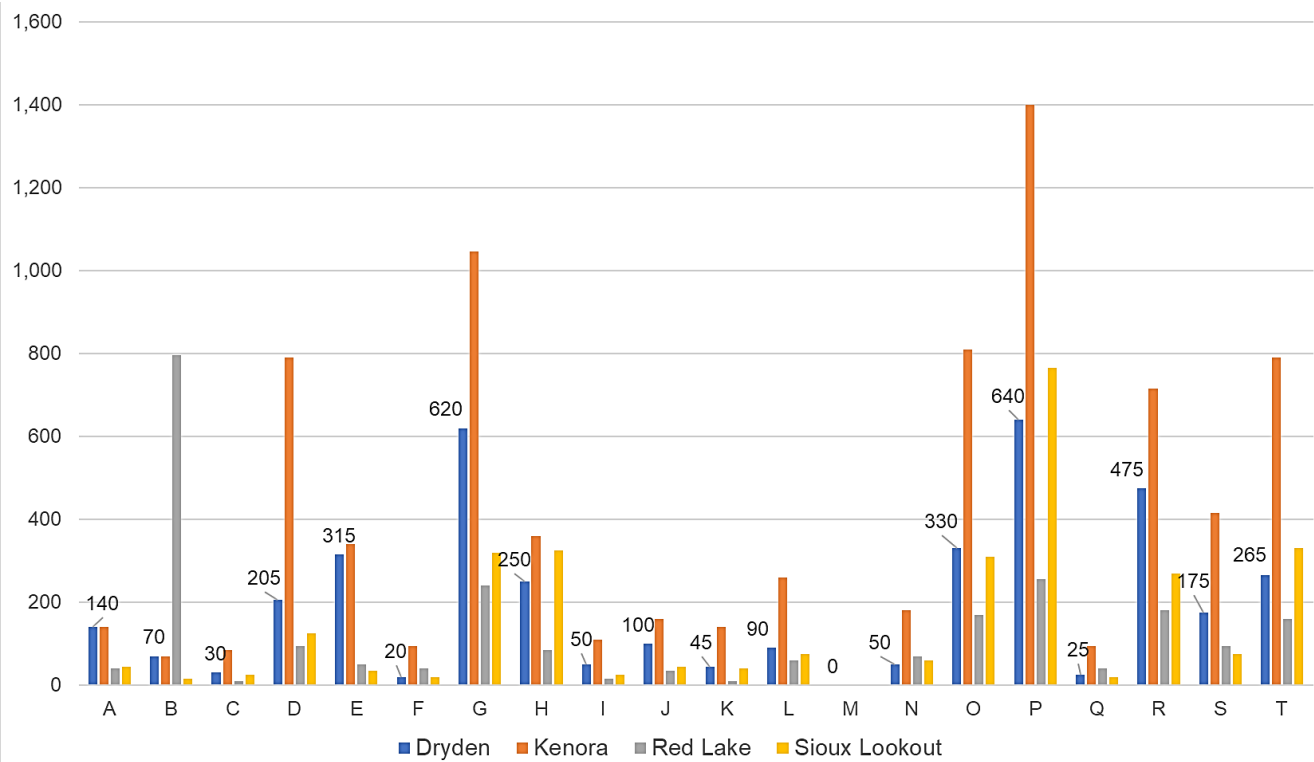


Figure 21 illustrates the size of labour force by NAICS classification code from 2016. From the visual below, it is evident that healthcare and social assistance, retail trade, accommodation and food services, educational services and manufacturing are the industries that have the largest local workforce.

Figure 21: Labour Force by NAICS Code (2016)



| | |
|---|---|
| A | Ag. / forestry / fishing / hunting |
| B | Mining / Quarrying / Oil-Gas Extraction |
| C | Utilities |
| D | Construction |
| E | Manufacturing |
| F | Wholesale Trade |
| G | Retail Trade |
| H | Transportation and Warehousing |

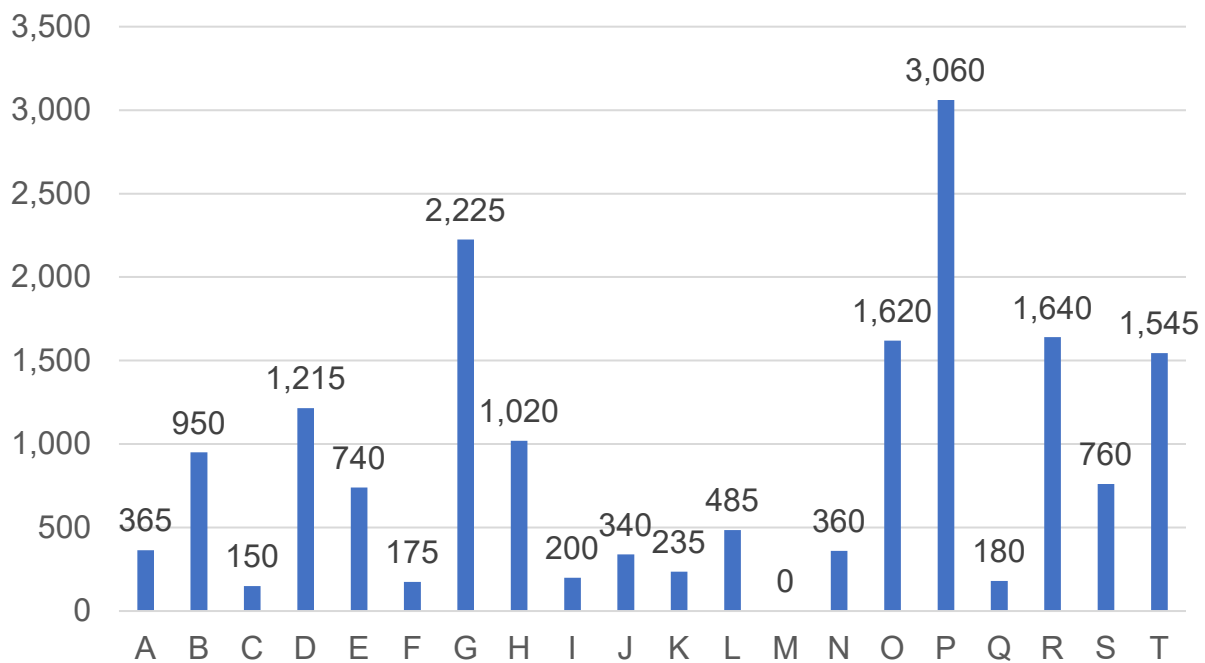
| | |
|---|--|
| I | Information and Cultural Industries |
| J | Finance and Insurance |
| K | Real Estate and Rental and Leasing |
| L | Professional, Scientific, and Technical Services |
| M | Mgmt of Companies and Enterprises |
| N | Administrative and Support, Waste |
| O | Educational Services |

| | |
|---|---------------------------------------|
| P | Health Care and Social Assistance |
| Q | Arts, Entertainment, and Recreation |
| R | Accommodation and Food Services |
| S | Other Services (Except Public Admin.) |
| T | Public Administration |

Another way to understand the prevailing labour force by industry (or NAICS classification code) is to total the labour force counts based on the four cities of Dryden, Kenora, Red Lake and Sioux Lookout presented in Figure 22. For the four cities as a whole, it is now more evident that the prevailing labour force pools support the following industries:

1. Health Care and Social Assistance (P)
2. Retail Trade (G)
3. Accommodation and Food Services (R)
4. Educational Services (O)
5. Public Administration (T)
6. Construction (D)
7. Transportation and Warehousing (H)
8. Mining / Quarrying / Oil-Gas Extraction (B)
9. Manufacturing (E)
10. Other Services, except public admin. (S)

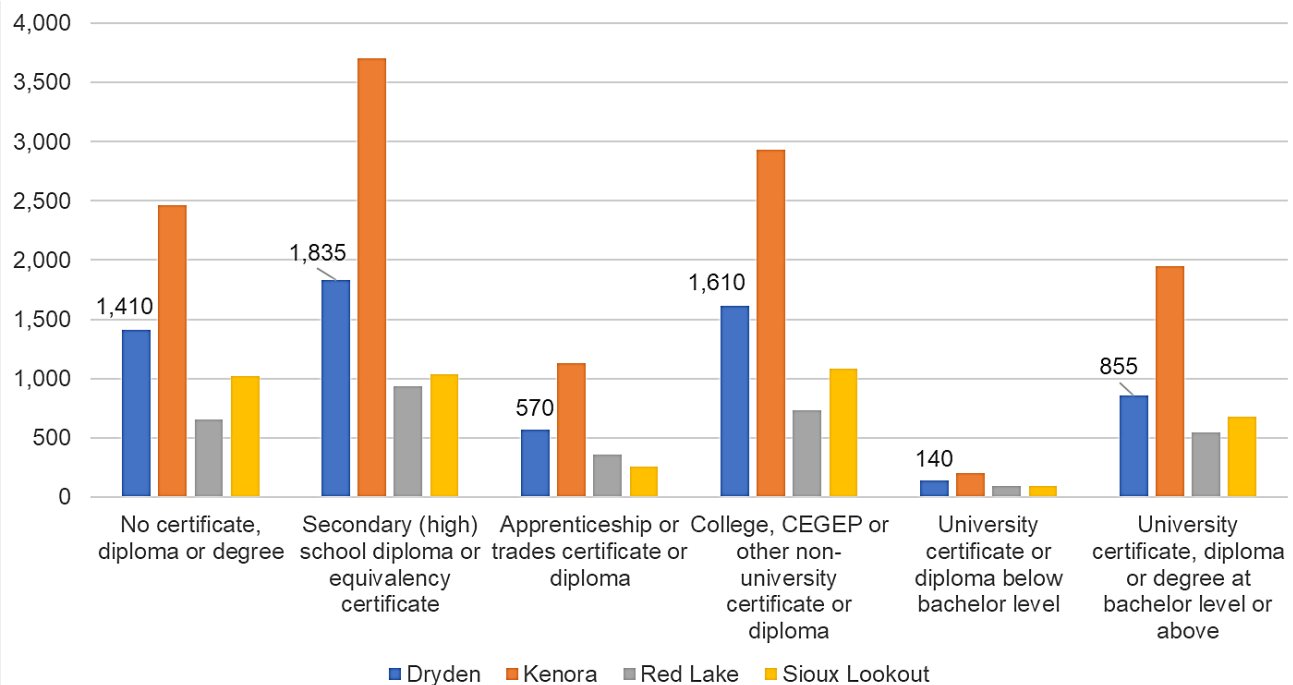
Figure 22: 4-Region Total Labour Force by Industry (2019)



8.1.5 Education Level

Figure 23 identifies the highest level of certificate, diploma or degree achieved. A large share (50.5%) of Dryden's residents report having only a secondary (high) school diploma or equivalency certificate or no certificate, diploma or degree; this is in comparison to the Province of Ontario, which reports 44.9% of its population with the same reported level of education.

Figure 23: Highest Certificate, Diploma or Degree by Municipality (#)



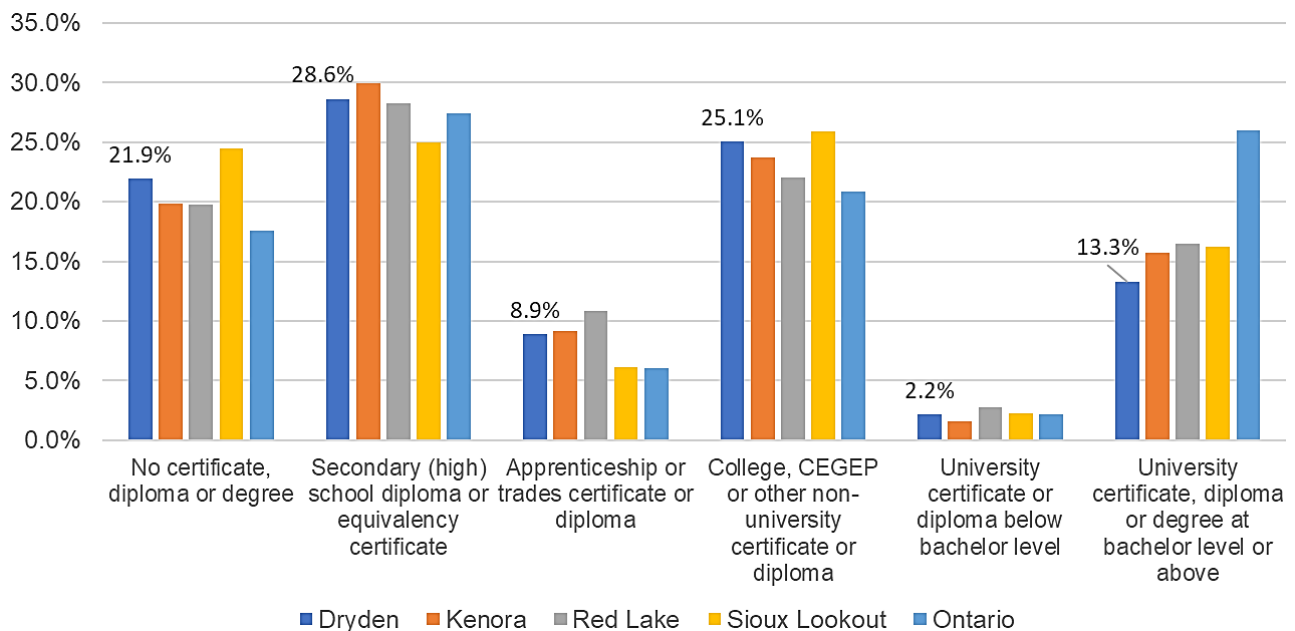
Overall, the four cities demonstrate that:

- 8.7% of residents report having an apprenticeship or trades certificate or diploma;
- 23.9% obtained a college, CEGEP or other non-university certificate or diploma;
- 2.2% hold a university certificate or diploma below bachelor level; and
- 6.1% hold a university certificate, diploma or degree at bachelor level or above.

When considering the City of Dryden against these four (4) municipal averages:

- 3.9% of residents report having an apprenticeship or trades certificate or diploma;
- 25.1% have obtained their College, CEGEP or other non-university certificate or diploma;
- 2.2% hold a university certificate or diploma below bachelor level; and
- 13.3% have received a university certificate, diploma or degree at bachelor level or above.

Figure 24: Highest Certificate, Diploma or Degree by Municipality (% of Population)



9.0 Economic Impact Study

9.1 Objectives and Definitions

This portion of the report focuses on identifying and quantifying the direct, indirect, and induced economic impacts of the Airport's activities and its tenants. This study aims to understand the real economic contribution of the airport at the regional level. The study's data should be used in various discussions and at multiple levels (municipal, regional, provincial, and federal) to demonstrate the Airport's importance as an asset for the City.

Each economic impact is summarized below to provide a common understanding of the terminology in this section:

Direct Economic Impacts

Direct economic impacts measure the magnitude of the economic impact generated at the Airport from the tenants (including the Airport) and passengers visiting the region (tourism spending and attraction). This is the effect generated by the operating expenses, the labour force, remuneration, and other elements contributing to GDP (gross profits, inventories/stocks, social benefits, and taxes) and government revenues.

Indirect Economic Impacts

Indirect economic impacts refer to the chain reactions that the airport activities generate in the regional economy - particularly the jobs and activities generated by regional subcontractors and suppliers collaborating with the airport tenants. In other words, companies in Dryden and across Ontario, whose income-generating activities are positively impacted by the Airport's vitality and its traffic, are included in this category.

Induced Economic Impacts

These are the multiplier effects generated by the expenses. Expenditures have direct and indirect effects, and a portion of this revenue is re-injected into the economy in the form of new spending on goods and services (consumer spending). These new expenditures will become, in part, revenue for other economic agents who will use, in turn, a fraction to make new expenses, and so on.

9.2 Methodology

All airport-based companies and stakeholders were surveyed to obtain the data required to complete the economic impact analysis as accurately as possible. The main target was the airport's tenants. The second targets were some specific users of the Airport, including commercial operators. With the help of the airport staff, an exhaustive list of tenants and users was prepared.

9.3 Results

The results obtained during the economic impact study are segmented into direct, indirect, and induced impacts. All the data presented was obtained from either the Airport Manager regarding information specific to the DRA or conversations held with airport tenants and users. The total economic GDP - direct, indirect, and induced effects - of businesses located at the airport amounted to \$51.5 million. In addition to this monetary economic impact, all the known expenditures supported and/or contributed to sustaining and/or creating about 347¹ jobs FTE, of which approximately 228 are directly attributable to airport tenants. **Error! Reference source not found.** provides a detailed portrait of the Airport tenants' economic impacts for each category and the type.

The breakdown of the results provides an assessment of the magnitude and impact of the Airport tenants' activity along the Dryden value chain. The Airport's activities generated a total payroll (labour income) of \$12.81M² and further \$2.25M in payroll taxation revenue. Property taxes paid from all tenants onsite amounted to \$13,299. Total gross corporate revenues/profits were not disclosed due to confidentiality, and as a result, corporate taxes paid were not able to be calculated.

Table 4: Summary of the Direct, Indirect and Induced Economic Impacts

| Categories | Direct Effect | Indirect Effect | Induced Effect | Total |
|--|-----------------------|----------------------|----------------------|------------------------|
| Jobs (FTE) | 228 | 73 | 46 | 347 |
| Labour Income | \$12,810,480 | \$4,099,354 | \$2,562,096 | \$19,471,930 |
| Labour Income Taxes Paid (Fed/Prov) | \$2,253,074 | \$720,984 | \$450,615 | \$3,424,672 |
| Property Taxes Paid | \$11,841 | \$3,789 | \$2,368 | \$17,998 |
| Contribution to the Gross Domestic Product (GDP) | \$15,075,395 65.8% | \$4,824,126 21.1% | \$3,015,079 13.2% | \$22,914,600 100.0% |

1 Either based on a range of employment figures provided or not disclosed by the airport tenants themselves, the following number of jobs were conservatively estimated (in consultation with the Airport Manager): MNRF (83 FTE, 110 PTE); MAG Aerospace (15); Bell Canada (2 ad hoc, but not included in the calculations); Hydro One (2); Forest Helicopters (2); Northern Youth Programs (2); Morgan Fuels/World Fuels (3); Bearskin Airlines (3); National Car Rental (1); and NAVCanada (2 ad hoc, but not included in the calculations).

2 The following 2019 payroll figures were utilized or calculated based on the estimated number of employees and a conservative annual salary: Dryden Regional Airport (\$574,204 – individual salaries provided); MNRF (\$10.5M – avg. FTE salary of \$74,699 and PTE \$39,091); MAG Aerospace (\$810,000 – avg. salary of \$54,000); Hydro One (\$262,000 – avg. salary of \$131,000); Forest Helicopters (\$184,276 – avg. salary of \$92,138); Northern Youth Programs (\$110,000 – avg. salary of \$55,000); Morgan Fuels/World Fuels (\$165,000 – avg. salary of \$55,000); Bearskin Airlines (\$165,000 – avg. salary of \$55,000); and National Car Rental (\$40,000 – avg. salary of \$40,000).

As presented in the table above, the approximate total direct, indirect and induced impacts are respectively \$15.1M (65.8%), \$4.8M (21.1%) and \$3.0M (13.2%). While unable to account for where employees of Airport tenants reside, it is important to emphasize that 100% of the airport employees employed at the Airport in 2019 live within the Dryden area.

9.4 Past and Future Investments

In addition to the Airport's financial statement data, respondents were asked to provide information on past and future capital investment projects that had or will occur at the Airport. To begin, Table 5 presents the list of past projects. In May 2018, the MNRF FMC/FMH construction project in Dryden was awarded at a \$32 million value and is expected to conclude by March 2021. As a result, this figure was assigned the classification as a "past project" in the economic analysis with a conservative value of \$31 million (as the total project was expected to come within a range of \$31 - \$32 million). Other noteworthy projects completed by the MNRF include the

- AFFES major capital investment (\$4.9M), which included the addition of the Aviation / Aerial Operations wing and a replacement backup generator;
- AFFES minor investments (\$0.2M) associated with various internal/outbuildings;
- Infrastructure Ontario funded investments (\$1.0M) associated with their capital responsibilities as the owner of the buildings; and
- MNRF's contribution of \$90,000 to support the paving of a small portion of Ghost Lake Road up to the Aviation hangar (the matching contribution of Infrastructure Ontario was unable to be verified).

These four past projects occurred before 2015-16 and are therefore not included in the economic analysis. However, they still demonstrate a long-term continuous investment into the Airport location, directly and indirectly impacting the surrounding community.

Other accounted past projects include the financial investment associated with the 2019-2020 hangar development by Northern Youth Programs, estimated at a construction cost of \$1,250/sqm based on the building footprint 80'x78'. Again, it is essential to recognize that these recent and more historical projects between the two organizations demonstrate long-term commitments to their current bricks and mortar operations at Dryden Regional Airport.

When considering past equipment purchases, a total spend of \$686,553 was recorded by the Dryden Regional Airport alone in 2019³. While these investments can be interpreted as economic outputs and not as direct economic impacts, it is essential to understand that not all projects have the same impact level. Construction projects create much more value in the economy than expenses that simply involve purchasing equipment.

Table 5: Presentation of Past Projects

| Category | Organization | Project Description | Amount (CAD) | Time Frame |
|---|-------------------------|---|---------------------|------------|
| Construction Projects | MNRF | FMC/FMH Construction Project | \$31,000,000 | 2018-2021 |
| Construction Projects | Northern Youth Programs | Hangar Development (80'x78') * Estimated \$1,250/sqm construction cost | \$725,000 | 2019-2020 |
| Total "Construction Project" Value | | | \$31,725,000 | |
| Purchase of Equipment | DRA | Sweeper - MB TOWGA | \$287,000 | 2020 |
| | | Motor Grader - Toromont CAT | \$310,233 | 2019 |
| | | De-icing Chemical Spray Trailer - Wausau/Tyler Ice | \$89,320 | 2019 |
| Total "Purchase of Equipment" Value: | | | \$686,553 | |
| Total "Past Projects" Value: | | | \$32,411,553 | |

Considering that the City is a regional centre, a high proportion of these construction projects involved local contractors and suppliers. When evaluating the indirect and induced economic impact of equipment purchases, these significant pieces of equipment (unless constructed/assembled locally or sold through a local distributor, have very low indirect and induced economic impacts on the local community. That said, it is important to be mindful that equipment purchases can create an operational cost-saving, which can be attributed to efficiencies, increased quality of work, etc. When combining the direct, indirect, and induced impacts of past reported projects, a total economic impact of recent past projects of \$48.9M is calculated.

3 The following two (2) pieces of equipment which were purchased in 2015 were not included within the calculations: Snow Blower - J.A. LaRue (\$346,948); and 544 K Front End Loader - John Deer (\$231,935).

Table 6: Direct, Indirect and Induced Economic Impacts of Past Projects

| Category | Direct | Indirect | Induced | Total Impact |
|-----------------------|---------------------|---------------------|--------------------|---------------------|
| Construction Projects | \$31,725,000 | \$10,152,000 | \$6,345,000 | \$48,222,000 |
| Purchase of Equipment | \$686,553 | n/a | n/a | \$686,553 |
| Total: | \$32,411,553 | \$10,152,000 | \$6,345,000 | \$48,908,553 |

Looking into the future, Table 8 presents a series of upcoming projects identified to take place at the Airport. Two projects will be led by the DRA (valued at \$761,318), six (6) by the City (valued at \$626,000) and one associated with MNRF (which the budget has yet to be made public). The City also has an estimated \$440,000 budget tied to equipment purchases. At the time of undertaking the consultation process, no other future projects or equipment were disclosed by Airport tenants. The total value of planned construction projects and equipment purchases is \$1,827,318.

Table 7: Presentation of Future Projects

| Category | Project Description | Amount (CAD) | Timeframe |
|---|---|--------------------|-----------|
| Construction Projects | DRA Pave Taxiway Charlie | \$413,351 | n/a |
| | DRA Excavate and Pave Taxiway Delta | \$347,967 | n/a |
| | DRA Groundside Tenant Hanger Access/Parking Lot | \$50,000 | 2021 |
| | DRA Maintenance Shop Roof Replacement | \$36,000 | 2021 |
| | DRA Maintenance Shop Heater Replacements - Upgrade to Natural Gas | \$40,000 | 2021 |
| | DRA Terminal Building Refurbishment | \$100,000 | 2021 |
| | DRA Sand Shed | \$300,000 | 2021 |
| | MNRF Fuel Storage Building | n/a | n/a |
| Total "Construction Project" Value: | | \$1,387,318 | |
| Purchase of Equipment | City Wet Dry Material Spreader | \$100,000 | 2021 |
| | City Regulator Replacement (Program) | \$40,000 | 2021 |
| | City Airport Plow Truck | \$300,000 | 2023 |
| Total "Purchase of Equipment" Value: | | \$440,000 | |
| Total "Future Projects" Value: | | \$1,827,318 | |

Like past projects, it is possible to estimate the direct, indirect and induced economic impacts for future construction projects. Based on the direct investment of \$761,318 into airport-related construction projects, a total economic impact of \$2.5 million can be realized (Table 6).

Table 8: Direct, Indirect and Induced Economic Impacts of Future Projects

| Category | Direct | Indirect | Induced | Total Impact |
|-----------------------|--------------------|------------------|------------------|--------------------|
| Construction Projects | \$1,387,318 | \$443,942 | \$277,464 | \$2,108,723 |
| Purchase of Equipment | \$440,000 | n/a | n/a | \$440,000 |
| Total: | \$1,827,318 | \$443,942 | \$277,464 | \$2,548,723 |

9.5 Economic Impacts Generated by External Passengers

In addition to the impacts generated by Airport tenants, it is essential to consider passengers travelling outside the municipality who use the Airport to visit the area (tourism) or business purposes. The Airport only formally commenced tracking passenger data in August 2019. Based on the 40 jet movements recorded in 2019, a series of strong assumptions were applied to help estimate these passengers' economic impact considering the time each aircraft remained at the Airport (i.e., less than/greater than 24 hours) and the number of seats per aircraft.

With these various parameters in hand, the clientele's estimated economic impacts were calculated (as shown in Table 7). The total spending reached \$33,787 in 2019, reflecting the direct, indirect, and induced results generated by the Airport's external visitors.

9.6 Economic Impacts Generated by External Passengers

Table 9: Assumptions and Calculation of the Economic Impacts Generated by External Passengers

| Categories | Description | Spending |
|--------------------------------------|--|----------|
| Total Number of Visits by Jet | <p># of Visits by Jet (<1 hour) = 5 # of Visits by Jet (1-2 hours) = 19 # of Visits by Jet (1-4 Days) = 16</p> <p>Based on having known the origin and destination, we can assume that the 24 aircraft onsite for less than two (2) hours were there picking up passengers and no economic impact was calculated for these aircraft or passengers.</p> <p>The 16 aircraft that remained onsite for 1-4 days were utilized to calculate the economic impact.</p> | n/a |
| Clientele | <p>Since passenger tracking records were not fully established at the airport (during this period), in consultation with the Airport Manager, each aircraft was estimated to be at 50% occupancy at the time of arrival. Therefore, 16 aircraft = 143 seats at 50% capacity = ~71 passengers.</p> | n/a |
| Duration of Overnight Stays | <p>Based on the number of days that each of these aircraft remained onsite, the 16 jet visits collectively remained onsite for 29 days.</p> | n/a |
| Overnight Spending | <p>A rate of \$130/night was utilized to calculate overnight spending on accommodations. With 71 visitors spending a mix of 1-4 nights in the Dryden area, total spending on overnight accommodations was \$18,005.</p> | \$18,005 |
| Food and Beverage | <p>A rate of \$75/day was utilized to calculate daily spending on food and beverage. With 71 visitors spending a mix of 1-4 days in the Dryden area, total spending on food and beverage was \$10,387.</p> | \$10,387 |
| Vehicle Rental and Fuel | <p>It was estimated that 25% of overnight visitors secured a rental vehicle at a rate of \$50/day – as such total spending on vehicle rentals was \$1,731. Additionally, a value of \$50 per rental agreement was also utilized to calculate the cost of fuel purchases. As such, total spending on fuel purchases was \$894.</p> | \$2,625 |

| Categories | Description | Spending |
|----------------------------|---|-----------------|
| Incidentals | A rate of \$20/day per person was utilized to calculate the cost of incidentals while in the Dryden area. As such, total spending on incidentals was \$2,770. | \$2,770 |
| Total Annual Spend: | | \$33,787 |

9.7 Total Economic Impacts

A summary of the four evaluated economic impacts is presented in Table 9. Overall, the “Recurrent Impacts (Exploitation Impacts)” category, which includes the impacts generated by the airport tenants and the external visitors, generated ~\$22.9 million in 2019. The second category, called the “Non-Recurrent Impacts (Capital Investment Projects),” generated and is estimated at \$51.5 million. It is important to note that non-recurrent economic impacts have a unique occurrence and are not repetitive annually.

Table 10: Summary of the Economic Impacts by Category

| Recurrent Impacts | Total Impact (\$) (Direct, Indirect, Induced) |
|----------------------------|---|
| Airport’s Tenants | \$22,914,600 |
| External Visitors Spending | \$33,787 |
| Total: | \$22,948,387 |

Table 11: Summary of the Non-Recurrent Impacts (Capital Investment Projects - Immobilizations)

| Non-Recurrent Impacts | Total Impact (\$) (Direct, Indirect, Induced) |
|------------------------------------|---|
| Past Capital Investment Projects | \$48,908,553 |
| Future Capital Investment Projects | \$2,548,723 |
| Total: | \$51,457,276 |

10.0 Foreign Investment Review

The Airport and aviation businesses based at the Airport employ a fair number of people in the aviation sector. While the Airport is not a significant employer in the aerospace sector than others, there are opportunities to attract foreign direct investment (FDI). However, it highlights the importance of incorporating and leveraging regional partnerships to ensure the Airport can build upon its strengths and identify new opportunities that align with its ability to accommodate, from an infrastructure and operational perspective.

The real potential in FDI is measured by reviewing:

1. The strengths that the region has in each of its target sectors.
2. Other jurisdictions with which the targeted companies are competing.
3. The growth of the companies sought in the region, province, country, and the world, and assessing the potential for growth in the community.

10.1 Market Overview – Canada's Aerospace Industry

10.1.1 Economic Impact

- The industry's \$31 billion in revenue has contributed over \$25 billion to Gross Domestic Product (GDP) and over 213,000 jobs in the Canadian economy⁴
- The aerospace industry and its value chain contributed over \$20.3 billion in GDP and 160,000 jobs to the Canadian economy (direct and indirect).
- Consumer spending by associated employees contributed an additional \$5.2B to GDP and supported 53,000 jobs (induced).
- Positive year-over growth in revenue, GDP, and jobs.

10.1.2 Ecosystem

- The Canadian aerospace industry ecosystem interlinks with the defence and space industries (Statistics Canada, 2019).
- Close to 70% of the industry's activity (GDP) is dedicated to manufacturing, while the balance focused on maintenance, repair, and overhaul (MRO).

⁴ ISED's model estimates direct, indirect and induced employment and GDP impacts based on revised data from Statistics Canada, National Input-Output Multipliers (2015 adjusted to 2018 employment), Canada Revenue Agency, OECD and firm level observations, 2019.

10.1.3 Global Value Chain

- Over 90% of Canadian aerospace manufacturing firms are exporters (Statistics Canada, 2020).
- Aerospace manufacturing is 30% more export intensive than total manufacturing.
- Medium-sized aerospace manufacturing firms are 3X more trade diverse⁵ than those in total manufacturing.
- Close to 50% of exports are supply chain-related (Global Trade Information Services, 2019).

10.1.4 Innovation and Skills

- Aerospace is the number one R&D player⁶ among all Canadian manufacturing industries.
- Canadian aerospace manufacturing invested \$1.4 billion in research and development (R&D), contributing close to a quarter of total manufacturing R&D in Canada (Statistics Canada, 2019).
- Aerospace manufacturing is six times more R&D intensive⁷ than the manufacturing average.
- STEM (Science, Technology, Engineering and Math) employment in aerospace manufacturing is two times higher than in total manufacturing (Statistics Canada, 2019).
- The aerospace-manufacturing sector is one of the most R&D intensive in the Canadian economy. Manufacturing R&D performed by the aerospace sector totalled \$1.64 billion in 2016, representing nearly thirty percent of all manufacturing industry R&D in Canada.
- Canada's expertise in flight training is recognized around the world. In 2015, Canada's 169 certified flight schools issued 1,186 commercial-pilot licenses. Canadian flight schools provide training in diverse climates and geographies, enabling pilots to develop superior professional skills. Canada's Maintenance, Repair and Overhaul (MRO) sector generates \$7.7 billion in annual revenues and directly employs 31,000 highly skilled workers.

All data is from 2018, unless otherwise stated, source Aerospace Industries of Canada (Innovation, Science and Economic Development Canada and Aerospace Industries Association Canada, 2019).

⁵ Trade diversity is measured as a share of non-US exports.

⁶ In terms of value of R&D activity.

⁷ R&D intensity is calculated using the ratio of R&D to GDP.

10.2 Canada's Key Strengths in Aerospace and Aviation

- Commercial and business aircraft
- Helicopters
- Utility and general-aviation aircraft
- Aircraft engines
- Avionics
- Aerostructures
- Flight simulation, pilot, and air-traffic-control training
- Landing gear systems
- Advanced-composites manufacturing
- Airframe, engine, and component MRO
- Satellites, robotics, and space-based services
- Product development and testing for cold weather conditions

10.3 Ontario Aerospace Sector

The Ontario aerospace sector generates over \$6 billion in annual sales with a GDP impact of \$3.2 billion, employing over 21,000 directly in aerospace employment. Ontario accounts for over 30% (\$500 million) of all aerospace research and development (R&D) in Canada. The Canadian aerospace manufacturing sector outpaced key industrial sectors, the total manufacturing average, and all industries in terms of R&D intensity. Approximately a quarter (25%) of all Canadian aerospace activity is done in Ontario.

Ontario's aerospace industry is a world leader in several areas, including turboprop aircraft, business jets, turbine engines, landing gear systems, avionics, environmental systems, space robotics, and 18 universities and colleges offering over 40 aerospace-specific programs.

Foreign companies operating successfully in Ontario include Airbus Helicopters Canada, Bombardier, United Technologies Aerospace Systems, Honeywell Canada, Magellan (MAG) Aerospace, MDA, Safran Electronics & Defense, L-3 Electronic Systems Services, MHI Canada Aerospace, Northstar Aerospace and Pratt & Whitney.

An increasing number of innovative small and medium-sized businesses have unique capabilities in composites, precision machining, coatings, and component system design.

10.4 Investment Readiness

It is essential to identify unique value propositions that differentiate competitors' locations to promote FDI opportunities effectively. In the aerospace and aviation sector in Ontario and Canada, many smaller airports are interested in attracting domestic and foreign investment. A key component of developing an FDI is to assess the sector strengths and align them with investor requirements.

Area Development, a US-based economic development publication, undertakes an annual survey to determine key site selection factors for investors and their consultants. According to the 16th annual Area Development Survey (Area Development, 2020) Table 12 outlines the ranking results from 2019 and 2018. Highway accessibility is a primary determinate at 92.4%, followed by the availability of skilled labour at 92.3%, land and buildings came in at 64%, and proximity to major markets ranked 72.6%.

Table 12: Corporate Survey Results – Site Selection Factors 2018 - 2019

| Ranking | Site Selection Factors | 2019 (%) | 2018 (%) |
|---------|------------------------------------|----------|------------|
| 1 | Highway Accessibility | 92.4 | 87.2(3) |
| 2 | Availability of Skilled Labour | 92.3 | 90.5(1) |
| 3 | Labour Costs | 87.1 | 89.1 (2) |
| 4 | Quality of Life | 82.2 | 82.8 (6) |
| 5 | Occupancy or Constructions Costs | 80.3 | 76.1 (10) |
| 6 | Corporate Tax Rate | 79.7 | 86.7 (4) |
| 7 | Energy Availability & Costs | 79.5 | 77.8(8) |
| 8 | Tax Exemptions | 75.0 | 83.0(5) |
| 9 | Environmental Regulations | 73.0 | 69.9 (16T) |
| 10 | Proximity to Major Markets | 72.6 | 71.8 (14) |
| 11 | Right-to-Work State | 72.0 | 70.2 (15) |
| 12 | Available Buildings | 71.3 | 76.7 (9) |
| 13 | Expedited or Fast-Track Permitting | 70.7 | 64.9 (19) |
| 14 | State and Local Incentives | 70.2 | 82.5 (7) |
| 15 | Inbound/Outbound Shipping Costs | 69.8 | 69.2 (18) |
| 16 | Proximity to suppliers | 68.1 | 72.8 (13) |
| 17 | Available Land | 64.4 | 75.6 (11) |
| 18 | Low Union Profile | 62.7 | 74.4 (12) |

| Ranking | Site Selection Factors | 2019 (%) | 2018 (%) |
|---------|---|----------|------------|
| 19 | Training Programs/Technical Schools | 60.3 | 69.9 (16T) |
| 20 | Availability of long-term financing | 59.5 | 60.5 (21) |
| 21 | Availability of unskilled labour | 59.0 | 59.4 (22) |
| 22 | Raw Materials Availability | 56.1 | 55.6 (23) |
| 23 | Accessibility to Major Airports | 50.6 | 62.7 (20) |
| 24 | Water Availability | 45.2 | 51.6 (24) |
| 25 | Proximity to Innovation Commercialization/R&D Centres | 35.7 | 41.5 (27) |
| 26 | Availability of Advanced ICT Services | 26.7 | 50.0 (25) |
| 27 | Railroad Service | 25.3 | 46.6 (26) |
| 28 | Waterway of Oceanport Accessibility | 20.3 | 34.1 (28) |

The survey results outline factors and level of importance to Executives or Site Selector Consultants when deciding upon a location. Site Selectors identify decision criteria related to labour, transportations and telecommunications connectivity, available funding and finance, and other community factors that would indicate the level of business friendliness.

The Government of Ontario supports an "Investment Ready Certified Site" designation program for industrial properties that highlights the minimal requirements for attracting investment promoted by the province. Properties with this designation have completed the program requirements that demonstrate the property development is primed and ready for investment. An Investment Ready Certified Site designation is attractive to investors and Site Selectors because it provides essential background information on the site's availability, utilities, transportation access and environmental records and encourages faster site selection decisions.

Minimum eligibility requirements include:

- All properties must be designated for industrial use in the approved municipal Official Plan and zoned within the municipality's comprehensive Zoning By-Law to permit a wide range of industrial use.
- A Plan of Subdivision must be available for properties located within designated business and industrial parks.

Property Size:

Properties located outside of business or industrial parks must consist of at least 4 hectares, or 10 acres of contiguous area, which can be developed. The property may be a grouping of multiple lots or parcels.

Properties located within a business or industrial park must be a minimum cumulative total of 10 acres that can be developed. The total can represent either an individual lot or a group of multiple lots.

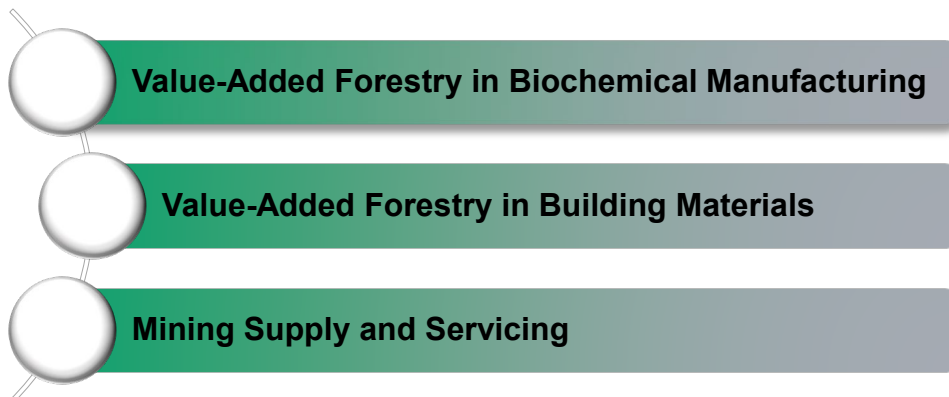
The property or business/industrial park must:

- Have existing public road access or be accessible by public road by certification date.
- Have municipal water and wastewater service at or adjacent to the lot line or be serviced by the certification date.
- Where available, have serviced or is serviceable by natural gas.
- Be serviced or serviceable by hydro and telecommunication services.

10.5 Regional Foreign Direct Investment Attraction Strategies

The City of Dryden has conducted several studies to determine appropriate strategies for attracting new investment and has an active marketing and outreach program for various sectors. In 2007, the Dryden Development Corporation (DDC) was developed as an arms-length corporation to simplify and streamline processes to establish new businesses within the City and surrounding areas.

In September 2015, the DDC initiated an Economic Development Strategic Plan to examine the economic base and prepare a five-year economic development strategy. The plan identified many competitive advantages and disadvantages related to economic development activities in the City and identified leading Foreign Direct Investment (FDI) opportunities that included:



However, the Strategic Plan recommended that DDC not dedicate resources to these opportunities until Dryden is more investment-ready. The primary reasons for this conclusion noted:


- The best FDI opportunity for Dryden is bio-chemical manufacturing, part of the value-added forestry sector, and securing an investment would require the full support and involvement of Domtar, a relationship that needs to be re-built.
- FDI opportunities in forestry product manufacturing, specifically new innovations in advanced building materials for wood building construction, appear to be minimal or invested by Canadian sources.
- Due to global economic conditions, investment in the mining sector has slowed; until conditions improve and an active local extraction operation is imminent, it is not recommended to pursue FDI in mining supply and servicing.

Noted during consultations with the City's Economic Development Department, the City's investment readiness has improved significantly since 2015, but it is not yet in a position (based on limited resources) to proactively and aggressively pursue and target specific Foreign Direct Investment (FDI) in the Airport's aviation and aerospace sectors. With that said, the Economic Development Department has the capacity and is ready to work with and respond to all inbound FDI inquires to ensure they are given the proper attention and support. The City remains committed to partnering with key stakeholders to bring about new economic development investments and job-creating opportunities through FDI. The Airport's Business Enablement Team (BET) will also identify prospective foreign Direct Investment (FDI) opportunities and will pursue them accordingly.

10.6 Recommendations

Before COVID-19 was declared a global pandemic in March 2020, Canada's aerospace and aviation industry were in growth mode with opportunities in various key sub-sectors. While the pandemic caused significant disruptions in the aviation and aerospace industry, the Airport witnessed substantial growth in attracting aviation-related businesses. It has successfully attracted two helicopter companies and a small air charter and cargo company in 2020 and is negotiating with other companies interested in relocating. Identifying appropriate opportunities and ensuring the capacity to attract and accommodate new business will be crucial to Dryden Regional Airport's future growth and foreign investment success.

A review of the investment readiness is required based on this report, and further investigation is needed to determine the value proposition for foreign investment. A niche market may exist for the Airport to build from with companies or associated support services already in place.



The Airport should engage with provincial and federal stakeholders already focused on foreign investment to take advantage of the skills, resources, and strategies set in place.

While there is significant employment in the manufacturing and forestry sectors, skilled labour availability remains a challenge in the City and surrounding areas and is endemic throughout Northern Ontario. The lack of skilled labour availability poses a challenge to attracting new employers identified in the Area Development Survey (Table 12). Available serviced land may also be a challenge to investment growth opportunities.

Without dedicated financial and human resources for FDI, the Airport should engage with provincial and federal stakeholders already focused on foreign investment to take advantage of the skills, resources, and strategies set in place. Partnerships and open communication lines will keep the Airport in the forefront for opportunities not suitable for other communities in the region, allowing competition for new investment.

All business development activities should align with regional, provincial, and national efforts in the aerospace and aviation sector to position Dryden Regional Airport for business growth, investment promotion and infrastructure funding opportunities.

11.0 Passenger Activity Forecasts

As air travel increases, airports that lack the funding and/or space to expand their facilities must find ways to minimize disruptions and deliver exceptional service, or they will risk losing market share. The key to success is adopting technology-driven capabilities that provide greater end-to-end visibility and planning across landside and airside operations and facilitate increased collaboration and information sharing between airport stakeholders (International Civil Aviation Organization, 1981).

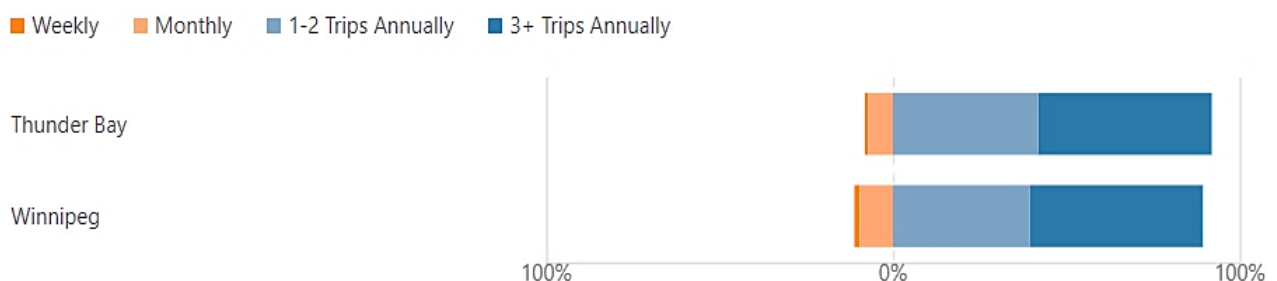
Airlines prefer to operate from airports where their aircraft can take off with unrestricted (100%) payloads, leading to the best overall route economics and financial returns. An aircraft's takeoff weight is affected by the runway environment and characteristics and environmental conditions such as wind, temperature, and pressure. Runway length is one of the critical factors limiting the aircraft takeoff weight and, consequently, the payload.

At a payload-limited airport, where the runway is shorter, an airline may be forced to reduce the number of passengers it carries on the affected aircraft type to reach the desired destination. If the payload reduction is too significant, the airline will not serve that airport with the affected aircraft type. Ultimately, the payload, be it passenger or cargo, represents an aircraft's revenue earning capability.

11.1 Passenger Activity Forecasts based on Community Survey Results

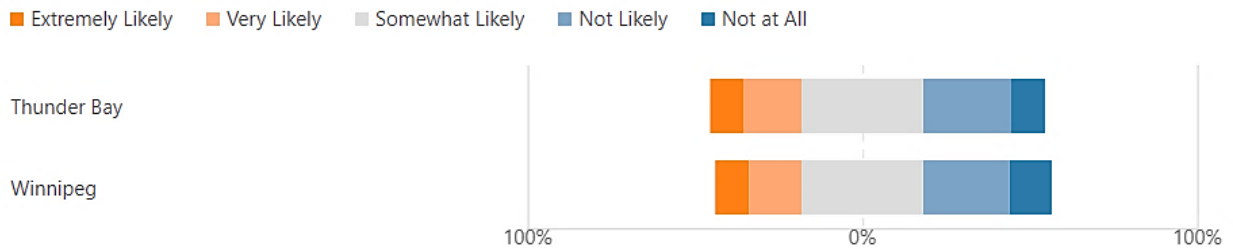
Before the COVID-19 pandemic, the Airport recorded 388 passengers from August 2019 to December 2019. August represented the busiest month with 136 passengers and September the lowest with 51 passengers. Based on the Community Engagement Survey results, the number of passengers using the Airport could significantly increase if there were better connections and prices. As noted in Figure 25, 50% of respondents indicated travel to Thunder Bay and Winnipeg at least three times annually.

Figure 25: Survey Respondents Frequency of Travel to Thunder Bay and Winnipeg



When questioned about the likelihood of utilizing the Airport for travel, only 27.3% of respondents answered that they were very likely or extremely likely to travel to Thunder Bay, and 25.3% were very or extremely likely to make a trip to Winnipeg.

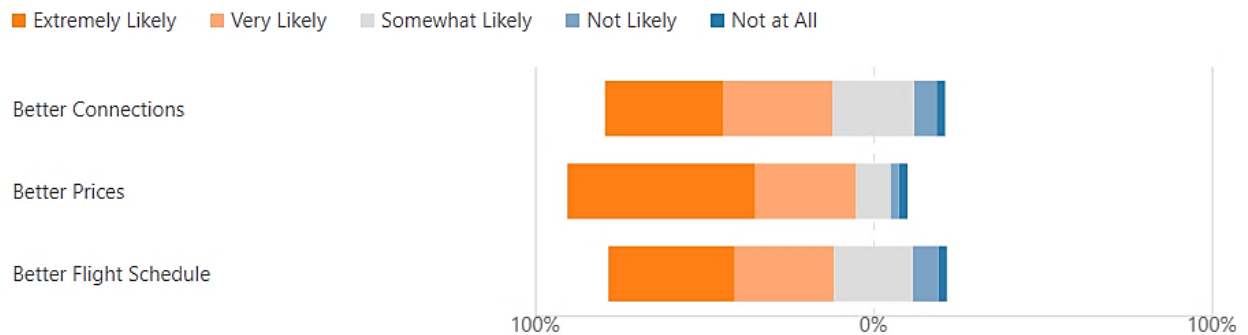
Figure 26: Likelihood Respondents would use the Airport for Travel to Thunder Bay or Winnipeg



According to the Community Survey results, the likelihood of Airport use would increase if there were better options for flight connections, prices, and flight schedule. Figure 26 provides a graphical presentation of responses to the questions posed with:

- 66.7% responding it was Extremely and Very Likely with better connections.
- 85.2% responding it was Extremely and Very Likely with better prices.
- 66.7 responding it was Extremely and Very Likely with better flight schedules.

Figure 27: Respondents Likelihood of Airport use if provided better options.



11.2 Effects of COVID-19 Pandemic on the Industry

The COVID-19 pandemic has significantly impacted the aviation industry due to the restrictions and lockdowns imposed by provincial and federal governments. In August of 2020, the Airports Council International (ACI) published an analysis of the economic impact of the COVID-19 pandemic on global airport business and global passenger traffic.

ACI Advisory Bulletin Section 2 Global Passenger Traffic

As indicated by the Airports Council International report (Airports Council International, 2020), the impact on aviation from the COVID-19 pandemic began in January 2020, where global passenger traffic grew by a mere +2.1%; this is 1.6 percentage points down from +3.7%, a month prior.

February saw a significant decline in passenger traffic volumes, hitting the double digits of 13.9% decline.

The COVID-19 pandemic progressed, and with the travel restrictions imposed and national lockdowns initiated, aviation was brought to a halt by the end of March. Furthermore, passenger traffic declined on a global scale by -56.7% in March year-over-year. Under the business-as-usual (BAU) paradigm (projected baseline), there was a decrease of -58.2% globally.

During the second quarter, there was a record decline in passenger traffic volumes, with April reaching -93.7% on a global scale compared to April of 2019. Civil aviation virtually ceased in Europe, with a decline in passenger traffic of -98.4% year-over-year.

Civil and commercial aviation activity rebounded slightly in May as opposed to previous months. Markets with a large domestic base started to gradually reopen their domestic routes, resulting in a May decline of -90.3% year-over-year.

This trend continued into June when more countries began reopening international flights, the decline in traffic rose to -84.3%. This resulted in 2020's second quarter having a -89.3% decline in passenger traffic volumes from the previous year and a -86.9% decline from the projected traffic.

This resulted in a passenger traffic loss of -2.6 billion for the first two quarters of 2020.

12.0 Airport Business Plan

The Loomex Group created a business plan to identify strategic priorities to help with the Airport's future development and considers operational and airport development-related studies, including financial documents. The business plan focuses on current Airport activities to develop strategic priorities for the future and addresses several critical areas, as shown below.

12.1 Airport Strategic Priorities

1. ➤ Financially Sustainable Airport System
2. ➤ Engaging with Scheduled Service Providers
3. ➤ Partnership(s) with Northern Communities
4. ➤ Non-Aeronautical Land Development
5. ➤ Hangar and Facility Development and Activity Growth
6. ➤ Airport Branding and Marketing
7. ➤ Transportation/Evacuation Hubs
8. ➤ Securing Potential Government Grants and Subsidies
9. ➤ Reviewing Fee Structure for Provincial Airport Use
10. ➤ Review Airport Operations including Staffing & Hours of Operation

12.2 Strategic Priority #1 Financially Sustainable Airport System

Airport Financial Analysis and Recommendations

An Airport's long-term success and its operations depend on the airport's financial responsibilities' successful execution. In recent years, the City has maintained a modest annual budget to support airport management, operations, and basic maintenance activities.

Table 13: Airport Expense Summary

| Expenditure by Category | FY 2017 Actual | FY 2018 Actual | FY 2019 Actual | FY 2020 Budget |
|--|----------------|----------------|----------------|----------------|
| Personnel & Benefit Costs | 532,949 | 555,820 | 589,645 | 410,604 |
| Contracted Services | 0 | 0 | 0 | 159,940 |
| Operating Supplies & Equipment | 379,112 | 319,002 | 173,248 | 342,874 |
| Total Expenditures | 912,061 | 874,822 | 762,893 | 913,328 |
| Revenue Category | FY 2017 Actual | FY 2018 Actual | FY 2019 Actual | FY 2020 Budget |
| Airport Revenue | 543,057 | 696,855 | 540,461 | 648,740 |
| Operating Fund Contribution by City | 369,004 | 178,027 | 222,431 | 264,588 |

*Note: Due to COVID-19 pandemic, revenues are down approximately 90% worldwide in the aviation and aerospace sectors.

Revenues vary year to year depending on the fire season.

Initiatives for cost reduction and revenue generation implemented or currently in consideration by Airport leadership have helped mitigate loss on the Airport caused by the pandemic.

Table 14: Initiatives for Cost Reduction and Revenue Generations

| Revenues | Expenditures |
|--|--|
| <ul style="list-style-type: none"> • Aircraft parking charges approximately 35% increase from improvements to the process. • Airport Land Tax Recovery Analysis to ensure accurate billing amounts. • Airport Office and Shop Space increase due to more leased space. • Airport public lots increased revenues by approximately 80% due to corporate billings for parking. • Airport Passenger Departure Fee process was improved to capture Chartered flight passenger revenue. | <ul style="list-style-type: none"> • Airport operational schedule change. • OLS survey original budget for one runway \$15,600, but both runways completed for the same price. • Removal of redundant phone lines • Discontinue use of SMS software licence. • Staffing efficiency. |

Table 15: Areas for Consideration for Financial Sustainability and Profitability

| Revenues | Expenditures |
|--|---|
| <ul style="list-style-type: none"> • Enhanced scheduled passenger service • Determine best non-aviation land use for generation of income • Public parking fees implementation of an electronic system (Impark, HotSpot App) • Development of vehicle parking area dedicated to helicopter designated area • Condo hangar builds for immediate ROI and infrastructure contracted work fee • Attracting aircraft/helicopter parts distributor • Attracting use for air cargo services • Establish a transportation and evacuation centre hub for communities in the north. • Airport Standards for Leased Areas • Landing fees for small private aircraft | <ul style="list-style-type: none"> • Hydro use reduction through upgraded technologies funded by grants where possible, such as LED light conversions for airside lighting • There is an identified link between financial sustainability and strategic priority number ten, Airport Operations (staffing and hours). Ongoing analysis of staffing and hours consistently occurring as the needs and circumstances demand |
| <ul style="list-style-type: none"> • Terminal space leasing potential • Sale of standard pilot supplies/airport promotional items | |

Financial Forecast Summary

Given the current economic predictions for aviation and air travel, it would be recommended to be conservative for revenue increases.

If some or all recommended changes from the strategic plan are implemented in the third quarter of 2021, the progress of financial recovery over the next three years is estimated as follows:

Table 16: Financial Forecast

| Year | Operating Expenses | Operating Revenue | Surplus / Deficit | Notes |
|------|--------------------|-------------------|-------------------|-----------------|
| 2017 | 912,061 | 543,057 | (369,004) | Actual |
| 2018 | 874,822 | 696,855 | (178,027) | Actual |
| 2019 | 762,893 | 540,461 | (222,431) | Actual |
| 2020 | 913,328 | 648,740 | (264,588) | Budget |
| 2021 | 885,020 | 599,400 | (285,620) | Proposed Budget |
| 2022 | 750,000 | 750,000 | 0 | |
| 2023 | 785,000 | 800,000 | 15,000 | |
| 2024 | 825,000 | 900,000 | 75,000 | |

12.3 Strategic Priority #2 Engaging with Scheduled Service Providers

The Airport should engage with scheduled air service providers in Northern Ontario and Manitoba to support air service development at the Airport. In addition to that, the City should conduct a market analysis/leakage study to analyze the region's air service market potential serviced from the Airport.

12.4 Strategic Priority #3 Partnership(s) with Northern Communities

The City should investigate cargo and passenger transportation partnership opportunities with remote northern Ontario Indigenous Communities. The Airport is located strategically between Winnipeg and Thunder Bay and offers direct access to highways, rail lines, big box stores, and sports and recreation centres ideally suited to provide goods and passenger service to remote and nearby communities.

12.5 Strategic Priority #4 Non-Aeronautical Land Development

Landside real estate is a crucial source of non-aeronautical revenue (NAR) and an essential part of the airport business model. The Airport should consider property not needed for aeronautical use to be used for compatible land use purposes, including light industrial or commercial sites that could directly or indirectly support the airport revenues in the long-term.

12.6 Strategic Priority #5 Hangar and Facility Development and Activity Growth

Hangars are a crucial component of airport activity, supporting both the recreational flyer and commercial businesses. Significant hangar development often results in spinoff aviation-related business interests (e.g., aircraft maintenance and overhaul companies).

Based on current and future demand, the City should investigate constructing rental hangars. In this scenario, the Airport provides the capital for construction and secures a return on investment through lease agreements over a longer-term. The Airport can attract potential customers who may not want or have the means to obtain financing for hangar construction. Pursuing the development of hangars and other "on-airport" aviation facilities and infrastructure will increase Airport revenues.

12.7 Strategic Priority #6 Airport Branding and Marketing

The City should commit to building a strong marketing brand and undertake promotional campaigns to highlight the value of utilizing the Airport to:

- 1 Increase commercial and business activities.
- 2 Strengthen the relationship and keep existing tenants
- 3 Promote hangar development and increase the number of based aircraft

The Airport should identify its branding needs and objectives and develop associated marketing and branding strategies to attract businesses and services.

Key Target Markets

The key target markets for the Airport include:

- Air Service Providers
- General Aviation
- Air Terminal and Special Events
- Advertising Opportunities
- Aeronautical and Non-Aeronautical Land Use Development

12.8 Strategic Priority #7 Transportation/Evacuation Hubs

As per Ontario's Mass Evacuation Plan (OMEP) for the far north, the Emergency Response Plan requires the appropriate resources, including transportation and accommodation. The Airport has a strong potential to become a Transportation Hub of Northwestern Ontario.

The OMEP Plan (Province of Ontario, 2008) identified the following:

Transportation hubs are places where passengers and cargo are exchanged between vehicles or modes of transportation and are temporary locations established at aerodromes providing air to air or air to ground connections. Transportation hubs may provide emergency social services and health services depending on the evacuees' needs, the resources of the community, and the length of time evacuees will be in the hub. (Annex 7)

Table 17: Considerations for Selecting a Transportation Hub

| Criteria | • Key Considerations |
|----------------------------------|--|
| Capacity of the Aerodrome | <ul style="list-style-type: none"> • The runway length and condition will limit the type and number of aircraft that can use the facility. • The capacity of the airfield to stage aircraft for the purposes of loading and off-loading. • Staging areas for ground transportation. • The impact of other operations at the aerodrome may also be a consideration. |
| Resources | <ul style="list-style-type: none"> • Adequate support personnel to operate the transportation hub, including people from the community, neighbouring communities, non-governmental organizations, and other partners. Transportation operations may have extended hours. • Adequate fuelling facilities as well as support from vendors for additional fuel as needed. • Provision of supplies for supporting the transportation hub. Supplies may include bottled water, food, sanitary supplies, etc. Supplies may also need to be made available to flight or ground transportation crews to provide for evacuees while they are in transit. |
| Hosting | <ul style="list-style-type: none"> • It is advisable to hold some shelter capacity at the transportation hubs in the event scheduled flights are delayed or cancelled. • The overall capacity of the community should be considered if the community is also being requested to host evacuees. |

| Criteria | • Key Considerations |
|--------------|--|
| Holding Area | <ul style="list-style-type: none"> • Be available to accommodate evacuees with appropriate heating/cooling, washroom facilities, etc. • Where there is no facility available on-site, a similar facility should be sourced near the aerodrome. Temporary facilities may include tents. • Quiet areas may be established for evacuees feeling stressed or experiencing medical issues. |

The Airport has acted as an essential transportation hub during evacuations resulting from flooding and forest fires in Northern Ontario. The City should seek further opportunities with provincial emergency management organizations to strengthen this partnership.

12.9 Strategic Priority #8 Securing Potential Government Grants and Subsidies

The Airport is eligible under the federal government’s Airport Capital Assistance Program (ACAP) to secure funding for airport safety-related projects, including projects to rehabilitate airside facilities, buy heavy equipment, and improve air terminals' safety. The Airports Capital Assistance Program (ACAP) (Transport Canada, 2020) has been funding improvement projects for regional airports since 1995. To date, the Government has invested more than \$785.9 million for 904 projects at 182 airports.

In December 2020, it was announced by Transport Canada that they would be increasing the annual funding contribution from \$38 million to \$138 million per year for the next two years. This would be a tremendous opportunity for the City to apply for funding for all their eligible projects.

The Airport should also explore funding options, such as the Northern Ontario Heritage Fund Corporation (NOHFC). Their mandate is to provide funding assistance for economic development initiatives specific to Northern Ontario to stabilize and broaden the region's growth, focused on the following existing and emerging economic sectors (Northern Ontario Heritage Fund Corporation, 2020):

- Advanced manufacturing
- Agriculture, aquaculture, and food processing
- Arts, culture, and creative industries
- Digital economy
- Forestry and value-added forestry-related products
- Health sciences
- Mineral sector and mining supply and services
- Renewable energy and services

- Tourism
- Transportation, aviation, and aerospace
- Water technologies and services

NOHFC's current funding programs focus on business opportunities, innovation, strategic economic infrastructure, and community capacity building.

In addition to the above funding programs, the Airport should explore other funding and subsidy opportunities with both provincial and federal governments.

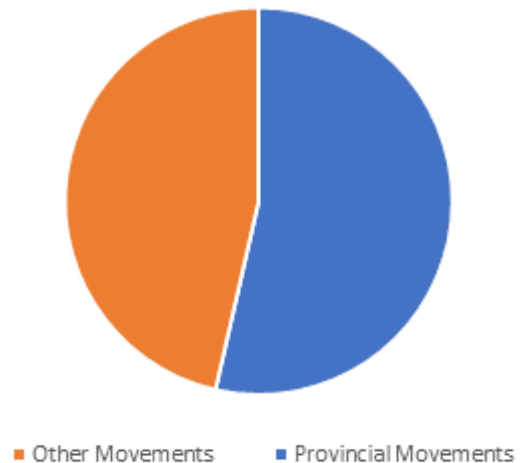
12.10 Strategic Priority #9 Reviewing Fee Structure for Provincial Airport Use

The City supports significant provincial operations by providing a base at the Airport for the MNRF Fire Management Centre, a command-and-control centre for Northwestern Ontario. There were 843 forest fires reported in Northwestern Ontario in 2018 and 300 in 2019, proving the Airport's significance to the entire region in fire management activities. The airport also supports critical flights related to the Ontario Justice system and medical evacuations.

In 2019, 53.6% of the Airport's total flight movements were directly related to provincial government operations.

The Airport should further investigate options of additional government funding to support operational costs.

Figure 28: Total Aircraft Movements 2019



12.11 Strategic Priority #10 Review Airport Operations including Staffing and Hours of Operation

It is recommended for the Airport to conduct a review of operations, including staffing and hours of operation, to ensure the Airport runs efficiently and effectively based on its needs.

As noted in priority number one, there is a link between financial sustainability and Airport operations. Ongoing analysis of staffing and hours consistently occurring as the needs and circumstances demand.

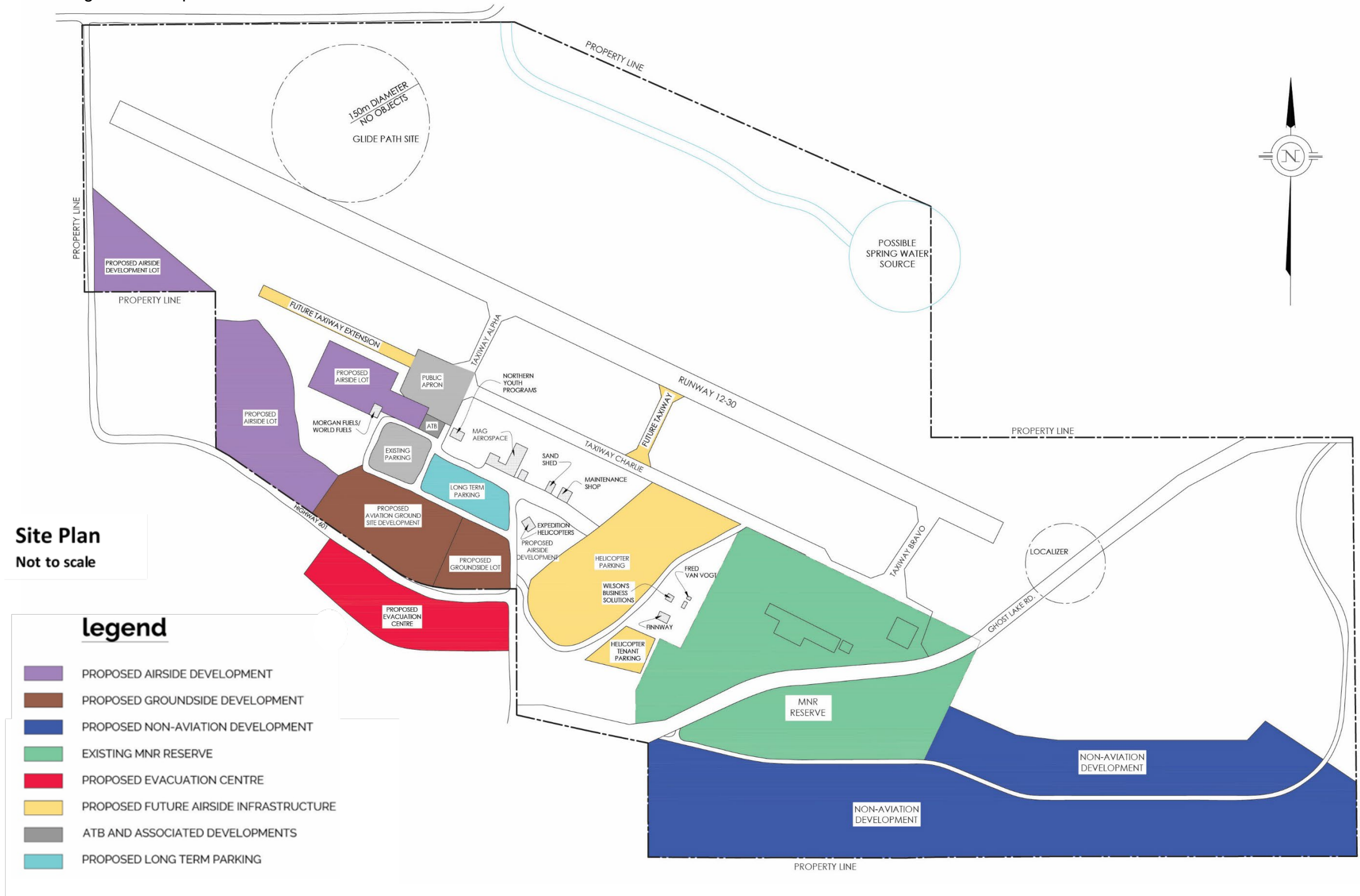
13.0 Proposed Site Plan

The Airport Site Plan (ASP) serves as a critical planning tool that depicts both existing facilities and planned development for an airport.

The ASP is a plan for an airport that shows:

- Boundaries and proposed additions to all areas owned or controlled by airport.
- The location and nature of existing and proposed airport facilities and structures.
- The location on the airport of existing and proposed non-aviation areas and improvements thereon.

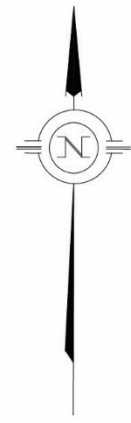
Figure 29: Proposed Site Plan



Site Plan
Not to scale

Legend

- PROPOSED AIRSIDE DEVELOPMENT
- PROPOSED GROUNDSIDE DEVELOPMENT
- PROPOSED NON-AVIATION DEVELOPMENT
- EXISTING MNR RESERVE
- PROPOSED EVACUATION CENTRE
- PROPOSED FUTURE AIRSIDE INFRASTRUCTURE
- ATB AND ASSOCIATED DEVELOPMENTS
- PROPOSED LONG TERM PARKING



ALL CONSTRUCTION METHODS AS PER PART 9 OF THE O.B.C.
 ALL TRADES TO HAVE MIN. FIVE YEARS EXPERIENCE IN THEIR RESPECTIVE DISCIPLINES.
 ANY DEVIATION FROM THESE PLANS DURING THE BUILDING PROCESS MUST BE REPORTED TO THIS OFFICE TO ENSURE COMPLIANCE WITH THE ONTARIO BUILDING CODE, LATEST EDITION. FAILURE TO DO SO ABSOLVES THIS FIRM FROM RESPONSIBILITY AND LIABILITY. DRAWINGS ARE NOT TO BE SCALED.
 DRAWINGS ARE NOT TO BE COPIED OR REPRODUCED WITHOUT PERMISSION OF MOLLY CONLIN DESIGN & DRAFTING.

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 30 VAN HORNE AVE.
 DRYDEN, ON

Notes / Revisions:

Project:
 SITE PLAN

Title:
 SITE PLAN

MOLLY CONLIN
design & drafting

FIRM BCIN#: 109402
 319 County Rd. 8
 Douro, ON K9L 2H0
 705-313-5510

SIGNATURE:

Designed By:
 M. CONLIN

Date:
 DECEMBER, 2020

Page:
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Appendix A

Community Survey



Appendix B

Strategic Priorities Key Performance Indicators (KPI)



Strategic Priorities

KPIs will be developed using the City’s SMART goals procedures that align with the 5-year City Strategic Plan

S: Short-Term (2021-2022) **M:** Medium-Term (2022-2023) **L:** Long-Term (2024-2025)

| Strategic Priorities | Term | Key Performance Indicators |
|--|----------|----------------------------|
| 1. Financially Sustainable Airport System* | M | |
| 2. Engaging with Scheduled Service Providers | S | |
| 3. Partnership with Northern Communities | S | |
| 4. Non-Aeronautical Land Development | M | |
| 5. Hangar and Facility Development and Activity Growth | M | |
| 6. Airport Branding and Marketing | S | |
| 7. Transportation/Evacuation Hubs | M | |
| 8. Securing Potential Government Grants and Subsidies | S | |
| 9. Reviewing Fee Structure for Provincial Airport Use | S | |
| 10. Review Airport Operations including Staffing & Hours of Operations | S | |

Note: *could be affected by COVID-19 Pandemic