Benchmarking the Creative Economy in Rural Ontario

MARTIN Prosperity Institute

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Martin Prosperity Institute
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EXHIBITS

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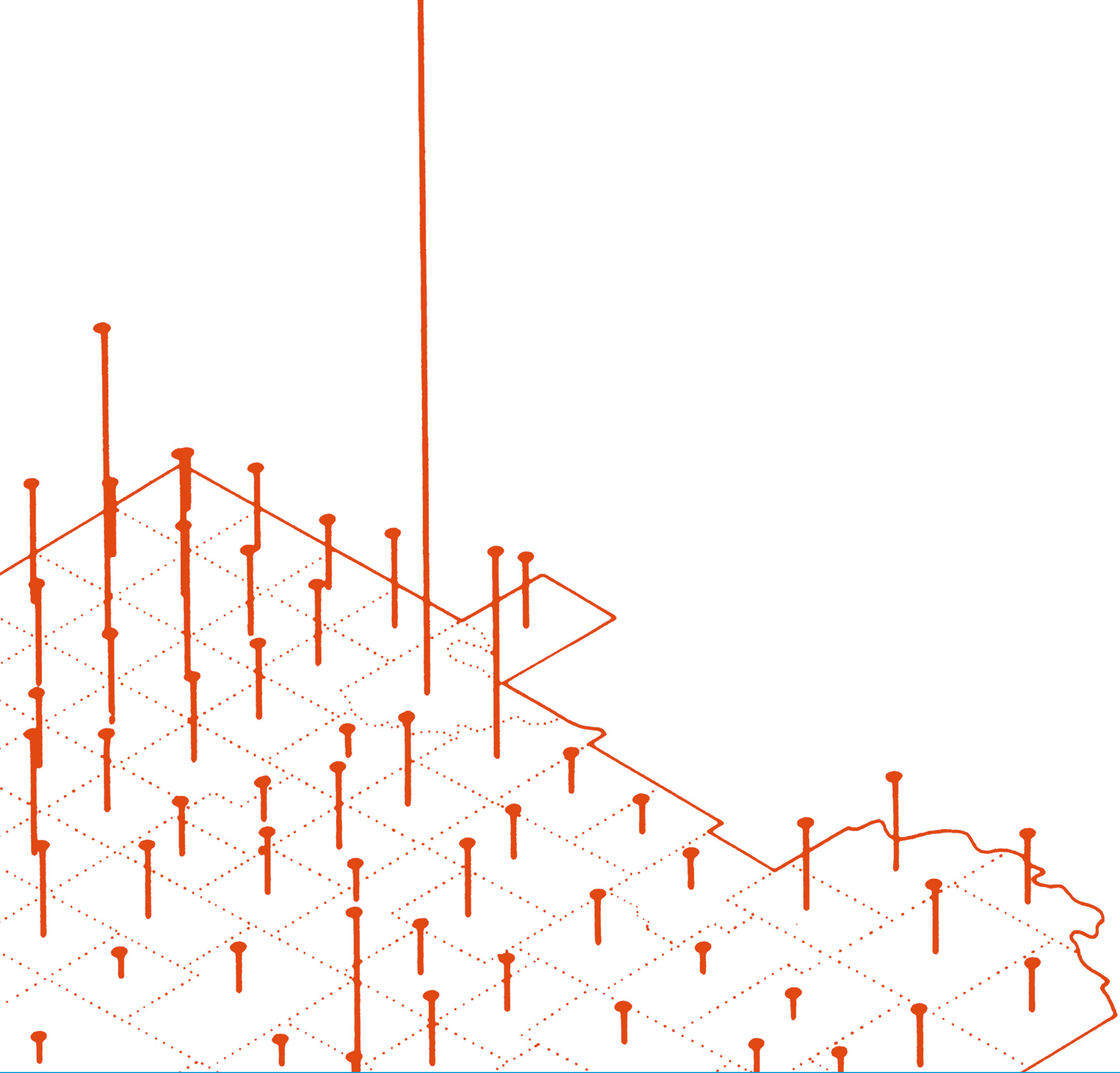
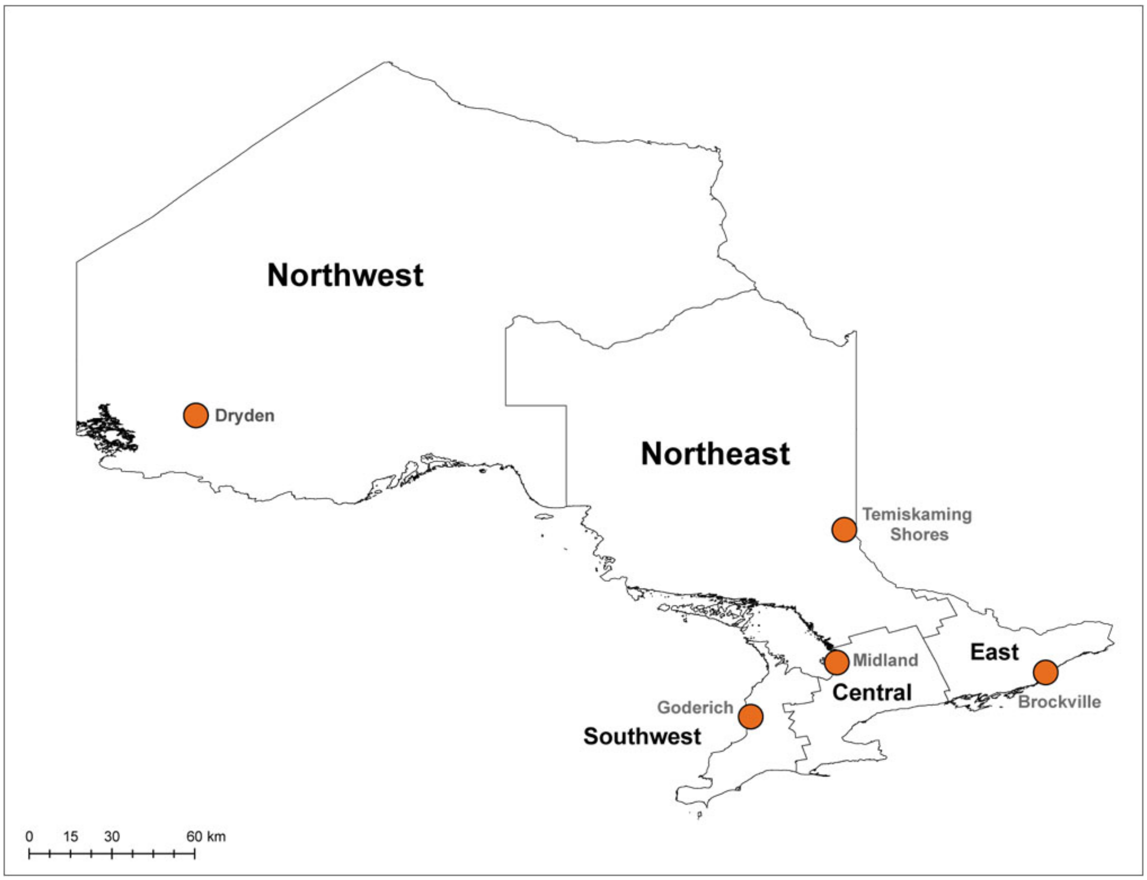


Section 1: Introduction

INTRODUCTION

Ontario

Exhibit 1.0



In the emerging economy of the 21st century, rural communities and peripheral regions across Ontario face significant challenges in encouraging continued economic growth and regional prosperity. With the ongoing reduction in the relative importance of manufacturing, and the restructuring of the agricultural industry, many rural communities have turned to tourism as a way to promote job creation and respond to declining social and economic conditions. The challenges rural communities face have only become further augmented by the ever expanding emphasis on knowledge-based industries and on larger metropolitan centres in the emerging service-driven economy. Indeed, communities and cities across Ontario are increasingly seeking new and innovative ways to bolster and strengthen their economies in the Creative Age. Although some communities have experienced success in using tourism to promote prosperity, they are seldom able to regain the same level of success, economic diversity and self-sustaining momentum they once experienced.

However, opportunities exist for rural communities to regain momentum and stimulate their regional economies by pursuing their own distinct strategies in the emerging Creative Economy. Previous research has indicated that rural communities possess many of the place-based qualities and characteristics that are shown to attract and retain members of the Creative Class. Yet, many communities are not aware that these opportunities exist within their region. Understanding the nature and potential of the Creative Economy in their jurisdiction is an important step forward for rural communities in recognizing alternative opportunities to promote prosperity.

The growing recognition of the success of creative-based economic development strategies in rural communities is the driving force behind the rationale, and need, for this report. As an increasing number of communities continue to seek out, adopt, and replicate creative-based economic development strategies; eager to enjoy the success experienced as a result of such strategies in other rural communities, further research is needed. At this moment, there exists a small body of research that explores and provides insight into the nature and implications of the Creative Economy in a rural setting. However, this research does not provide detailed accounts of the methods and analysis used in Creative Economy research. This has serious implications for how the Creative Economy is interpreted by rural communities seeking to both understand and incorporate it into their economic development strategies. While this project will not provide specific policy recommendations for rural communities, it will provide a better understanding of the way in which to interpret the Creative Economy in a rural setting, and how it can be approached from a practical perspective.

This report examines the Creative Economy in rural communities across Ontario, providing a vital tool for any community seeking to better understand how to develop and execute Creative Economy research, and begin to interpret results. Through this endeavour, the existing body of research on the Creative Economy in rural communities has been expanded, as we further seek to assist in the transfer of that knowledge in an accessible format to reach and inform communities interested in applying the concepts themselves.

METHODOLOGY

Introducing methods to implement and capitalize upon Creative Economy strategies in the rural context is a unique and challenging endeavor. Commonly used methods are altered when looking at rural regions, as these communities tend to have much more in common with other communities in their same region than with communities that are farther away. As a result, this report utilizes peer regions which have been chosen based on both population size and location within the economic region. While the community selected for closer examination will clearly benefit from this work, the peer communities chosen also benefit from being included in the research. The description of the methodology and analytical work done in the report will ensure that any community can reproduce the analysis and benchmarking activities presented. A detailed explanation of the methods used to calculate all the indices are available as an Appendix at the end of this report.

The types of data collected here depict the occupational structure of the workforce and provide measures that characterize a community's level of creative assets, such as level of Talent, Technology, and Tolerance. As a final measure, the report measures each community's score on the Creativity Index and compares it to its peers. The Creativity Index measures the overall extent to which a region has developed the conditions associated with a Creative Economy. The Creativity Index is derived from three individual measures of a Creative Economy.

Understanding creativity in the rural context: The use of the "Three T's"

The three measures are Talent, Technology and Tolerance, and are often referred to as the '3T's of economic development.' The 3T's of economic development is part of a theory that gives primacy to the attraction and retention of a specific type of capital—creative capital. Creative capital differs from human capital by identifying the Creative Class as key to economic growth and its focus on the underlying factors that determine their location decisions (Florida, 2002). In the Creative Economy, brawn and the ability to mass produce goods is subordinate to the innate human capability to generate new ideas, concepts, products and processes. The Creative Class is defined as people in occupations paid to think. Regions that attract and retain this group of workers are best positioned to succeed in the future. The global city hierarchy of the Creative Age will be determined not by access to natural resources, but by how and which are able to attract this class of worker. With the concentration of Talent and the multitude of perspectives that comes with people being able to carve out their own space in a new community (Tolerance), come new technologies and innovations that support continued growth (Technology). Each of the 3T's plays an important role in the ability of regions to attract the Creative Class. As a result regions should not choose to focus on any one 'T'; each is necessary but not sufficient for economic growth. In the Creative Age, regions will continue to be judged by their GDP per capita and other traditional measures, but it will be their overall creative output that determines their sustained success.

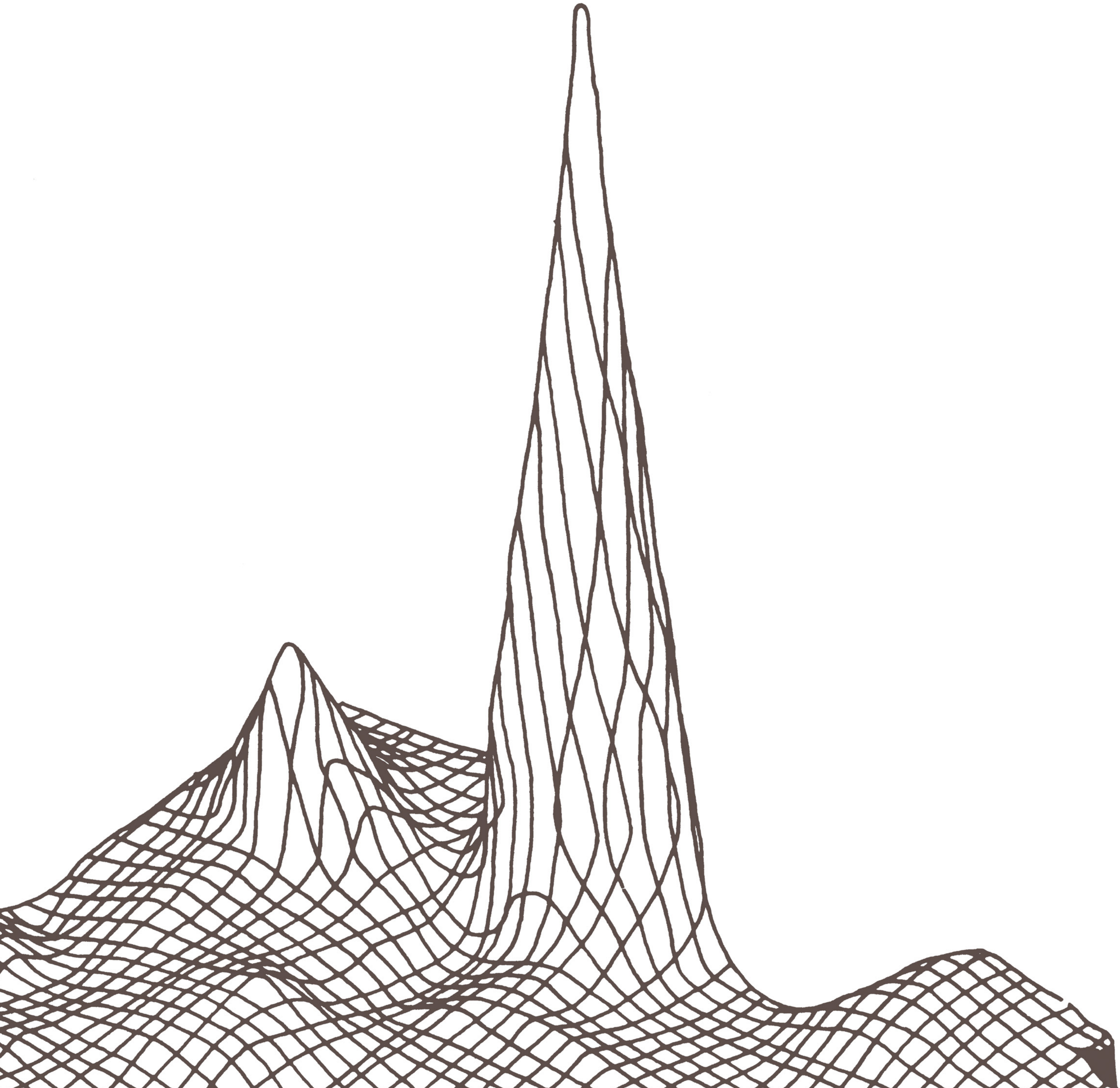
The first 'T' is Talent. The level of Talent within a region is measured according to the size of a region's creative workforce. The indicators that we use for "Talent" combine an examination of the Creative Class with other, more traditional measures of human capital. Using both an occupational measure and educational measures better captures the creative capital of a region but due to the high correlation we chose to only use the Creative Class to determine the Overall Talent Ranking. Human capital became a major theme in economics with the work of Jacob Mincer (1958), Gary Becker (1964), and most recently Ed Glaeser (2001). Their work has demonstrated the importance of investing in personal productivity as a way to generate growth for firms and regions. A talented and creative workforce is an important component in driving the creative potential of a region. The presence of a creative workforce is captured by the existence of Creative Class workers within a region. The Talent Index measures the percentage of a region's workforce that is employed in the Creative Class. The Creative Class is one of four unique occupational groupings defined by Richard Florida (2002). It includes workers employed in occupations such as science, engineering, architecture, design, education, arts, music and entertainment. The primary purpose of Creative Class workers is the generation of new ideas and creative content, which drive growth. The three remaining occupational groupings include the service class, working class and farming, fishing, and forestry class. An alternative measure of Talent that is sometimes used is human capital. When human capital is used to measure Talent it calculates the percentage of a region's population over the age of 25 that holds a Bachelor's degree or higher. However, this method of measuring Talent is not used to calculate the Creativity Index. Instead, the human capital measure of Talent is often used to provide additional information regarding the educational level of a region's population at large. This information helps to further contextualize the nature of a region's population as it relates to Talent.

The second 'T' is Technology. Technology is a critical component of any region seeking to drive economic growth and is an important component of a Creative Economy. Robert Solow, Paul Romer, and Robert Lucas, among others, have shown in different ways that technology is the driving force behind economic growth (e.g. Solow, 1956; Romer, 1990). Regions cannot access the global economy—let alone compete in it—without the technologies that connect, and provide high speed information processing. Rather, the dichotomy that matters between highly competitive regions is that of leader and follower. First movers that introduce innovations and that have well developed high-tech industrial complexes are able to reap significant benefits in the form of sustainable growth and the production of new wealth. The Technology Index is used to measure the presence of "high" technology within a region and is a combination of two separate indicators. The first indicator is the Tech Pole Index, which measures the size of a region's high-tech industry, while the second indicator measures the level of innovation that occurs within a region.

The final 'T' is Tolerance. The level of tolerance and diversity within a region is an important factor in promoting a Creative Economy. Tolerance is often overlooked in the study of economic development. As the 3rd 'T', Tolerance is necessary for regions to act as magnets of creative capital. Regions that demonstrate greater levels of tolerance tend to be open to diverse groups of people and ideas. These regions in turn provide supportive conditions for new and creative ideas to emerge. The more tolerant a region is, the more supportive it is of the new and creative ideas which drive economic growth. The collection of Tolerance indicators is not meant to suggest that regions with high levels of gay and lesbians, bohemians, or immigrants cause economic growth. Rather these indicators go deeper to reflecting cultural elements that are difficult to capture empirically. Regions that are open to different types of people have a more open-minded culture, which is conducive to idea exchange and the creativity that is vital to the process of innovation. When regions are open to new ideas and tolerant of different views it acts as a signal to others that the creative ecosystem of the region is a place where people can be successful. The ability to tap into the rich diversity of a region is a great competitive advantage that all regions should aspire towards. The Tolerance Index is derived from three indices used to measure a region's level of openness and diversity, which include the Visible Minority Index, and the Immigrant Index. The Visible Minority Index measures the amount of racial diversity within a region by calculating the percentage of a population that is non-white.

THE REPORT

This report is more of an information package and tool-kit, designed to be accessible to civic and community leaders in rural regions. This report is divided into five sections; with each one examining one community, compared to nine benchmarking communities, for each of the five major economic regions in Ontario. This technique helps to reflect the fact that Ontario is composed of five very distinct regions, each presenting unique opportunities and challenges. Moreover, this structure allows communities not only to gauge their own performance in the Creative Economy, identifying strengths, weaknesses, and opportunities, but to also better understand how their community fits within the larger context of the region in which they exist. As a result, this report stands to benefit all rural communities in Ontario; providing a document that rural communities can use to gain insight into alternative opportunities for growth and develop strategic responses to the changing economic and social circumstances they face.



Section 2: Summary and Conclusions

Exhibit 2.2 shows the range of scores on the Creativity Index for the five regions of Ontario and the approximate score for the focus and benchmark regions. It is worth noting that the central and east regions on average have higher scores on the Creativity Index than the northeast, northwest and southwest regions. southwest Ontario, which is closely aligned with Detroit, is especially challenged.

Clearly, the different regions of Ontario while obviously having some things in common also are facing their own challenges. Below are summarized the findings for each of the Focus Communities from across the five regions. While drawing some general conclusions may be possible, it really would not be all that helpful. To understand the province and the challenges that it faces, look to the Martin Prosperity Institute's *Ontario in the Creative Age*.

The key to success in today's Creative Economy is for each region to understand its own strengths and weaknesses. Commiserating by looking at the challenges other regions are facing may be cathartic, and looking with envy at other successful regions may be a palliative, but neither will help the region succeed. Increasing regional prosperity for any region requires a clear picture of the current situation and an understanding of who is leaving the region, who is staying, and who is moving in. By understanding and leveraging current strengths, a region can improve its chance of success. It is only by understanding its unique challenges and opportunities that any region can advance.

EAST

Brockville strengths:

- High Creative Class share, highest score on the Creativity Index out of eastern benchmarking regions
- St. Lawrence College (The Brockville campus of St. Lawrence College offers diploma programs in Musical Theatre Performance, and Visual & Creative Arts)
- Well connected on transportation routes
- Highest of peers on Tolerance indicators
- High Technology scores
- Large per capita number of healthcare professionals

Brockville weaknesses:

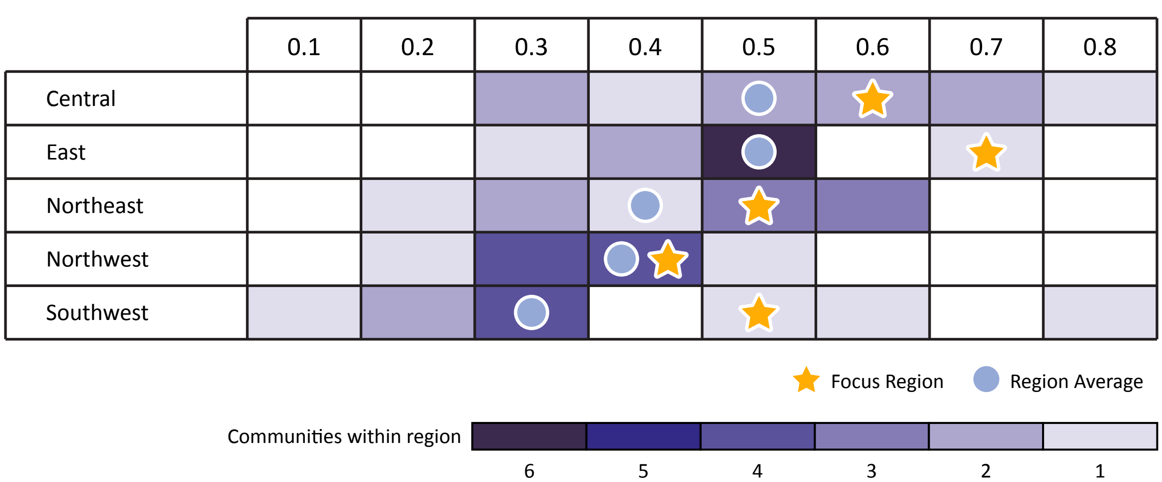
- High unemployment/low employment
- Middle of the pack on education/income
- Above average crime rates
- Middle of the pack on Talent ranking (10% below the Ontario average)

Recommendations

- Population size: Brockville has an opportunity to leverage its distinctive population size within eastern Ontario, which allows it to offer much more than many other small towns in the region; while still maintaining a 'small town feeling' that many find desirable.
- Low Average Incomes: Brockville needs to both monitor and investigate the causes of low average incomes in this region, and develop strategies to improve average earnings across the region.
- High Unemployment Rates: This is an obvious and immediate concern for Brockville, and requires more investigation and attention.

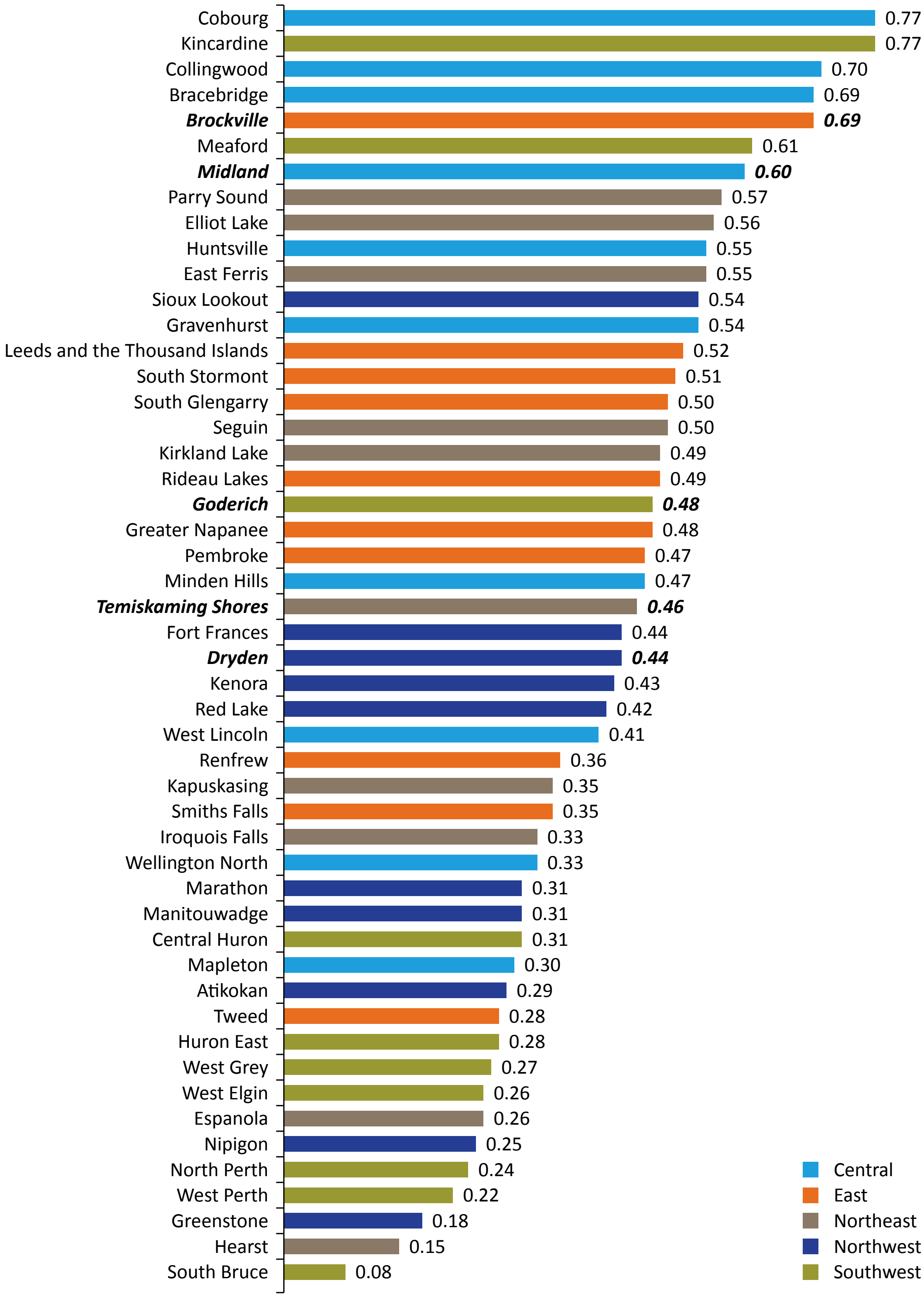
Creativity Index scores by Ontario region

Exhibit 2.1



Creativity Index

Exhibit 2.2



- Creative Class Share: Brockville's high Creative Class share is reflective of its unique geographic and population position, and should be leveraged as much as possible.
- 'Meds and Eds': While Brockville has an existing strength in 'Meds and Eds' occupations, it is important to focus on diversifying these sectors, in favour of those in sectors such as arts and culture, recreation, and financial support and management occupations; all of which are below the provincial average, and should be enhanced.
- Rural Hub: There is also an opportunity for Brockville to emerge as the rural financial—and managerial—hub for eastern Ontario,
- Service Class Jobs: Brockville, and the eastern region, are too dependent on low-paying service class jobs. There is a need to find ways to transition some of these workers to better, more stable, and higher paying jobs, through focusing on skills development and education.
- Manufacturing Jobs, and the Working Class: Brockville is not as dependent on manufacturing and working class jobs as its peer regions, or rural Ontario. This is an advantage that should not be lost. Brockville is already transitioning to becoming a regional hub, and should focus on these developments rather than 'smokestack chasing' strategies.
- Diversity: Brockville should also focus on the opportunity presented by much higher scores on diversity indicators, relative to other rural areas. Moreover, Brockville should focus on building immigrant attraction strategies aimed at immigrants in the nearby regions.
- Education: While Brockville does well on total post-secondary education levels, they score lower levels of those with university degrees. As it is apparent the population sees the value of education already, this is a factor that needs to be enhanced through greater availability to a Bachelor's education.
- High-Tech Firms: Brockville also has the opportunity to leverage their high-tech strength, and high education levels in seeking to attract new firms to the region.
- Recreation Opportunities: Brockville should also use the recreation opportunities of Leed,s and the Thousand Islands to the regions advantage. In particular, Brockville has the infrastructure to support much greater levels of tourist activities, which should be encouraged and promoted.

CENTRAL

Midland strengths:

- Midland Cultural Centre opening in spring 2012
- Share of the Creative Class employed in technical occupations in art, culture, recreation and sport is much higher than the Ontario average (not true of many of the rural places)

Midland weaknesses:

- Low population growth
- Low dwelling value compared to peers/high share of pop spending greater than thirty percent of income on housing (other values probably higher because of cottage country though)
- High unemployment rate
- Low on percentage of population with higher education

Observations, key findings & opportunities

- Tourism: Continue to rely on the base that exists in this region, but it should not be merely relied on. Cottage industry should be supported, while new sports and recreation facilities should also be developed, and enhanced.
- Education: Midland should take advantage of growth in post-secondary education levels, and use this as a leverage for future economic growth.
- Housing Affordability: While other benchmarking communities in the region are largely cottage based, Midland has the opportunity to benefit from population growth due to lower than average housing costs. However, Midland does have a higher share of the population spending 30% or more on housing, suggesting lower income levels in the region. This could also be explained by residents who are earning incomes elsewhere, but desire Midland's quality of life
- Occupations: Midland has an opportunity to growth professional occupations in both arts and culture, and natural and applied sciences, while technical (support) occupations are already much stronger than the Ontario average.
- 'Meds and Eds': There is also a need in Midland to shift away from the 'Meds and Eds' occupations—such as doctors and teachers—whereby Midland should aim to maintain current levels, but without a focus on growing these occupations specifically.

- Service Employment: Midland should carefully monitor the percentage of the labour force that is employed in service class occupations, so this figure does not balloon. The result of this form of development would be an increased share of the population who are working at lower wage levels.
- Manufacturing: Recognising the strength of this region, along with many rural areas, that comes from manufacturing, Midland should work to further leverage the existing industry base it currently has. It is important to both identify and support manufacturing firms of all sizes from across the region, as a high priority.
- Immigrant Populations: Midland should pursue targeted immigrant attraction strategies, aimed at individuals who are already situated near the region.
- Aboriginal Population: Carefully leverage the Aboriginal population, as a way to signal regional strength and diversity.

NORTHEAST

Temiskaming Shores strengths:

- Experienced some population growth while almost all of its peer regions experienced decline
- Relatively low unemployment rate
- Relatively high on Talent Index
- High number of arts establishments/rec facilities/ restaurants per 10,000

Temiskaming Shores weaknesses:

- Large population with no high school diploma
- Low high-tech shares

Observations, key findings & opportunities

- Challenges of Restructuring: In the context of economic challenges, Temiskaming Shores has done relatively well, which provides an encouraging sign moving forward.
- Occupational Structure: The region has a strong showing in 'Meds and Eds' occupations, but these are also occupations that have been shown to be less beneficial to rural areas. A concentrated effort on attracting other creative workers—particular those in arts, and culture, and the natural, and applied sciences—is greatly needed.
- Farming, Fishing, and Forestry: Temiskaming Shores has an opportunity to develop its small, but relatively strong performing, farming, fishing, and forestry occupations which can be increasingly leveraged (as is the case currently with the Guelph research station) to attract more natural sciences professionals, researchers, and companies.
- Diversity: Those immigrants that have chosen this region can help to attract the further attraction of immigrants to this region.
- Location: The location and relationship with Quebec in this region provides opportunities that few other small towns in Ontario have access to.
- Education: Despite a relatively strong performance on university graduates, this region has a higher share of its population without a post-secondary degree or certification. While education at all levels can always be improved, this deserves special attention.
- Technology: Despite the lower high-tech share and LQ shares, the Tech Pole Index shows that the region does have an advantage in high-tech, when concentration is combined with share of provincial high-tech in the region.
- Amenities: The region's strong amenity base, coupled with a low crime rate, can be used to help attract both tourists and potential new residents to the region.

NORTHWEST

Findings

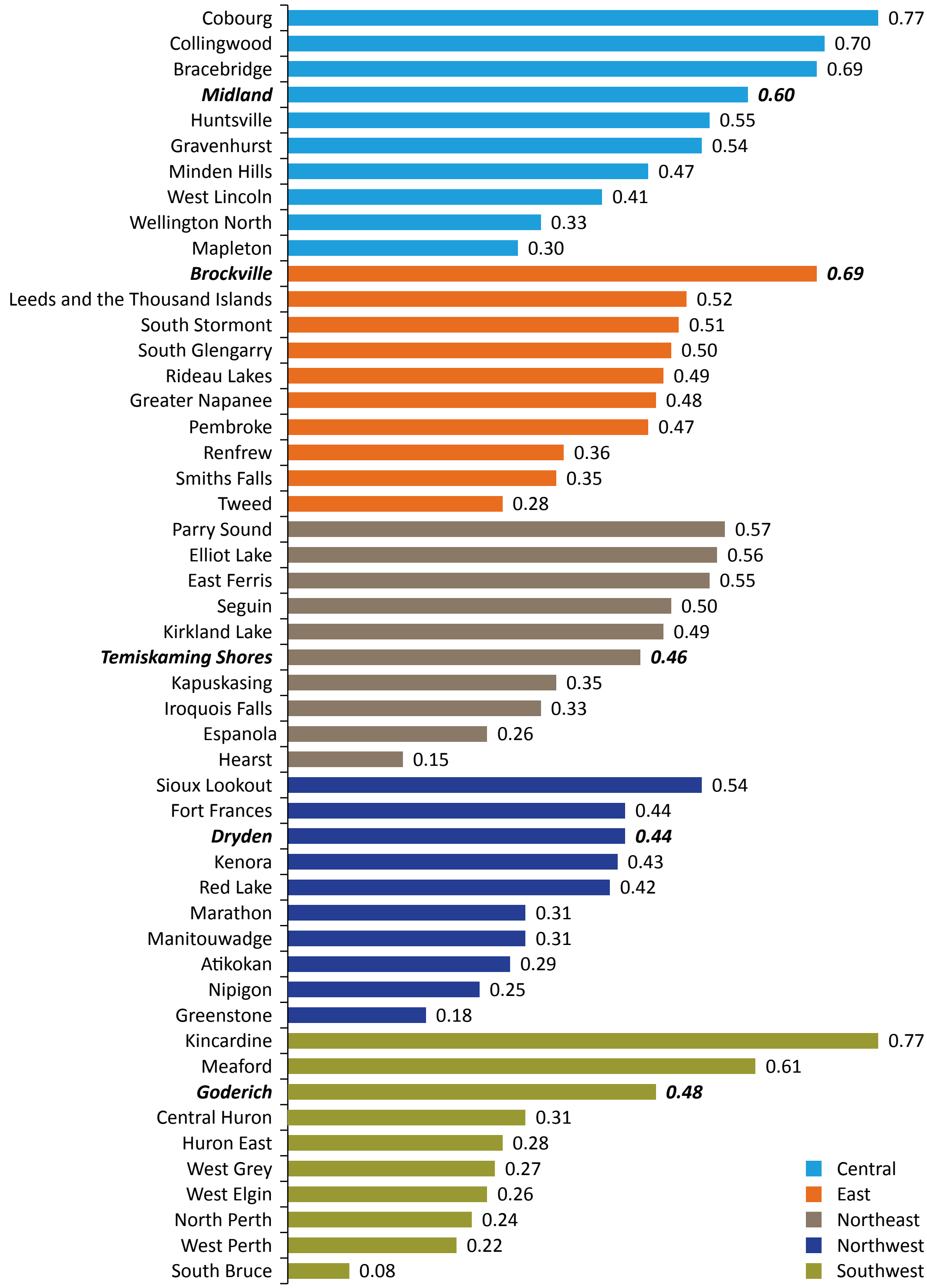
Among its benchmarking peers, Dryden often performs middle of the pack. It is more populous and dense than much of the benchmarks, yet unremarkable in many of the measures. Dryden is experiencing neither population growth, nor loss. Its income measures and proxies for quality of life and civic engagement are also unremarkable. Dryden performs well among benchmarks on the Creativity Index and has a relatively higher share of the Creative Class than most benchmarks.

Dryden strengths:

- Did not experience population decline between 2001 and 2006
- Relatively low unemployment rate
- High Creative Class share made up of technical occupations related to natural and applied sciences
- Relatively high Adjusted Creative Class share

Creativity Index by Ontario region

Exhibit 2.3



- Recent development of a cultural plan: http://www.dryden.ca/UserFiles/Servers/Server_6/File/Municipal%20Cultural%20Plan%20Final.pdf
- Interesting event venue: http://www.thecentreonline.ca/facility-info/

Dryden weaknesses:

- Zero population growth
- Relatively low on all territorial amenities
- While it does score high on many measures compared to peers it is usually still much lower than similarly sized regions in southern Ontario

Observations, key findings & opportunities

- Creative Class Breakdown: While Dryden has a clear strength in 'Meds and Eds' occupations, this cannot be relied on as an area of major attention; rather there is a need to diversify the range of creative and knowledge based occupations in this region.
- Technology: Dryden has an opportunity to leverage their tremendous strength in technical (support) workers in natural, and applied sciences, to get more professionals into these fields.
- Healthcare Workers: Dryden had a very strong performance in healthcare professions, which not only needs to be more clearly understood, but also potential opportunities around healthcare research and entrepreneurship should also be investigated.
- Service Class: Similar to Goderich, Dyden has a high service class share with middle incomes, providing an opportunity to build on the these higher paying service class jobs.
- Regional Hub: The workforce results presented here suggest Dryden is more of a regional hub for extraction based companies; providing home office (or regional office) financial, managerial and other support services. This includes being an ideal location for providing training, which is an opportunity that can be expanded upon. These findings make it apparent that Dryden functions as a "Toronto of the North" when it comes to extraction support, services, and education. As a result, Dryden has a clear opportunity to become the convenient location for managing and overseeing all the work being done at the 'ring of fire' and throughout northern Ontario.
- Education: Dryden needs to improve location education opportunities—especially post-secondary—to facilitate this transition to an extraction regional hub.
- Diversity: Dryden has an opportunity to leverage existing diversity and immigrant measures in this region, to attract more to the region.

SOUTHWEST

Findings

Goderich as a community has a fascinating position among the benchmarking peers studied. Goderich is considerably more densely populated than the other communities, with a large share of the workforce employed in the service class, perhaps to fill the demands of its abundant restaurants and bars. However, Goderich performs well among peers in the Creative Economy as well, largely owing to its teachers, professors, judges, lawyers, and social workers. Its population is relatively more highly educated than many of its peers, and it scores better than most benchmarks in the Creativity Index. However, Goderich is also an aging community, with a higher median age of population than the provincial median. Goderich is experiencing mild population loss, and has both low employment rates and high unemployment rates. Goderich also experiences higher crime rates than the provincial average and the benchmark communities.

Goderich strengths:

- Much higher population density than peers
- High service class share/lots of restaurants/bars
- High share of population with post-secondary education

Goderich weaknesses:

- Experienced population decline between 2001 and 2006
- Low employment rate/high unemployment rate
- Tornado recovery cost

Observations, key findings & opportunities

- Demographics: Goderich's older population creates an opportunity in the region for specialized healthcare services in the region; making it a regional leader in these services.
- Occupational Composition: Goderich has a notable strength in medical, education and social service occupations, but these cannot merely be relied on. There is a need in Goderich to build upon creative, knowledge and skill driven jobs, as

Goderich is currently below the provincial average in these jobs.

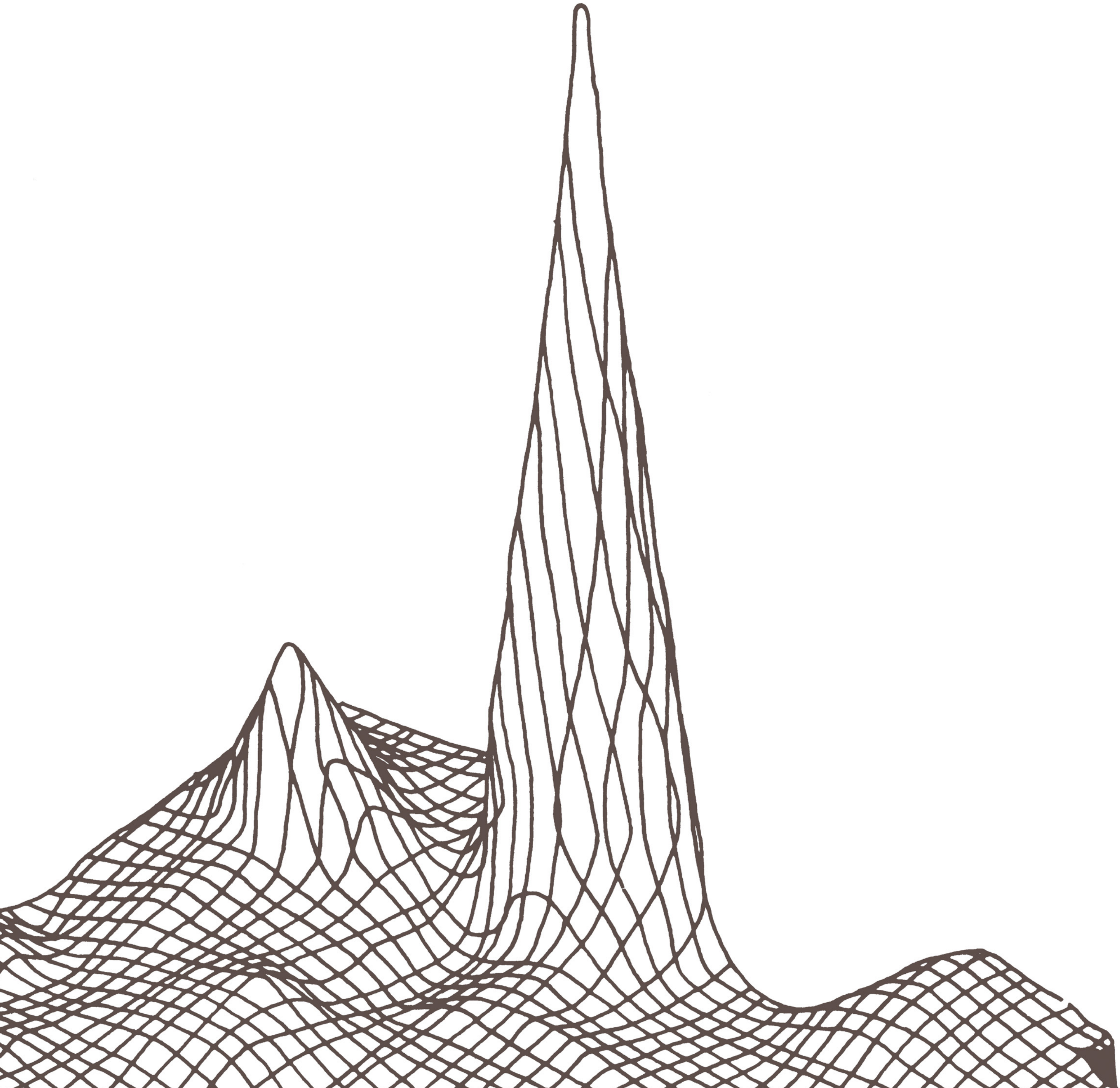
- Service Class: Goderich has a both a high level of service class employment, and a reasonable ranking on income indicators, suggesting the region is home to higher wage service class jobs. This should be investigated more in depth, and those jobs should be expanded if possible.
- Working Class: The high unemployment and low working class share in this region shows that Goderich has started the painful process of transitioning away from a dependence on manufacturing work. In this context, Goderich should not exacerbate the situation by chasing new manufacturing establishments without long term commitments, and a high demand for highly skilled workers.
- Diversity: Goderich should leverage its existing immigrant populations to attract more immigrants.
- Education: Efforts should continue to be made to enhance high school graduation rates and increase access to, and completion, of post-secondary education at all levels
- Technology: Goderich has a strong showing on technology levels relative to its benchmarks. It can use that and its relative proximity to Kincardine (and the Bruce Nuclear Station) to attract more high-tech firms.

How to Use the Report if You're Not One of These Regions

Benchmarking the Creative Economy in Rural Ontario is designed to be accessible to civic and community leaders in rural regions. This report (primarily the Appendix) outlines the methodological procedures used to analyze the Creative Economy in a rural context. The final report is divided into five sections, examining one community from each major economic region in Ontario: Midland (central), Goderich (southwest), Brockville (east), Temiskaming Shores (northeast), and Dryden (northwest). This reflects the fact that Ontario is composed of five very distinct regions, each presenting unique opportunities and challenges. This structure allows communities not only to gauge their own performance in the Creative Economy, identifying strengths, weaknesses and opportunities, but also to better understand how their community fits within the larger context of the region in which they exist. Any community within one of these regions should be comparing itself to others in their same region. As a result, the report can benefit all rural communities in Ontario, providing a document that rural communities can use to gain insight into alternative opportunities for growth and to develop strategic responses to the changing economic and social circumstances they face.

In order to provide valuable insights that will help inform community leaders seeking to establish strategic plans for the future, this report includes benchmarks to highlight the strengths and weaknesses within rural communities and their peer regions. Each community is compared to 10 peers within the region. Peer regions are chosen based on both population size and location within the economic region. As a result, while the community selected for closer examination will hopefully benefit from this work, the selected peer communities can also benefit from this research by simply switching the focus from the current region to their region.

Data collected by Statistics Canada was used in executing the benchmarking exercise. All data was analyzed at the Census Subdivision (CSD) level, providing detailed results in each community. Data was also summarized across the region, for metropolitan areas in the region, for all of rural Ontario, and for the entire province. The types of data reported here depict the occupational structure of the workforce and economy and provide measures that characterize a community's level of Creative Assets, including its level of Talent, Technology and Tolerance. Any region not included in this report can obtain information about their region from Statistics Canada at the CSD level and compare their results with the focus and benchmarking regions reported here.

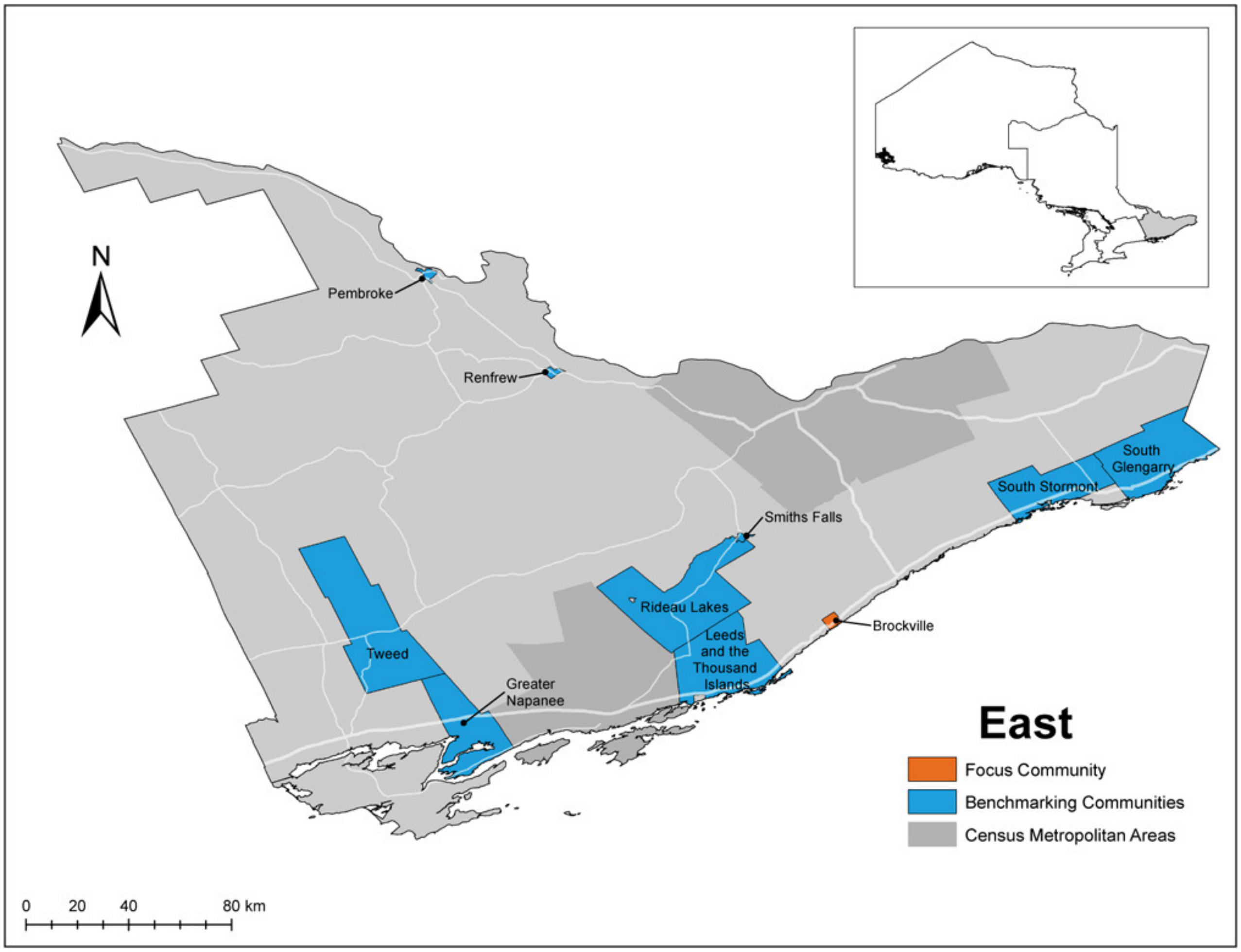


Section 3: East Region

INTRODUCTION

East region

Exhibit 3.0



The east region of Ontario has a population of 1,723,135 (2010). Included in this region are the metropolitan areas of Ottawa and Kingston which make up 59.9% of its total population (2006). Bordering Quebec, the metros in this region have the highest regional Creative Class percentage of the five Ontario regions under examination, while Brockville has the largest Creative Class share with 25.3%. It also had an unemployment rate of 7.2% in 2011.

The city of Brockville was selected as the Focus Community for this region. With a population of 21,957 (2006), Brockville is located midway between Toronto and Montreal directly off of Highway 401, in addition to being well served by Via's passenger rail service.

Brockville is also located adjacent to the Thousand Islands and the St. Lawrence River, and is well known a tourist and deep sea diving destination. Moreover, according to the city of Brockville, the key industries in this city are pharmaceuticals, food processing and logistics. There is also an extensive list of major employers in Brockville, including: Proctor & Gamble, Shorewood Packaging, 3M Canada, Burnbrae Farms, Trillium Health Care, Abbott Laboratories, Brockville Mental Health Centre, Brockville General Hospital, Black & Decker, Canarm, Shell, Invista and the Upper Canada District School Board. In addition, St. Lawrence College provides postsecondary education in Brockville.

The city of Brockville is compared to the following nine benchmarking communities in the east region: Greater Napanee, Pembroke, South Glengarry, South Stormont, Rideau Lakes, Leeds and the Thousand Islands, Smiths Falls, Renfrew and Tweed. These benchmarking communities are included to give an idea of how Brockville is performing compared to its regional rural Ontario peers. Data for regional metros (Kingston & Ottawa) is also included for most indicators as well as averages for all of Ontario, metropolitan Ontario, and rural Ontario.

SUMMARY

Brockville strengths:

- High Creative Class share, highest score on the Creativity Index out of eastern benchmarking regions
- St. Lawrence College (The Brockville campus of St. Lawrence College offers diploma programs in Musical Theatre Performance and Visual & Creative Arts)
- Well connected on transportation routes
- Highest of peers on Tolerance indicators
- High Technology scores
- Large per capita number of healthcare professionals

Brockville weaknesses:

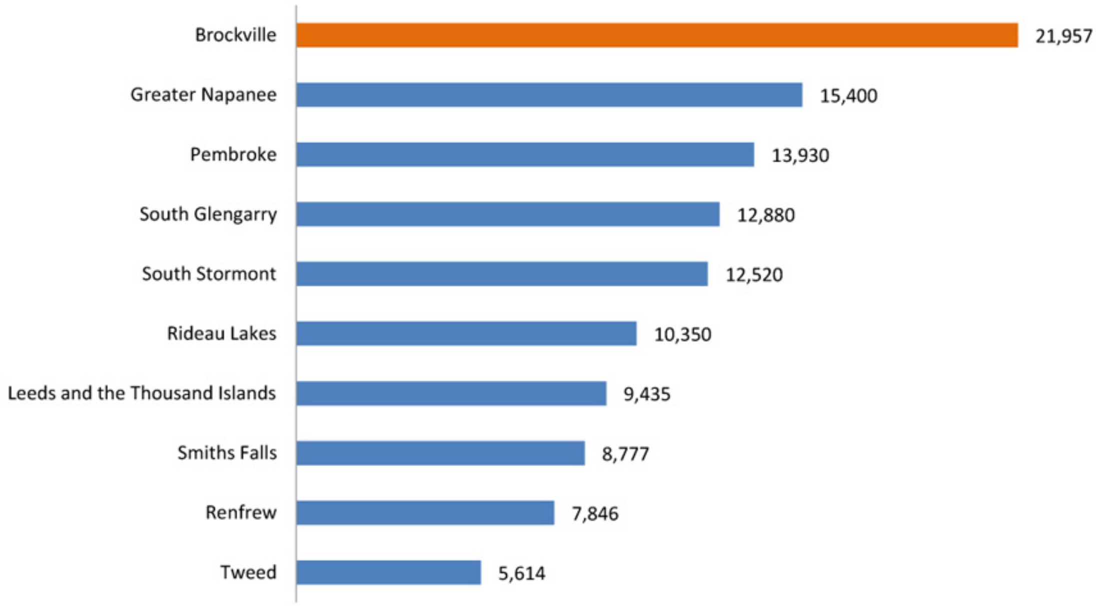
- High unemployment/low employment
- Middle of the pack on education/income
- Above average crime rates
- Middle of the pack on Talent ranking (10% below the Ontario average)

OBSERVATIONS, KEY FINDINGS & OPPORTUNITIES

- Population Size: Brockville has an opportunity to leverage its distinctive population size within eastern Ontario, which allows it to offer much more than many other small towns in the region; while still maintaining a 'small town feeling' that many find desirable.
- Low Average Incomes: Brockville needs to both monitor and investigate the causes of low average incomes in this region, and develop strategies to improve average earnings across the region.
- High Unemployment Rates: This is an obvious and immediate concern for Brockville, and requires more investigation and attention.
- Creative Class Share: Brockville's high Creative Class share is reflective of its unique geographic and population position, and should be leveraged as much as possible.
- 'Meds and Eds': While Brockville has an existing strength in 'Meds and Eds' occupations, it is important to focus on diversifying these sectors, in favour of those in sectors such as arts and culture, recreation, and financial support and management occupations; all of which are below the provincial average, and should be enhanced.
- Rural Hub: There is also an opportunity for Brockville to emerge as the rural financial—and managerial—hub for eastern Ontario.
- Service Class Jobs: Brockville, and the eastern region, are too dependent on low-paying service class jobs. There is a need to find ways to transition some of these workers to better, more stable and higher paying jobs, through focusing on skills development and education.
- Manufacturing Jobs and the Working Class: Brockville is not as dependent on manufacturing and working class jobs as its peer regions, or rural Ontario. This is an advantage that should not be lost. Brockville is already transitioning to becoming a regional hub, and should focus on these developments rather than 'smokestack chasing' strategies.
- Diversity: Brockville should also focus on the opportunity presented by much higher scores on diversity indicators, relative to other rural areas. Moreover, Brockville should focus on building immigrant attraction strategies aimed at immigrants in the nearby regions.
- Education: While Brockville does well on total post-secondary education levels, they score lower levels of those with university degrees. As it is apparent the population sees the value of education already, this is a factor that needs to be enhanced through greater availability to a University education.
- High-Tech Firms: Brockville also has the opportunity to leverage their high-tech strength and high education levels in seeking to attract new firms to the region.
- Recreation Opportunities: Brockville should also use the recreation opportunities of Leeds and the Thousand Islands to the regions advantage. In particular, Brockville has the infrastructure to support much greater levels of tourist activities, which should be encouraged and promoted.

Population (2006)

Exhibit 3.1

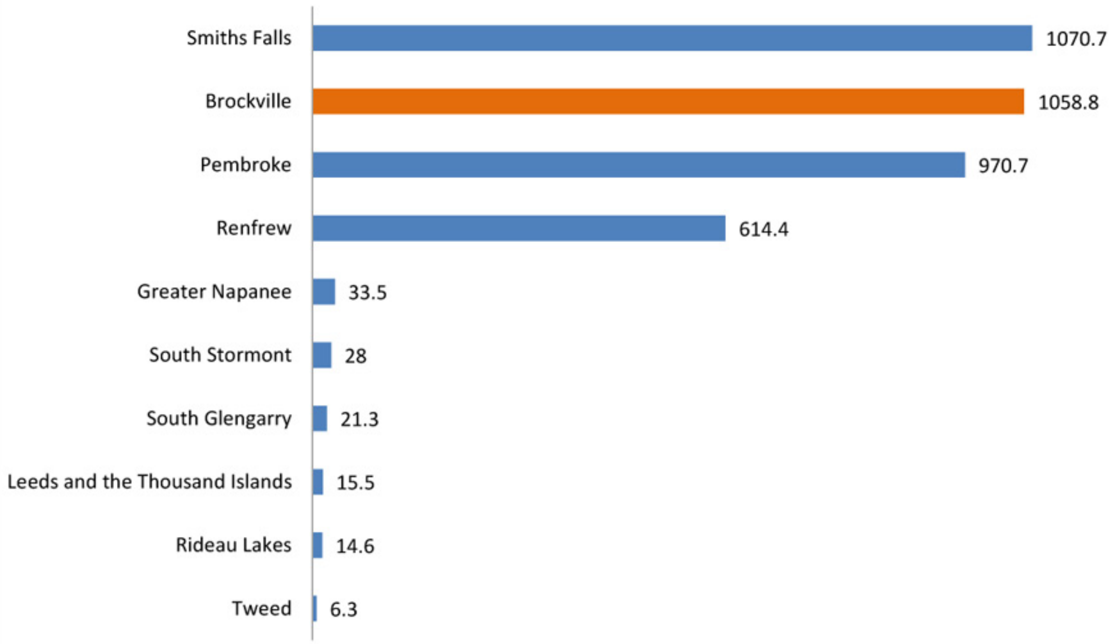


3.1 Population

Of the ten communities, there is a range in population of 16,343. Brockville is the largest community under examination, with a population of 21,957 to a low of 5,614 in the municipality of Tweed. All but two of these communities (Brockville and Greater Napanee) have populations under 15,000. Given the large population differences, Brockville actually occupies a unique position within eastern Ontario. It is larger than the other small towns but not to the metro level or part of large metro region.

Population density (2006)

Exhibit 3.2

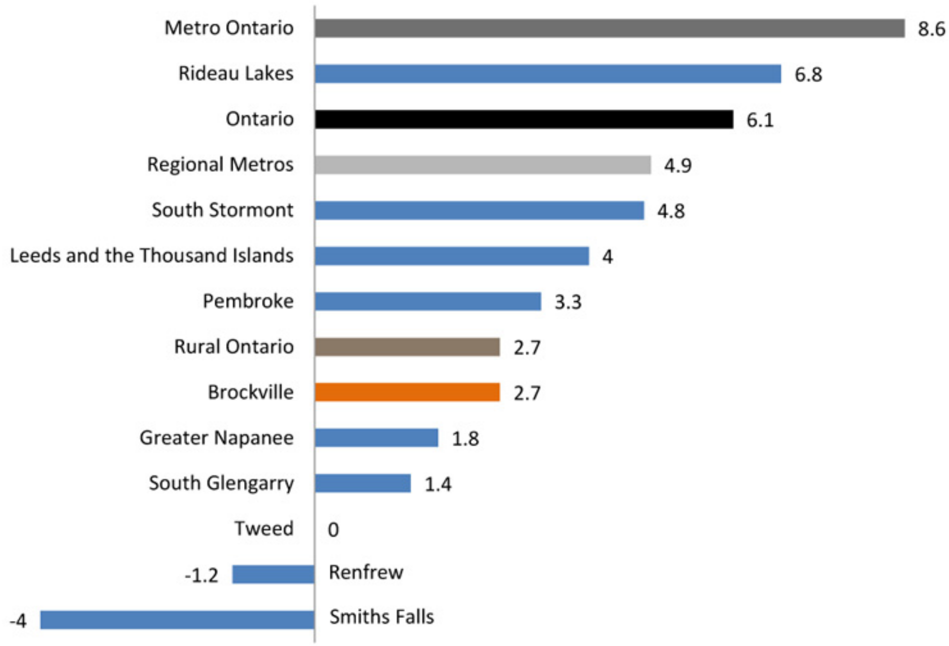


3.2 Population density

It is readily apparent that these communities vary greatly in population density. Brockville has one of the highest population densities of the group with 1,058.8 people per square km, just behind that of Smiths Falls with a population density of 1,070.7. Close to Brockville is Pembroke, with a population density of 970.7 and further down the line is Renfrew with 614.4. These communities stand in stark contrast to the remaining focus communities in the region, which all have a population density of less than 50 people but have much larger areas.

Population growth (2001–2006)

Exhibit 3.3

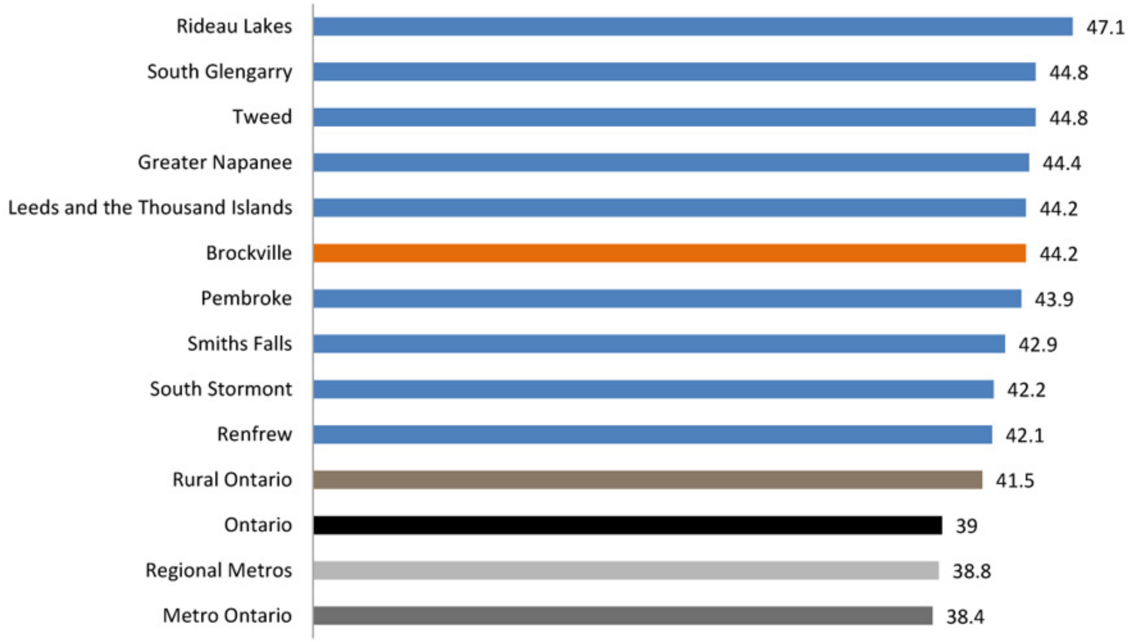


3.3 Population growth

The metropolitan regions in eastern Ontario have experienced lower population growth (4.9%) between 2001 and 2006, than both the metropolitan Ontario average (8.6%) and the Ontario average (6.1%). Brockville has had a population growth of 2.6% during this time, consistent with the average growth for rural Ontario, but is still lower than many of the Focus Communities from the region, such as Rideau Lakes (6.8%) and South Stormont (4.8%). At the other end of the spectrum, while Tweed has a growth rate of zero (0) between 2001–2006, both Renfrew (-1.2%) and Smiths Falls (-4%) actually lost population during this time.

Median age (2006)

Exhibit 3.4



3.4 Median age

While Brockville's median age (44.2) falls in the middle of its benchmarking peers, it is still well above both the Ontario and rural Ontario median ages. Moreover, all ten eastern communities are older than the median age for rural Ontario (41.5), Ontario (39), regional metros (38.8) and metro Ontario (38.4). The median age of Rideau Lakes, the oldest of benchmarking communities at 47.1, is nearly 10 years above that of metro Ontario (38.4).

3.6 Female age distribution

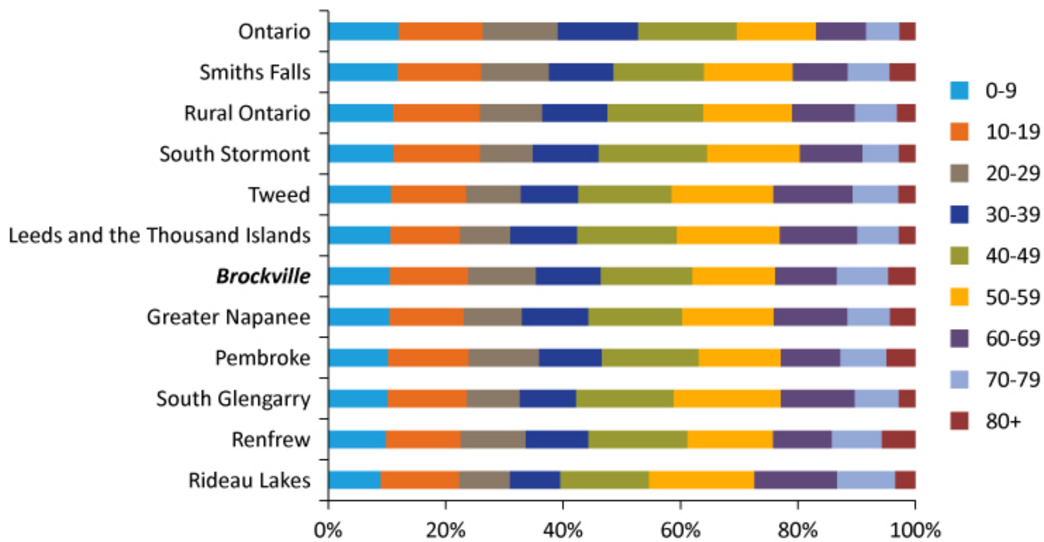
In examining the female age distribution of our benchmarking regions, a similar pattern emerges. Brockville and its benchmarking regions have smaller female populations in the age brackets 20–29 and 30–39 than the Ontario average. There is also evidence that the benchmarking regions have older populations than the provincial average. For example, Rideau Lakes has the smallest proportion of its population in the age bracket 20–29 of the benchmarking regions, while having the largest proportion of women age 50–59.

3.5 Male age distribution

In examining the male age distribution, overall, it would appear the ten benchmarking regions are fairly similar to each other, and to that of the province overall. Where there is notable variation is in the age bracket 60–69, where for example, communities such as Tweed, Leeds and the Thousand Islands, South Glengarry, and Rideau Lakes have a larger share of the population in this age bracket in comparison to the Ontario average. This would support the findings in Exhibit 3.4, whereby the eastern region benchmarking communities have a median age above that of the provincial averages. It is also apparent that communities such as Leeds and the Thousand Islands have fewer men under 30 in their population, in comparison to the provincial average as well. Finally, in examining Brockville, the proportion of the male population that is 70+ also exceeds the Ontario distribution.

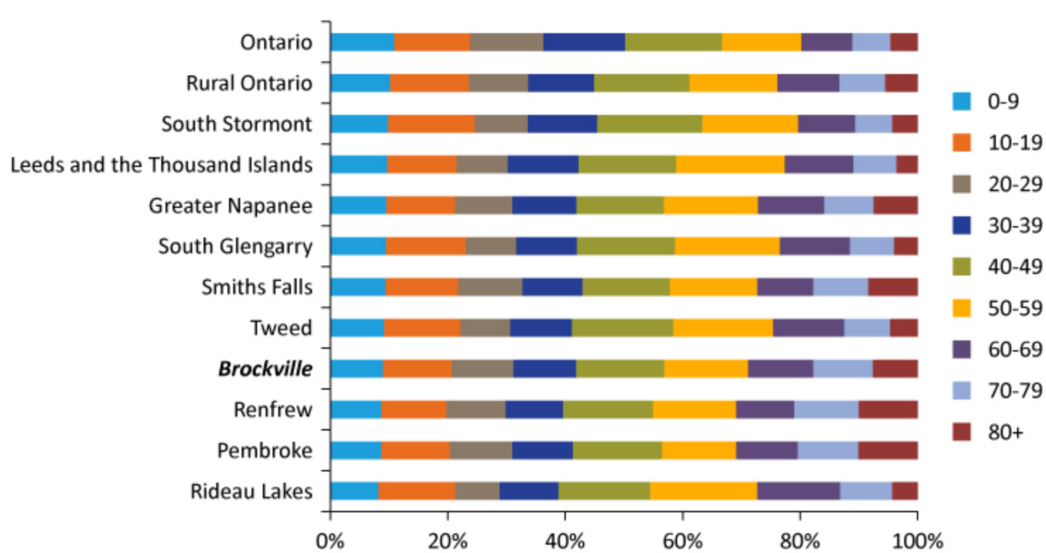
Male age distribution (2006)

Exhibit 3.5



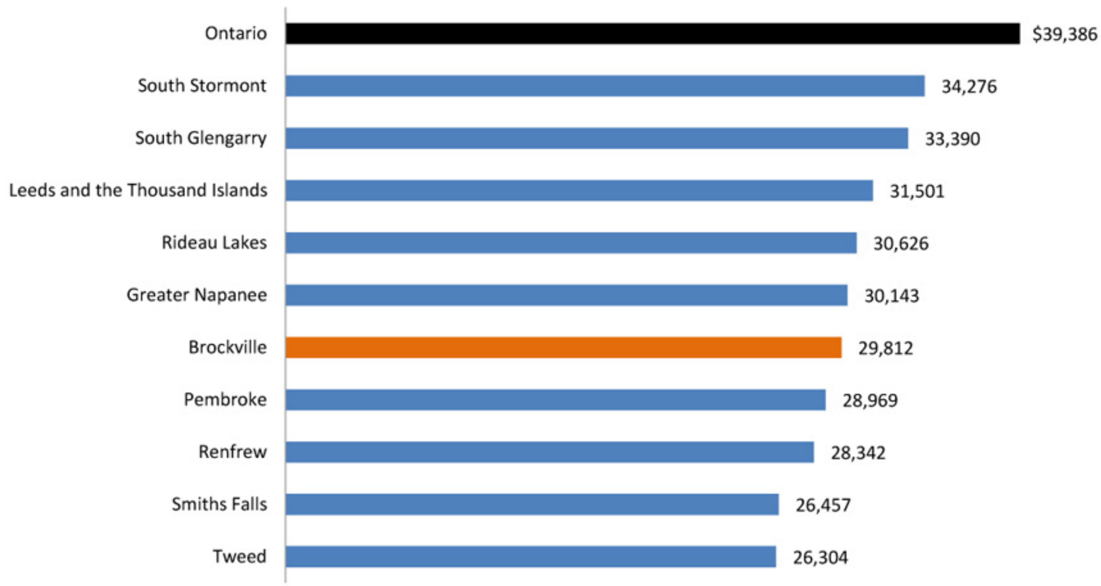
Female age distribution (2006)

Exhibit 3.6



Average employment income (2005)

Exhibit 3.7

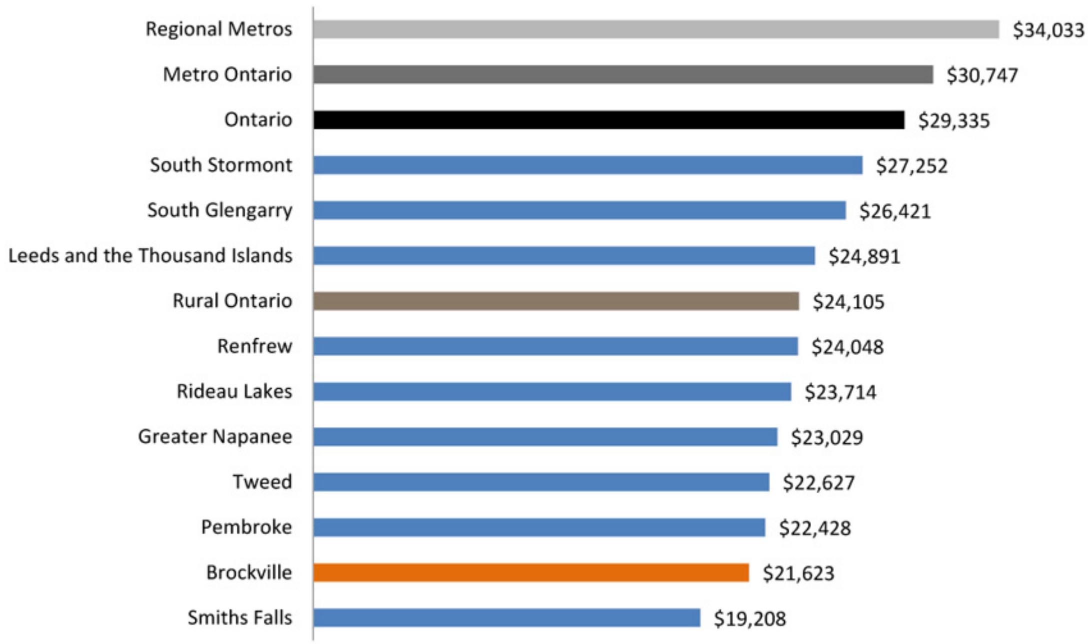


3.7 Average employment income

In examining average employment incomes, all of the eastern benchmarking regions fall below that of the Ontario average, ranging from $5,010 to $13,082 below the provincial average of $39,386. In Brockville, the average employment income is $29,812. This figure is almost $10,000 less than the Ontario average employment income of $39,386.

Median employment income (2005)

Exhibit 3.8

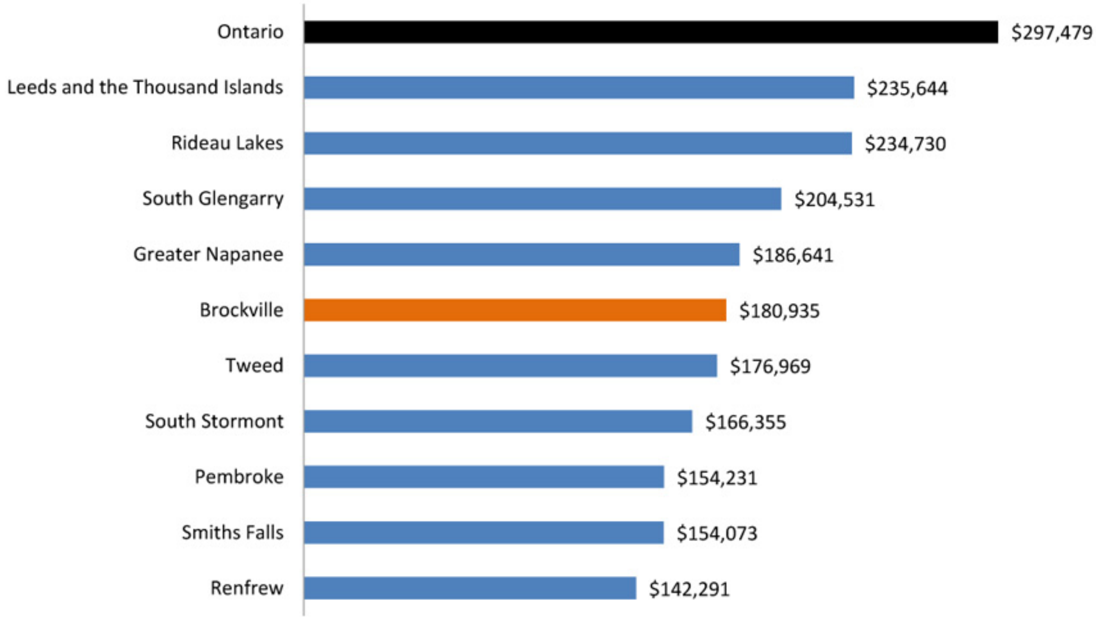


3.8 Median employment income

Brockville's median income is $21,623, below the rural Ontario average of $24,105 and second from last amongst its peer regions. Only Smiths Falls has a lower median employment income ($19,208). Of the eastern region, South Stormont has the highest median employment income with $27,252, followed closely by South Glengarry with $26,421. It is also interesting to note that the median income for metros in this region ($34,033) is higher than the median income for all metros in Ontario ($30,747).

Average value of dwelling (2006)

Exhibit 3.9



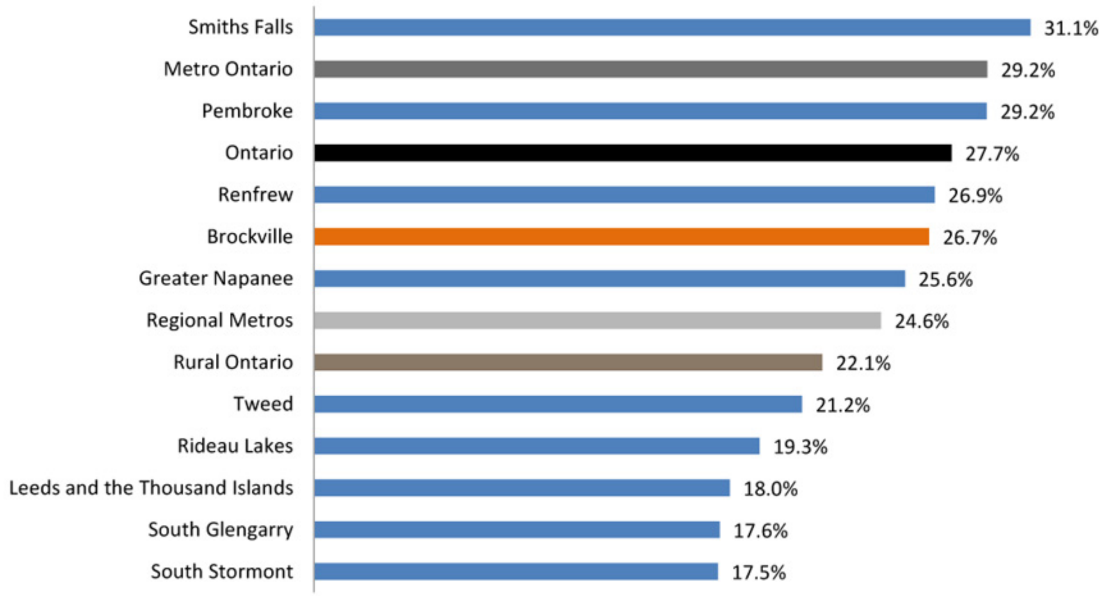
Note that this graph is inconsistent with the income information displayed in Exhibits 3.7 and 3.8, suggesting that average and median incomes do not necessarily correlate with more expensive dwellings in this sample. Keep in mind that the average can be easily influenced by outliers

3.9 Average value of dwelling

The average value of a dwelling in Brockville is $180,935. While this figure is over $100,000 less than the Ontario average, it about on par for the majority of rural communities in the region. Leeds and the Thousand Islands ($235,644) and Rideau Lakes ($234,730) have the highest average value of a dwelling of the benchmarking regions. At the other end of the spectrum, the average value of a dwelling in Renfrew ($142,291) is approximately half of the value of the average Ontario dwelling ($297,479).

Share of households spending 30% or more of income on housing costs (2006)

Exhibit 3.10

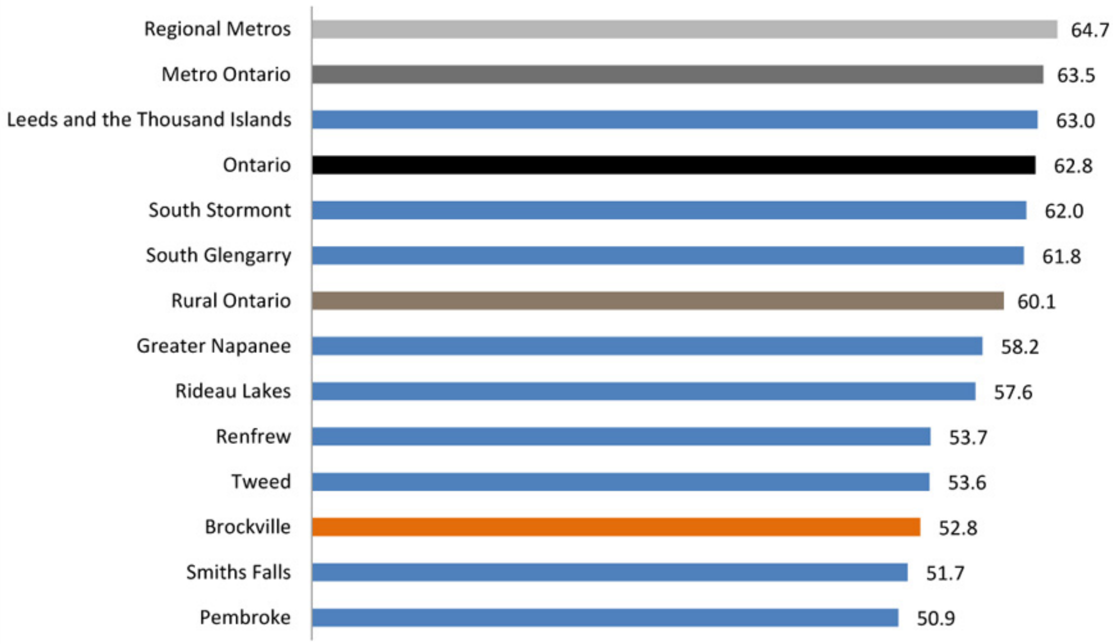


3.10 Share of households spending 30% of more of income on housing costs

In Ontario, 27.7% of households spend 30% or more of their income on housing costs. However, in Brockville, more residents tend to spend their income on housing costs than their regional peers, where 26.7% spend more than 30% of their income on housing costs. Not only is this higher than the rural Ontario average (22.1%) but it is also higher than the metros in the region (24.6%). A large percent of three of Brockville's peer regions (Smiths Falls, Pembroke, and Renfrew) also spend more than 30% or more of their income on housing costs. In the regions of Rideau Lakes (19.3%), Leeds and the Thousand Islands (18.0%), South Glengarry (17.6%), and South Stormont (17.5%), less than 20% of the population spends 30% or more of their household income on housing costs; the lowest of the benchmarking regions. Given the roughly median housing values for Brockville, this result is likely being driven by Brockville's lower median income.

Employment rate (2006)

Exhibit 3.11

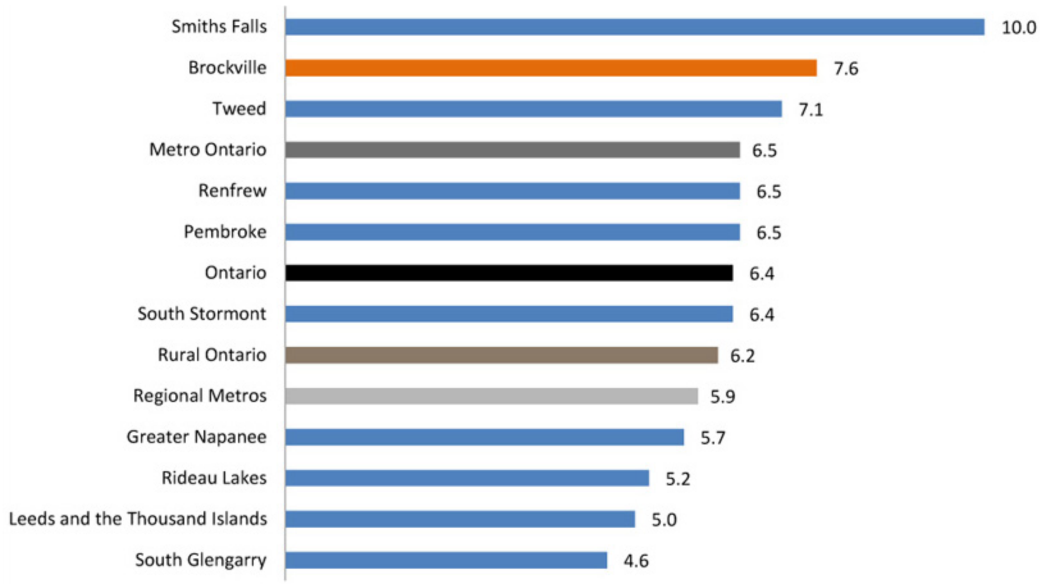


3.11 Employment rate

The employment rate in Brockville in 2006 was 52.8%, almost 10 points lower than the Ontario average (62.8%) and 8 points lower than the rural Ontario average (60.1%). Only two of Brockville's peer regions had a lower employment rate (Smiths Falls; 51.7% and Pembroke; 50.9%). However, the regional metros average had a higher employment rate (64.7%) than both the metro Ontario average (63.5%) and overall Ontario average (62.8%). The only benchmarking region with an employment rate above the Ontario average is Leeds and the Thousand Islands, with an employment rate of 63%.

Unemployment rate (2006)

Exhibit 3.12



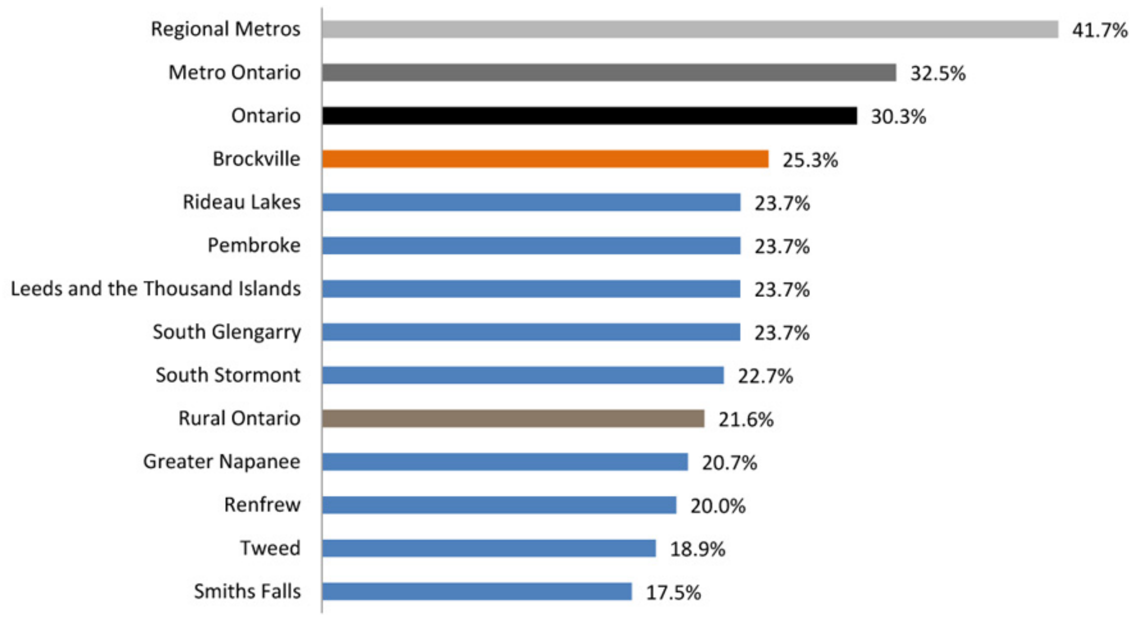
3.12 Unemployment rate

Brockville's unemployment rate in 2006 was 7.6%, second only to Smiths Falls with an unemployment rate of 10%. This can be compared to the metro Ontario average of 6.5% or the rural Ontario average of 6.2%. The region with the lowest unemployment rate is South Glengarry with 4.6%, Leeds and the Thousand Islands with 5.0%, and Rideau Lakes with 5.2%.

OCCUPATIONAL CLASSES

This section examines the occupational structure of Brockville. 25.3% of Brockville's residents are employed in Creative Class occupations, 50.3% in the service class, 28.4% in the working class and 0.4% in the farming, fishing, and forestry class.

Creative Class share (2006) Exhibit 3.13

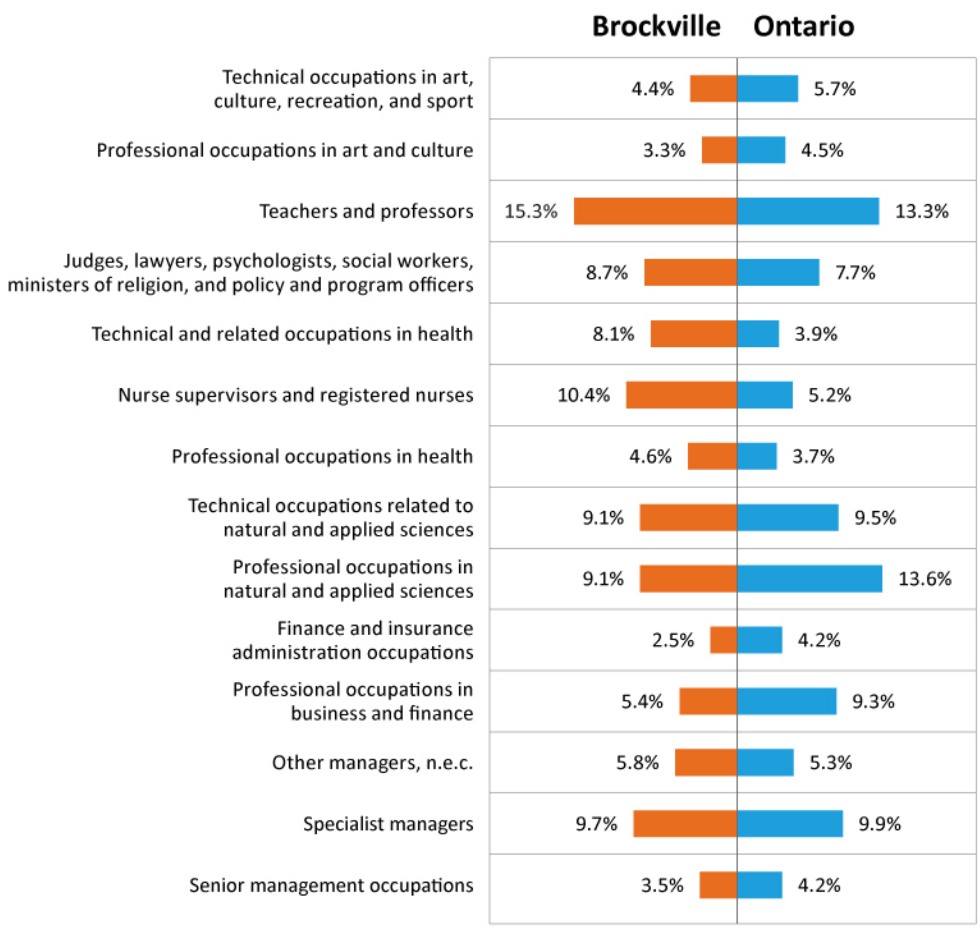


3.13 Creative Class share

At 25.3%, Brockville's Creative Class share is higher than the rural Ontario average (21.6%) and is also the highest of the benchmarking regions. Rideau Lakes, Pembroke, Leeds and the Thousand Islands, and South Glengarry, all have a Creative Class share of 23.7% while Smiths Falls has the lowest of the peer regions with 17.5%. The nearby regional metros have 41.7% of their labour force employed in Creative Class occupations; well above the metro Ontario average of 32.5%, and the rural Ontario average of 21.6%.

Creative Class breakdown (2006)

Exhibit 3.14

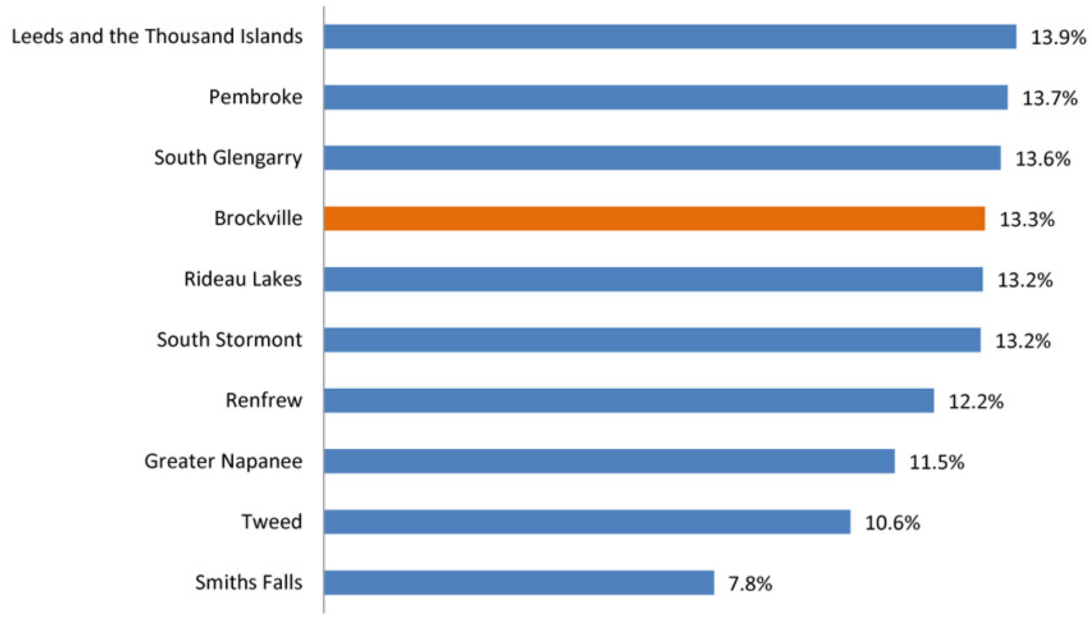


3.14 Creative Class breakdown

When Brockville's Creative Class is broken down into its different occupation groups it becomes clear that much of Brockville's strong Creative Class performance comes from teachers and professors (15.3% of the Creative Class in Brockville) and health-related occupations (23.1%). This is a much different structure than Ontario overall where only 12.8% of the Creative Class is composed of health occupations and 13.3% composed of teachers and professors. Moreover, Brockville has lower percentages of Creative Class members in finance and insurance administration occupations (5.4% compared to 9.3% in Ontario), and fewer senior management occupations (3.5% compared to 4.2% in Ontario).

Adjusted Creative Class share (2006)

Exhibit 3.15

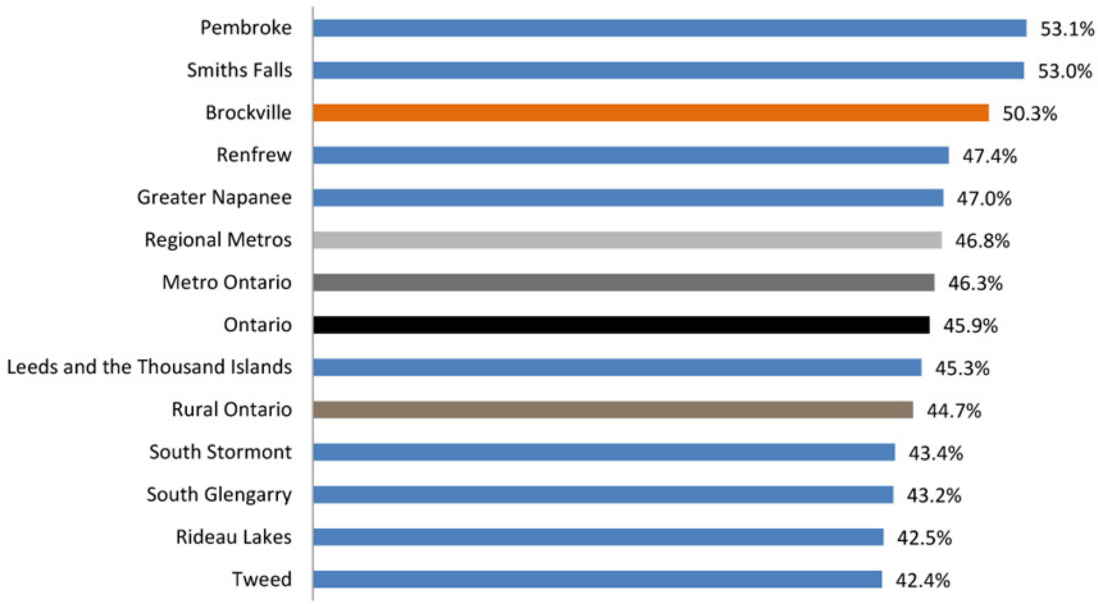


3.15 Adjusted Creative Class share

When occupations associated with economic reproduction (see appendix) are taken out of the Creative Class, Brockville's Adjusted Creative Class share of the labour force changes to 13.3%; a drop of 12% from its overall Creative Class share. Moreover, Brockville now falls below—albeit only slightly—three of its peer regions (Leeds and the Thousand Islands; 13.9%, Pembroke 13.7%, and South Glengarry; 13.6%), while still remaining above the rural Ontario average of 12.7%. Smiths Falls continues to have the lowest Adjusted Creative Class share, dropping nearly 10% of its Creative Class share to 7.8%.

Service class share (2006)

Exhibit 3.16

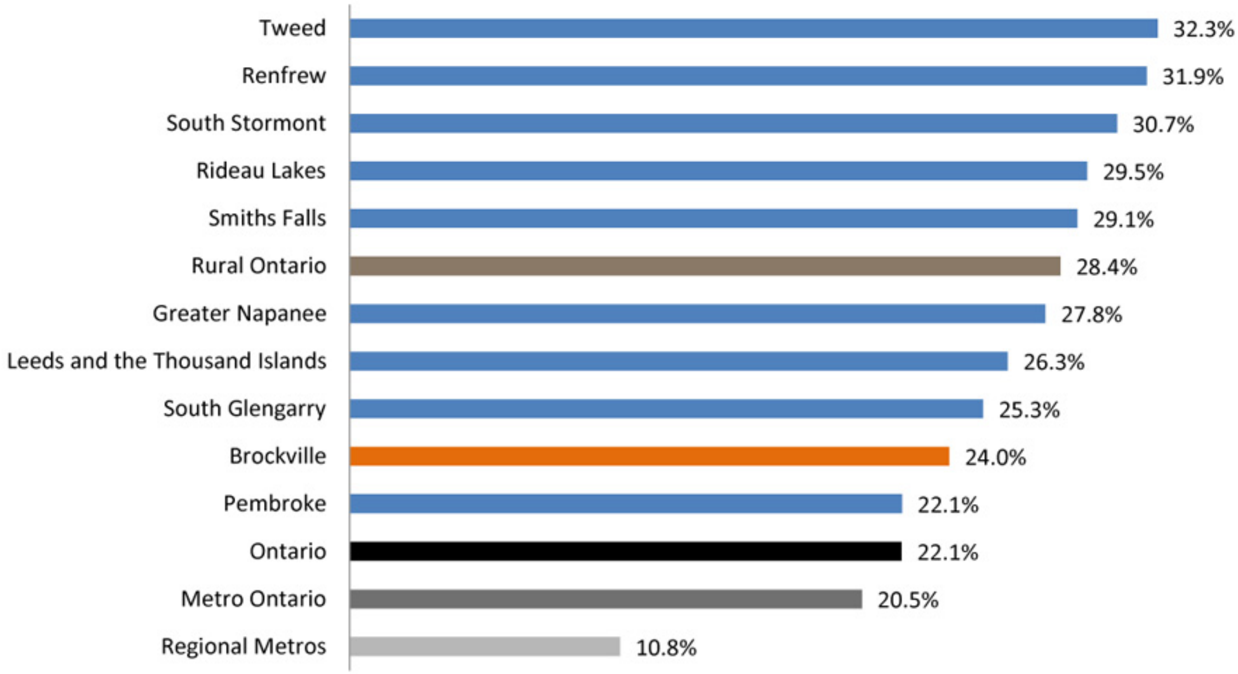


3.16 Service class share

In examining the share of workers employed in the service class, approximately one half of Brockville's population is employed in service class occupations (50.3%). Only two other peer regions (Pembroke with 53.1% and Smiths Falls with 53%) have more than 50% of their labour force employed in service class occupations. The average service class share hovers at approximately 46% for regional metros, metro Ontario and Ontario, and is slightly lower at 44.7% in rural Ontario. Four of the benchmarking regions (South Stormont, South Glengarry, Rideau Lakes and Tweed) are all below the rural Ontario share of workers employed in the service class, which is also approximately 10% less than the share of service class workers in Pembroke.

Working class share (2006)

Exhibit 3.17

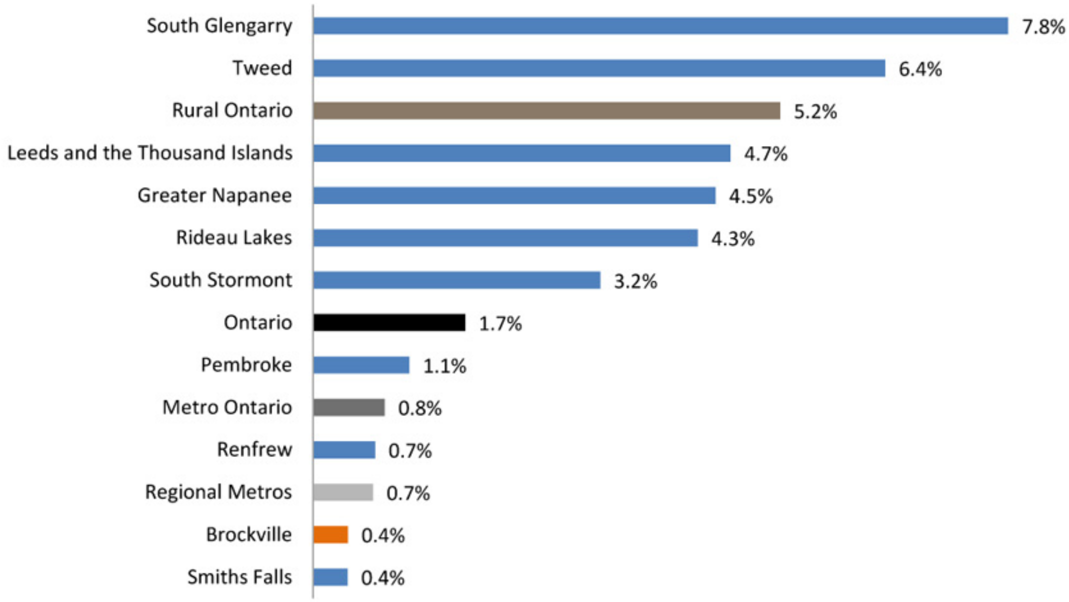


3.17 Working class share

We are also able to examine the share of the population that is employed in the working class. With 24% of the population employed in working class jobs, Brockville has a lower working class share than almost all of its peer regions, with only Pembroke (22.1%) having a lower working class share. However, all of the benchmarking regions are above the provincial (22.1%), metro Ontario (20.5%) and regional metros (10.8%) average working class shares. It is readily apparent the surrounding regional metros have far fewer working class workers than the benchmarking regions; a full 21.5% lower than the working class share in Tweed. The majority of the remaining benchmarking regions have working class shares that are similar to that of the rural Ontario average (28.4%); ranging from 31.9% in Renfrew to 25.3% in South Glengarry.

Farming, fishing, and forestry class share (2006)

Exhibit 3.18



3.18 Farming, fishing, and forestry class share

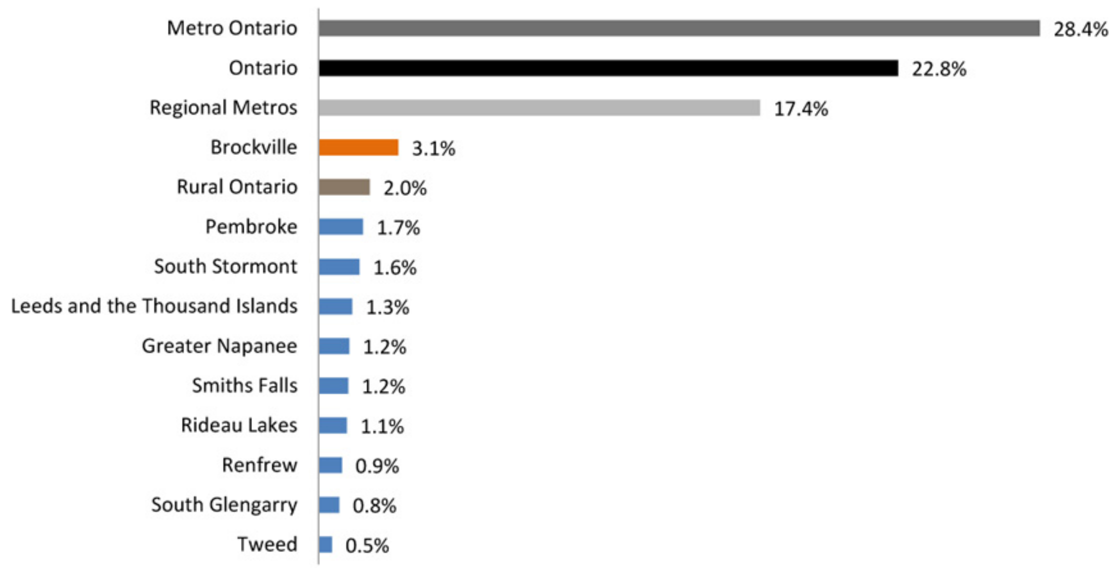
Finally, we can examine the share of each region's population that is employed in farming, fishing, and forestry occupations. The rural Ontario average of 5.2% is larger than the Ontario average (1.7%), metro Ontario average (0.8%) and Regional metros average (0.7%). Brockville also has a very small share of its population employed in farming, fishing, and forestry occupations (0.4%); identical to that of Smiths Falls. While Pembroke (1.1%) and Renfrew (0.7%) fall below the Ontario average employment in the farming, fishing, and forestry share average, the remaining benchmarking regions are above this provincial average. Only South Glengarry (7.8%) and Tweed (6.4%) are above the rural Ontario average employment share in the farming, fishing, and forestry class.

TOLERANCE

Tolerance has been repeatedly identified in the literature (see: Florida, 2002) as a vital requirement for the attraction, and retention of Creative Class workers seeking a diverse and open environment, and is a facet of economic development that rural areas have been struggling to overcome. Tolerance will be examined through the shares of visible minority, immigrant, and Aboriginal populations in the ten benchmarking regions.

Visible minority population share (2006)

Exhibit 3.19

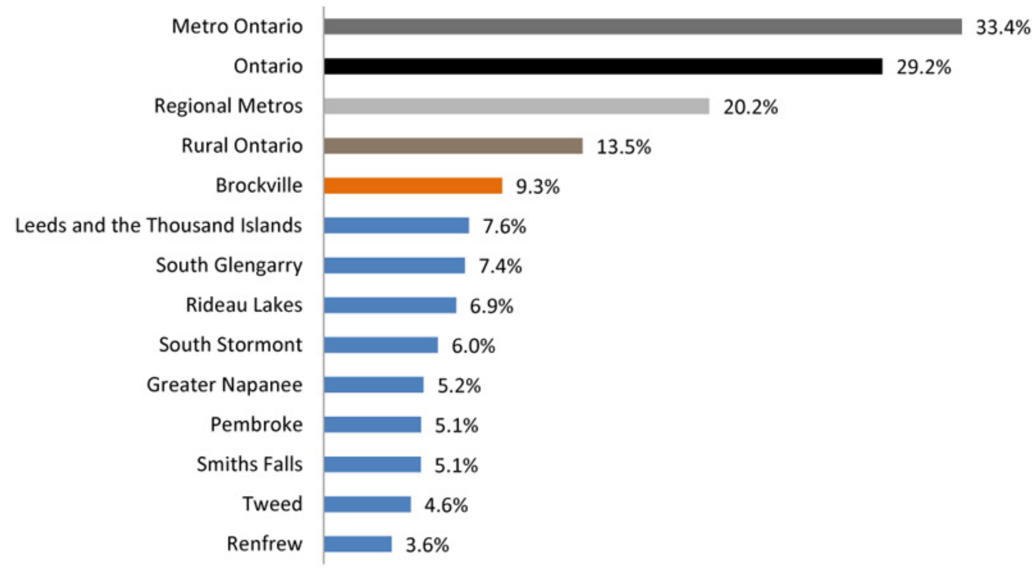


3.19 Visible minority population share

The majority of Ontario's visible minority population is overwhelmingly concentrated in metro Ontario, where 28.4% of the population is visible minority, followed by 22.8% in Ontario, and 17.4% in the surrounding regional metros. Of the benchmarking regions, Brockville has the largest visible minority share, at 3.1%, which is slightly above the rural Ontario average of 2%. The remaining benchmark regions all fall below the rural Ontario average, ranging from 1.7% in Pembroke to 0.5% in Tweed. All of the benchmarking regions remain in stark contrast to the metro Ontario and Ontario average visible minority population shares.

Immigrant population share (2006)

Exhibit 3.20

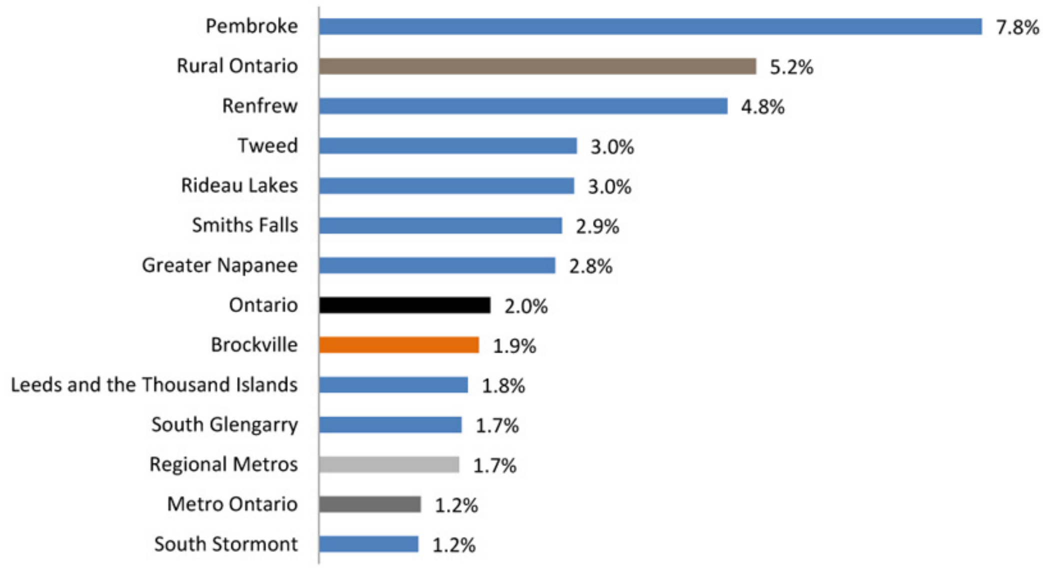


3.20 Immigrant population share

Similar to examining visible minority populations, metro Ontario (33.4%), Ontario (29.2%) and the regional metros (20.2%) all have the largest immigrant population shares. In this case, rural Ontario has an immigrant population share of 13.5%, which is larger than the share for each of the benchmarking regions. Brockville outperforms its peers in attracting immigrants as a share of the overall population, where 9.3% of Brockville's population are immigrants. Leeds and the Thousand Islands has the second largest immigrant population share (7.6%), followed closely by South Glengarry (7.4%) and Rideau Lakes (6.9%). The remaining benchmarking regions have immigrant population shares that hover between 5.2% in Greater Napanee to 3.6% in Renfrew.

Aboriginal population share (2006)

Exhibit 3.21



3.21 Aboriginal population share

Finally, we can examine the share of the population that is Aboriginal across our ten benchmarking regions, which paints a very different picture than the previous two charts. Pembroke has the largest Aboriginal population share, at 7.8%, which is above the rural Ontario share of 5.2% and well above the Ontario share of 2%. While there is a cluster of benchmarking regions between the rural Ontario and Ontario Aboriginal Population shares (Renfrew, 4.8%; Tweed, 3%; Rideau Lakes, 3%; Smiths Falls, 2.9% and Greater Napanee, 2.8%), Brockville falls below the Ontario average, with an Aboriginal population share of 1.9%. While this is comparable to Leeds and the Thousand Islands (1.8%), and South Glengarry (1.7%), the remaining region, South Stormont, matches the metro Ontario average of 1.2%.

TALENT

The Talent Index measures the share of the population 25 and above with a Bachelor's degree or higher.

3.22 Talent Index

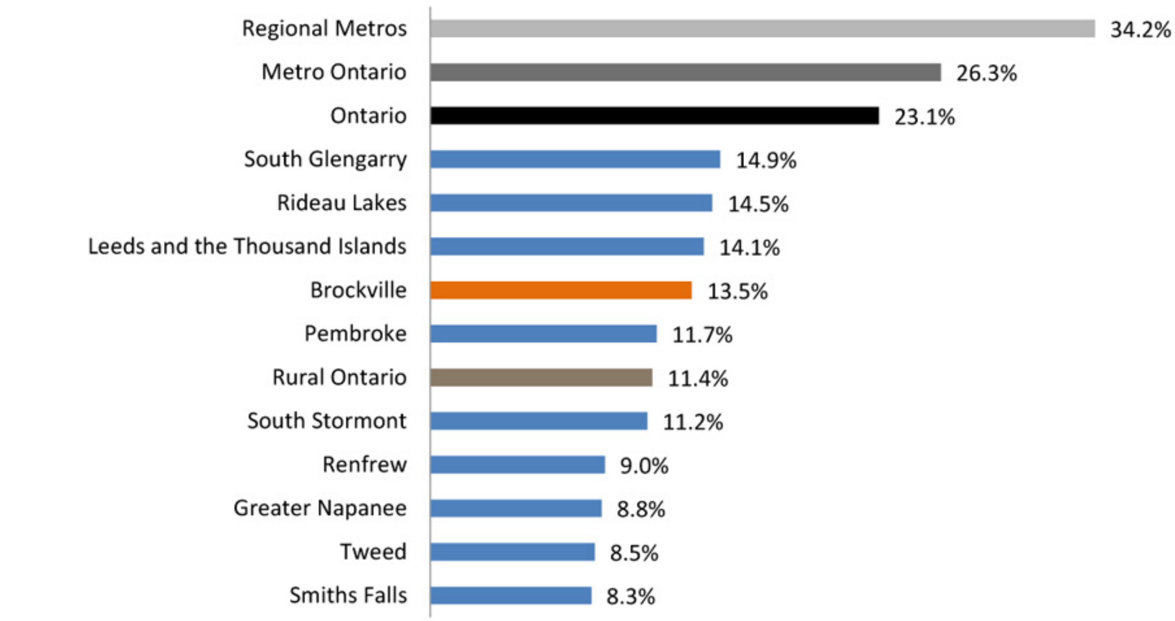
The regional metros (34.2%), metro Ontario (26.3%) and Ontario (23.1%) outperform all of the benchmarking regions. South Glengarry ranks highest on the Talent Index, with 14.9% of the population holding a Bachelor's degree or above, followed closely by Rideau Lakes (14.5%), Leeds and the Thousand Islands (14.1%), and then Brockville, with 13.5%. While Pembroke (11.7%) and South Stormont (11.2%) have scores similar to the rural Ontario average of 11.4% on the Talent Index, the remaining benchmarking regions of Renfrew, Greater Napanee, Tweed and Smiths Falls all fall below 10% of the population that hold a Bachelor's degree or above.

3.23 Highest certificate, diploma or degree

The next chart shows the distribution of the different education levels for each region. In particular, it should also be noted that the highest degree, certificate or diploma refers to the highest educational certification attained by a person. 26.3% of Brockville's population 25 and above has a college, CEGEP or other non-university certificate or diploma as their highest form of education. This is much higher than the Ontario average of 20.1%. Only one peer region, Smiths Falls, has a higher share of its population with this type of degree. In the case of Brockville, the high share of college certificates in the area may be attributed to the presence of St. Lawrence College in the town. 8.4% of Brockville's population has an apprenticeship or trades certificate or diploma declared as their highest level of education. This is lower than all nine peer regions and lower than the Ontario average of 9.1%. On other forms of educational attainment Brockville falls in the middle of the pack when compared to its peer regions.

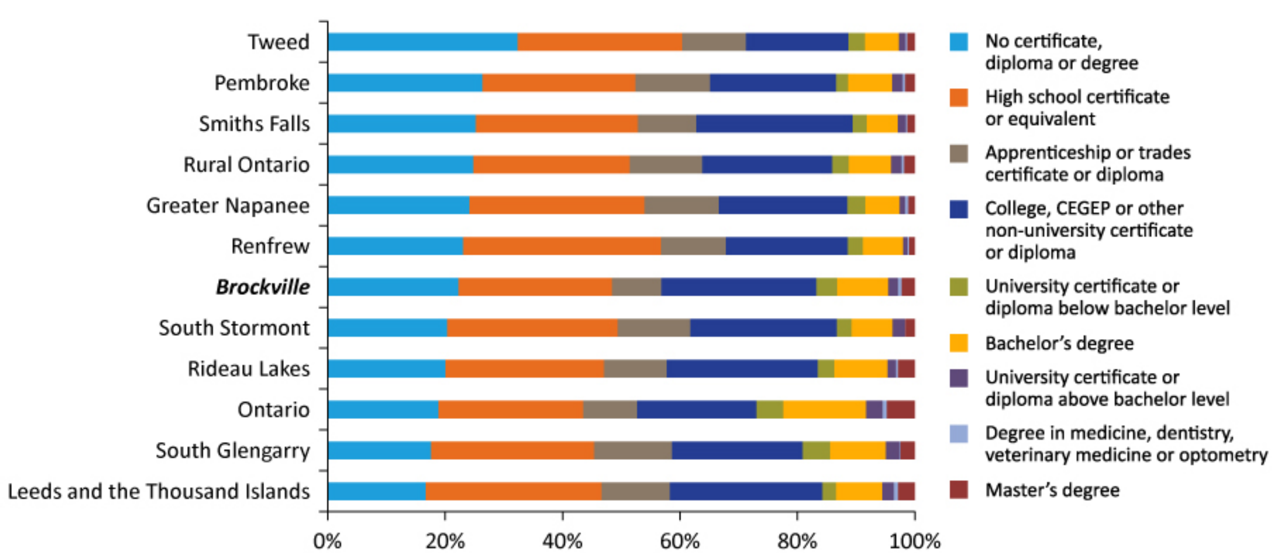
Talent Index (2006)

Exhibit 3.22



Highest certificate, diploma or degree (2006)

Exhibit 3.23

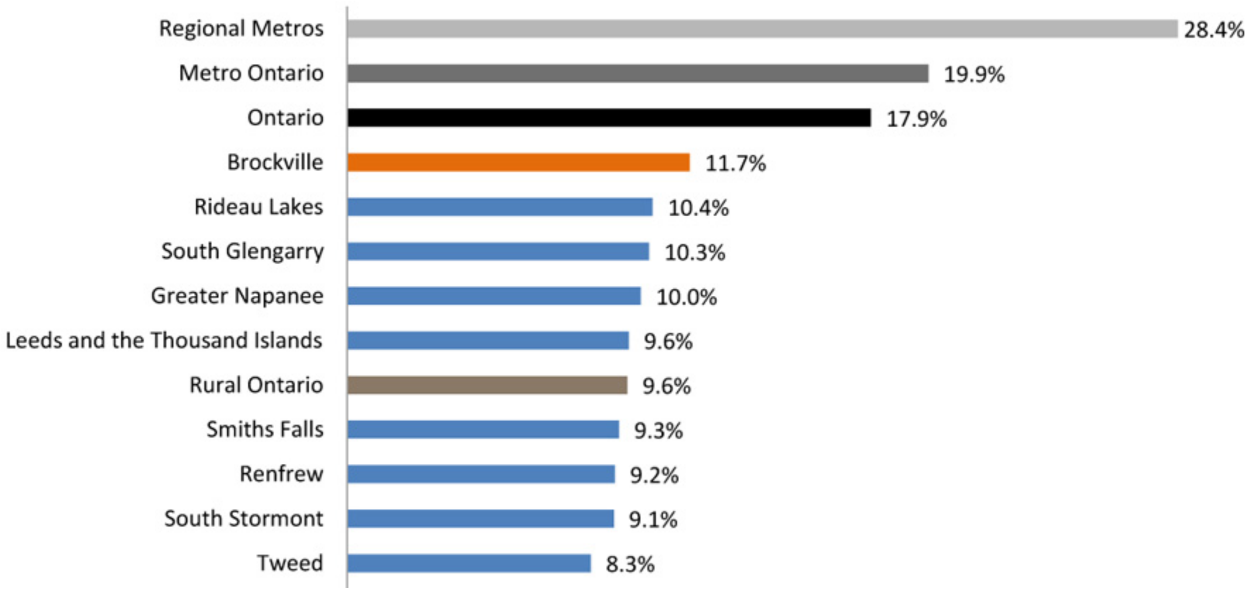


TECHNOLOGY

In examining the prevalence of high technology industries in our benchmark regions, the high-tech establishment share, high-tech location quotient (LQ) and Ontario Tech Pole Index will all be examined.

High-Tech establishment share (2008)

Exhibit 3.24

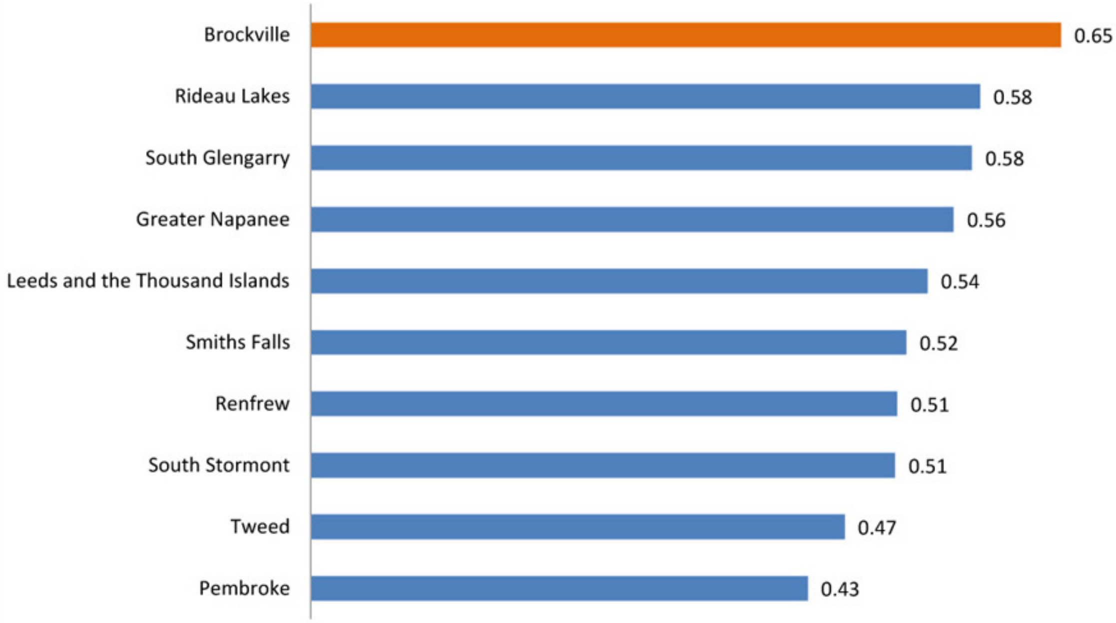


3.24 High-Tech establishment share

We use the North American Industry Codes (NAICS) to calculate the percentage of high-tech establishments in a geographic area relative to all industries. For a complete list of industry codes aggregated in the development of this high-tech measure, please see the Appendix. Brockville leads its peer regions on the measure of high-tech establishment share, with 11.7% of establishments in 2008 considered high-tech industries. While the leader of the benchmarking regions, this falls far below the share of Brockville's regional metros, with a high-tech establishment share of 28.4%, and still below metro Ontario (19.9%) and metro Ontario (17.9%). The remaining benchmarking regions are consistent with the rural Ontario average of 9.6%, with a high of 10.4% in Rideau Lakes, and a low of 7.8% in Pembroke.

High-Tech LQ (2008)

Exhibit 3.25

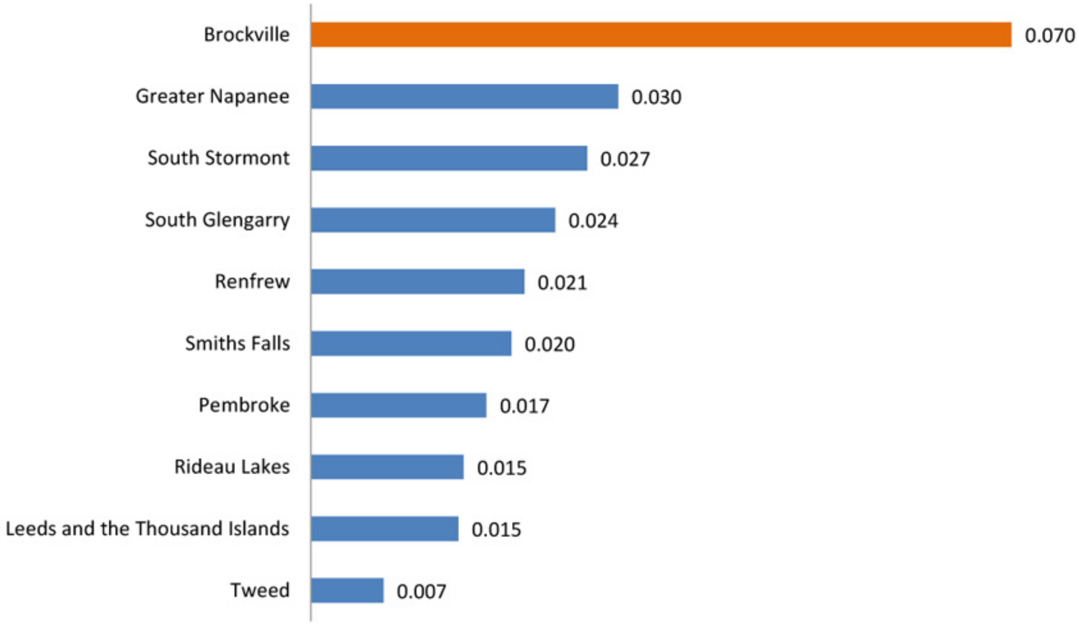


3.25 High-Tech LQ

A high-tech LQ was calculated to further examine the presence of high-tech establishments in the region. Location quotients (LQs) are ratios that allow an area's distribution of employment by industry to be compared to a reference or base area's distribution. A full explanation of how an LQ is calculated is available in the Appendix. Using this measure, Brockville has the largest score of the benchmarking regions, with a high-tech LQ of 0.65. The majority of peer regions range from an LQ of 0.58 in Rideau Lakes and South Glengarry to 0.51 in Renfrew and South Stormont. Tweed (0.47) and Pembroke (0.43) have the lowest high-tech LQs of the benchmarking regions.

Ontario Tech Pole Index (2008)

Exhibit 3.26



3.26 Ontario Tech Pole Index

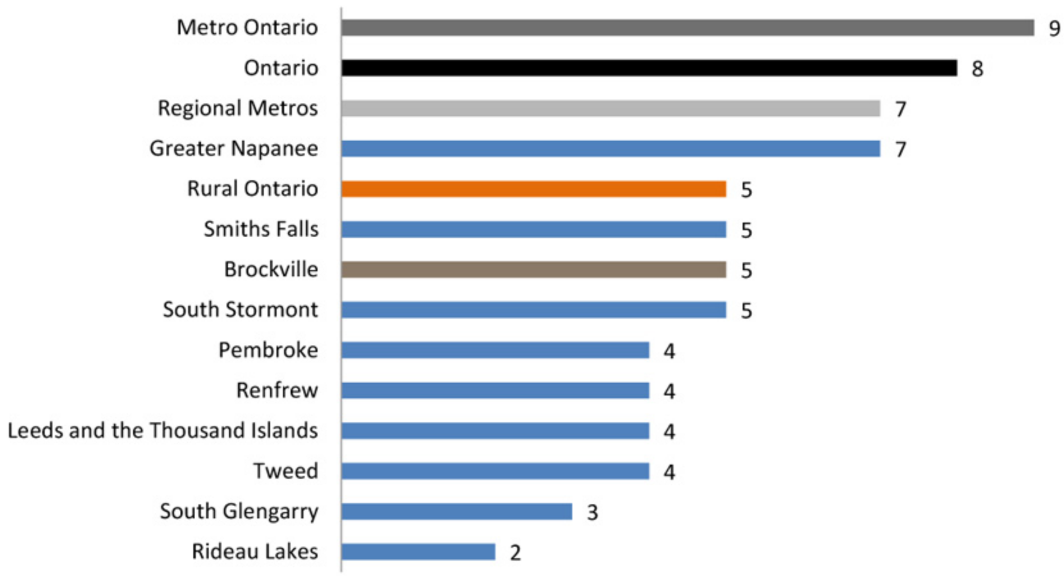
Finally, we can examine the benchmark regions through utilizing the Ontario Tech Pole Index, which examines the total high-tech employment in a region, using Ontario as a base, which is in turn adjusted for city size and compared to the Ontario base (for a complete description, please see the Appendix). Using this measure, Brockville scores highest, with a score of 0.070, over double that of the score of Greater Napanee and South Stormont. The remaining regions all fall below 0.025, with Tweed having the lowest score on the Ontario Tech Pole Index with 0.007.

TERRITORIAL ASSETS

The territorial assets discussed in this section are an attempt to quantify indicators of quality of place and civic engagement. The territorial assets that will be examined include: Arts & Entertainment establishments, recreation facilities, restaurants and bars, healthcare professionals, voter turnout, and crime rate per 10,000.

Arts & Entertainment establishments per 10,000 (2008)

Exhibit 3.27

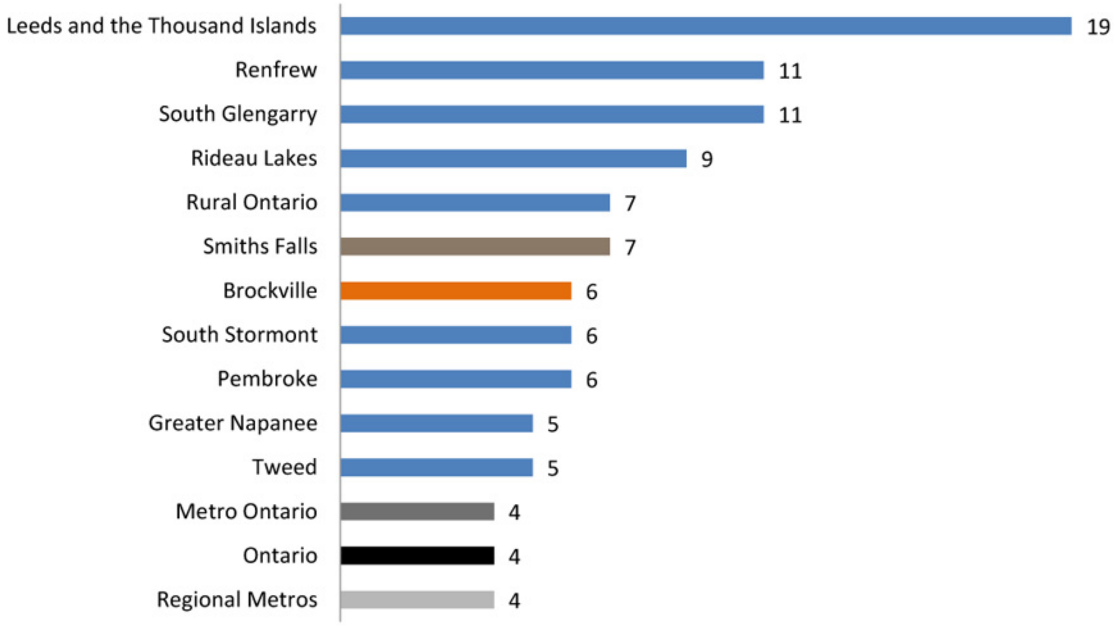


3.27 Arts & Entertainment establishments per 10,000

In examining the number of Arts & Entertainment establishments per 10,000 people, it is interesting to note that all of the benchmark regions fall below metro Ontario (9) and Ontario (8), while Greater Napanee matches that of the regional metros average (7). Brockville with 5 Arts & Entertainment establishments per 10,000 is in the middle of the pack, along with South Stormont and Smiths Falls, which is also the rural Ontario average. The Brockville campus of St. Lawrence College offers diploma programs in Musical Theatre Performance and Visual & Creative Arts which may contribute to their ranking. Brockville also has a well established arts centre and is host to a number of annual festivals including the Thousand Islands Jazz Festival. Finally, Leeds and the Thousand Islands, Pembroke, Renfrew and Tweed all have 4 Arts & Entertainment establishments, while South Glengarry has 3, and Rideau Lakes has 2.

Recreation facilities per 10,000 (2008)

Exhibit 3.28

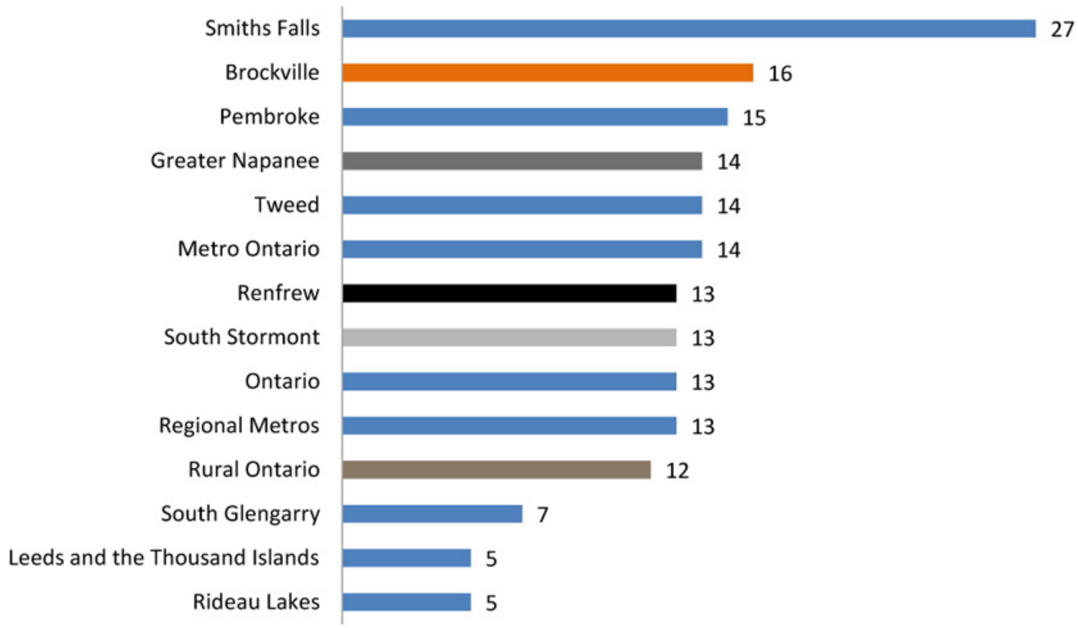


3.28 Recreation facilities per 10,000

In examining the number of recreation facilities per 10,000 Brockville, Pembroke, and South Stormont all have 6 facilities, slightly below the rural Ontario average. Brockville's location on the St. Lawrence River makes it a destination for water sports including boating and deep sea diving. However, Leeds and the Thousand Islands has approximately three times the number of recreation facilities per 10,000 people with 19, followed by Renfrew and South Glengarry with 11 each, and then Rideau Lakes with 9. The remaining benchmark regions, Greater Napanee and Tweed have 5 recreation facilities per 10,000; slightly above the average for metro Ontario, Ontario and the surrounding regional metros with 4.

Restaurants and bars per 10,000 (2008)

Exhibit 3.29

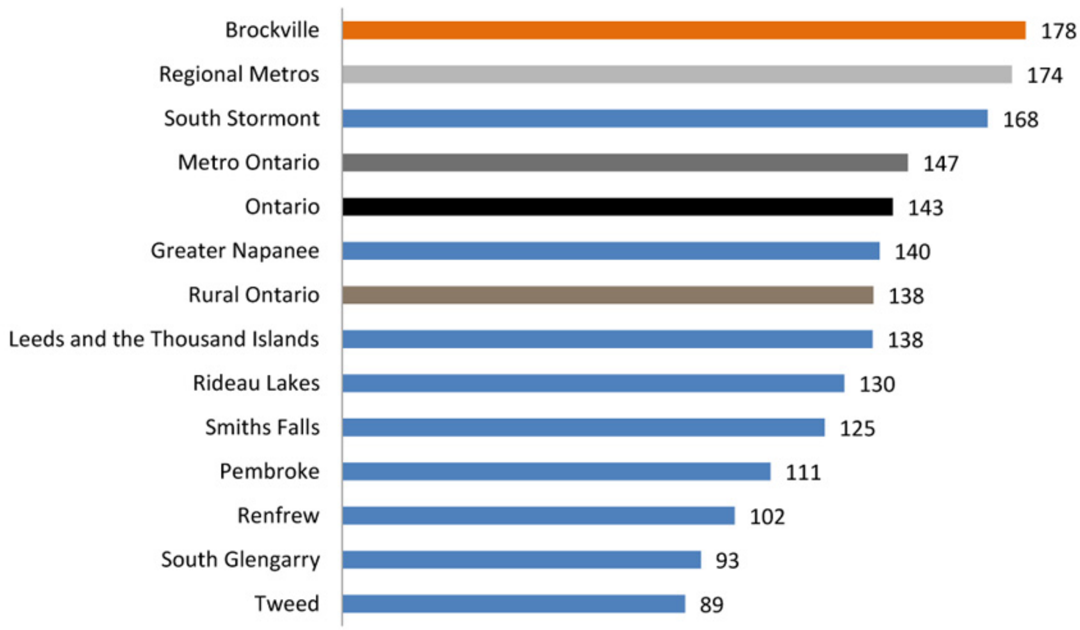


3.29 Restaurants and bars per 10,000

We are also able to examine the number of restaurants and bars per 10,000 in each of the benchmarking regions. Brockville has 16 restaurants and bars per 10,000 people, behind only Smiths Falls, with 27. The majority of regions match the metro Ontario average of 14 (Greater Napanee and Tweed), or the Ontario and regional metros average of 13 (South Stormont and Renfrew). The remaining communities fall below the rural Ontario average of 12 restaurants and bars per 10,000 people, as South Glengarry has 7, while Leeds and the Thousands Islands and Rideau Lakes have 5 each.

Healthcare professionals per 10,000 (2006)

Exhibit 3.30

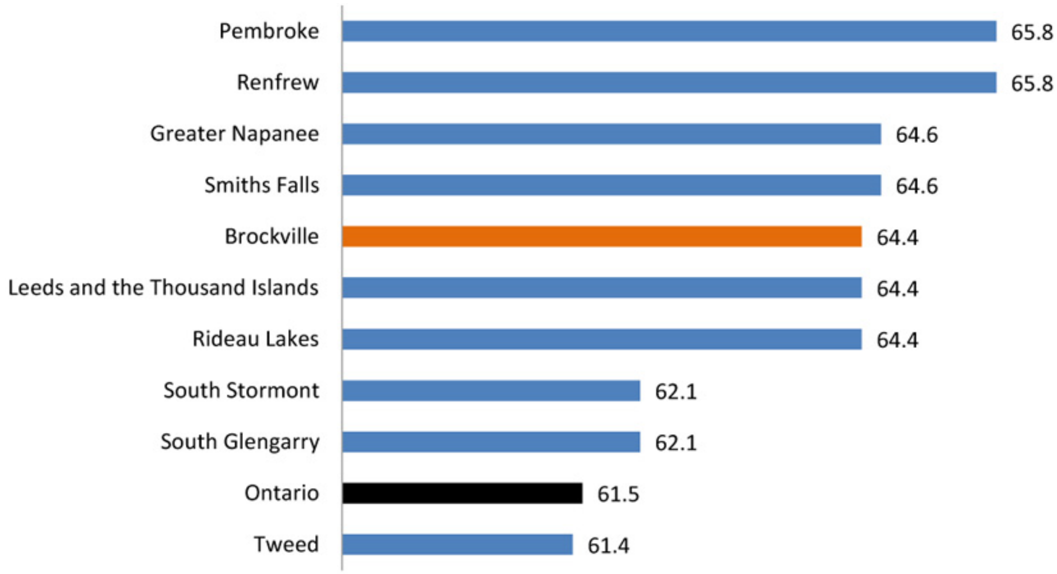


3.30 Healthcare professionals per 10,000

In examining the number of healthcare professionals, such as doctors, dentists and nurses, per 10,000, Brockville has 178; well above both all of its peer regions, as well as the rural Ontario average of 138. After the regional metro average of 174, South Stormont has 168 healthcare professionals per 10,000, slightly above the metro Ontario average of 147, and the Ontario average of 143. The majority of the remaining regions are similar to the rural Ontario average, ranging from Greater Napanee (140) to Smiths Falls (125) and Pembroke (111). The remaining regions have approximately 100 healthcare professionals per 10,000 or less (Renfrew, 101; South Glengarry, 93; Tweed, 89).

Voter turnout 2011 General Election

Exhibit 3.31

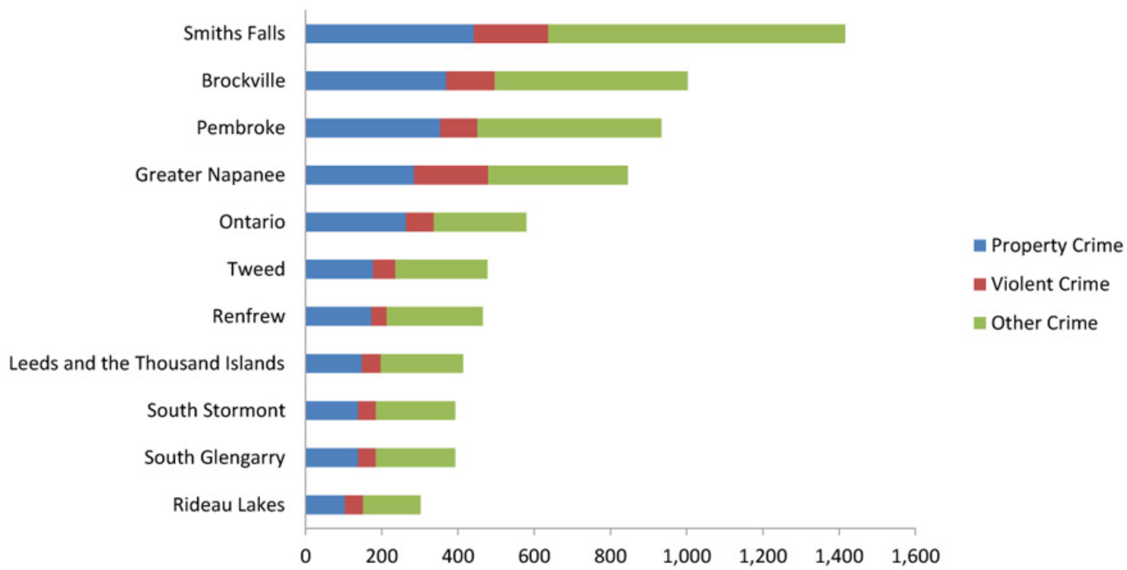


3.31 Voter turnout 2011 General Election

Using poll results from the 2011 General Election, we can also examine voter turnout rates. We see a consistent pattern of voter turnout across the benchmark regions, with all but Tweed (61.4%), falling above the Ontario average of 61.5%. While Pembroke and Renfrew have the highest voter turnout, with 65.8%, Brockville (part of the Leeds-Grenville Federal Electoral District), is close behind with 64.4%.

Crimes per 10,000 (2007)

Exhibit 3.32

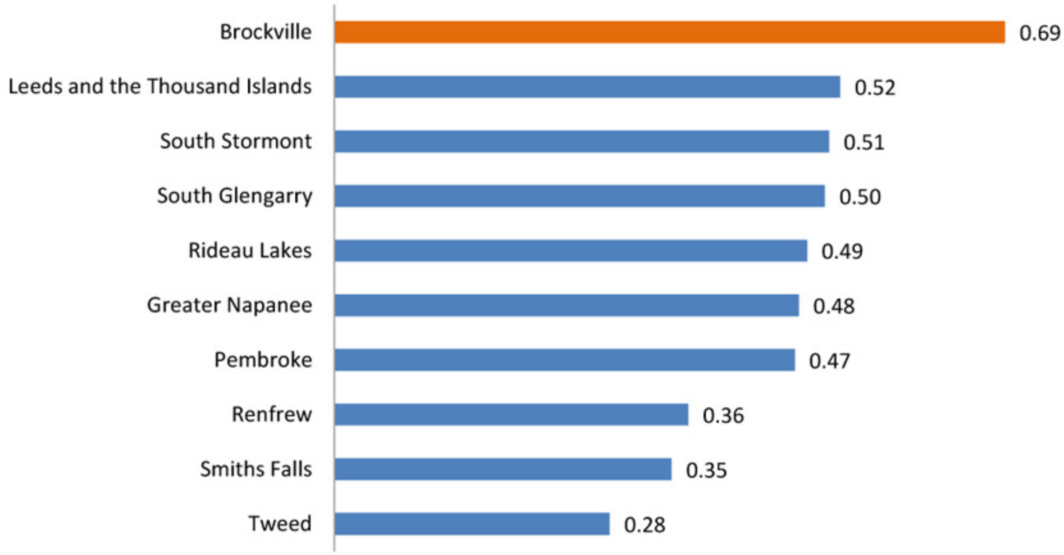


3.32 Crimes per 10,000

We also examined crime rates per 10,000, which includes a breakdown of property crime, violent crime, and total crime. In 2007, the Brockville area had 1,003 reported crimes per 10,000 people. Of this, 12.6% were violent crimes and 36.9% were property crimes. This is above the Ontario average of 580 crimes per 10,000; of which 264 were property crime and 73 were violent crimes. Smiths Falls has the highest crime rate, with 1,417 crimes per 10,000. On the other hand, Rideau Lakes had the fewest crimes, with 302 per 10,000 and one of the lowest violent crime rates with 48.

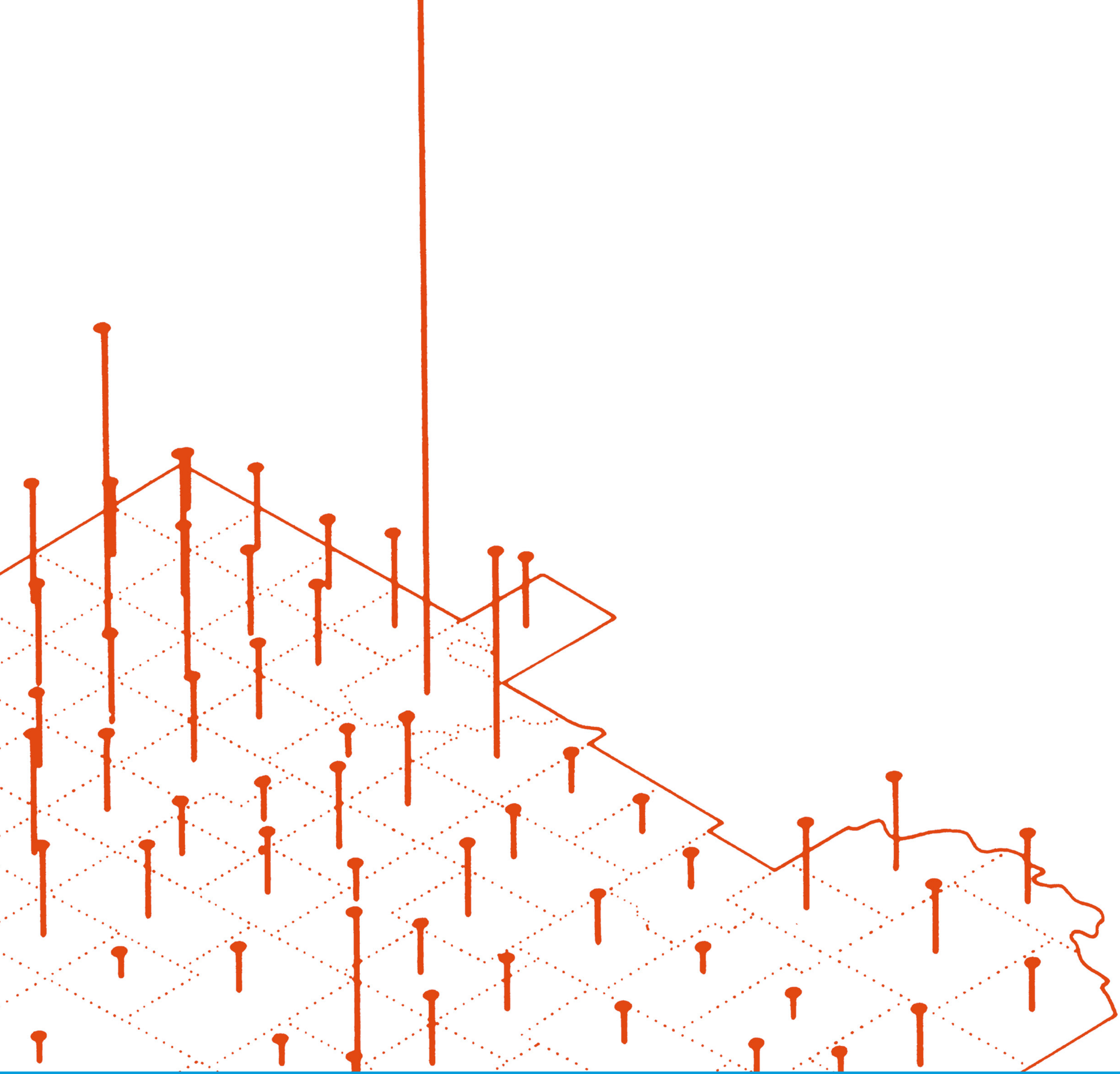
Creativity Index

Exhibit 3.33



3.33 Creativity Index

Finally, we can examine the eastern benchmark regions on the Creativity Index. The Creativity Index is calculated using a region's Talent, Technology, and Tolerance levels (see Appendix for a detailed explanation). Brockville leads its eastern Ontario peer regions, scoring highest on the Creativity Index, with a score of 0.69. This is well above Leeds and the Thousand Islands (0.52), South Stormont (0.51), South Glengarry (0.50), Rideau Lakes (0.49), Greater Napanee (0.48), and Pembroke (0.47), which are clustered around the average. On this measure, Brockville scored 72nd out of 347 census subdivisions in Ontario (rural and metro). With a score of approximately half that of Brockville, Renfrew has a Creativity Index result of 0.36, followed by Smiths Falls (0.35) and Tweed (0.28).

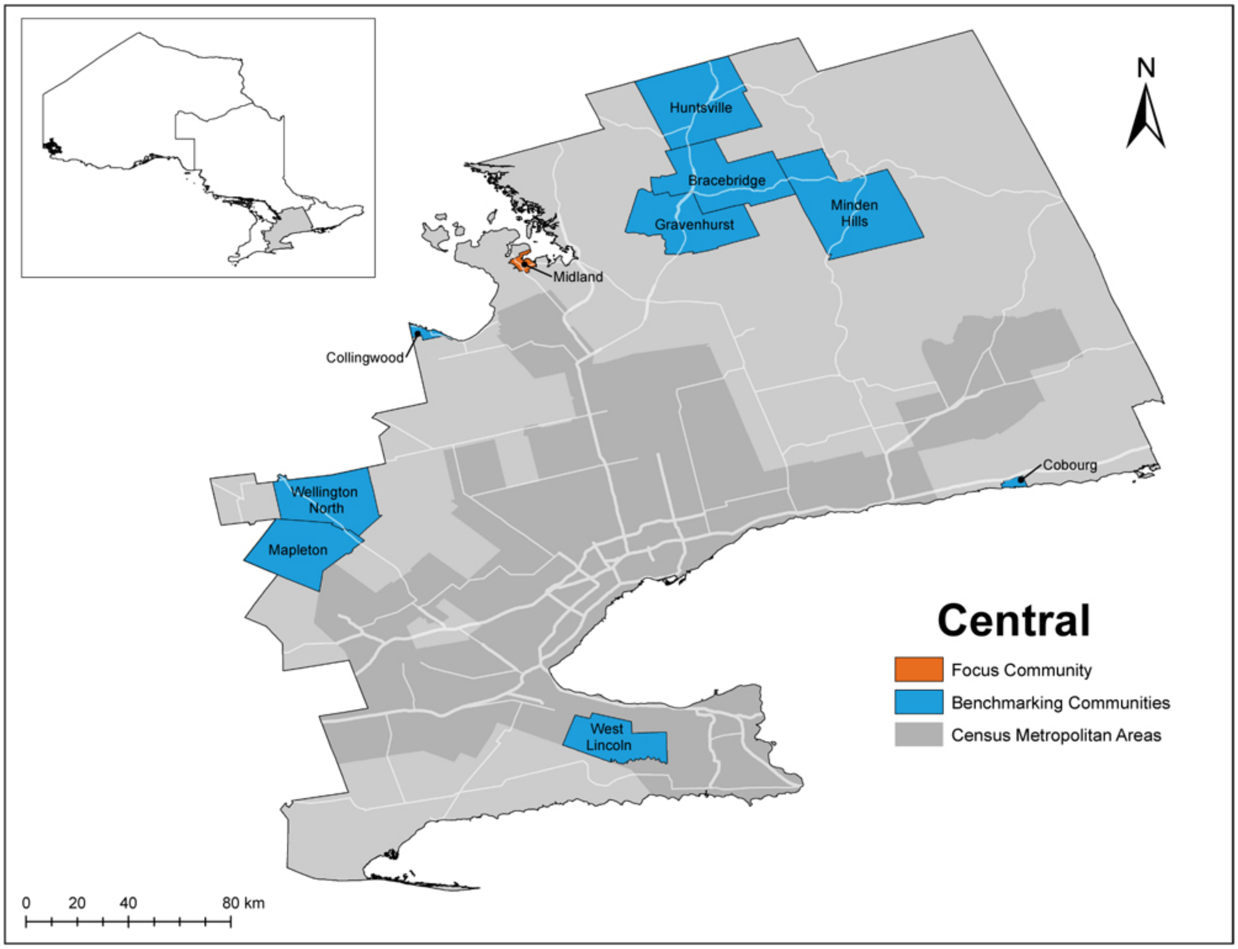


Section 4: Central Region

INTRODUCTION

Central region

Exhibit 4.0



The central region of Ontario has a population of 8,215,076. It includes Ontario's largest metropolitan area of Toronto as well as the metros of Peterborough, Oshawa, Hamilton, St. Catharine's-Niagara, Kitchener, Brantford, Guelph and Barrie, which made up 91% of the region's total population in 2006. The region also has an unemployment rate of 6.3%, which is the lowest of the five regions under examination.

The town of Midland was selected as the Focus Community for this region. With a population of just over 16,000 residents, it is considered to be the economic centre of the Georgian Bay region. This population can swell to 100,000 during the summer months because of the many cottages, resorts and parks in the area. 1.5 hours north of Toronto, the closest CMA to Midland is Barrie, which is approximately 50 km away and accessible by daily bus service. Midland is also accessible from the 400 series highway.

Midland is home to the regional campus of Georgian College of Applied Arts and Technology, and is close to both Georgian College and the Orillia campus of Lakehead University. The Quest Art School & Gallery and Huronia Foundation for the Arts are also located in Midland. Midland is a popular boating and fishing destination, and has a new cultural centre scheduled to open in the spring of 2012.

The major employers in Midland are Elcan Optical Technologies, Georgian Bay General Hospital, educational institutions, TRW Vehicle Safety Systems, New England Business Systems

Business Forms Ltd., Baytech Plastics Inc., town of Midland, Kindred Industries Limited, Saint-Gobain Technical Fabrics, Schott Gemiron Canada Corporation, Community Living Huronia, Weber Manufacturing Ltd., Hillcrest Village, VillaCare Centre and the YMCA.

Midland will be compared to the following nine benchmarking communities in the central region, in order to give an idea of how Midland is performing compared to its regional rural Ontario peers: Cobourg, Mapleton, Wellington North, West Lincoln, Collingwood, Gravenhurst, Bracebridge, Huntsville and Minden Hills. In addition, data for the regional metros is also included for most indicators, as well as averages for all of Ontario, metropolitan Ontario and rural Ontario.

SUMMARY

Midland strengths:

- Midland Cultural Centre opening in spring 2012
- Share of the Creative Class employed in technical occupations in art, culture, recreation and sport is much higher than the Ontario average (not true of many of the rural places)

Midland weaknesses:

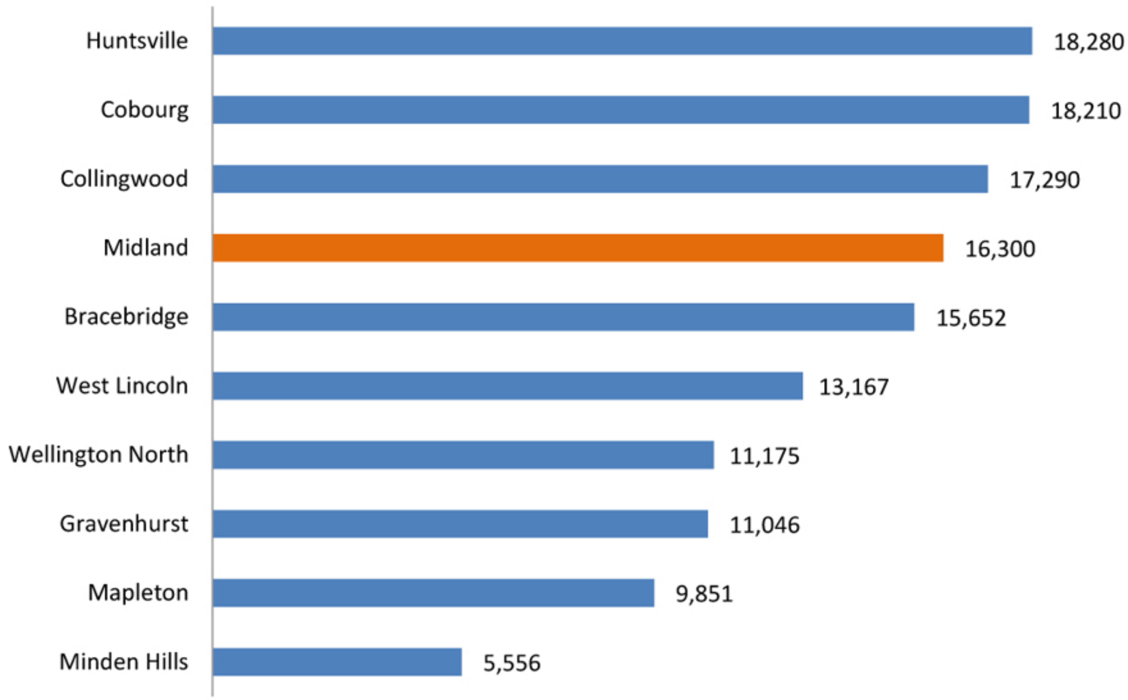
- Low population growth
- Low dwelling value compared to peers/high share of pop spending >30% of income on housing (other values probably higher because of cottage country though)
- High unemployment rate
- Low on percentage of population with higher education

OBSERVATIONS, KEY FINDINGS & OPPORTUNITIES

- Tourism: Continue to rely on the base that exists in this region, but it shouldn't be merely relied on. Cottage industry should be supported, while new sports and recreation facilities should also be developed and enhanced.
- Education: Midland should take advantage of growth in post-secondary education levels, and use this as a leverage for future economic growth.
- Housing affordability: While other benchmarking communities in the region are largely cottage based, Midland has the opportunity to benefit from population growth due to lower than average housing costs. However, Midland does have a higher share of the population spending 30% or more on housing, suggesting lower income levels in the region. This could also be explained by residents who are earning incomes elsewhere, but desire Midland's quality of life
- Occupations: Midland has an opportunity to grow professional occupations in both arts and culture, and natural and applied sciences, while technical (support) occupations are already much stronger than the Ontario average.
- 'Meds and Eds': There is also a need in Midland to shift away from the 'Meds and Eds' occupations—such as doctors and teachers—whereby Midland should aim to maintain current levels, but without a focus on growing these occupations specifically.
- Service Employment: Midland should carefully monitor the percentage of the labour force that is employed in service class occupations so this figure does not balloon. The result of this form of development would be an increased share of the population who are working at lower wage levels.
- Manufacturing: Recognising the strength of this region, along with many rural areas, that comes from manufacturing, Midland should work to further leverage the existing industry base it currently as. It is important to both identify and support manufacturing firms of all sizes from across the region, as a high priority.
- Immigrant Populations: Midland should pursue targeted immigrant attraction strategies, aimed at individuals who are already situated near the region.
- Aboriginal Population: Celebrate and recognize the contributions of First Nations communities to the region.

Population (2006)

Exhibit 4.1

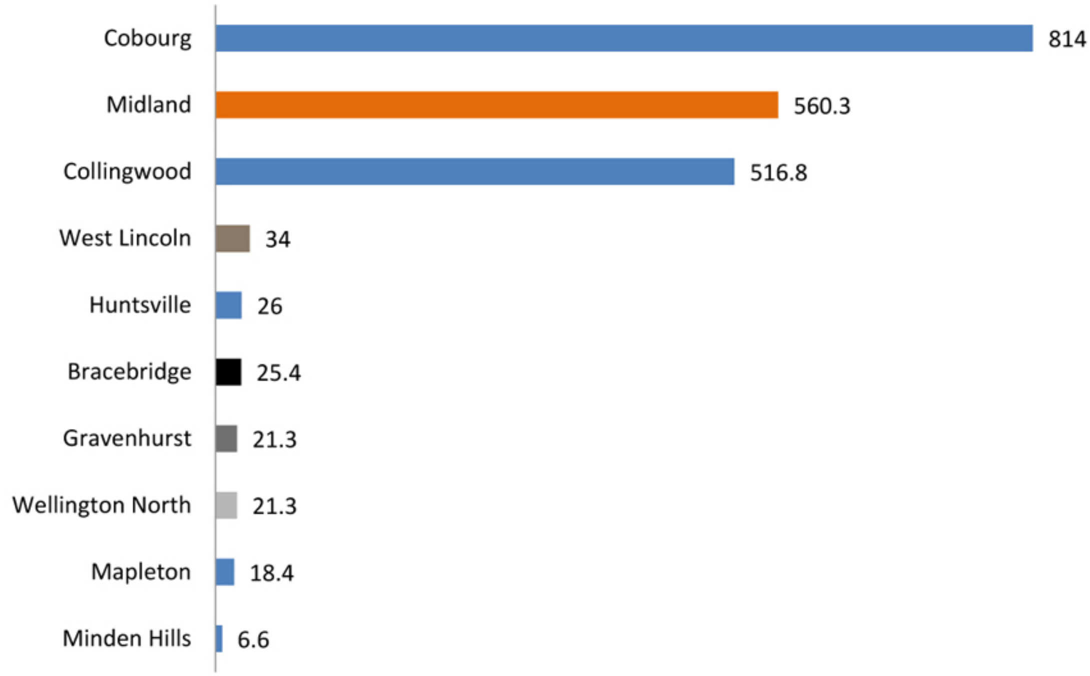


4.1 Population

Midland is the fourth largest community of the benchmarking regions, with a population in 2006 of 16,300; behind Huntsville (18,280), Cobourg (18,210) and Collingwood (17,290). While Bracebridge (15,652) and West Lincoln (13,167) are of similar sizes to Midland, Wellington North (11,175) and Gravenhurst (11,046) are slightly smaller. Mapleton (9,851) and Minden Hills (5,556) are the smallest of the benchmarking regions.

Population density (2006)

Exhibit 4.2

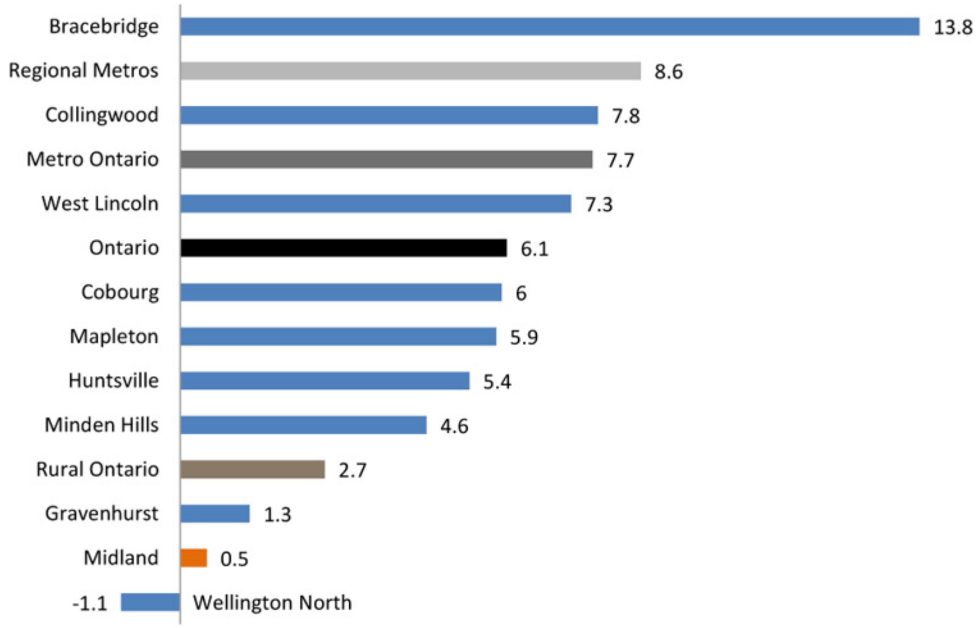


4.2 Population density

The ten central benchmarking regions vary greatly in population density. Midland has one of the highest population densities of the group, with a population density of 560 people per square km, only behind Cobourg with a population density of 814 people per square km. While Collingwood is comparable to Midland, with a population density of 517 people per square km, the remaining communities have population densities below 50 people per square km, ranging from a high of 34 people per square km in West Lincoln, to a low of 7 in Minden Hills people per square km.

Population growth (2001–2006)

Exhibit 4.3

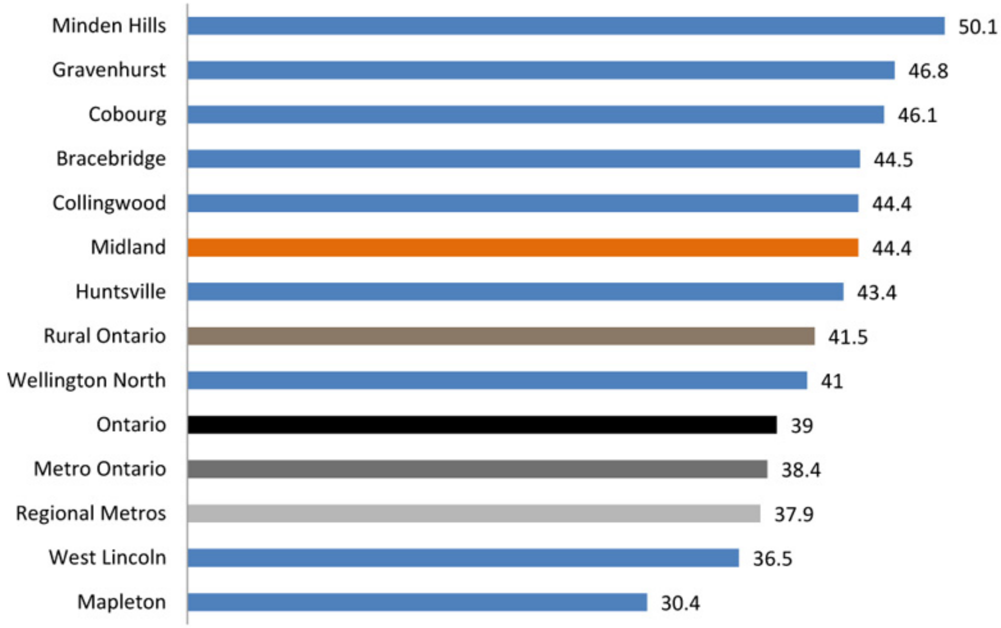


4.3 Population growth

With the exception of Wellington North, which experienced negative population growth (-1.1%) between the years 2001–2006, Midland has the lowest population growth of the regions under examination, with a growth rate of 0.5%. This is in stark comparison to Bracebridge, which has grown 13.8%, which is also above the regional metros average of 8.6%. Collingwood has grown 7.8%, which is on par with the population growth rate of 7.7% in metro Ontario. Cobourg (6%), Mapleton (5.9%) and Huntsville (5.4%) and Minden Hills (4.6%) all experienced population growth rates above the rural Ontario average during this period (2.7%), while Gravenhurst fell below with 1.3% growth.

Median age (2006)

Exhibit 4.4



4.4 Median age

Midland falls in the middle of its benchmarking peers along with Collingwood, with a median age of 44.4. However, this is well above the Ontario average of 39, metro Ontario median of 38.4, and regional metros average of 37.9, and is also above the rural Ontario average of 41.5. Only West Lincoln, with a median age of 36.5, and Mapleton with a median age of 30.4, fall below the provincial median ages. At the other end of the spectrum, Minden Hills is significantly older than several of its peer regions, with a median age of 50.1, while Gravenhurst (46.8) and Cobourg (46.1) also have above average median ages.

4.6 Female age distribution

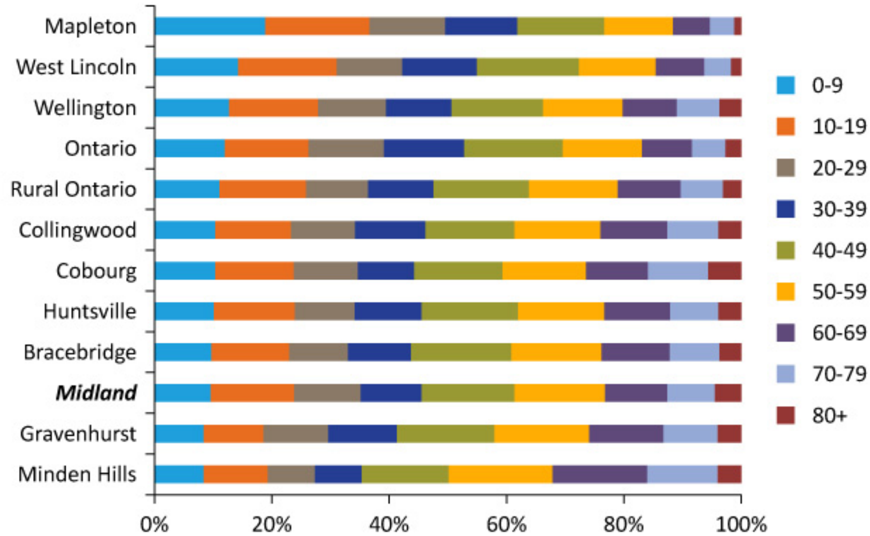
In examining the female age distribution, similar trends emerge to that of the male population. For example, Midland has a female age distribution that is similar to that of its peer regions. Mapleton, along with West Lincoln and Wellington North all have populations that are younger than the Ontario and rural Ontario average. On the other hand, Minden Hills has the smallest population of young people, with 75% of the population over the age of 30.

4.5 Male age distribution

In examining the male age distribution, Midland has an age distribution consistent with that of its peer regions, with no major variations in the age structure. It is apparent that some regions, such as Minden Hills and Gravenhurst, have larger shares of the population that are age 50–59 and 60–69. On the other hand, Mapleton has the youngest population of the regions examined, where 37% of the population is under age 20. This can be compared to 23.8% in Midland, or 19.3% in Minden Hills.

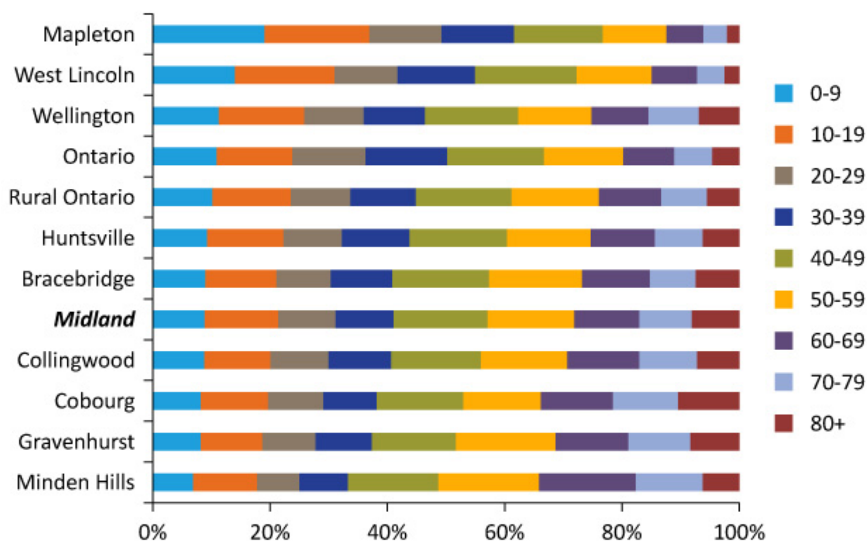
Male age distribution (2006)

Exhibit 4.5



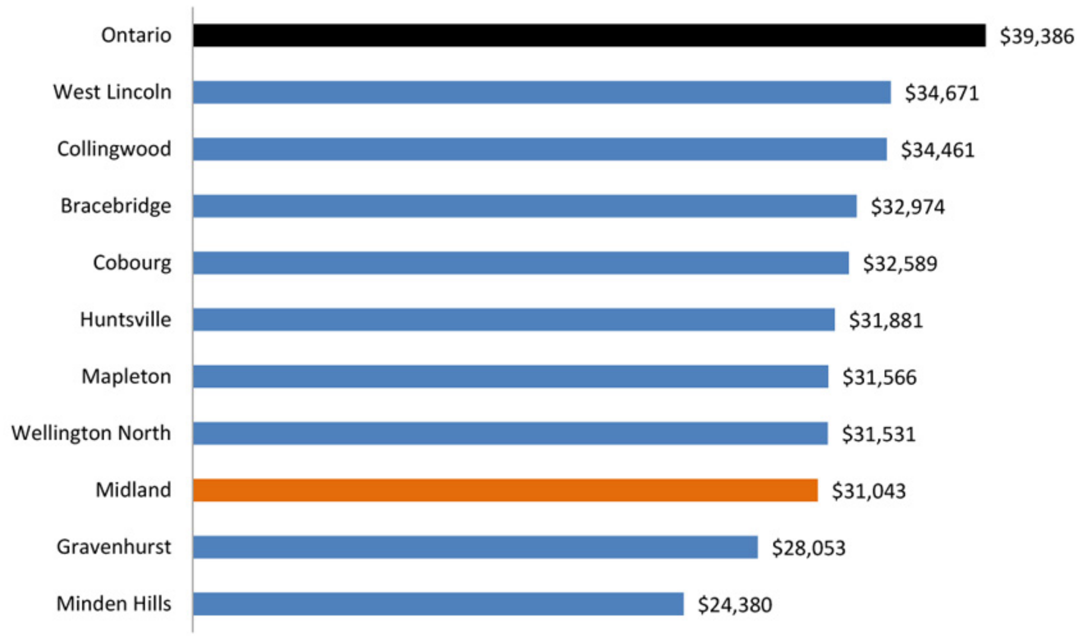
Female age distribution (2006)

Exhibit 4.6



Average employment income (2005)

Exhibit 4.7

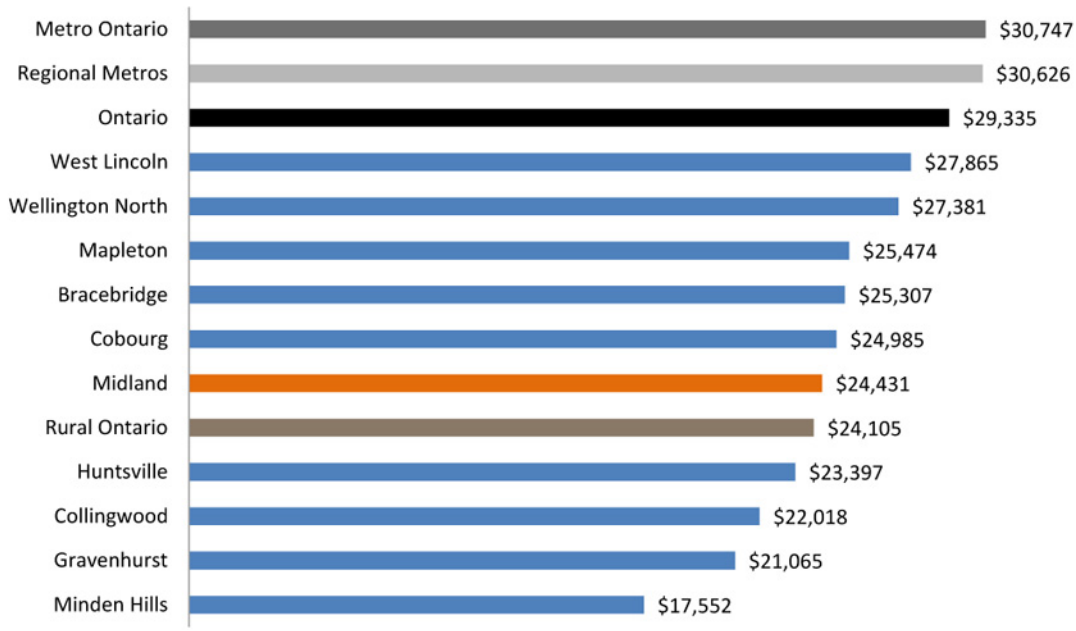


4.7 Average employment income

All of the central benchmarking regions have average employment income below the Ontario average of $39,386. While Midland, with an average employment income of $31,043, is similar to that of several peer regions (Cobourg, Huntsville, Mapleton, and Wellington North), it is still at the lower end of the income spectrum; as this is almost $10,000 less than the Ontario average. Only Gravenhurst, with $28,053, and Minden Hills with an average employment income of $24,380, have lower employment incomes. West Lincoln ($34,671) and Collingwood ($34,461) have nearly identical average employment incomes, followed closely by Bracebridge ($32,974) and Cobourg ($32,589).

Median employment income (2005)

Exhibit 4.8

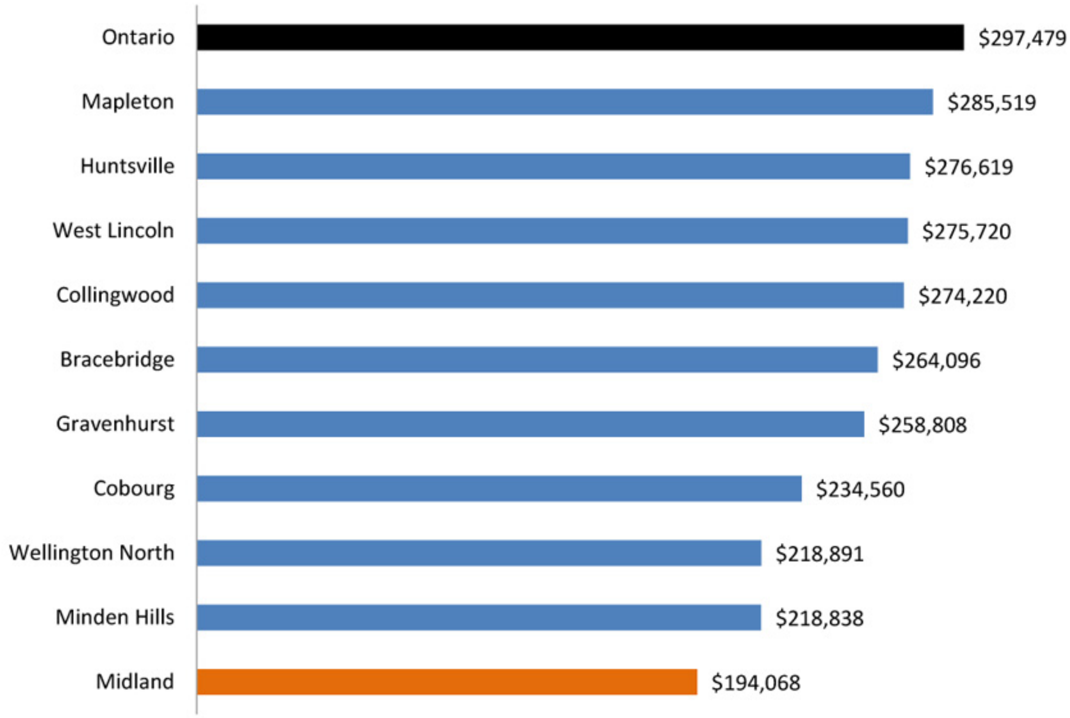


4.8 Median employment income

In examining median employment income, we again see that all of the central regions are below the Ontario average of $29,335, in addition to the metro Ontario average ($30,747) and regional metros average ($30,626). Midland falls roughly in the middle of its peer regions with a median income of $24,431, just above the rural Ontario average of $24,105. West Lincoln tops the list of peer regions with a median income of $27,865 while Minden Hills is at the bottom with $17,552.

Average value of dwelling (2006)

Exhibit 4.9



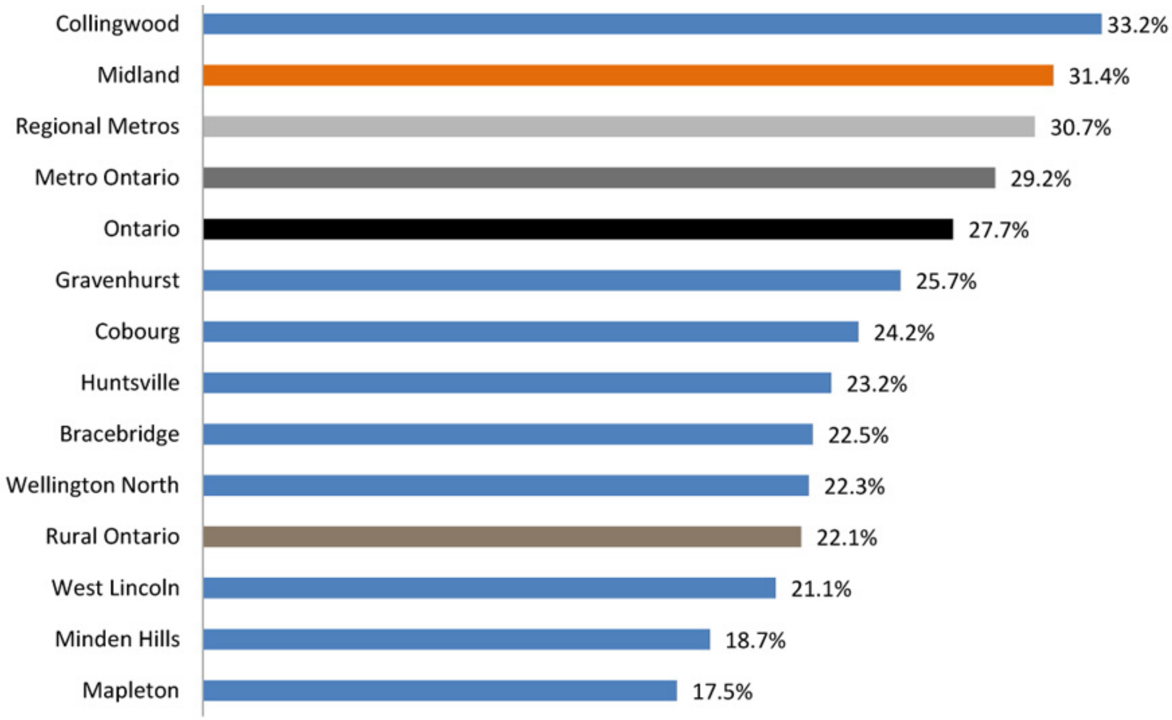
Note that this graph is inconsistent with the income information displayed in Exhibits 4.7 and 4.8, suggesting that average and median incomes do not necessarily correlate with more expensive dwellings in this sample. Keep in mind that the average can be easily influenced by outliers.

4.9 Average value of dwelling

In the central region, all of the benchmark regions have an average dwelling value below that of the Ontario average of $297,479. There are also several benchmarking regions clustered around an average family dwelling value of approximately $275,000, ranging from Mapleton ($285,519) to Gravenhurst ($258,808). In Midland, the average value of a dwelling in Midland is $194,068, which is approximately $100,000 less than the Ontario average, leaving Midland at the bottom of its peer regions. The average dwelling value in Cobourg ($234,560) is worth approximately $40,000 more than Midland, while Wellington North ($218,891) and Minden Hills ($218,838) also have average dwelling values above that of Midland. However, it is important to keep in mind that several of the peer locations being examined in this region are located in cottage country, which contributes to increased dwelling values.

Share of households spending 30% or more of income on housing costs (2006)

Exhibit 4.10

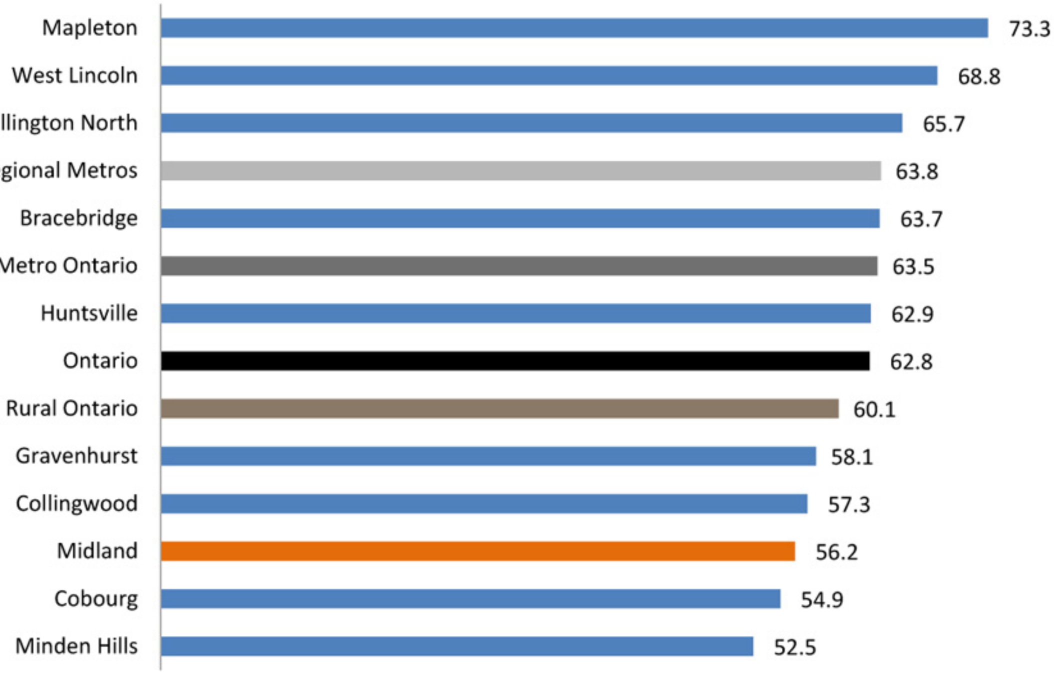


4.10 Share of households spending 30% of more of income on housing costs

In each of the peer regions, we are also able to examine the share of the households spending 30% or more of their income on housing costs. Midland (31.4%) and Collingwood (33.2%) residents spend a higher share of their income on housing costs, when compared to their regional peers. The remaining benchmarking regions all spend less than the regional metros average (30.7%), metro Ontario average (29.2%), and Ontario average (27.7%) share of the population that is spending 30% or more of household income on housing costs. There are several benchmarking regions, from Gravenhurst (25.7%) to Wellington North (22.3%), that are between the Ontario and rural Ontario average. West Lincoln (21.2%), Minden Hills (18.7%), and Mapleton (17.5%) all have fewer than the rural Ontario average (22.1%) share of the population that is spending 30% or more of household income on housing costs.

Employment rate (2006)

Exhibit 4.11

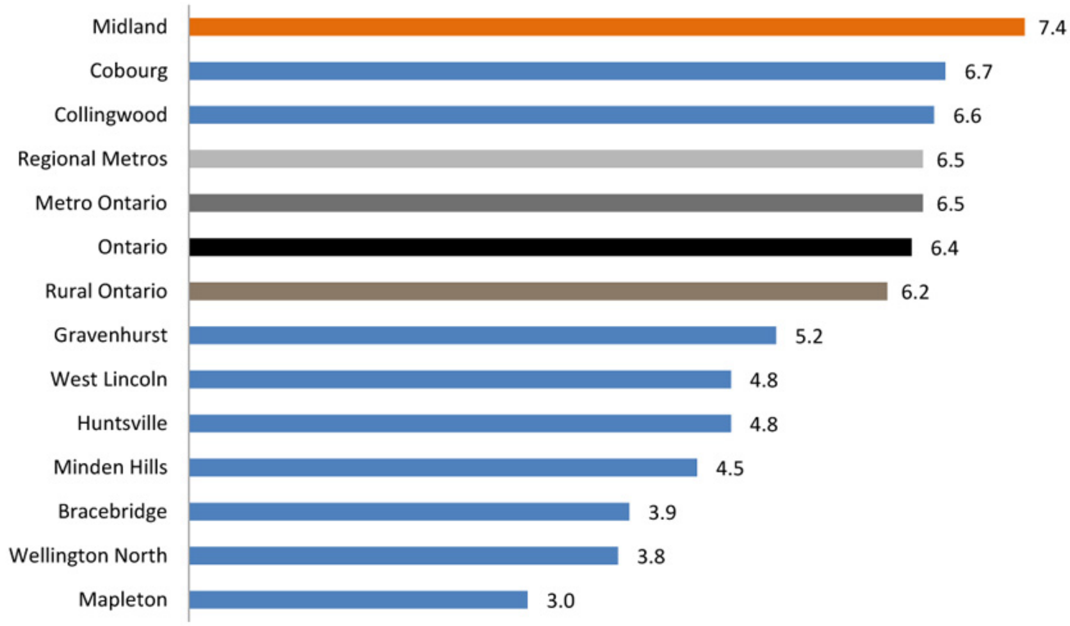


4.11 Employment rate

In examining employment rates across the benchmarking regions, there is a great deal of variation across the peer communities; with a difference of 20.8% separating the community with the highest employment rate (Mapleton, 73.3%) and the lowest employment rate (Minden Hills, 52.5%). While West Lincoln (68.8%) and Wellington North (65.7%) are above the regional metros average employment rate of 63.8%, Bracebridge has an employment rate of 63.7%, which is also above the metro Ontario average of 63.5%. Huntsville has an employment rate of 62.9%, which is nearly identical to the Ontario average of 62.8%, and is slightly above the rural Ontario average of 60.1%. The remaining benchmarking regions have employment rates below that of the rural Ontario average, ranging from 58.1% in Granvehurst to a low of 52.5% in Minden Hills. The employment rate in Midland in 2006 was 56.2%, almost 7 points lower than the Ontario average and near the bottom of its benchmarking peers.

Unemployment rate (2006)

Exhibit 4.12



4.12 Unemployment rate

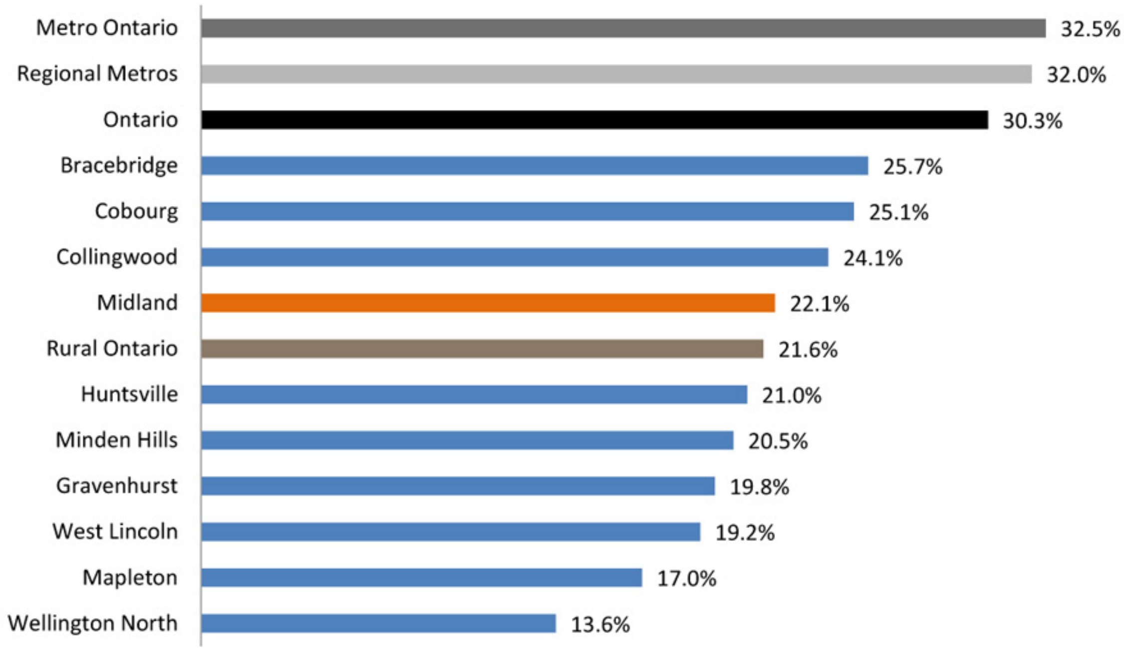
Midland has the highest unemployment rate of all the peer regions, at a rate of 7.4% in 2006. Cobourg (6.7%) and Collingwood (6.6%) have unemployment rates above the regional metros (6.5%), metro Ontario (6.5%), Ontario (6.4%) and rural Ontario (6.2%) average unemployment rates. The remaining peer regions have unemployment rates of approximately 5% and lower, ranging from 5.2% in Gravenhurst and 4.8% in both West Lincoln and Huntsville, to a low of 3% in Mapleton.

OCCUPATIONAL CLASSES

This section examines the occupational structure of Midland. For a detailed description of the occupational classes and how they are calculated, please see the Appendix. In Midland, 22.1% of residents are employed in Creative Class occupations, while 47% are in the service class, 30.7% are in the working class and 0.2% in the farming, fishing, and forestry class.

Creative Class share (2006)

Exhibit 4.13

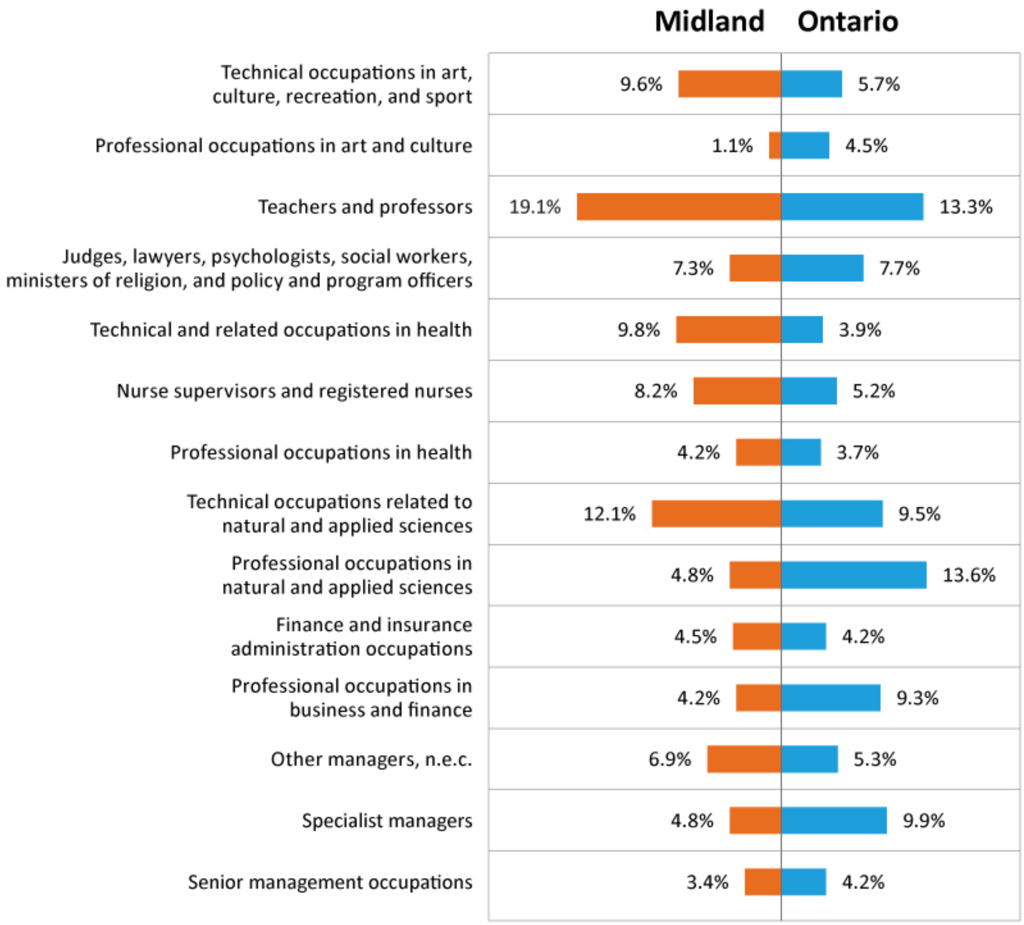


4.13 Creative Class share

First, we can examine the share of the population in each of the benchmarking regions that is in the Creative Class. All of the peer communities have Creative Class shares well below that of the metro Ontario average (32.5%); regional metros average (32%); and Ontario average (30.3%). Bracebridge, Cobourg and Collingwood all have similar Creative Class shares, with approximately one-quarter of the workforce employed in creative industries. At 22.1%, Midland's Creative Class share is only slightly higher than the rural Ontario average of 21.6%, but is on par with several of its benchmarking peers. Wellington North has the lowest Creative Class share of only 13.6%, which is 18.9% lower than the metro Ontario average.

Creative Class breakdown (2006)

Exhibit 4.14

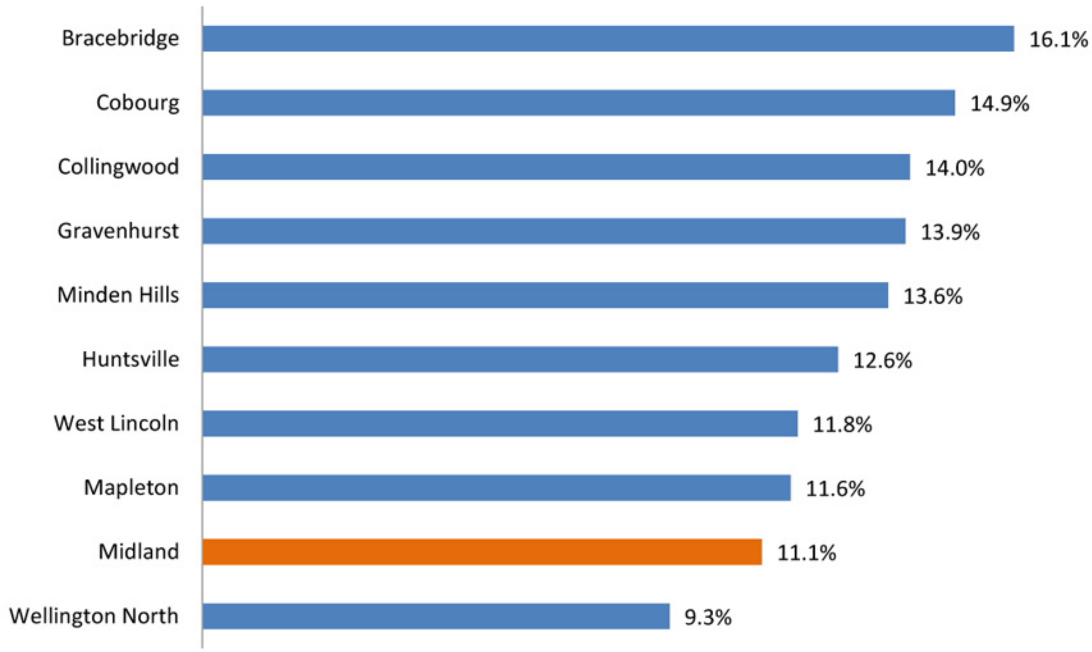


4.14 Creative Class breakdown

We are also able to examine the Creative Class occupations in Midland in greater depth to examine the various creative occupations the population is employed in. Through breaking down Midland's Creative Class, we see that the majority of its Creative Class share is composed of teachers and professors (19.1%), in addition to technical occupations related to natural and applied sciences (12.1%); both of which are well above the Ontario average. The share of the Creative Class composed of health-related occupations is also higher in Midland than Ontario overall. Interestingly, technical occupations in art, culture, recreation, and sport make up 9.6% of the Creative Class in Midland, much higher than the Ontario average of 5.7%. For both arts and culture, and natural and applied sciences, the share of these in technical (support) occupations is higher than the provincial average while the share of professional workers is much lower. The higher education and skill level requirements for professionals may be a factor.

Adjusted Creative Class share (2006)

Exhibit 4.15

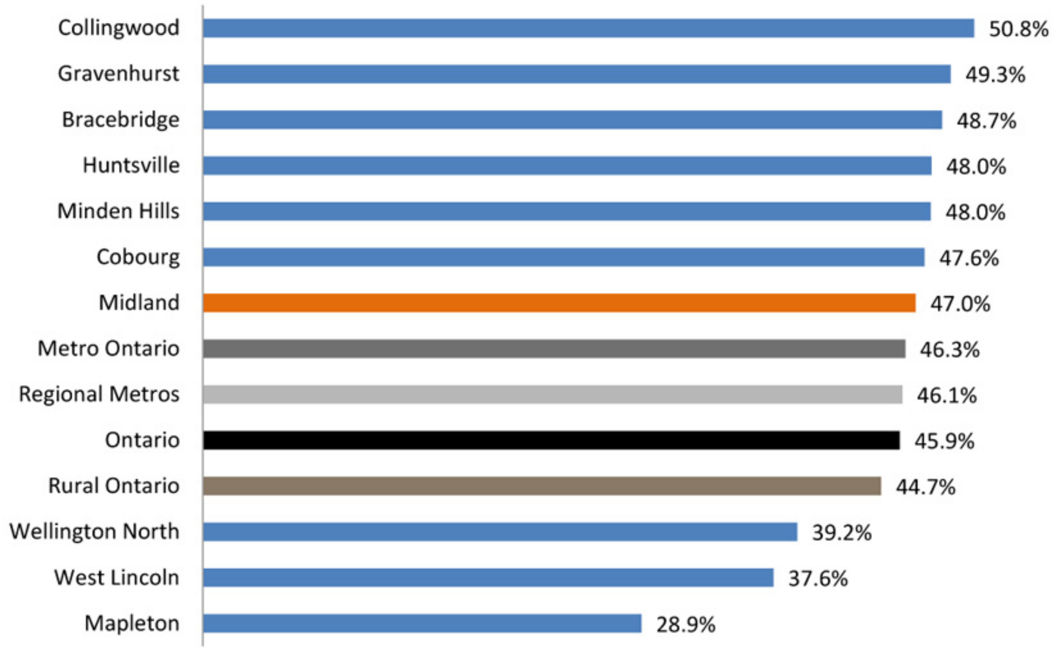


4.15 Adjusted Creative Class share

When occupations associated with economic reproduction (see appendix) are taken out of the Creative Class, Midland's Adjusted Creative Class share of the labour force drops below the vast majority of the benchmarking regions to 11.1%. This is a significant 10% decrease in the Creative Class share of Midland, which has a similar Adjusted Creative Class share to that of West Lincoln (11.6%) and Mapleton (11.6%). Bracebridge has the largest Adjusted Creative Class share of 16.1%, followed closely by Cobourg (14.9%), Collingwood (14%), Gravenhurst (13.9%) and Minden Hills (13.6%). This drop for Midland is reflective of the fact that education and healthcare workers make up a large share of its overall Creative Class.

Service class share (2006)

Exhibit 4.16

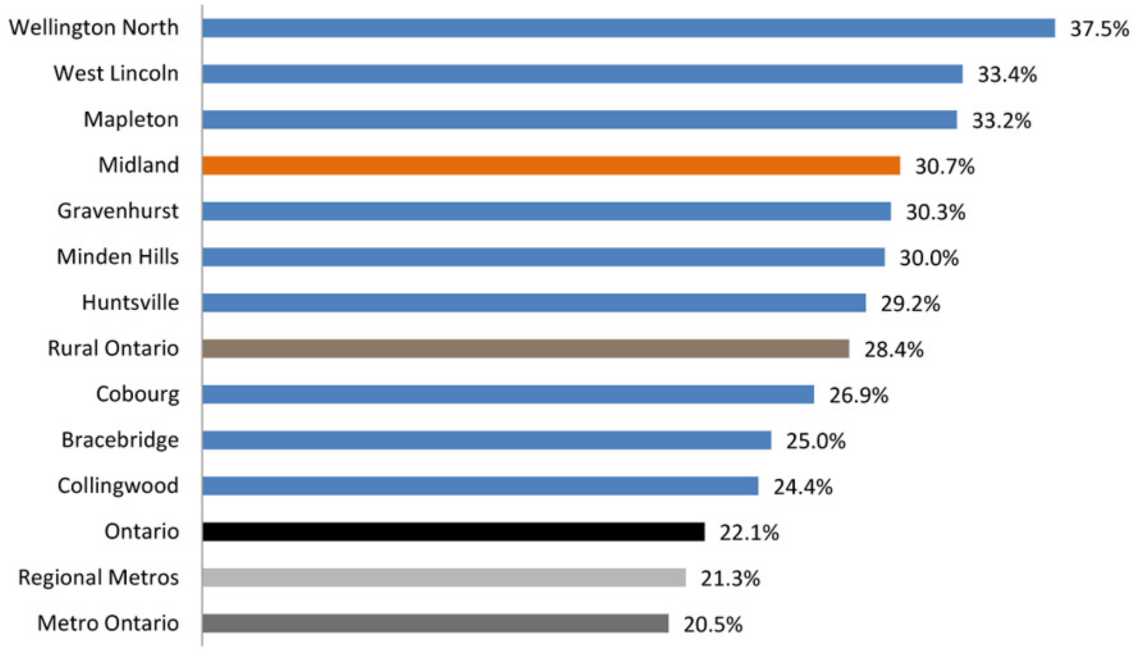


4.16 Service class share

Midland, with a service class share of 47%, is in the middle of its benchmarking peers, with a service class share similar to that of metro Ontario (46.3%), the regional metros (46.1%) and Ontario (45.9%). We see a significant variation in the share of the population that is in the service class across the benchmarking regions, with a high of 50.8% in Collingwood and 49.3% in Gravenhurst, to a low of 28.9% in Mapleton. While Wellington North (39.2%) and West Lincoln (37.6%) both have service class shares below the rural Ontario average (44.7%), the remaining metros hover around a service class share of approximately 48%. Notice Collingwood and Gravenhurst, which have the highest service class shares, were also two of the three benchmark regions with the lowest median incomes (Exhibit 4.8).

Working class share (2006)

Exhibit 4.17

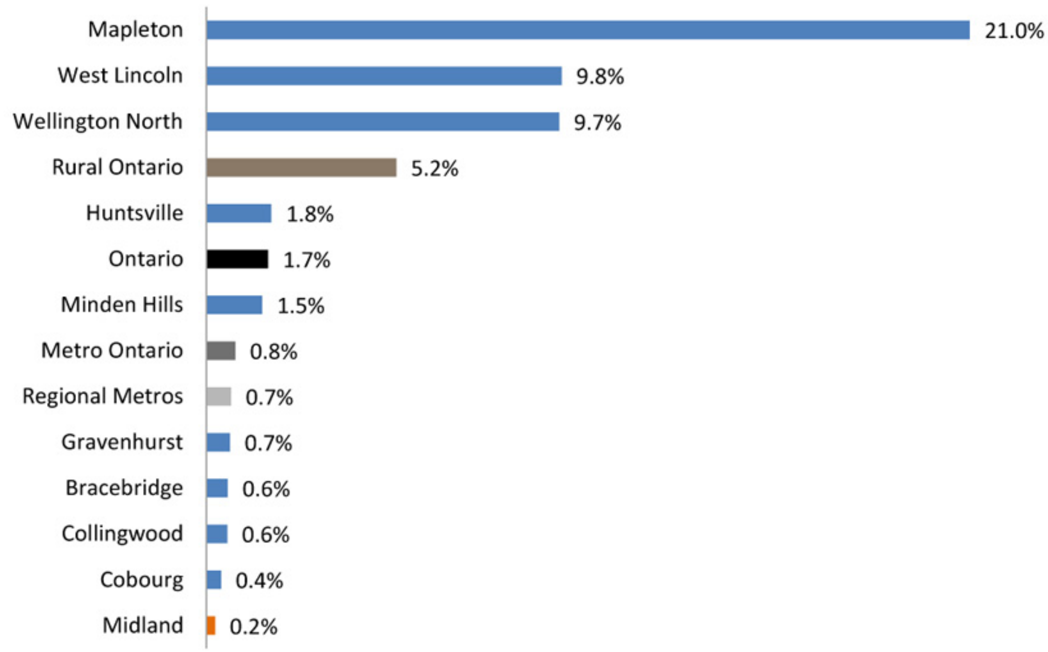


4.17 Working class share

We also see a significant variation across the benchmarking regions in examining the share of the population that is in the working class. All of the benchmarking regions are above the Ontario (22.1%), regional metros (21.3%) and metro Ontario (20.5%) average working class share, with Collingwood (24.4%) having the lowest working class share, followed closely by Bracebridge with 25%. At the other end of the spectrum, Wellington North has the largest working class share, with 37.5%, followed by West Lincoln (33.4%) and Mapleton (33.2%).

Farming, fishing, and forestry class share (2006)

Exhibit 4.18



4.18 Farming, fishing, and forestry class share

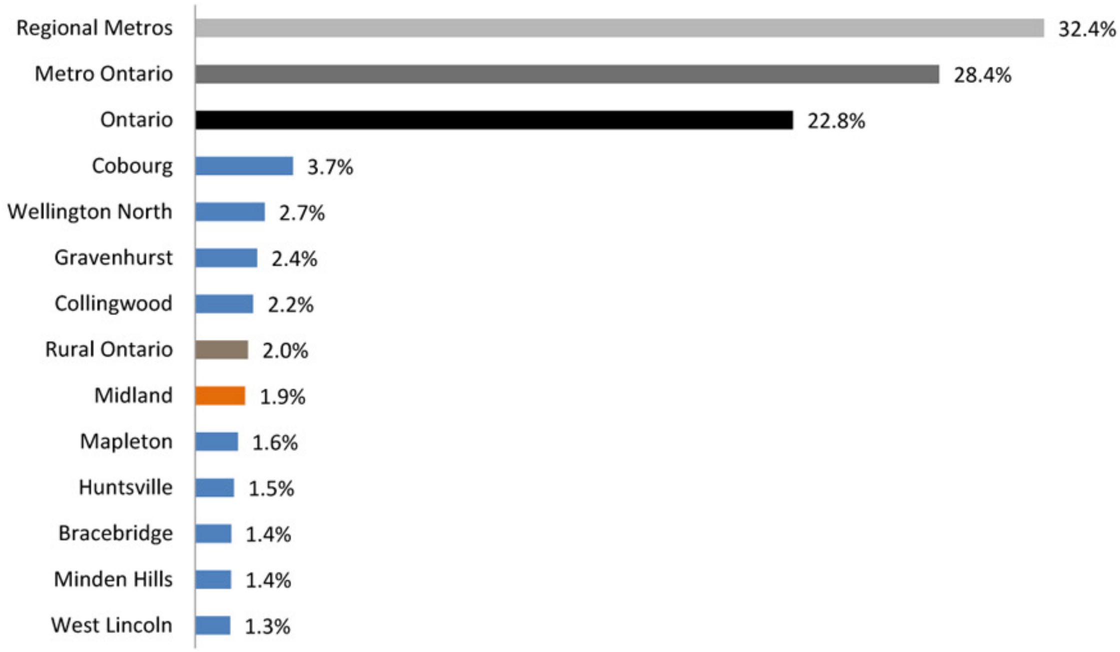
Finally, we can examine the share of the workforce that is employed in farming, fishing, and forestry occupations. Midland has an extremely small share of the workforce that is employed in farming, fishing, and forestry occupations (0.2%), along with a host of peer regions which fall below the regional metro average of 0.7% and the metro Ontario average of 0.8% (Gravenhurst, Bracebridge, Collingwood and Cobourg). Minden Hills (1.5%) and Huntsville (1.8%) have farming, fishing, and forestry class shares similar to that of the Ontario average (1.7%); still below the rural Ontario average of 5.2%. While Wellington North (9.7%) and West Lincoln (9.8%) have above average farming, fishing, and forestry class shares, Mapleton is over double that with a share of 21%.

TOLERANCE

Tolerance has been repeatedly identified in the literature (see: Florida, 2002) as a vital requirement for the attraction and retention of Creative Class workers seeking a diverse and open environment, and is a facet of economic development that rural areas have been struggling to overcome. Tolerance will be examined through the shares of visible minority, immigrant, and Aboriginal populations in the ten benchmarking regions.

Visible minority population share (2006)

Exhibit 4.19

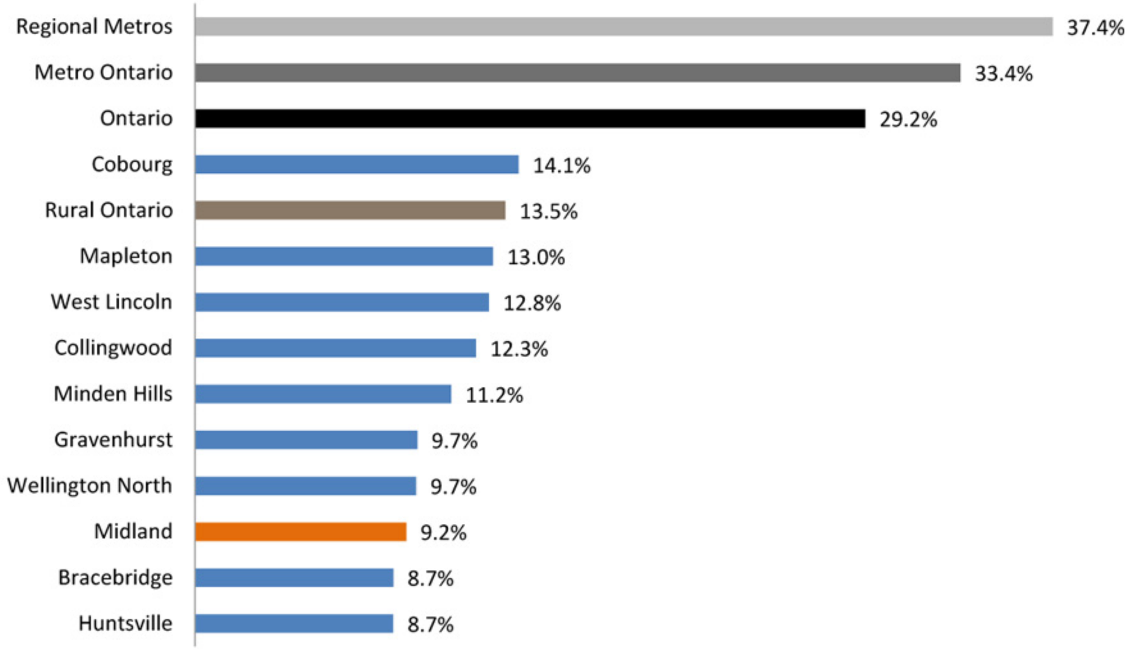


4.19 Visible minority population share

In examining the share of the population that is visible minority, all of the benchmarking regions fall below the regional metros (32.4%), metro Ontario (28.4%) and Ontario average (22.8%). With 1.9% of its population identifying as visible minority, Midland is consistent with the rural Ontario average and sits in the middle of its peer regions. Cobourg tops the list with 3.7% while West Lincoln is at the bottom with 1.3%.

Immigrant population share (2006)

Exhibit 4.20

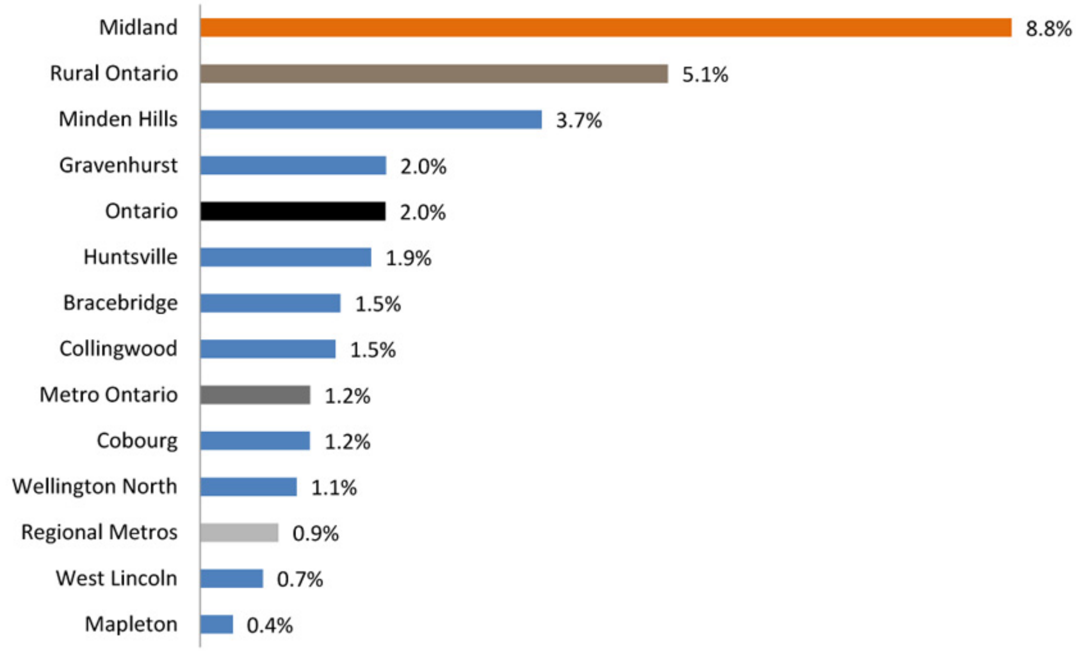


4.20 Immigrant population share

Again, all of the benchmarking regions are below the immigrant population share of the regional metros (37.4%), metro Ontario (33.4%) and Ontario average (29.2%). Of the benchmarking regions, Cobourg also has the largest immigrant population share (14.1%), which is slightly above the rural Ontario average of 13.5%. While the majority of the benchmark regions have immigrant population shares that hover at approximately 11%, Midland is slightly lower with an immigrant population share of 9.2%.

Aboriginal population share (2006)

Exhibit 4.21



4.21 Aboriginal population share

Finally, we can examine the share of the population that are Aboriginal in each of the benchmarking regions. Midland has the largest Aboriginal population share, with 8.8%, and is the only benchmarking region above the rural Ontario average of 5.1%. While Minden Hills has a slightly higher Aboriginal population share with 3.7%, the majority of the peer communities have a similar average to Ontario. The remaining benchmarking communities, West Lincoln (0.7%) and Mapleton (0.4%), have similar Aboriginal population shares to that of the regional metros (0.9%).

TALENT

The Talent Index measures the share of the population 25 and above with a Bachelor's degree or higher.

4.22 Talent Index

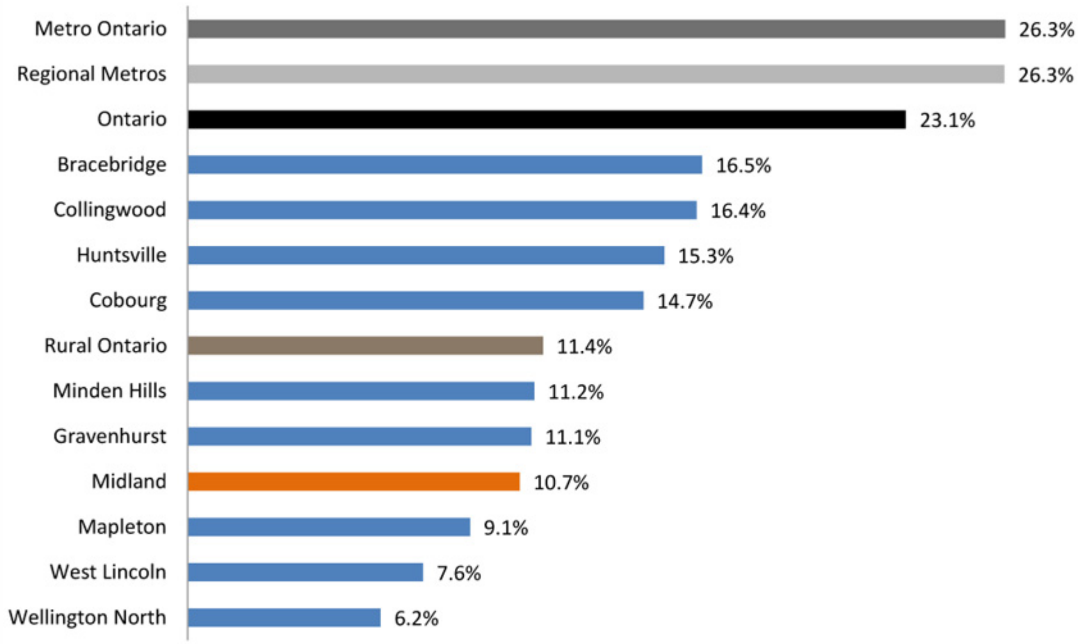
On the Talent Index, metro Ontario (26.3%) and the regional metros (26.3%), and Ontario (23.1%) outperform all of the benchmarking regions on this measure. While Bracebridge (16.5%) and Collingwood (16.4%) have the largest share of the population age 25 and above with a Bachelor's degree or higher, Midland is similar to the rural Ontario average of 11.4%, along with several peer regions (Minden Hills, Gravenhurst, and Mapleton). On the other hand, Wellington North scores lowest on the Talent Index, with 6.2%.

4.23 Highest certificate, diploma or degree

In examining the varying education levels across the benchmarking regions, Midland ranks similarly to that of the rural Ontario average, as in Midland, 26% of the population has no degree, 27% hold a high school certificate or equivalent, 12% have an apprenticeship or trades certificate or diploma, 21% hold a college diploma, and 7.2% have a Bachelor's degree. Collingwood has the most educated population, but on the other hand, it appears that Mapleton has the lowest levels of education of the benchmarking regions. In Mapleton, 40.4% of the population hold no certificate, diploma or degree; over 20% more than the Ontario average.

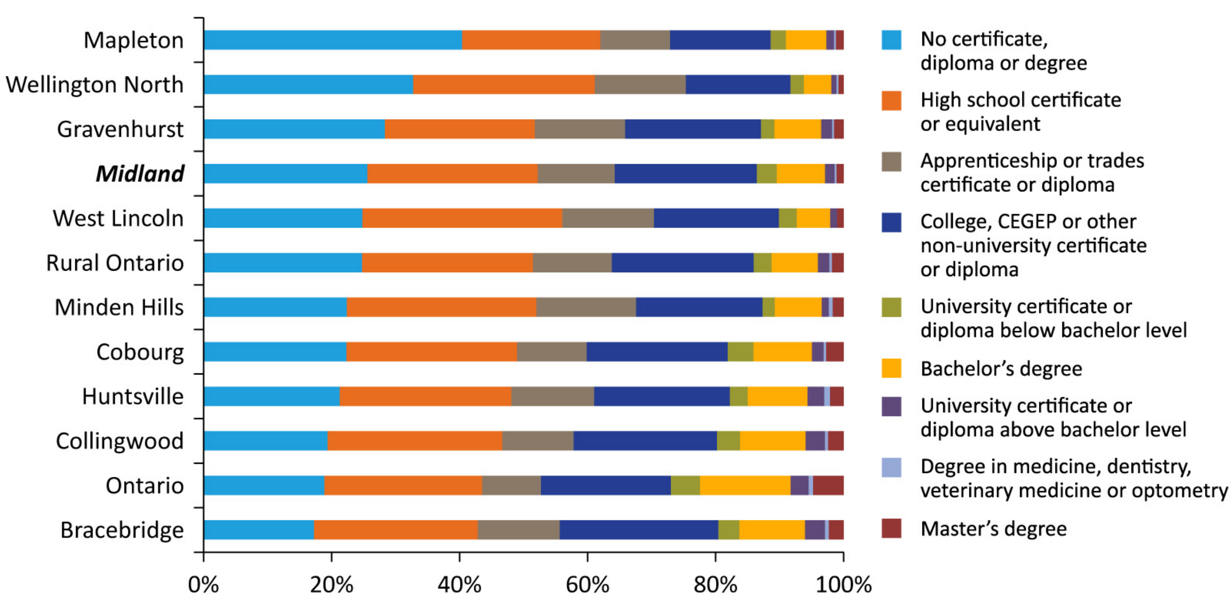
Talent Index (2006)

Exhibit 4.22



Highest certificate, diploma or degree (2006)

Exhibit 4.23

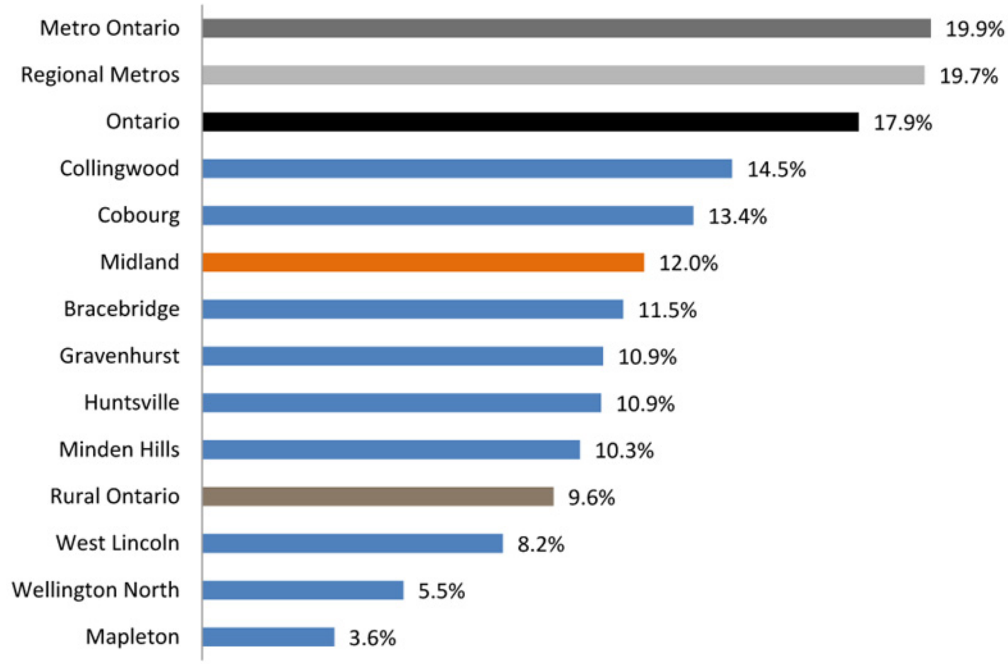


TECHNOLOGY

In examining the prevalence of high technology industries in our benchmark regions, the high-tech establishment share, high-tech location quotient (LQ) and Ontario Tech Pole Index will all be examined.

High-Tech establishment share (2008)

Exhibit 4.24

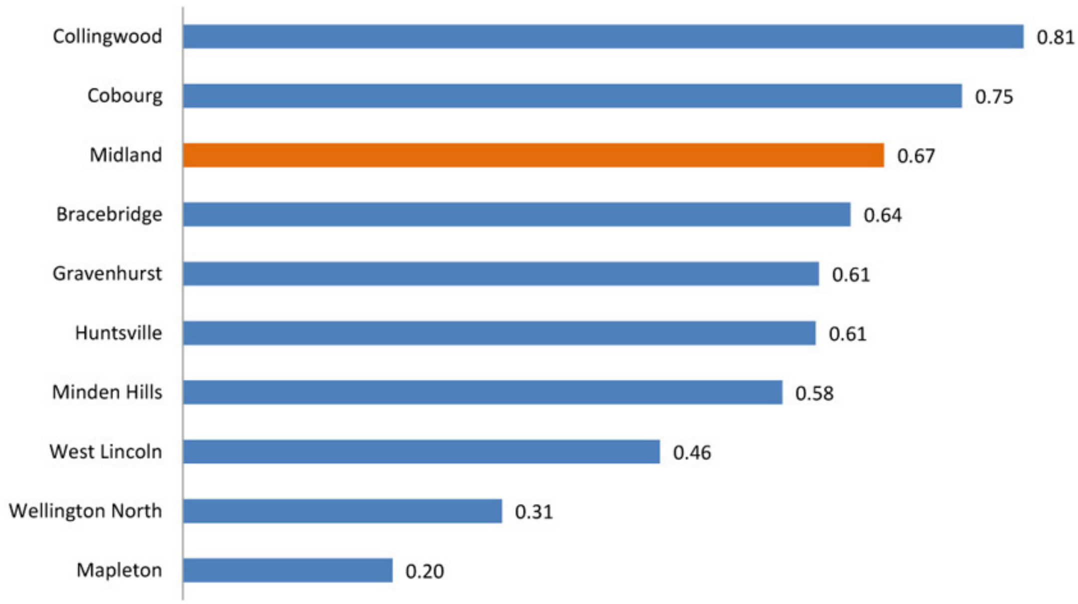


4.24 High-Tech establishment share

We use the North American Industry Codes (NAICS) to calculate the percentage of high-tech establishments in a geographic area relative to all industries. For a complete list of industry codes aggregated in the development of this high-tech measurement, please see the Appendix. While all of the benchmarking regions fall below the metro Ontario (19.9%), regional metro (19.7%) and Ontario (17.9%) averages, Midland (12%) is third amongst its peer regions in examining the high-tech establishment share, behind only Collingwood (14.5%) and Cobourg (13.4%). While several peer communities rank above the rural Ontario average of 9.6% (Bracebridge, Gravenhurst, Huntsville, and Minden Hills with a share of approximately 10%), West Lincoln falls below with 8.2%. Wellington North and Mapleton rank lowest on the high-tech establishment share, with 5.5% and 3.6% shares respectively.

High-Tech LQ (2008)

Exhibit 4.25

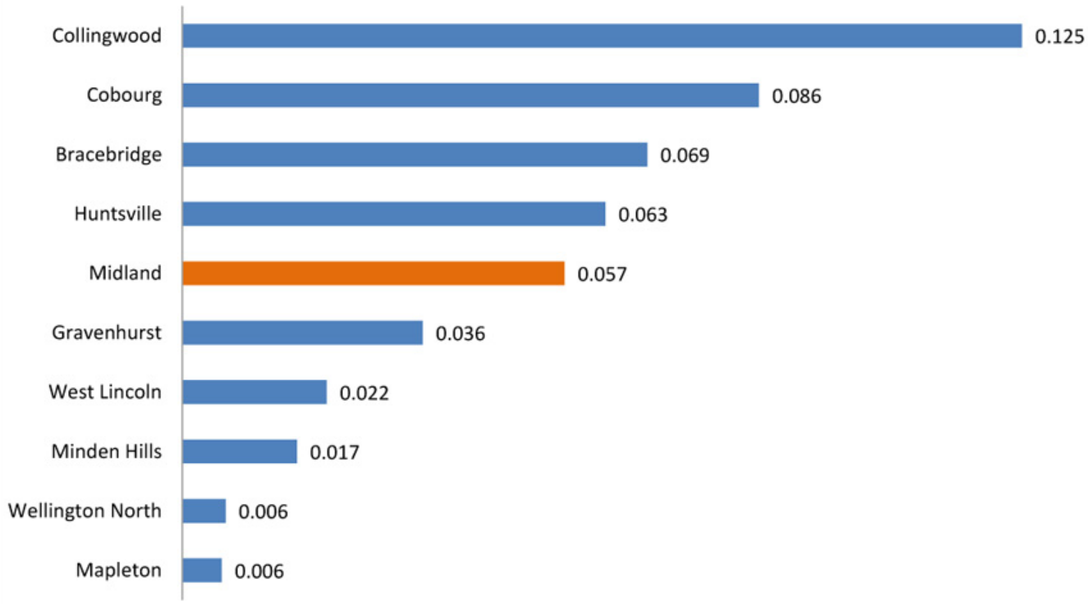


4.25 High-Tech LQ

High-Tech LQ was calculated to further examine the presence of high-tech establishments in the region. Location quotients (LQs) are ratios that allow an area's distribution of employment by industry to be compared to a reference or base area's distribution. A full explanation of how an LQ is calculated is available in the Appendix. Again, Midland scores higher (0.67) than many of its peer regions, only below Collingwood (0.81) and Cobourg (0.75). There is also a cluster of peer communities with similar scores, ranging from 0.64 in Bracebridge to 0.58 in Minden Hills. West Lincoln then follows with a score of 0.46, well ahead the communities of Wellington North (0.31) and Mapleton (0.20).

Ontario Tech Pole Index (2008)

Exhibit 4.26



4.26 Ontario Tech Pole Index

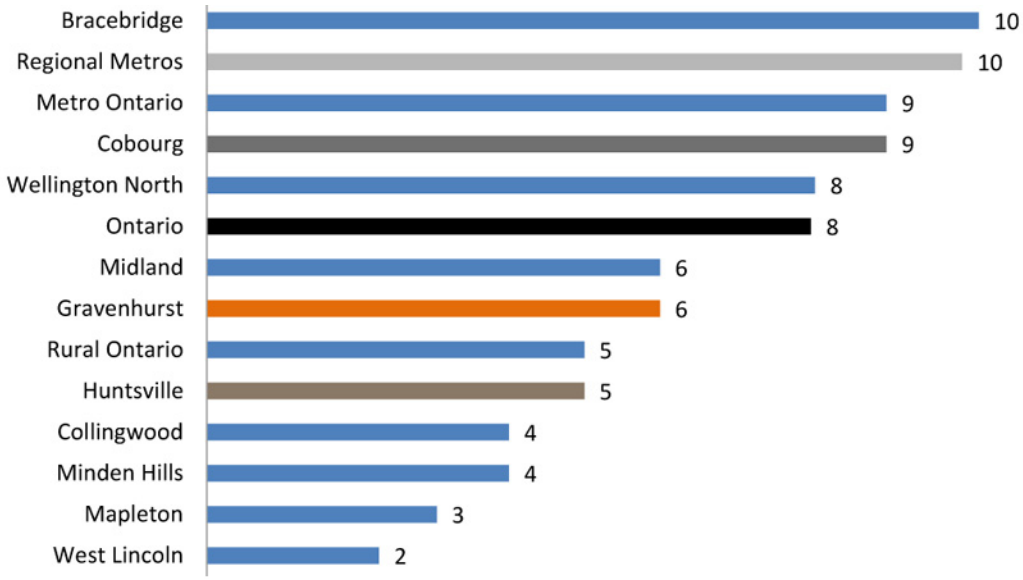
Finally, we can examine the benchmark regions through utilizing the Ontario Tech Pole Index. This examines the total high-tech employment in a region, using Ontario as a base, which in turn is adjusted for city size and compared to the Ontario base (for a complete description, please see the Appendix). Utilizing this index, we see a great deal of variation across the benchmarking communities. On the high end of the scale, we have Collingwood (0.125) and Cobourg (0.086), and alternatively, on the very low end of the scale we have Mapleton and Wellington North (0.006) as well as Minden Hills (0.017) and West Lincoln (0.022). Midland is the ‘middle of the pack’ with a score of 0.057 on the Ontario Tech Pole Index, similar to that of Huntsville (0.063) and Bracebridge (0.069) but also above Gravenhurst (0.036). Midland’s higher ranking on the high-tech LQ and slightly lower ranking on the Tech Pole indicates that relative to the rest of Ontario, the region has a greater concentration high-tech but the firms have lower employment.

TERRITORIAL ASSETS

The territorial assets discussed in this section are an attempt to quantify indicators of quality of place and civic engagement. The territorial assets that will be examined include: Arts & Entertainment establishment, recreation facilities, restaurants and bars, healthcare professionals, voter turnout and crime rate per 10,000. Finally, the Creativity Index will be examined.

Arts & Entertainment establishments per 10,000 (2008)

Exhibit 4.27

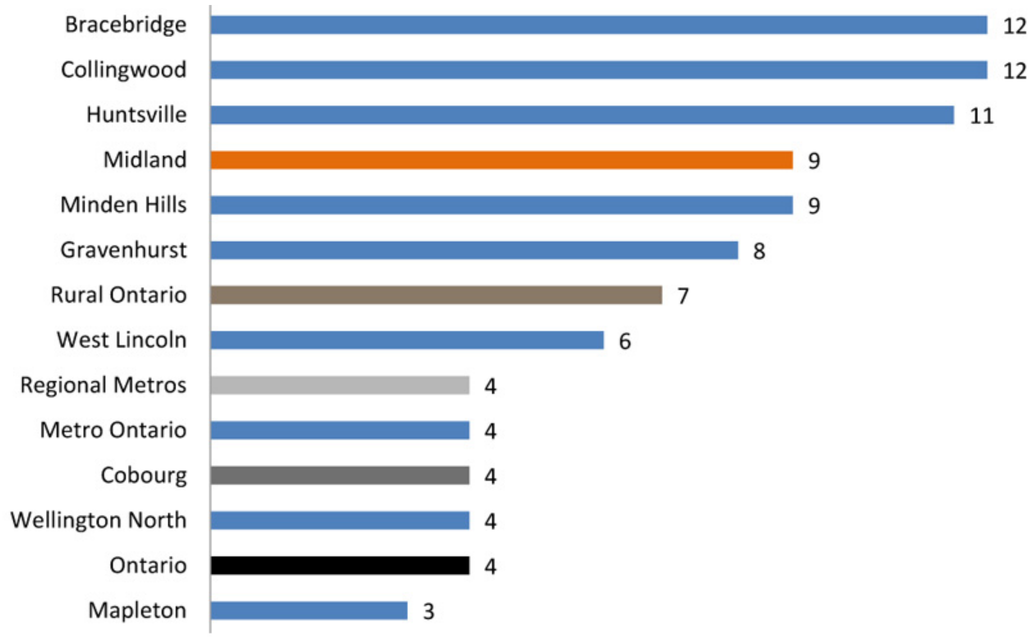


4.27 Arts & Entertainment establishments per 10,000

One facet of territorial assets is the number of Arts & Entertainment establishments per 10,000. Bracebridge has the largest number of Arts & Entertainment establishments (10), matching that of 10 in the regional metros, slightly above Cobourg and the metro Ontario average of 9 establishments per 10,000. While the Ontario average and Wellington North Arts & Entertainment establishments are identical, with 8 establishments per 10,000 each, Midland matches Gravenhurst with 6 establishments. Midland is slightly above the rural Ontario and Huntsville average (5), in addition to Collingwood and Minden Hills (4 respectively), Mapleton (3) and West Lincoln (2). In Midland, the Midland Cultural Centre will be opening in 2012, providing both increased event space as well as a new home for the Quest Art School and Gallery.

Recreation facilities per 10,000 (2008)

Exhibit 4.28

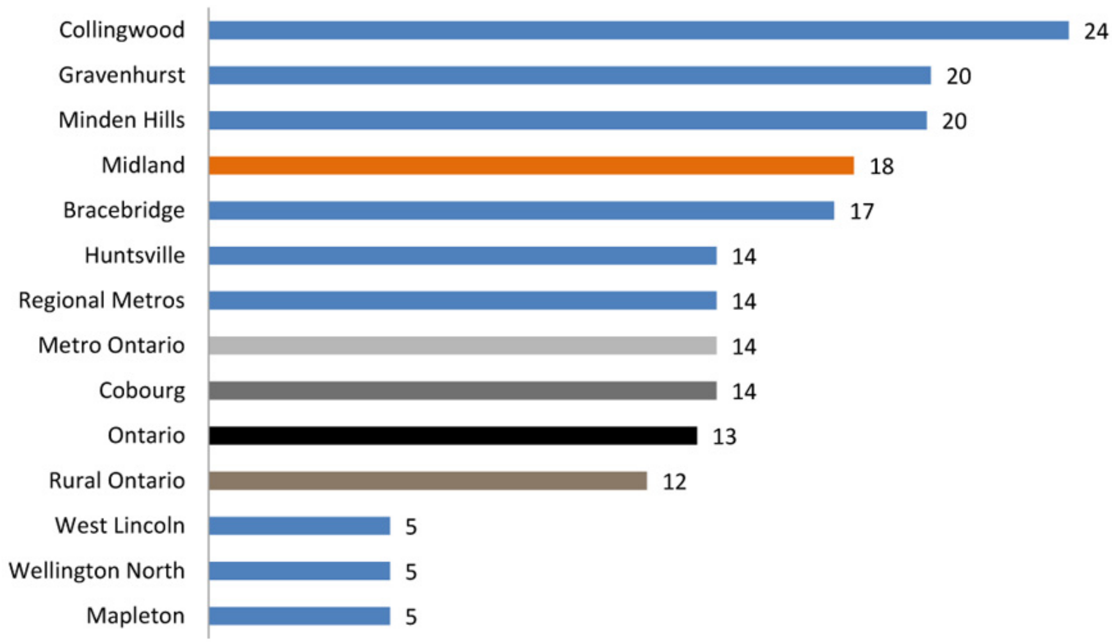


4.28 Recreation facilities per 10,000

With the exception Mapleton, with 3 recreation facilities per 10,000, all of the benchmarking communities are above the Ontario, metro Ontario and regional metros average of 4 recreation facilities per 10,000, along with Cobourg and Wellington North. Midland is in the middle of the pack with 9 recreation facilities per 10,000 people, leaving it slightly above the rural Ontario average of 7, which may be attributed in part to its location on Georgian Bay, making it a prime boating destination. Bracebridge and Collingwood lead the benchmarking communities with 12 recreation facilities per 10,000, followed closely by Huntsville with 11.

Restaurants and bars per 10,000 (2008)

Exhibit 4.29

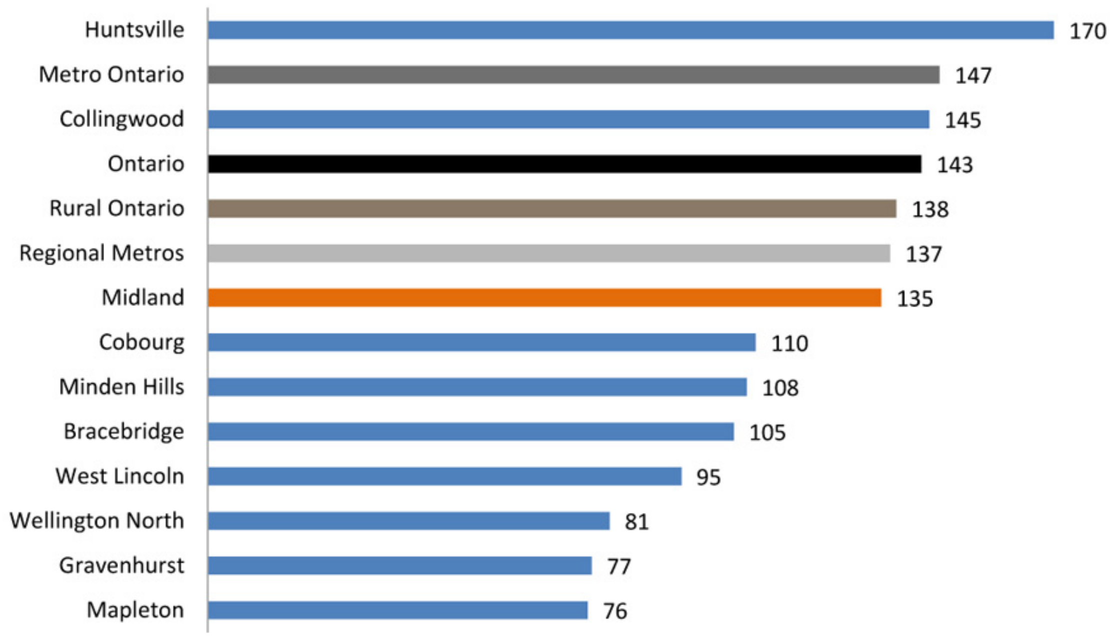


4.29 Restaurants and bars per 10,000

With 18 restaurants and bars per 10,000 people, Midland is behind only Gravenhurst and Minden Hills with 20 restaurant and bars per 10,000, and Collingwood with 24 restaurants and bars per 10,000. In the case of Midland, this likely reflects its role as the economic centre of the Georgian Bay region. The majority of the benchmarking communities are above the regional metros and metro Ontario average of 14 restaurants and bars per 10,000, and are also above the metro Ontario (13) and rural Ontario (12), with the exception of West Lincoln, Wellington North and Mapleton (5).

Healthcare professionals per 10,000 (2006)

Exhibit 4.30

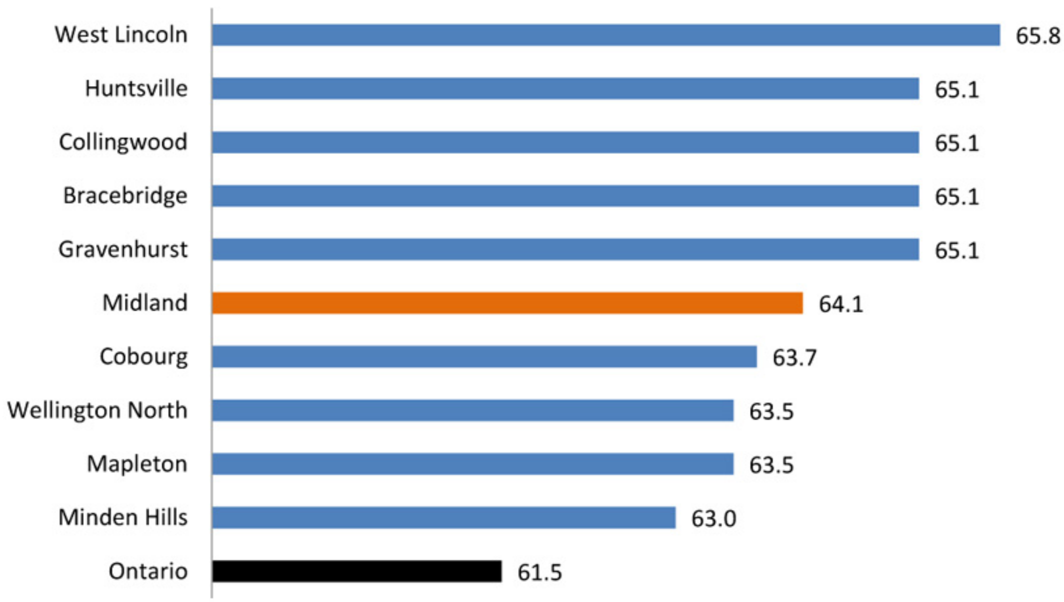


4.30 Healthcare professionals per 10,000

In examining the number of healthcare professionals, such as doctors, dentists and nurses, per 10,000, Midland has 135, slightly below rural Ontario (with 138). Collingwood has a similar number of healthcare professionals to that of metro Ontario (145 and 147 respectively), but are still well below the Huntsville average of 170. The remaining benchmarking regions fall below the rural Ontario average, ranging from a high of 110 healthcare professionals per 10,000 in Cobourg, to a low of 76 in Mapleton.

Voter turnout 2011 General Election

Exhibit 4.31

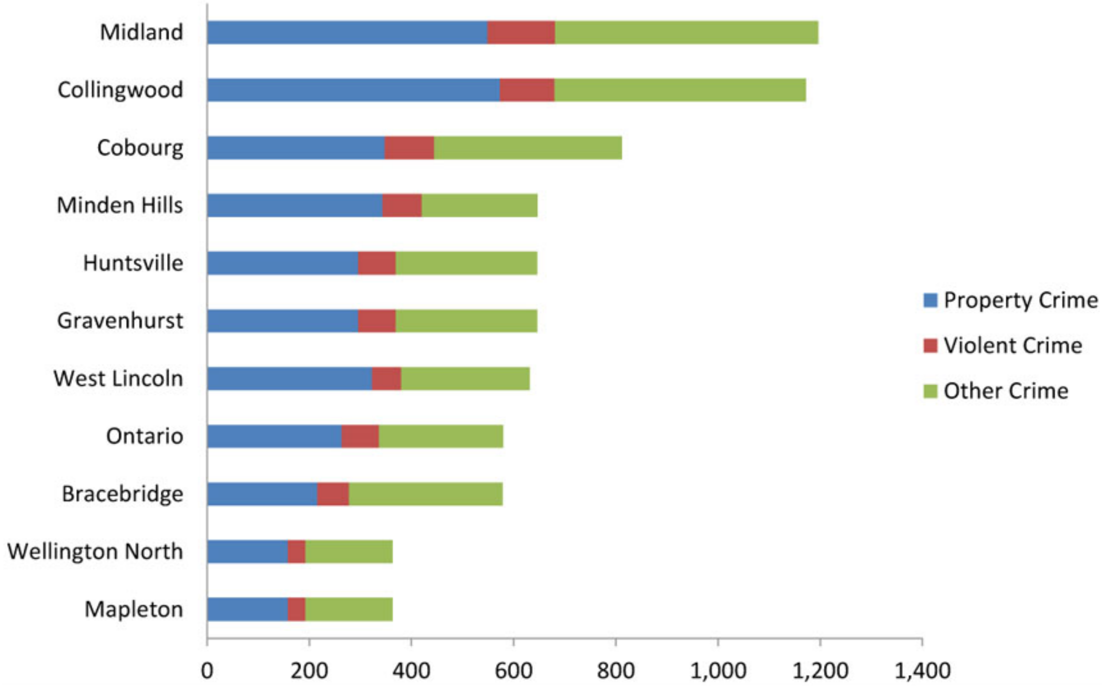


4.31 Voter turnout 2011 General Election

Using poll results from the 2011 General Election, we can also examine voter turnout rates. All of the benchmarking regions had voter turnout rates higher than the Ontario average of 61.5%. West Lincoln had the highest voter turnout rate, followed by Huntsville, Collingwood, Bracebridge and Gravenhurst; all with a voter turnout rate of 61.5%. Midland, part of the Simcoe North Federal Electoral District, is in the middle of the pack with a voter turnout rate of 64.5%, above the benchmarking regions Cobourg (63.7%), Wellington North and Mapleton (63.5%) and Minden Hills (63%).

Crimes per 10,000 (2007)

Exhibit 4.32

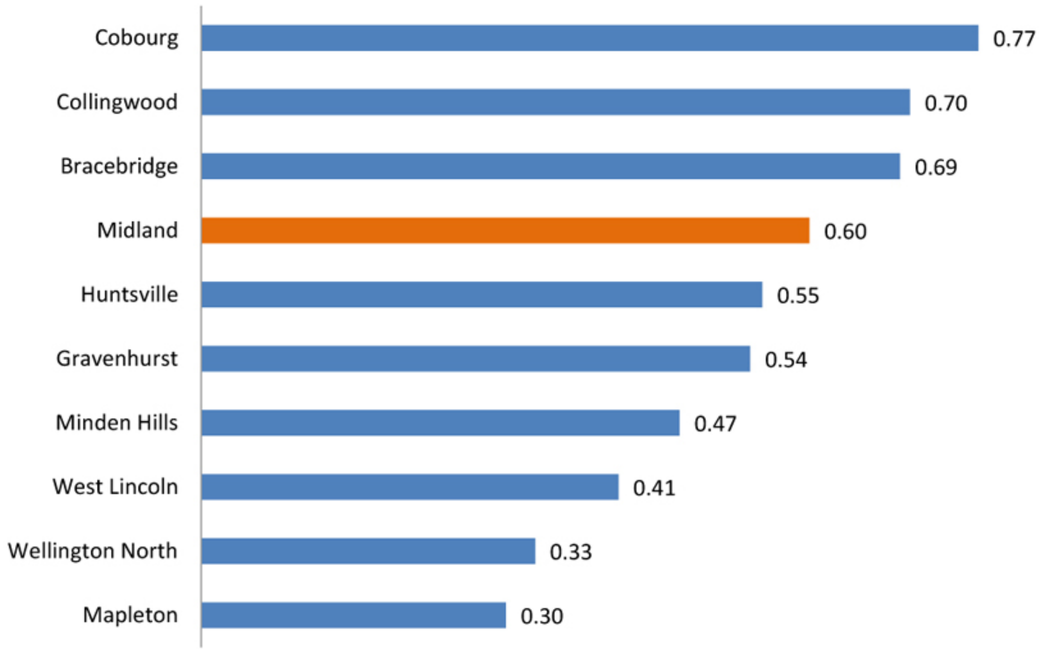


4.32 Crimes per 10,000

In 2007, the Midland area had 1,196 reported crimes per 10,000 people. Of this 11.1% were violent crimes and 45.9% were property crimes. This is second only to Collingwood, which had a total of 1172 crimes per 10,000; of which 574 were property crimes, and 107 were violent crimes. Only Bracebridge, Wellington North and Mapleton are below the Ontario average of 580 crimes per 10,000; of which 264 were property crimes, and 73 violent crimes, demonstrating a significant level of variation in crime levels across the central region.

Creativity Index

Exhibit 4.33



4.33 Creativity Index

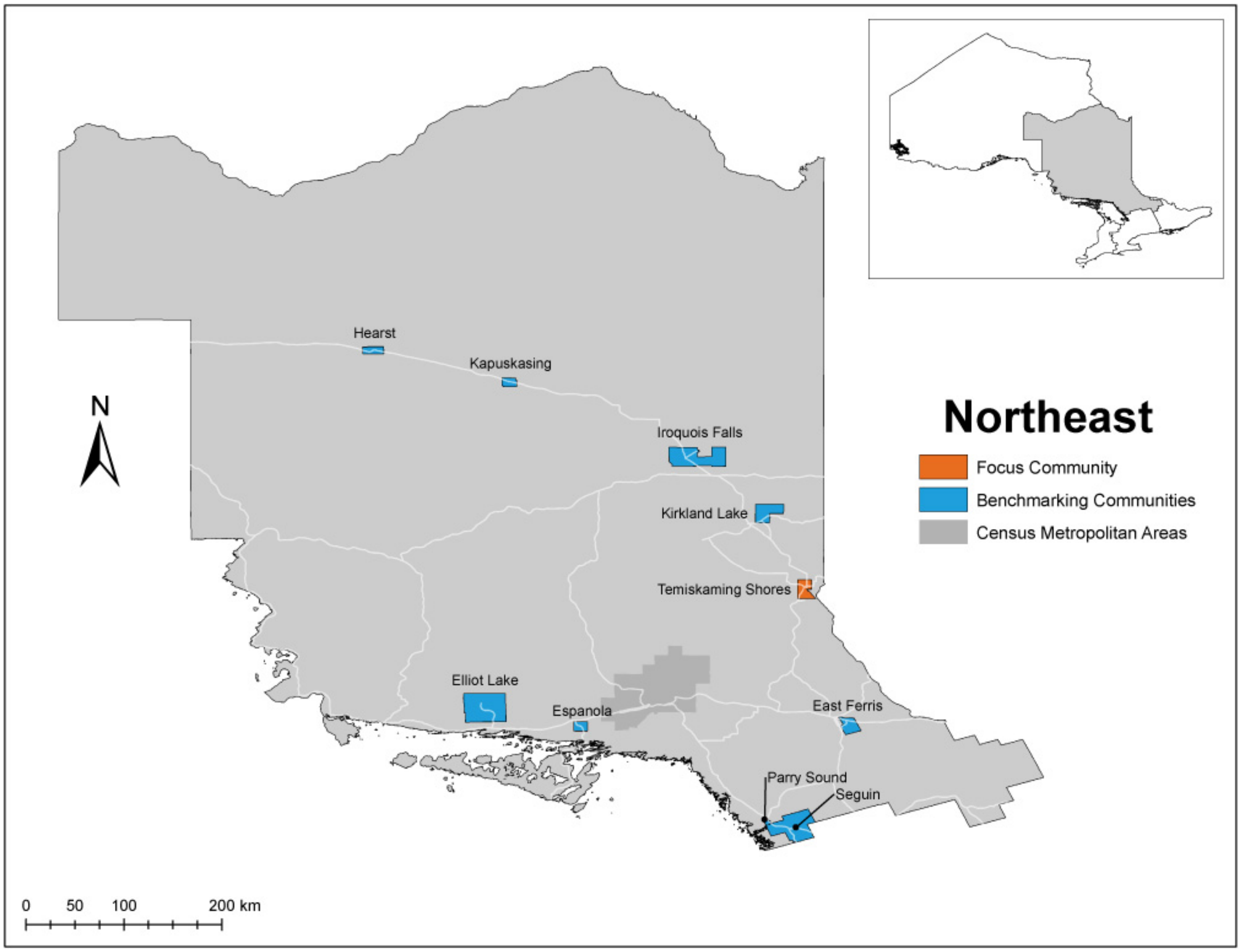
Finally, we can examine the central benchmark regions on the Creativity Index. The Creativity Index is calculated examining a regions Talent, Technology, and Tolerance levels (see Appendix for a detailed explanation). When compared to its peer communities, Midland scores higher than six of the nine peer regions, with a Creativity Index score of 0.60. This leaves Midland 110th out of 347 census subdivisions in Ontario (both rural and metro). Cobourg scores highest on the Creativity Index, with a ranking of 0.77, followed by Collingwood with a score of 0.70, and Bracebridge with a ranking of 0.69. With a Creativity Index score below Midland sit Huntville (0.55), Gravenhurst (0.54), Minden Hills (0.47), West Lincoln (0.41) and finally Wellington North (0.33) and Mapleton (0.30).

Section 5: Northeast Region

INTRODUCTION

Northeast region

Exhibit 5.0



In 2006, the northeast region of Ontario had a population of 571,608 (2006). The 2010 Statistics Canada estimates that the population has dropped slightly to 564,649. This population figure includes the metropolitan area of Sudbury, which made up 27.7% of its total population in 2006. The unemployment rate for this region in 2006 was 7.2%, and has risen to 8.9% in 2010.

It is on the Quebec border and is part of an *effective economic region* that includes Village à Breault and surrounding areas in Quebec. However, this analysis focuses only on Temiskaming Shores, the Ontario Census Subdivision (CSD) and does not include anything in Quebec.

The community of Temiskaming Shores was selected as the Focus Community for this region. It has a population of 10,732 and is considered to be the commercial and service centre for the region.

Transportation

Ontario Northland provides freight rail service to Temiskaming Shores and passenger rail and motor coach service to New Liskeard. Travelling by car, Sudbury is approximately 3.5 hours away, with Timmins approximately 3 hours away.

There are several post-secondary education institutions in Temiskaming Shores:

- The Collège Boréal campus in New Liskeard supports the college's programs in business administration, nursing, animal health, early childhood education and general arts and science.
- The Haileybury campus of the Northern College of Applied Arts and Technology offers programs in business and office administration, mining engineering technology, natural resources and veterinary sciences. It is also home of the Haileybury School of Mines.
- The University of Guelph operates the New Liskeard Agricultural Research Station, focusing on research on agronomy, beef, and horticulture.
- The 5th Wheel Training Institute trains equipment operators for various sectors including transportation, construction, mining, forestry, aggregate, and municipalities.
- The Ontario College of Reflexology provides training in modern alternative therapies.

Major employers in Temiskaming Shores include:

- Boart Longyear, a provider of mineral exploration drilling services and products.
- Miller Paving, a paving and construction services company.
- Grant's Transport Limited, a provider of tanker and van transportation.

Temiskaming Shores is compared to the following nine benchmarking communities in the northeast region: Elliot Lake, Kapukasing, Kirkland Lake, Parry Sound, Hearst, Espanola, Iroquois Falls, Seguin, and East Ferris.

These communities and Temiskaming Shores range in population from 4,200 (East Ferris) to 11,549 (Elliot Lake). These benchmarking communities are included to give an idea of how Temiskaming Shores is performing compared to its regional rural Ontario peers. Data for Sudbury (the region's only metro) is also included for most indicators as well as averages for all of Ontario, metropolitan Ontario and rural Ontario.

SUMMARY

Temiskaming Shores strengths:

- Experienced some population growth while almost all of its peer regions experienced decline
- Relatively low unemployment rate
- Relatively high on Talent Index
- High number of arts establishments/recreation facilities/restaurants per 10,000

Temiskaming Shores weaknesses:

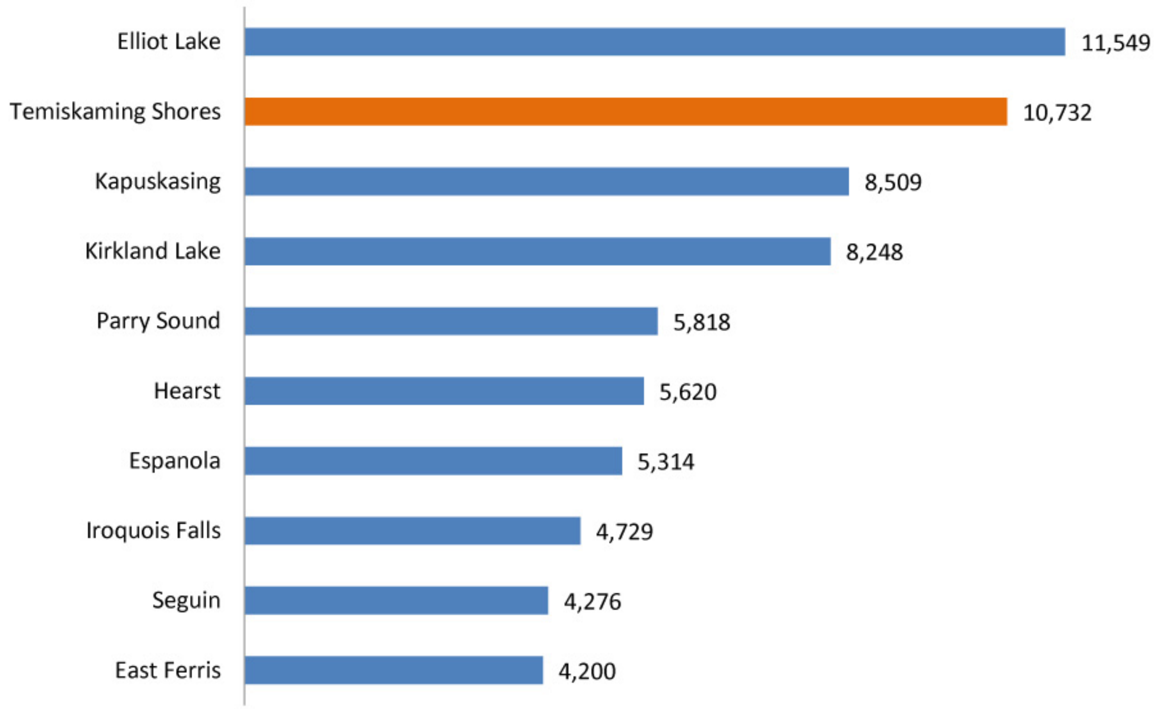
- Large population with no high school diploma
- Low high-tech shares

OBSERVATIONS, KEY FINDINGS & OPPORTUNITIES

- Challenges of Restructuring: In the context of economic challenges, Temiskaming Shores has done relatively well, which provides an encouraging sign moving forward.
- Occupational Structure: The region has a strong showing in 'Meds and Eds' occupations, but these are also occupations that have been shown to be less beneficial to rural areas. A concentrated effort on attracting other creative workers—particularly those in arts and culture, and the natural and applied sciences—is greatly needed.
- Farming, fishing, and forestry: Temiskaming Shores has an opportunity to develop its small, but relatively strong farming, fishing, and forestry occupations which can be increasingly leveraged (as is the case currently with the Guelph research station) to attract more natural sciences professionals, researchers, and companies.
- Diversity: Those immigrants that have chosen this region can help to attract the further attraction of immigrants to this region.
- Location: The location and relationship with Quebec in this region provides opportunities that few other small towns in Ontario have access to.
- Education: Despite a relatively strong performance on university graduates, this region has a higher share of its population without a post-secondary degree or certification. While education at all levels can always be improved, this deserves special attention.
- Technology: Despite the lower high-tech share and LQ shares, the Tech Pole Index shows that the region does have an advantage in high-tech, when concentration is combined with share of provincial high-tech in the region.
- Amenities: The region's strong amenity base, coupled with a low crime rate, can be used to help attract both tourists and potential new residents to the region.

Population (2006)

Exhibit 5.1

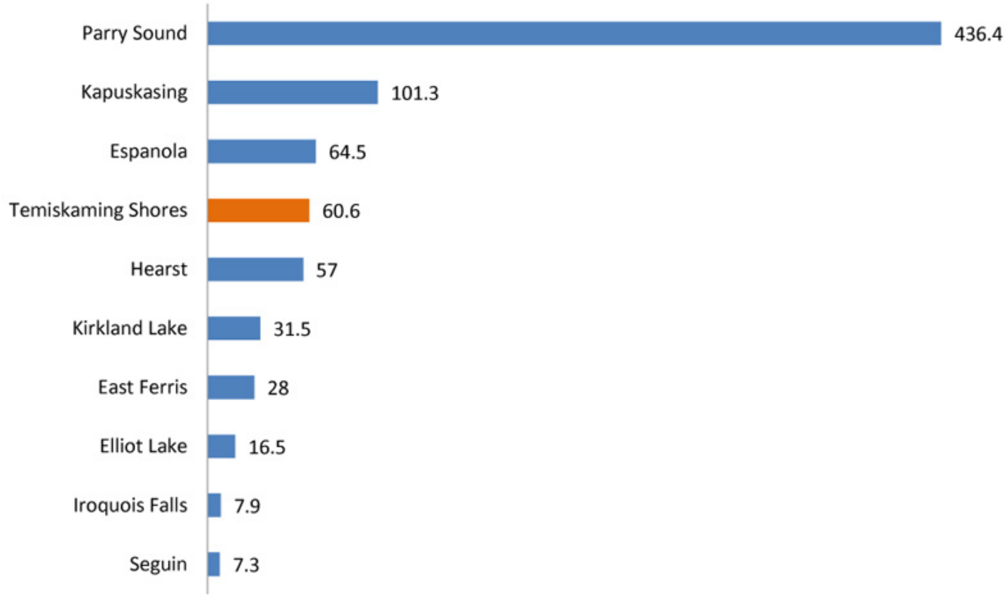


5.1 Population

Temiskaming Shores has the second-highest population figure among its peers at 10,732 in 2006, second only to Elliot Lake at 11,549. Kapuskasing is the next largest community with a population of 8,509. Seguin and East Ferris are the smallest of the peer communities in terms of population, with 4,276 and 4,200 respectively.

Population density (2006)

Exhibit 5.2

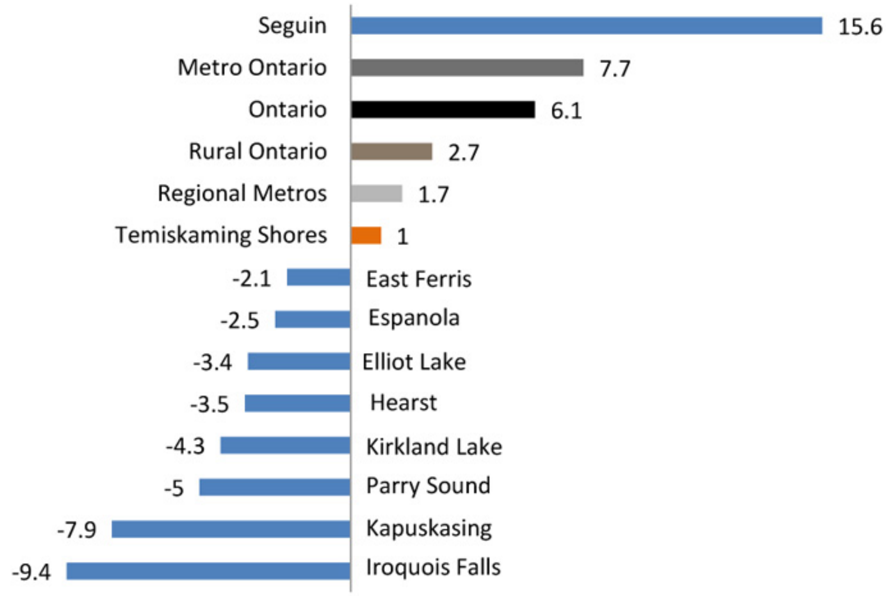


5.2 Population density

Temiskaming Shores has a population density of 60.6 people per square kilometre, similar to many of its peer regions, but much lower than Parry Sound (436.4) and much higher than Iroquois Falls (7.9) or Seguin (7.3). Temiskaming Shores' population has a lower density than Espanola (64.5) but a higher density than Hearst (57). Much of the difference in population density is from the different land areas for each region as defined by Statistics Canada.

Population growth (2001–2006)

Exhibit 5.3

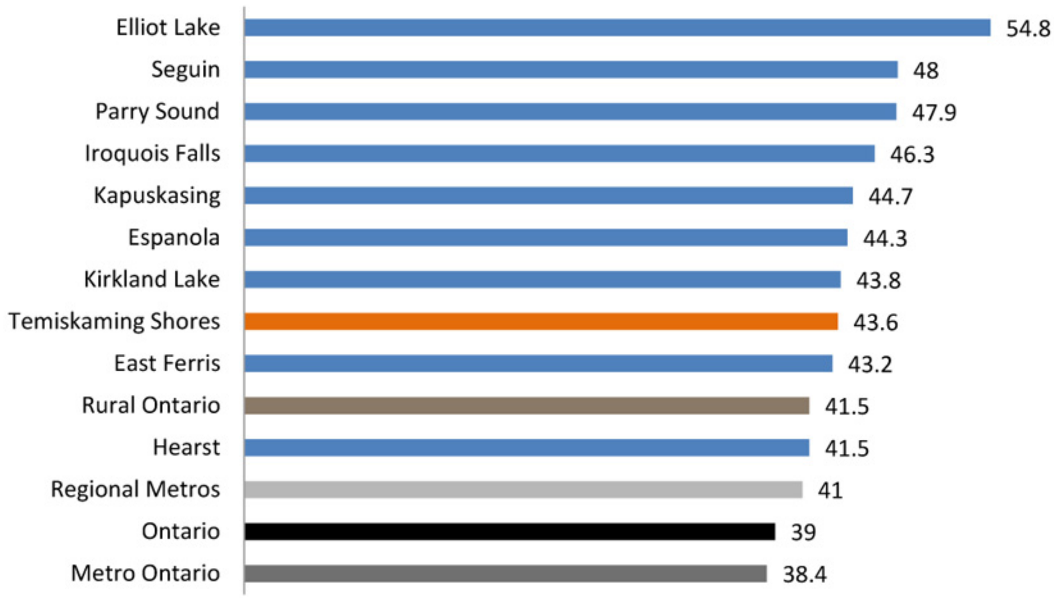


5.3 Population growth

Temiskaming Shores experienced slight population growth (1%) between 2001 and 2006. Seguin, which grew 15.6%, was the only peer region to experience significant growth during this period. The regional metro Sudbury experienced a population growth of 1.7%, only slightly higher than Temiskaming Shores and much lower than the overall growth for Ontario of 6.1%.

Median age (2006)

Exhibit 5.4



5.4 Median age

The median age of Temiskaming Shores is 43.6, older than the median age for rural Ontario, but younger than many other benchmarking peers. Temiskaming Shores' median age of 43.6 falls roughly in the middle of its benchmarking peers whose median ages range from 41.5 in Hearst to 54.8 in the retirement community of Elliot Lake. All 10 rural communities in the northeast region have a higher median age than Ontario's 39.

5.6 Female age distribution

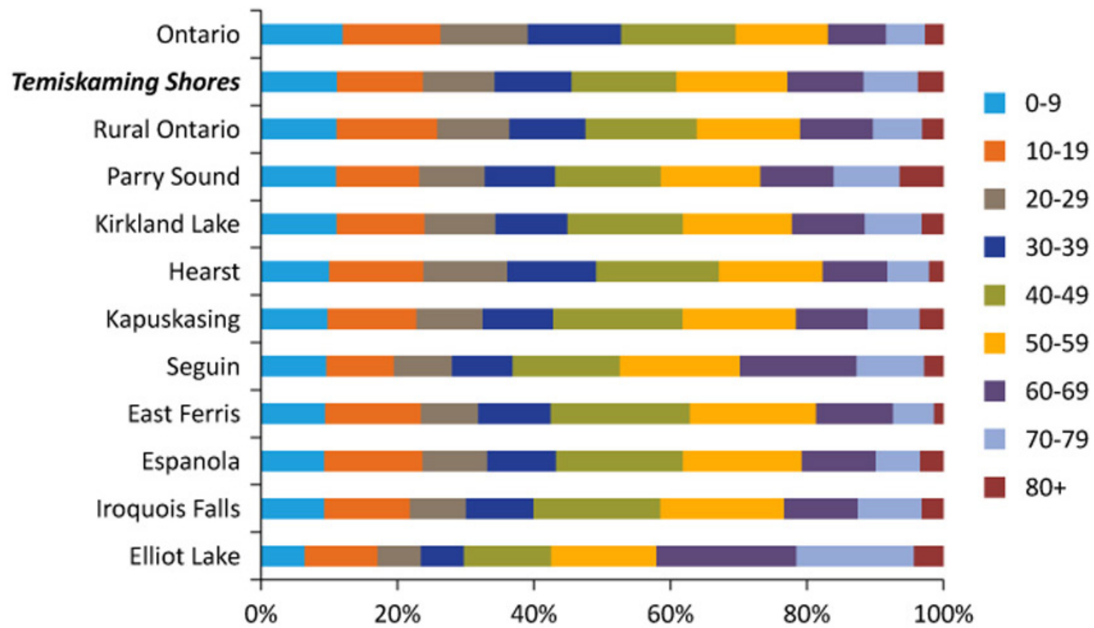
The female population in Temiskaming Shores is fairly even with its male population in two age ranges, with 15.3% of the female population aged 40–49 and 15.3% aged 50–59. There are slightly fewer school-aged females than males, with 10.2% aged 0–9 years and 11.6% aged 10–19 years. As with the male population, these figures are in line with the peer regions, aside from Elliot Lake where only 5.5% of the female population is under the age of 10, and 20.8% of the female population is aged 60–69.

5.5 Male age distribution

In Temiskaming Shores, the majority of its male population is aged 40–49 (15.4%) and 50–59 (16.3%). Only 11.3% of the male population is aged 30–39. School-aged males also make up a significant portion of the male population, with 11.2% aged 0–9 years and 12.6% aged 10–19 years. These figures are in line with its peer regions, aside from Elliot Lake where only 6.4% of the male population is under the age of 10, and 20.5% of the male population is aged 60–69.

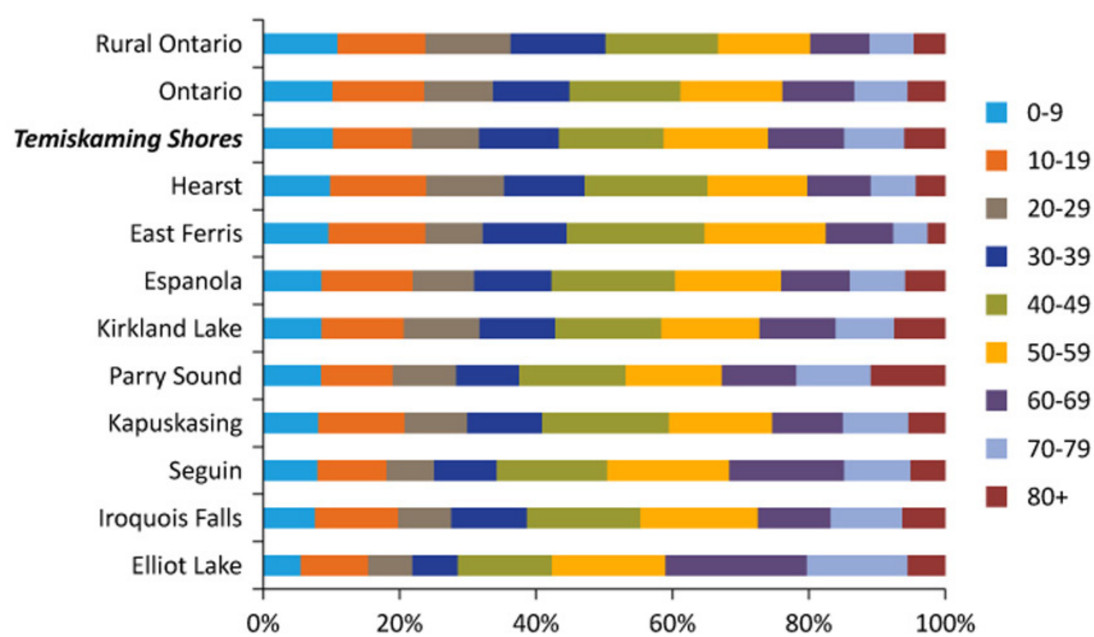
Male age distribution (2006)

Exhibit 5.5



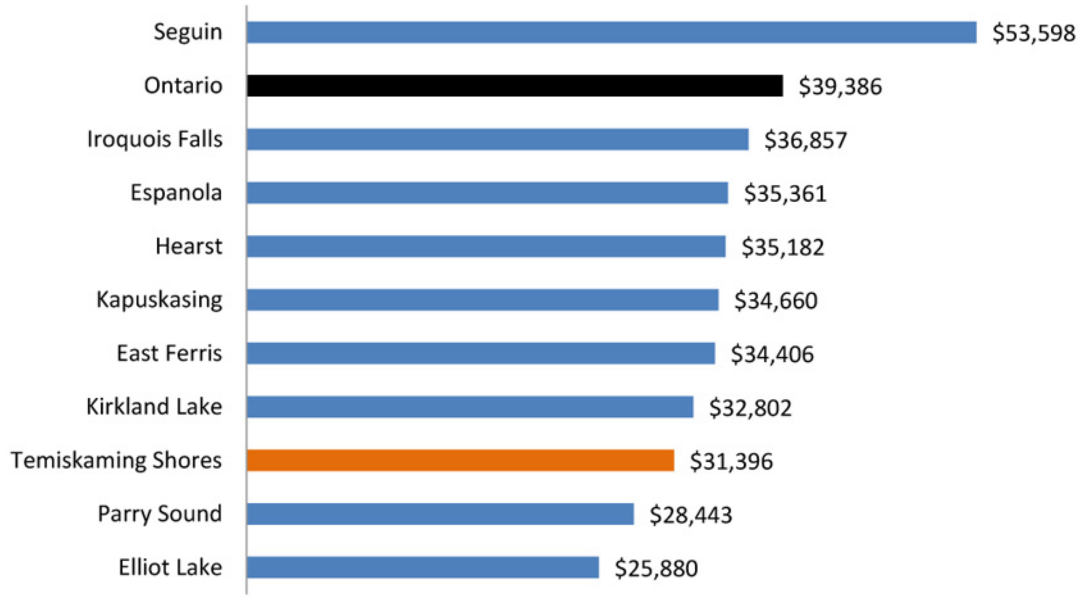
Female age distribution (2006)

Exhibit 5.6



Average employment income (2005)

Exhibit 5.7

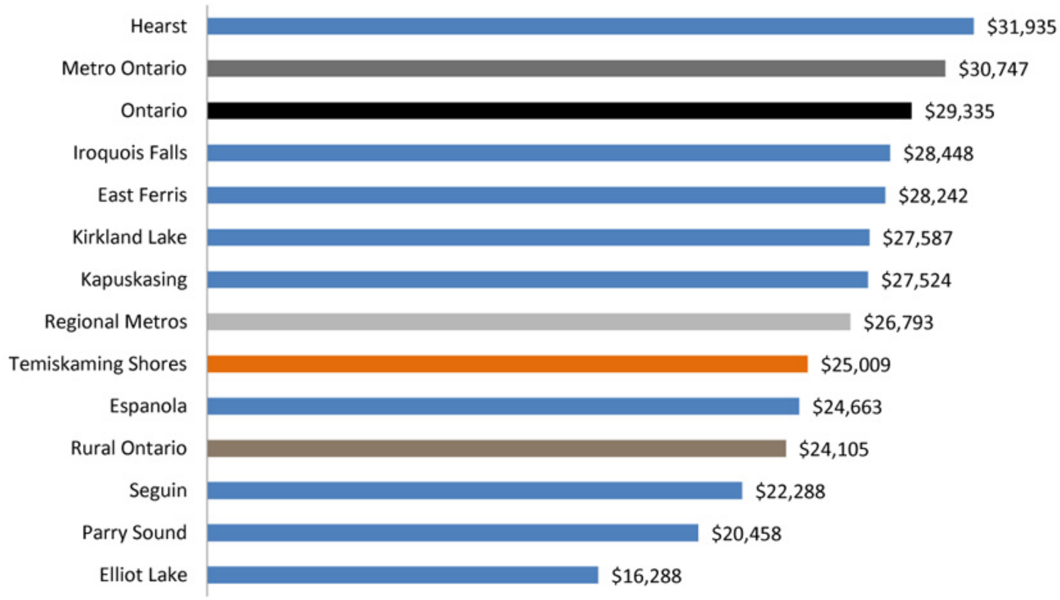


5.7 Average employment income

The average employment income in Temiskaming Shores was $31,396 in 2005. This was lower than the Ontario average employment income of $39,386 and near the bottom of its peer regions. Seguin topped the list at $53,598 while Elliot Lake was at the bottom with $25,880. Temiskaming Shores scored higher than Parry Sound and only slightly lower than Kirkland Lake.

Median employment income (2005)

Exhibit 5.8

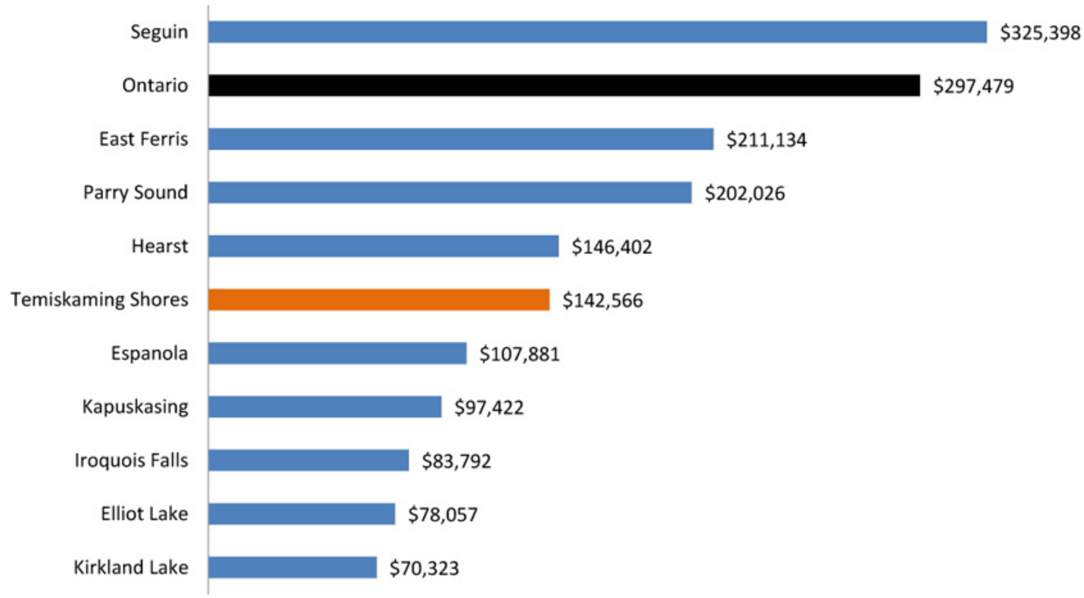


5.8 Median employment income

Temiskaming Shores ranks slightly higher on the median income measure with a median income of $25,009 in 2005. Elliot Lake is again at the bottom of the list with $16,288 while Hearst now tops the list with $31,935. While Seguin's average employment income scores high in comparison to its peers, it scores much lower in median income at just $22,288 which suggests that the region has a very uneven income distribution. Not surprising for a retirement community, Elliot Lake scores the lowest median employment income at $16,288.

Average value of dwelling (2006)

Exhibit 5.9

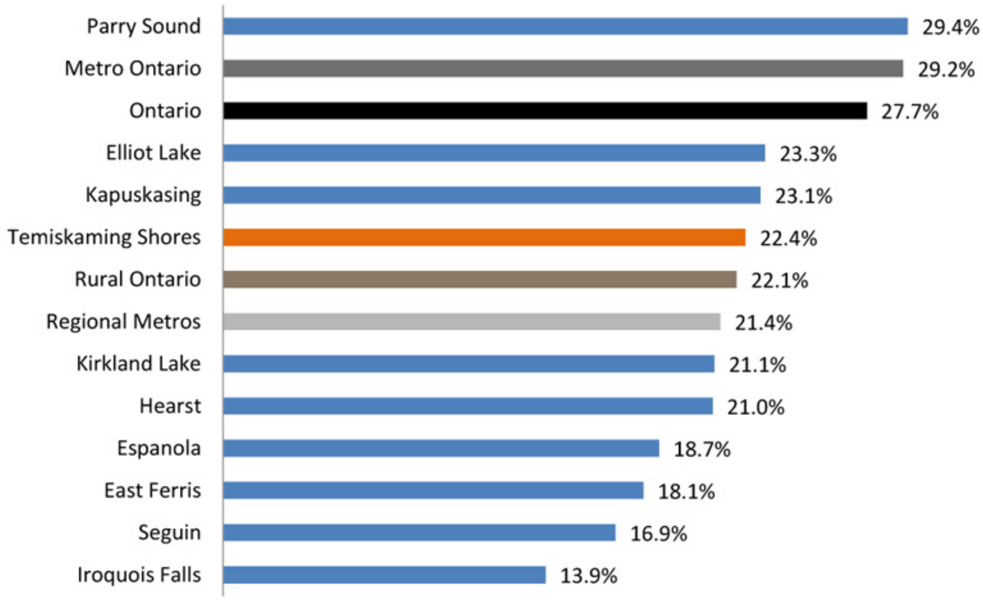


5.9 Average value of dwelling

The average value of a dwelling in Temiskaming Shores is $142,566 putting it near the middle of its benchmarking peers. Seguin tops the peer region list with an average dwelling value of $325,398 while Kirkland Lake is at the bottom with a value of $70,323. 22.4 % of Temiskaming Shores' population spends more than 30% of its income on housing costs. This is fairly consistent with the regional peers who range from 13.9% (Iroquois Falls) to 29.4% (Parry Sound).

Share of households spending 30% or more of income on housing costs (2006)

Exhibit 5.10

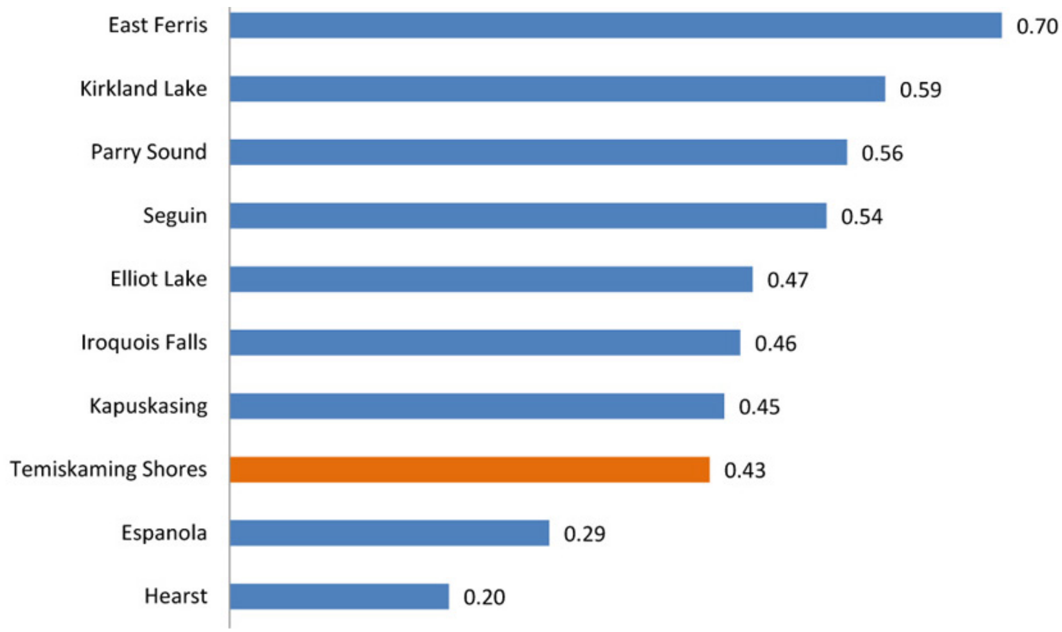


5.10 Share of households spending 30% of more of income on housing costs

The share of households in Temiskaming Shores spending 30% or more of their income on housing is 22.4%. This figure is in line with many of its peer communities including Elliot Lake at 23.3%, Kapuskasing at 23.1%, Kirkland Lake at 21.1%, and Hearst at 21%. Temiskaming Shores scores only slightly higher than the share for rural Ontario at 22.1%, but significantly lower than the share for all of Ontario at 27.7%. Interestingly, the highest share of households spending 30% or more of income on housing costs is in Parry Sound at 29.4%; Iroquois Falls boasts the lowest share with only 13.9%.

Employment rate (2006)

Exhibit 5.11

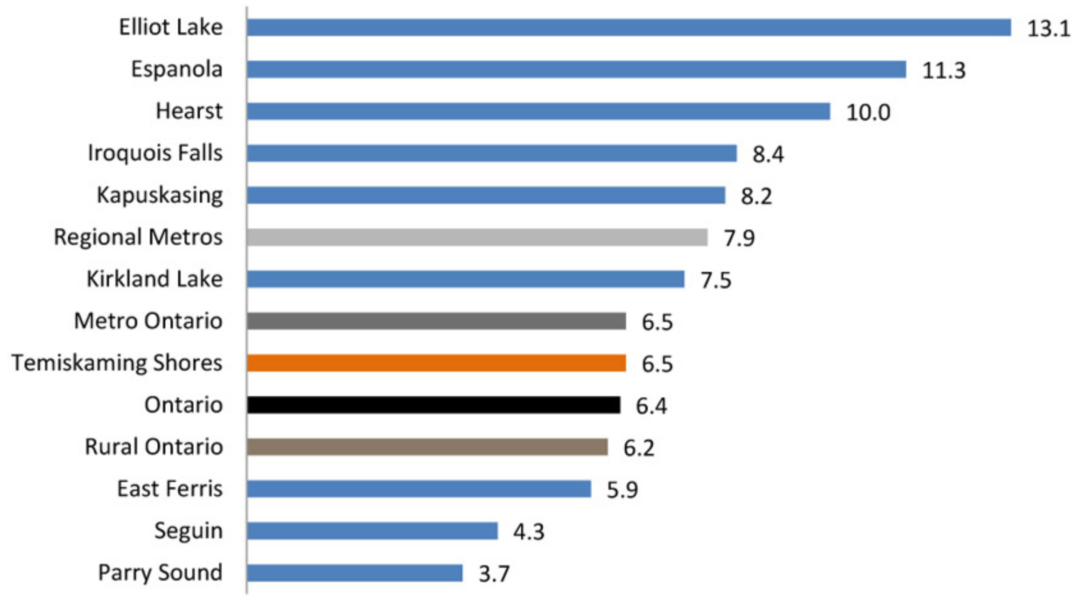


5.11 Employment rate

The 2006 employment rate in Temiskaming Shores was 58.3 which is consistent with its peer regions and the Greater Sudbury metro (58.1). East Ferris had the highest employment rate in the region (60.7) while Elliot Lake had the lowest (33.2), not surprising given the community's reputation as a popular place to retire. Temiskaming Shores and its peer regions scored lower than the employment rates for metro Ontario (63.5) and all of Ontario (62.8).

Unemployment rate (2006)

Exhibit 5.12



5.12 Unemployment rate

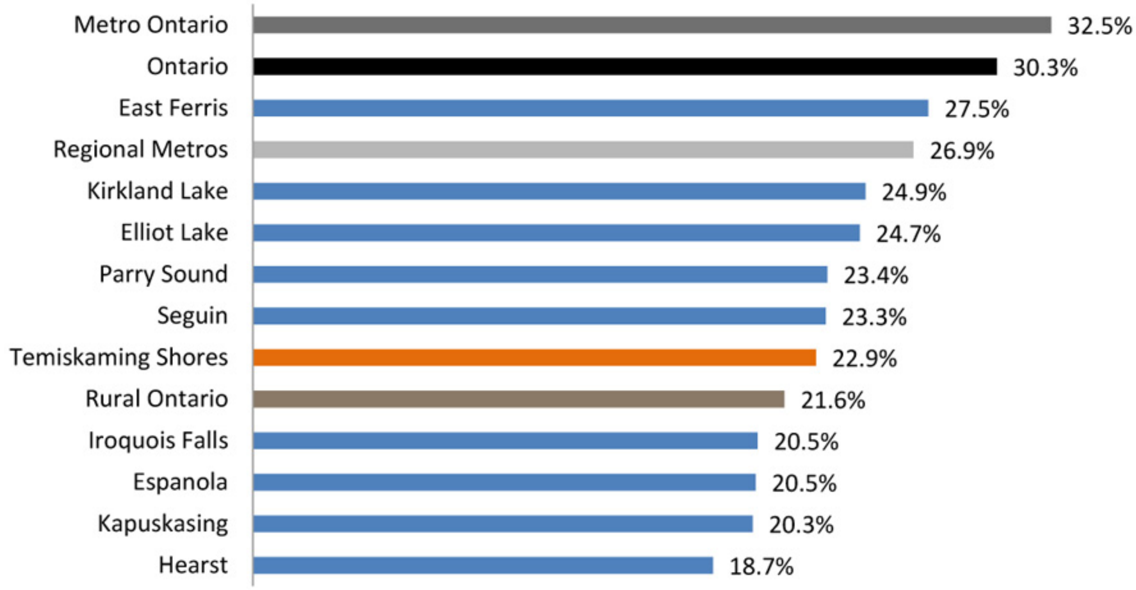
Temiskaming Shores' unemployment rate in 2006 was 6.5, just above the Ontario average and much lower than many of its peer regions. Three peer regions (Elliot Lake, Espanola, and Hearst) had unemployment rates higher than 10. Only East Ferris (5.9), Seguin (4.3) and Parry Sound (3.7) had lower unemployment rates than Temiskaming Shores.

OCCUPATIONAL CLASSES

This section examines the occupational structure of Temiskaming Shores. 22.9% of Temiskaming Shores' residents are employed in Creative Class occupations, 49.4% in the service class, 24.7% in the working class and 3.1% in the farming, fishing, and forestry class.

Creative Class share (2006)

Exhibit 5.13

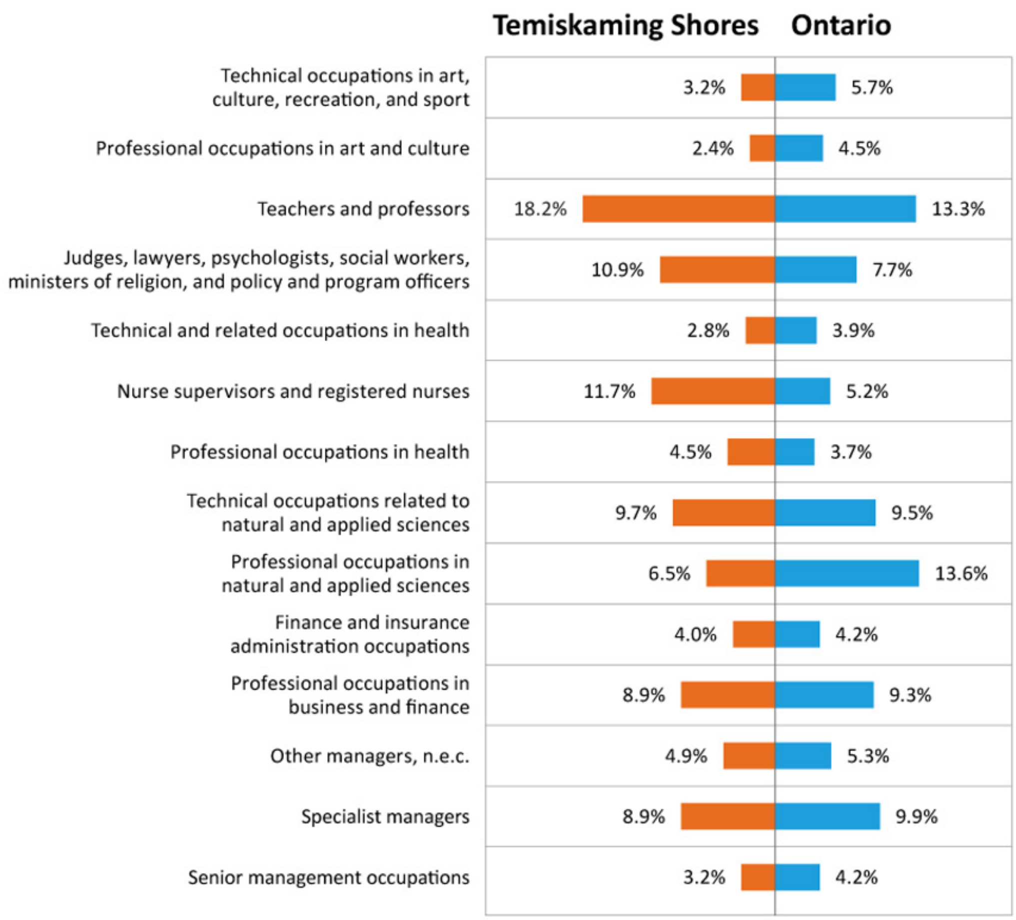


5.13 Creative Class share

At 22.9% Temiskaming Shores' Creative Class share is just above the rural Ontario average of 21.6% and ranks 6th among its peer regions. East Ferris (27.5%) is on top of the list while Hearst with 18.7% ranks at the bottom.

Creative Class breakdown (2006)

Exhibit 5.14

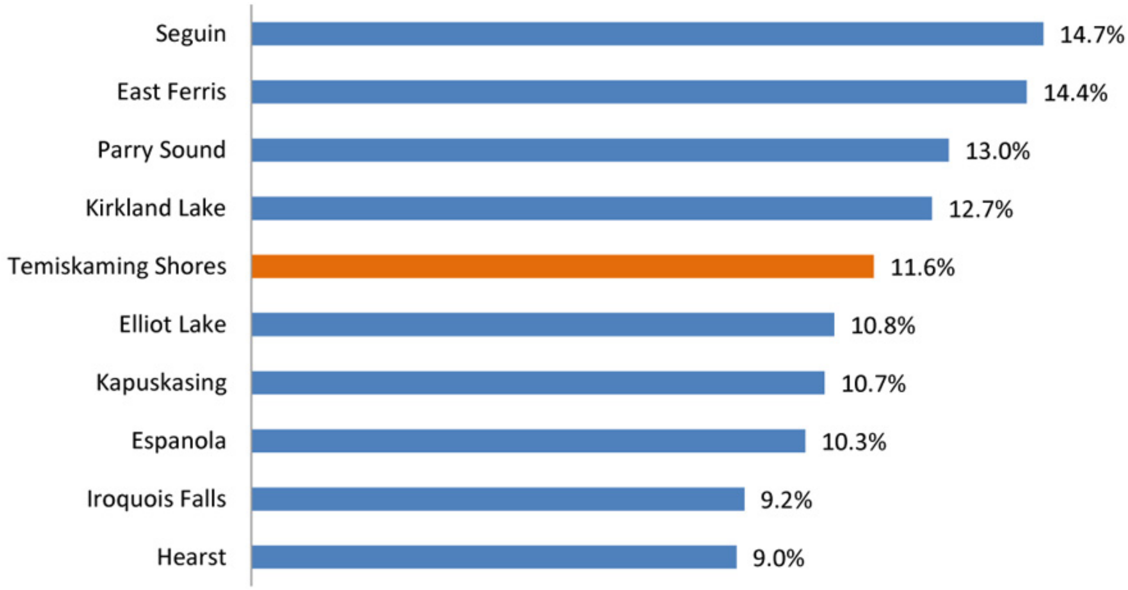


5.14 Creative Class breakdown

When Temiskaming Shores' Creative Class is broken down into its different occupation groups it becomes clear that much of its Creative Class is composed of teachers and professors (18.2%) and health-related occupations (19%). This is a much different structure than Ontario overall where only 13.3% of the Creative Class is composed of teachers and professors and 12.1% of health-related occupations. Also, Temiskaming Shores has fewer professional occupations in natural and applied sciences (6.5%) than Ontario overall (13.6%), but slightly more technical occupations related to natural and applied sciences (9.7%) than Ontario overall (9.5%).

Adjusted Creative Class share (2006)

Exhibit 5.15

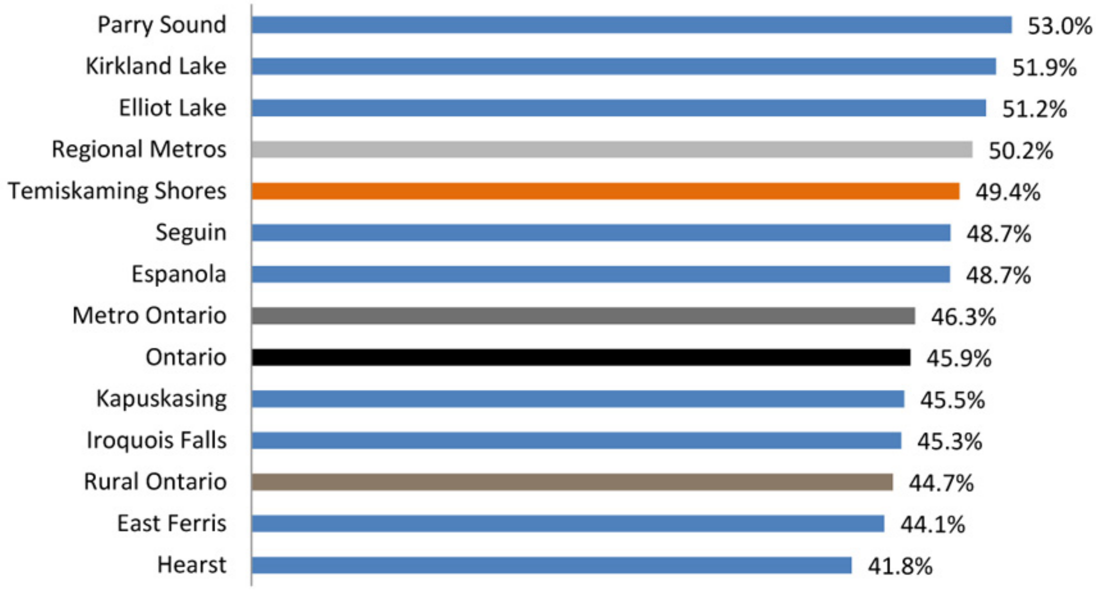


5.15 Adjusted Creative Class share

When occupations associated with economic reproduction (see Appendix) are taken out of the Creative Class group, Temiskaming Shores' Creative Class labour force share changes to 11.6% but its ranking amongst its peer regions stays roughly the same. It is still below the adjusted rural Ontario average of 12.7%.

Service class share (2006)

Exhibit 5.16

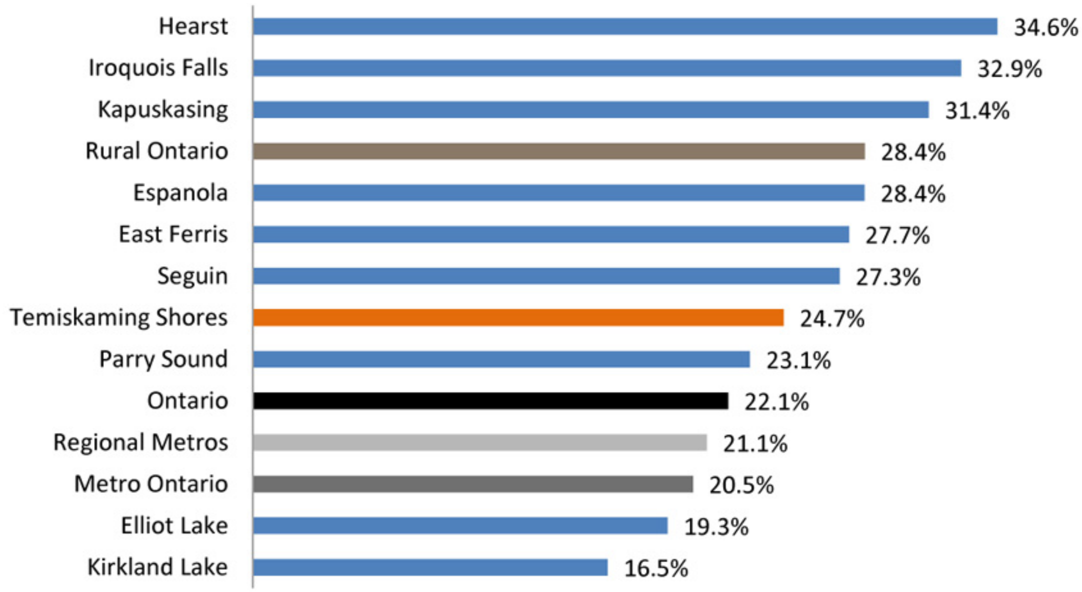


5.16 Service class share

Temiskaming Shores has 49.4% of its labour force employed in service class occupations putting it 4th among its peer regions and just behind the regional metro Sudbury (50.2%). Parry Sound tops the list with 53% of its labour force employed in service class occupations while Hearst is at the bottom with 41.8%. Temiskaming Shores has a larger share of the service class than both metro Ontario (46.3%) and Ontario overall (45.9%).

Working class share (2006)

Exhibit 5.17

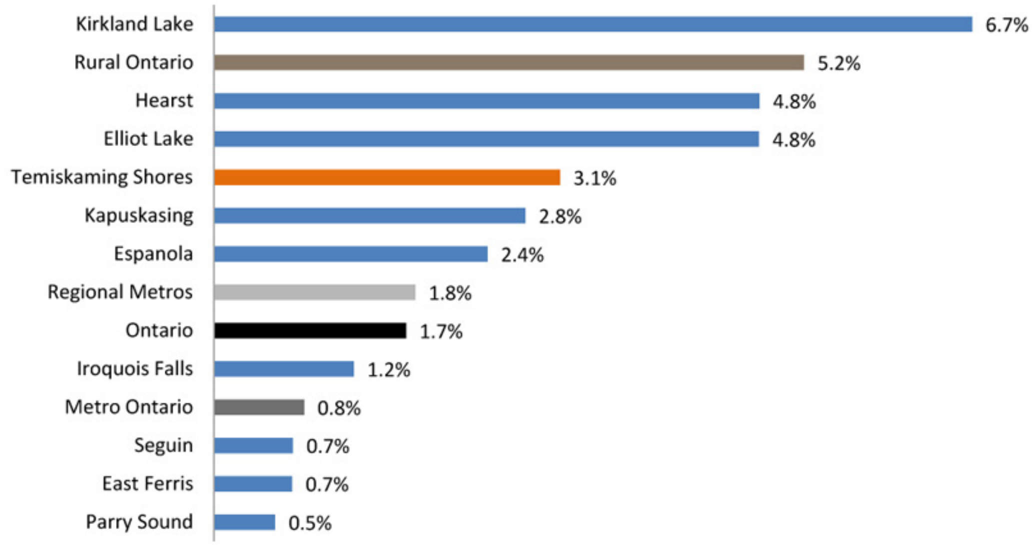


5.17 Working class share

24.7% of the labour force in Temiskaming Shores is employed in working class occupations. This is slightly below the rural Ontario average of 28.4% but above the Ontario average of 22.1%. Hearst has the highest share of its labour force in the working class (34.6%) out of the peer regions while Kirkland Lake has the lowest (16.5%).

Farming, fishing, and forestry class share (2006)

Exhibit 5.18



5.18 Farming, fishing, and forestry class share

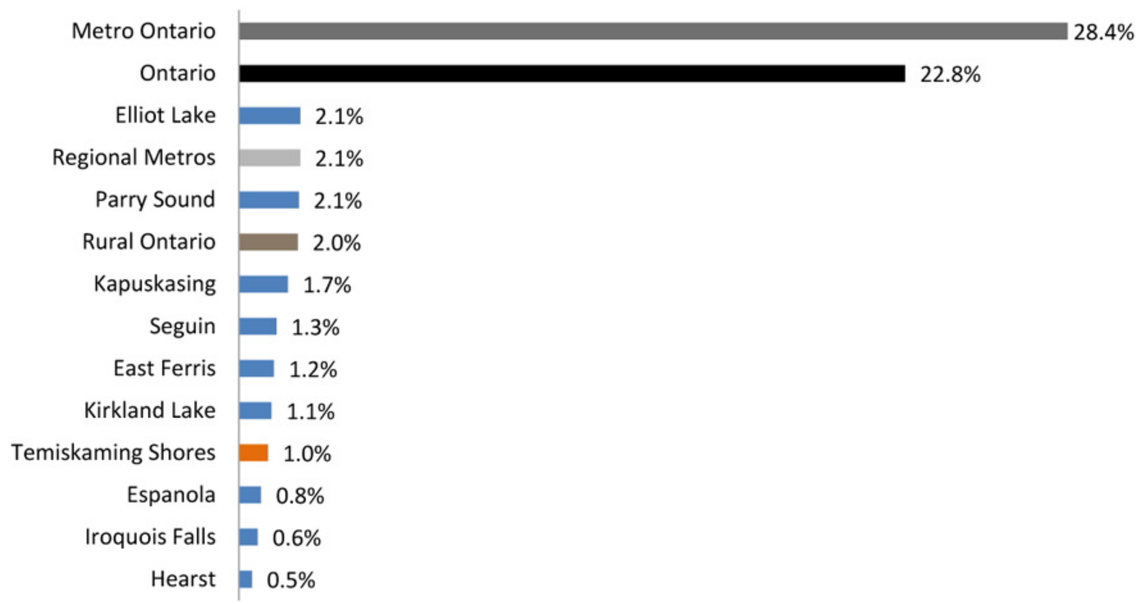
Temiskaming Shores ranks 4th amongst its peer regions on share of labour force employed in farming, fishing, and forestry occupations with 3.1%. This is lower than the rural Ontario average of 5.2% but still above the Ontario average of 1.7%. Parry Sound has the lowest share with 0.5% while Kirkland Lake tops the list with 6.7% of its labour force employed in farming, fishing, and forestry occupations.

TOLERANCE

Tolerance has been repeatedly identified in the literature (see Florida, 2002) as a vital requirement for the attraction and retention of Creative Class workers seeking a diverse and open environment, and is a facet of economic development that rural areas have been struggling to overcome. Tolerance will be examined through the shares of visible minority, immigrant and Aboriginal populations in the ten benchmarking regions. Most of Ontario's visible minority population is concentrated in the major metropolitan areas — 28.4% of the populations in Ontario's metropolitan areas are a visible minority compared with only 2% in rural Ontario.

Visible minority population share (2006)

Exhibit 5.19

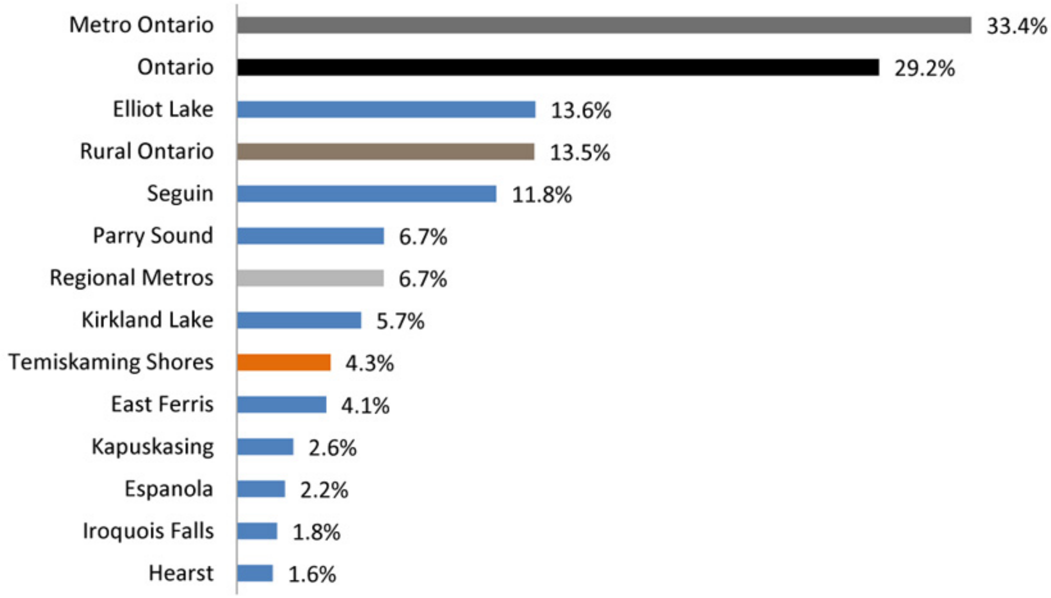


5.19 Visible minority population share

With only 1% of its population a visible minority, Temiskaming Shores falls just below the rural Ontario average and is in the middle of its peer regions. Elliot Lake tops the list with 2.1% while Hearst is at the bottom with 0.5%.

Immigrant population share (2006)

Exhibit 5.20

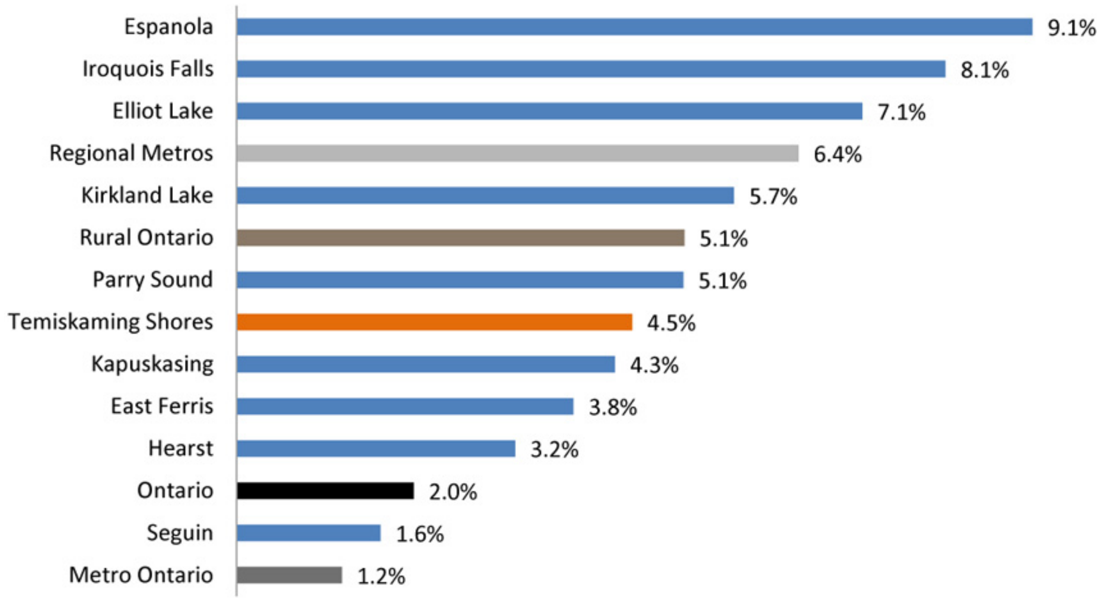


5.20 Immigrant population share

The share of immigrants in rural Ontario (13.5%) is also much lower than the Ontario average (29.2%) and especially the metro Ontario average (33.4%). Temiskaming Shores has an immigrant population share of 4.3%, putting it 5th among its benchmarking peers. Only Elliot Lake with 13.6% is above the rural Ontario average (and only slightly).

Aboriginal population share (2006)

Exhibit 5.21



5.21 Aboriginal population share

The share of Aboriginals in rural Ontario (5.1%) is higher than the Ontario average (2.0%) and even higher than the metro Ontario average (1.2%). Temiskaming Shores has an Aboriginal population of 4.5%, putting it 6th among its benchmarking peers. Espanola has the highest share of Aboriginals (9.1%) and Seguin the lowest share (1.6%).

TALENT

The Talent Index measures the share of the population 25 and above with a Bachelor's degree or higher.

5.22 Talent Index

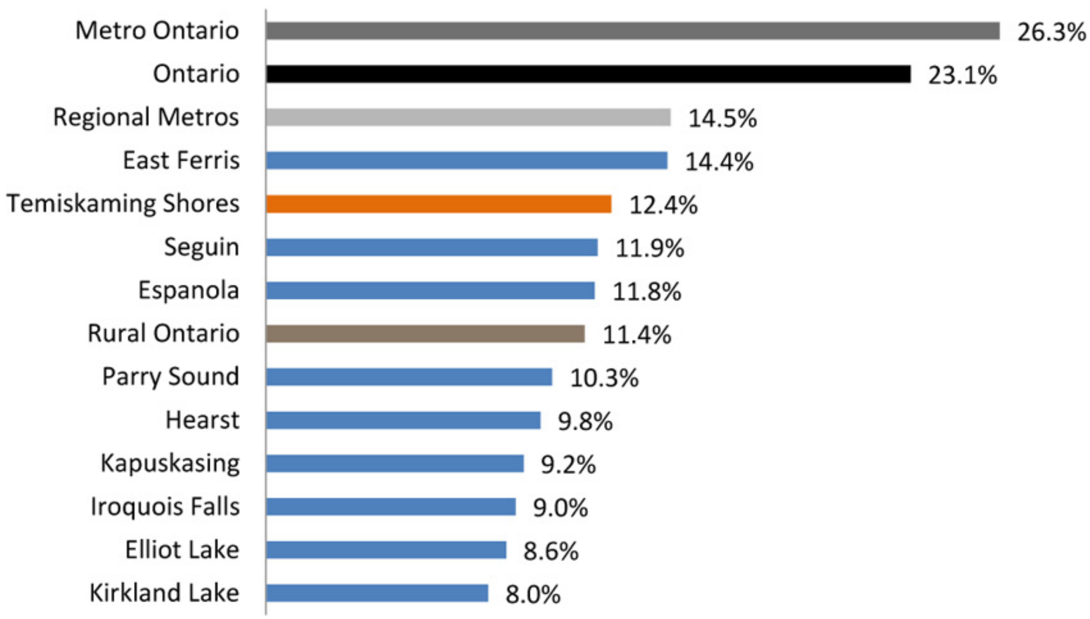
Metropolitan Ontario (26.3% of the population 25 and above has a BA or higher) consistently outperforms rural Ontario (11.4%) on this measure. 12.4% of Temiskaming Shores' population 25 and above has a Bachelor's degree or higher, lower than only one of its benchmarking peers who range from 8% (Kirkland Lake) to 14.4% (East Ferris).

5.23 Highest certificate, diploma or degree

The next chart shows the distribution of the different education levels for each of the different regions as well as for Ontario overall. 26.9% of Temiskaming Shores' population 25 and above has a no certificate, diploma or degree. This is much higher than the Ontario average where only 18.7% of the population 25 and above have no certificate, diploma or degree.

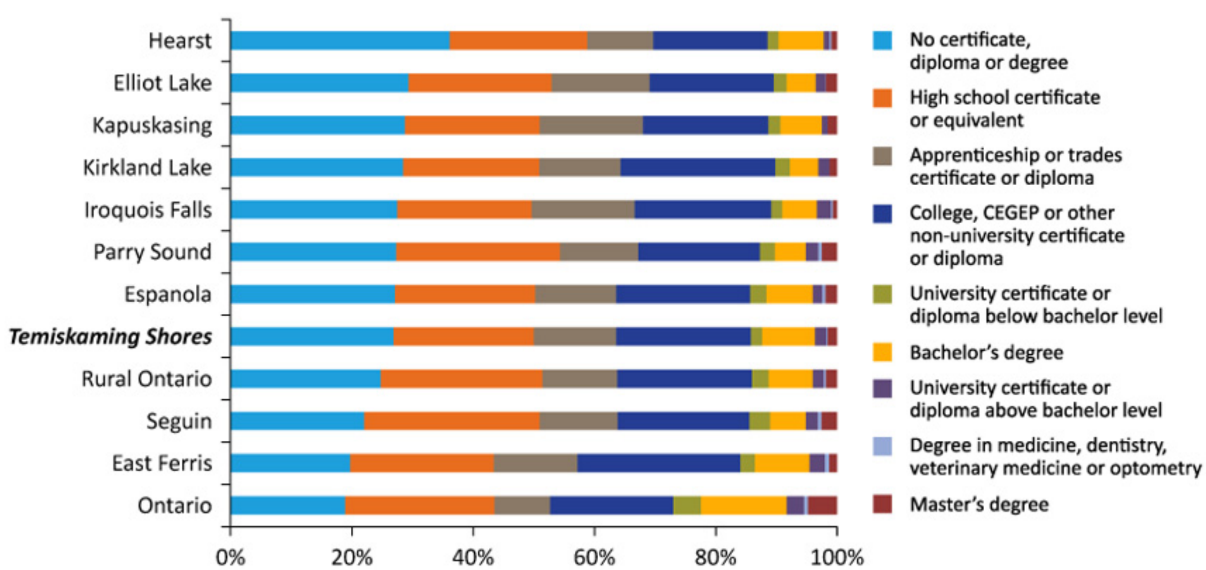
Talent Index (2006)

Exhibit 5.22



Highest certificate, diploma or degree (2006)

Exhibit 5.23

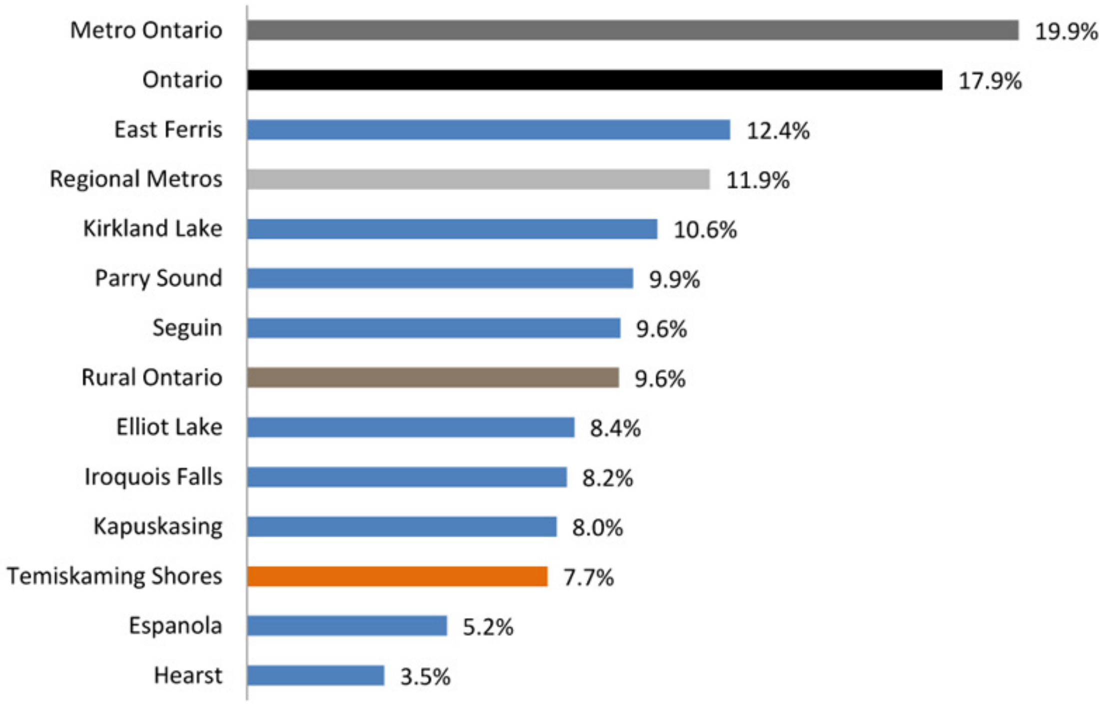


TECHNOLOGY

In examining the prevalence of high technology industries in our benchmark regions, the high-tech establishment share, high-tech location quotient (LQ) and Ontario Tech Pole Index will all be examined.

High-Tech establishment share (2008)

Exhibit 5.24

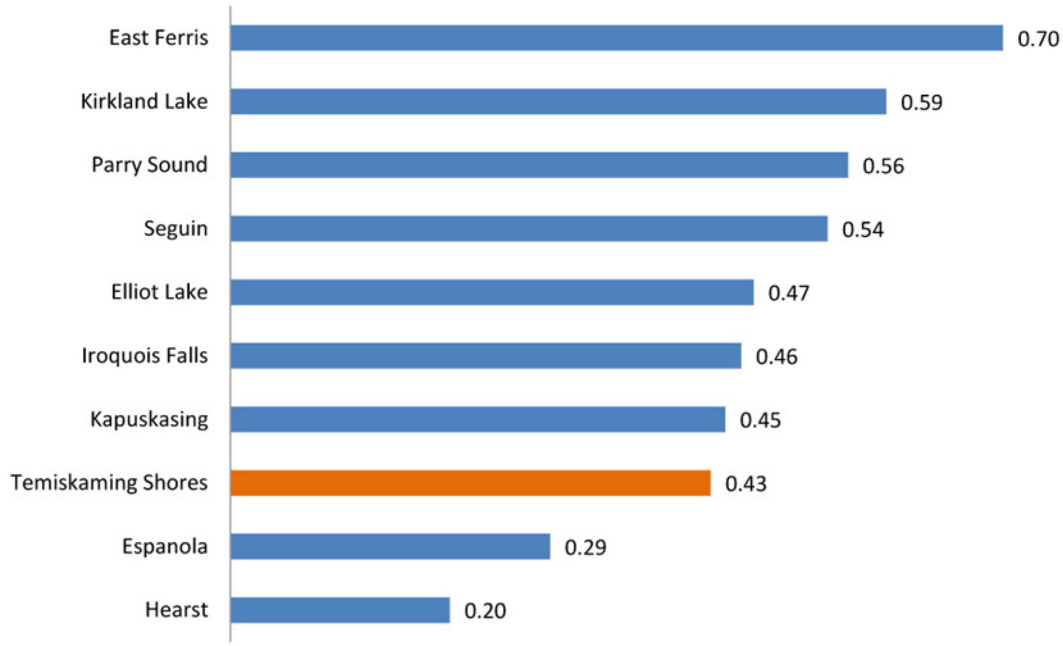


5.24 High-Tech establishment share

7.7% of Temiskaming Shores' establishments in 2008 were considered to be in high-tech Industries (see Appendix). Well below the Ontario average of 17.9%, Temiskaming Shores is also near the bottom of its peer regions on this measure. Only Espanola and Hearst have lower high-tech establishment shares (5.2% and 3.5%).

High-Tech LQ (2008)

Exhibit 5.25

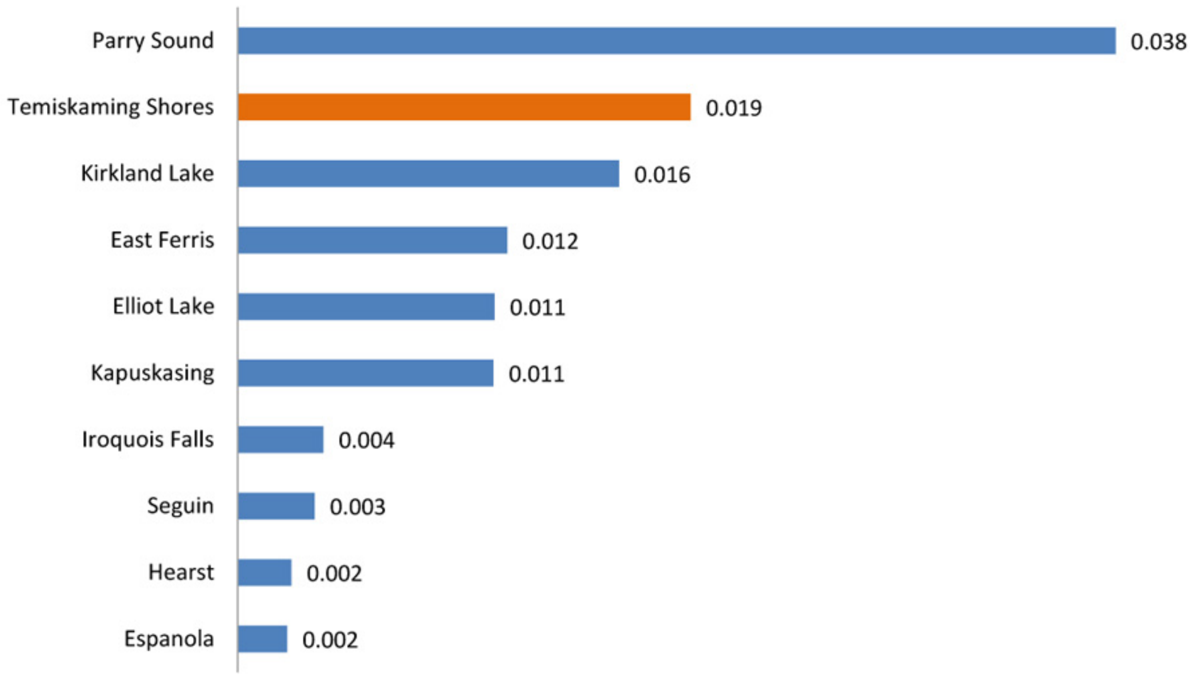


5.25 High-Tech LQ

A high-tech LQ was calculated to further examine the presence of high-tech establishments in the region. Again, Temiskaming Shores scores lower (0.43) than most of its peer regions. Among the peer regions, East Ferris scores highest at 0.70 and Hearst lowest at 0.20.

Ontario Tech Pole Index (2008)

Exhibit 5.26



5.26 Ontario Tech Pole Index

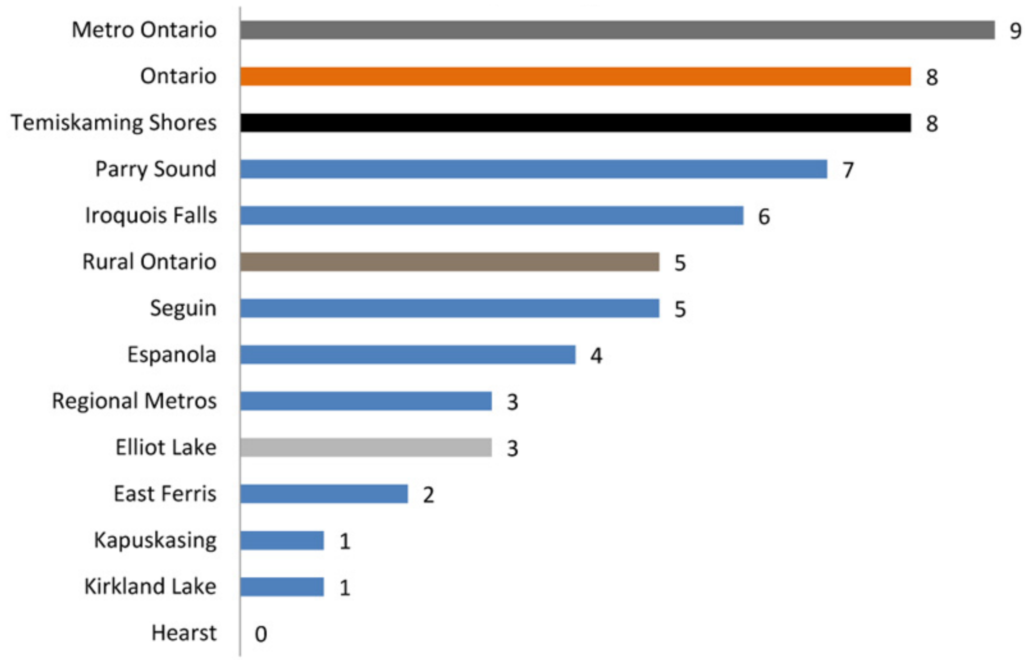
Temiskaming Shores places second (0.019) on the Tech Pole Index among its benchmarking peers, placing behind Parry Sound with 0.038. Kirkland Lake places a close third at 0.016. East Ferris, Elliot Lake and Kapuskasing are all clustered together at 0.012, 0.011 and 0.011 respectively. The atypical performance on the Tech Pole is an indication that for a city of its size, Temiskaming Shores, does well in terms of both high-tech concentration and share of Ontario's high-tech output.

TERRITORIAL ASSETS

The territorial assets discussed in this section are an attempt to quantify indicators of quality of place and civic engagement. The territorial assets that will be examined include: Arts & Entertainment establishments, recreation facilities, restaurants and bars, healthcare professionals, voter turnout, and crime rate per 10,000.

Arts & Entertainment establishments per 10,000 (2008)

Exhibit 5.27

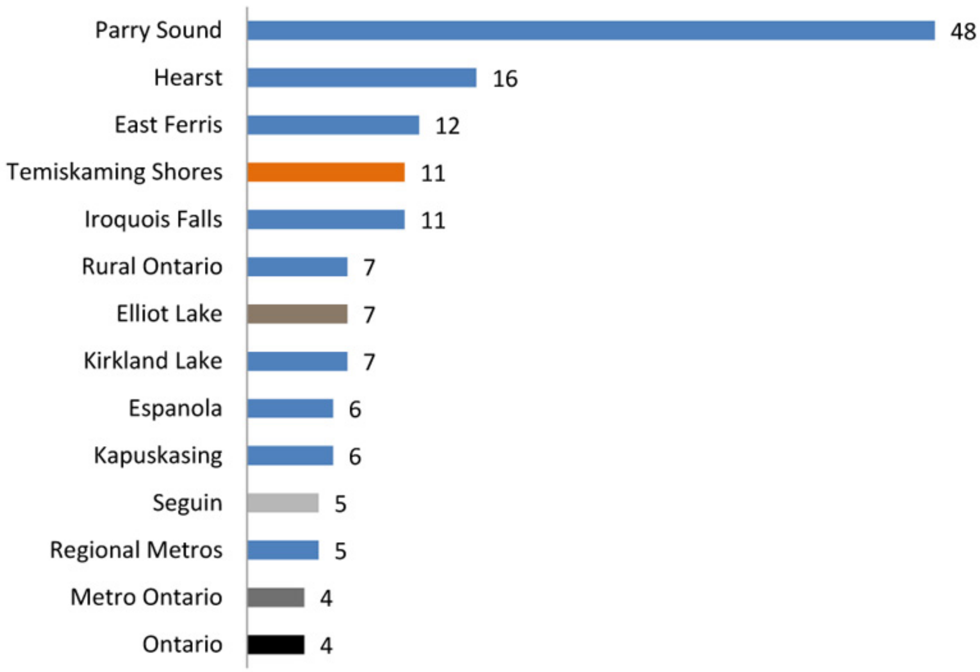


5.27 Arts & Entertainment establishments per 10,000

In examining the number of Arts & Entertainment establishments per 10,000 people, it is interesting to note that all of the benchmark regions fall below metro Ontario (9), while Temiskaming Shores matches that of the Ontario average (8). This puts it at the top of its peer regions and may be due to the large number of smaller museums in the region. Parry Sound and Iroquois Falls come in second and third with 7 and 6 Arts & Entertainment establishments per 10,000 respectively. Hearst is at the bottom of the list with zero reported Arts & Entertainment establishments.

Recreation facilities per 10,000 (2008)

Exhibit 5.28

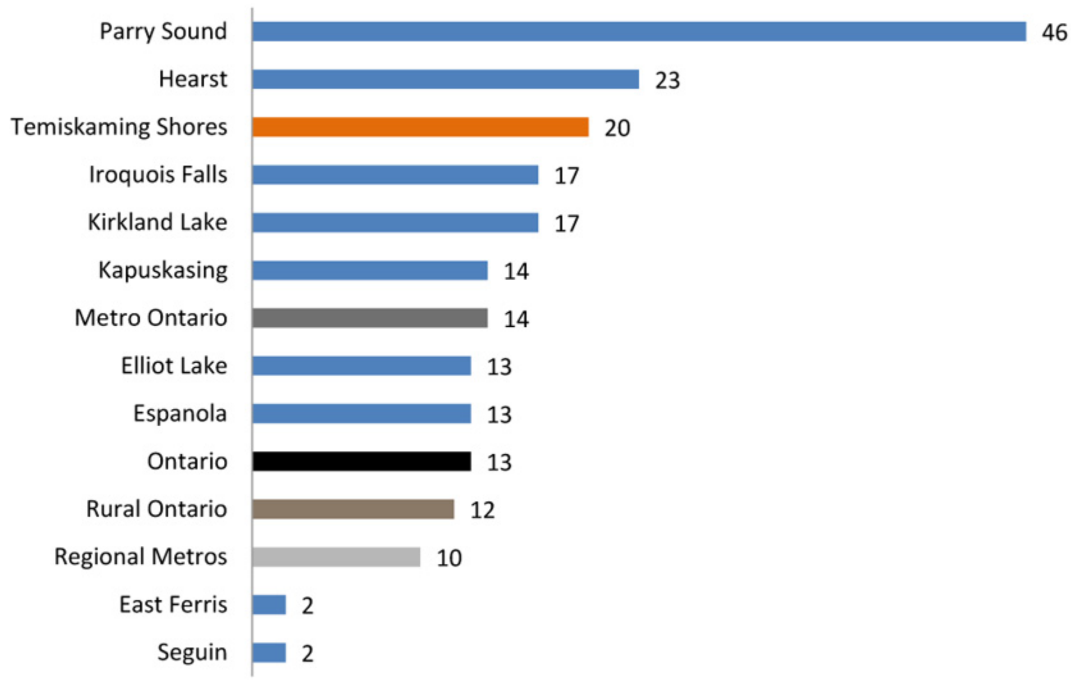


5.28 Recreation facilities per 10,000

Temiskaming Shores has 11 recreation facilities per 10,000 people, again above the rural Ontario average and roughly in the middle of its peer regions. Parry Sound tops the list with 48 per 10,000 well above the second ranked community of Hearst with 16 per 10,000. All nine benchmarking communities have more recreation facilities per 10,000 than the metro Ontario and Ontario average of 4.

Restaurants and bars per 10,000 (2008)

Exhibit 5.29

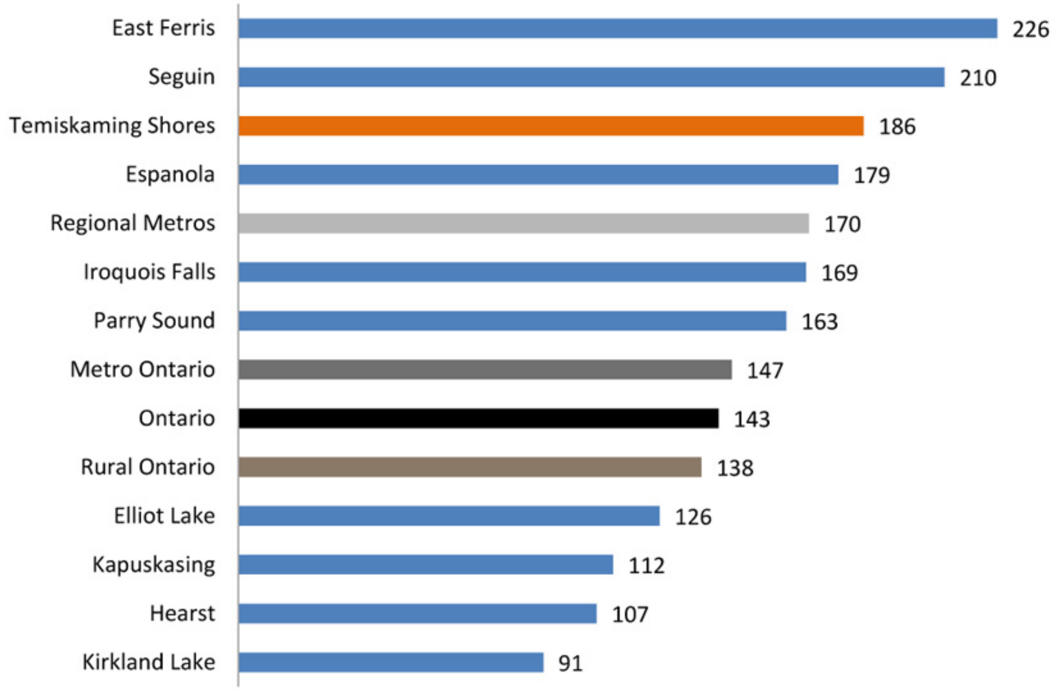


5.29 Restaurants and bars per 10,000

Temiskaming Shores nears the top of the list again of in terms of restaurants and bars per 10,000 with 20, less than only Hearst (23) and Parry Sound (46). It ranks much higher than metro Ontario (14), Ontario (13), rural Ontario (12) and the regional metro of Sudbury (10). East Ferris and Seguin are at the bottom of the list with 2 reported restaurants and bars per 10,000.

Healthcare professionals per 10,000 (2006)

Exhibit 5.30

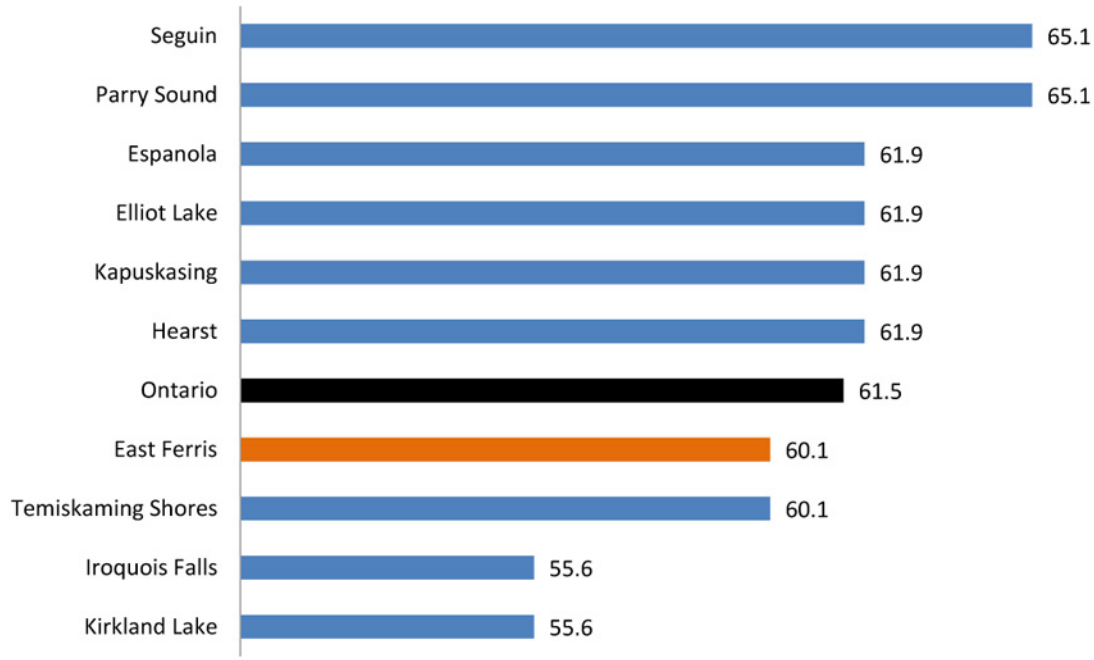


5.30 Healthcare professionals per 10,000

In examining the number of healthcare professionals, such as doctors, dentists and nurses, per 10,000, Temiskaming Shores has 186; well above most of its peer regions, as well as the rural Ontario average of 138. This is higher than the rural Ontario average (138) and more than 7 of its peer regions as well as the regional metro of Sudbury. East Ferris has the most healthcare professionals (226), and Kirkland Lake has the least (91).

Voter turnout 2011 General Election

Exhibit 5.31

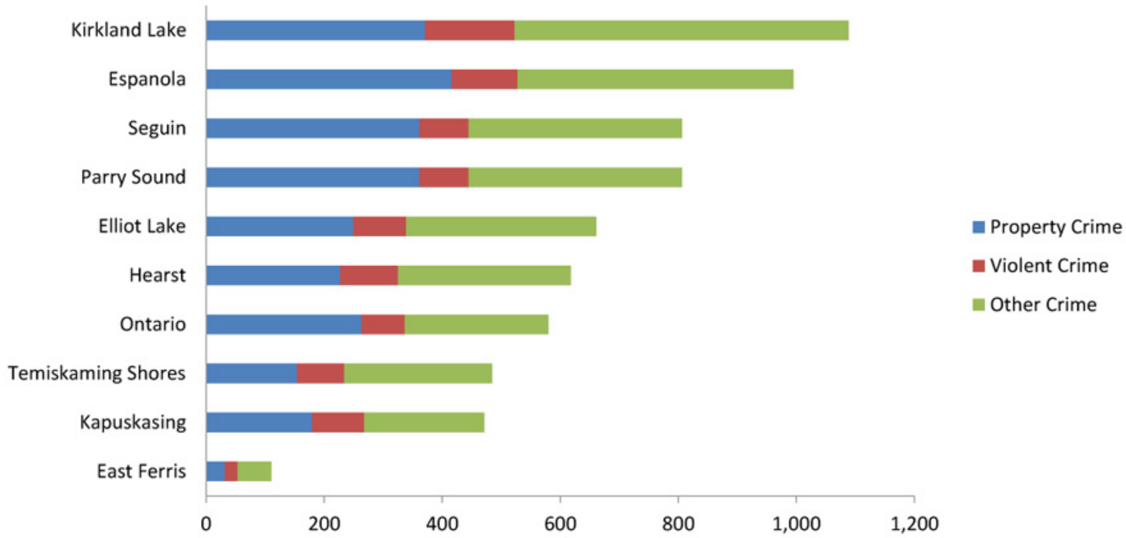


5.31 Voter turnout 2011 General Election

Part of the Nipissing-Temiskaming Federal Electoral District (along with East Ferris), Temiskaming Shores had a voter turnout of 60.1% in the 2011 Federal Election, slightly lower than the overall Ontario turnout of 61.5%. Peer communities Seguin and Parry Sound had the highest voter turnout at 65.1%, and Kirkland Lake and Iroquois Falls share the lowest voter turnout rate at 55.6%.

Crimes per 10,000 (2007)

Exhibit 5.32

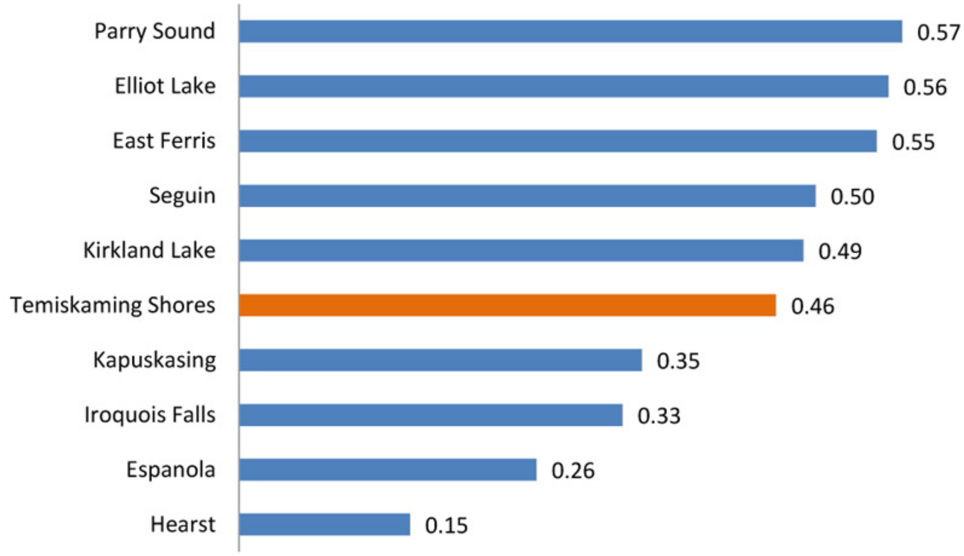


5.32 Crimes per 10,000

In 2007 the Temiskaming Shores area had 485 reported crimes per 10,000 people. Of this 16.4% were violent crimes and 31.8% were property crimes. Temiskaming Shores scores fairly low on crime in comparison to its peer regions, and lower than Ontario overall (580). Kirkland Lake had the most reported crimes at 1,089 and East Ferris the fewest at 111.

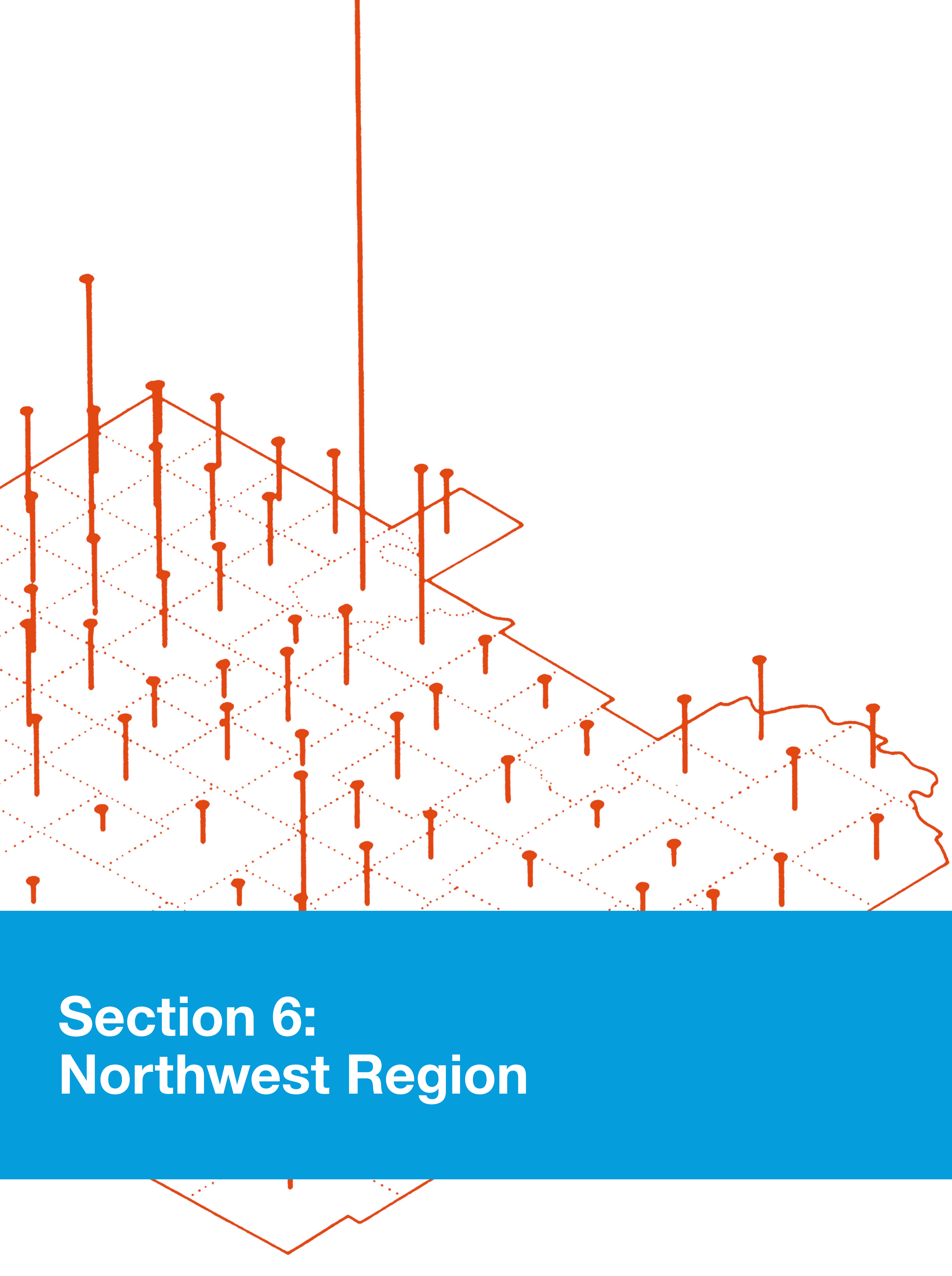
Creativity Index

Exhibit 5.33



5.33 Creativity Index

Finally, we can also examine the northeastern benchmark regions on the Creativity Index. The Creativity Index is calculated using a regions Talent, Technology, and Tolerance levels (see Appendix for a detailed explanation). When compared to its northeastern Ontario peer regions, Temiskaming Shores ranks near the middle on the Creativity Index. It scores 0.46, 180th out of 347 census subdivisions in Ontario (rural and metro). Parry Sound ranks top among the peer regions with 0.57 and Hearst ranks lowest with 0.15.

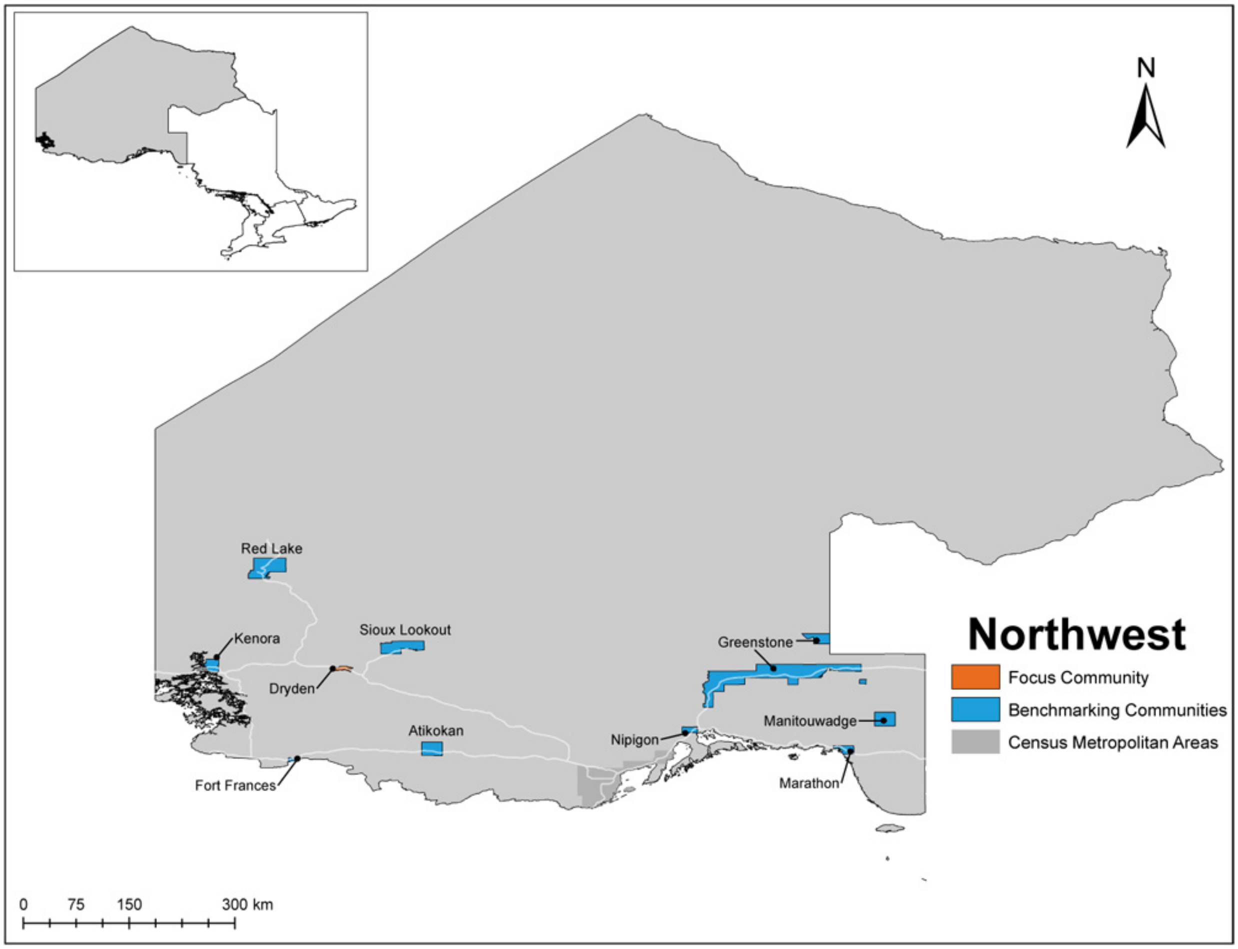


Section 6: Northwest Region

INTRODUCTION

Northwest region

Exhibit 6.0



The northwest region of Ontario has a population of 245,026 (2006). It includes the metropolitan area of Thunder Bay, which comprises 50.2% of the region's total population. The unemployment rate in 2010 was 7.2%.

The town of Dryden was selected as the Focus Community for this region. It has a population of 8,195, and sits between Thunder Bay (5 hour drive away) and Winnipeg (4.5 hour drive away) on the Trans-Canada Highway. Dryden is serviced by road and air, with Bearskin Airlines offering connections to large national carriers via Dryden Regional Airport.

Dryden is home to a regional campus of Confederation College, which offers education in a broad range of specialties including business, medical sciences, community services, and media studies. Also administered through Confederation College is the Domtar Apprenticable Trades Facility, which trains students in resource-based industries.

Dryden's major employers are Domtar, Raleigh Falls Ltd., Keewatin-Patricia District School Board, Dryden Regional Health Centre, and the City of Dryden.

In 2009, the City of Dryden adopted a Municipal Cultural Strategy intended to enrich the pride, hope, and unity of the community. In particular, the Strategy plans to "combat the fear of job and industry losses," and spur a future of economic development to regain the strength of historical years. (Full report available at: http://www.dryden.ca/living_in_dryden/municipal_cultural_planning/).

There were nine benchmarking communities used in the analysis of the northwest region: Red Lake, Kenora, Fort Frances, Sioux Lookout, Greenstone, Nipigon, Marathon, Manitouwadge, Atikokan. These communities are included to illustrate how Dryden is performing compared to its regional rural Ontario peers. Data for Thunder Bay (the region's only metro) is also included for most indicators as well as averages for all of Ontario, metropolitan Ontario and rural Ontario.

Findings

Among its benchmarking peers, Dryden often ranks in the middle of the pack. It is more populous and dense than many of the benchmarks, yet unremarkable in many other measures. Dryden is experiencing neither population growth, nor loss. Its income measures and proxies for quality of life and civic engagement are also unremarkable. Dryden performs well among benchmarks on the Creativity Index and has a relatively higher share of the Creative Class than most benchmarks.

SUMMARY

Dryden strengths:

- Did not experience population decline between 2001 and 2006
- Relatively low unemployment rate
- High Creative Class share made up of technical occupations related to natural and applied sciences
- Relatively high Adjusted Creative Class share
- Recent development of a cultural plan: http://www.dryden.ca/UserFiles/Servers/Server_6/File/Municipal%20Cultural%20Plan%20Final.pdf
- Interesting event venue: http://www.thecentreonline.ca/facility-info/

Dryden weaknesses:

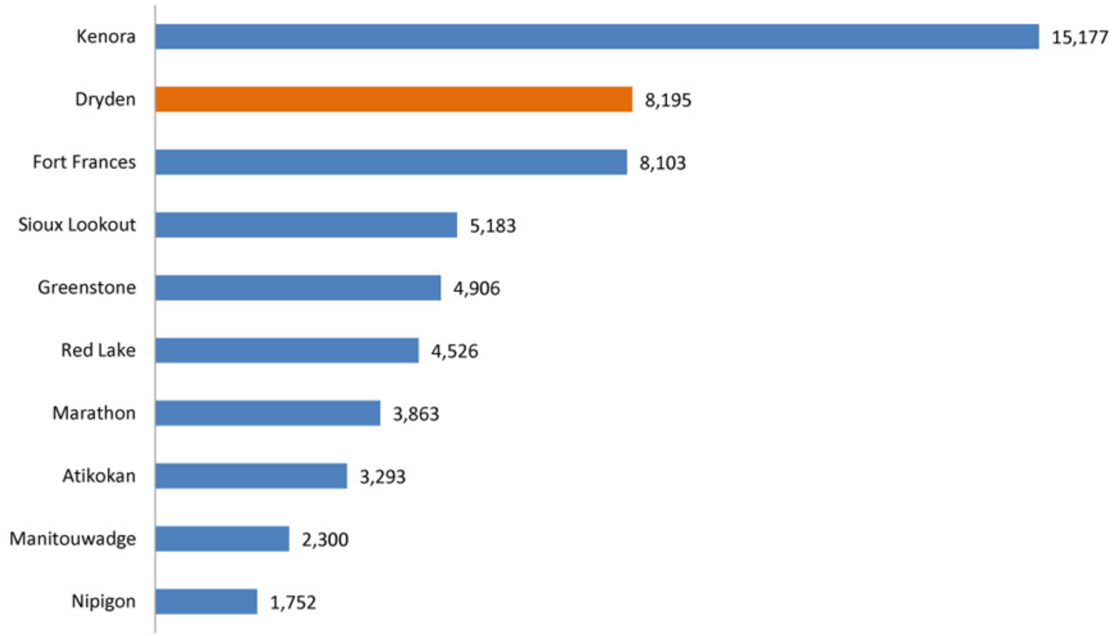
- Zero population growth
- Relatively low on all territorial amenities
- While it does score high on many measures compared to peers, it is usually still much lower than similarly sized regions in southern Ontario

OBSERVATIONS, KEY FINDINGS & OPPORTUNITIES

- Creative Class Breakdown: While Dryden has a clear strength in 'Meds and Eds' occupations, this cannot be relied on as an area of major attention; rather there is a need to diversify the range of creative and knowledge based occupations in this region.
- Technology: Dryden has an opportunity to leverage their tremendous strength in technical (support) workers in natural and applied sciences, to get more professionals into these fields
- Healthcare Workers: Dryden has a very strong performance in healthcare professions, which not only needs to be more clearly understood, but also potential opportunities around healthcare research and entrepreneurship should also be investigated.
- Service Class: Similar to Goderich, Dyden has a high service class share with middle incomes, providing an opportunity to build on the these higher paying service class jobs.
- Regional Hub: The workforce results presented here suggest Dryden is more of a regional hub for extraction based companies; providing home office (or regional office) financial, managerial and other support services. This includes being an ideal location for providing training, which is an opportunity that can be expanded upon. These findings make it apparent that Dryden functions as a "Toronto of the North" when it comes to extraction support, services and education. As a result, Dryden has a clear opportunity to become the convenient location for managing and overseeing all the work being done at the 'ring of fire' and throughout Northern Ontario.
- Education: Dryden needs to improve location education opportunities—especially post-secondary—to facilitate this transition to an extraction regional hub.
- Diversity: Dryden has an opportunity to leverage existing diversity and immigrant measures in this region, to attract more to the region.

Population (2006)

Exhibit 6.1

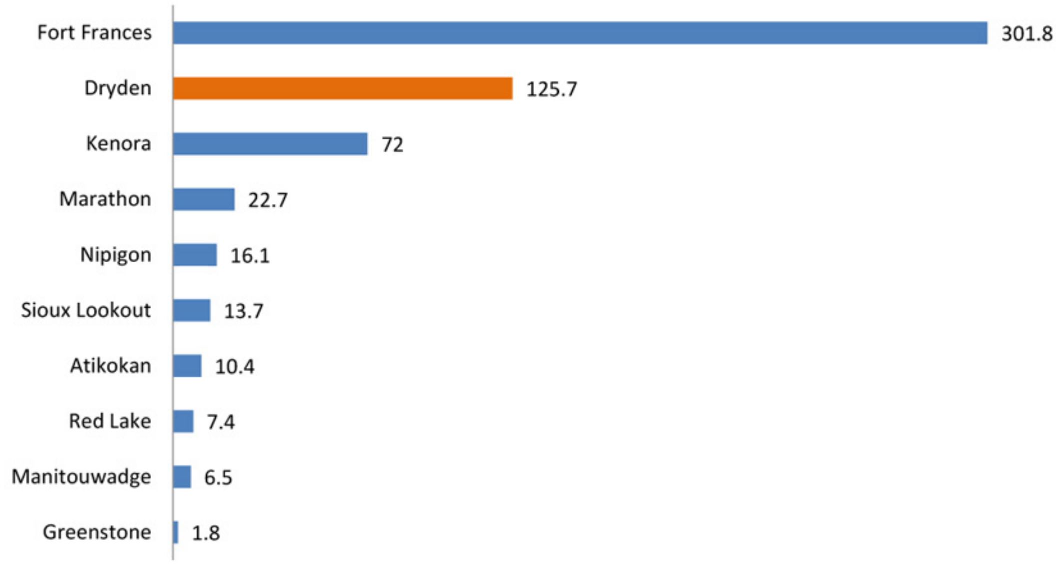


6.1 Population

The northwest communities studied range in population from 1,752 (Nipigon) to 15,177 (Kenora). Dryden is the second most populous community of the selection, with 8,195 residents. Yet, the largest city sampled (Kenora) is nearly twice as populous as Dryden. Most of the other communities analyzed have a population near 5,000 or below, except for Fort Frances (8,195) which is most comparable to Dryden with nearly the same population.

Population density (2006)

Exhibit 6.2

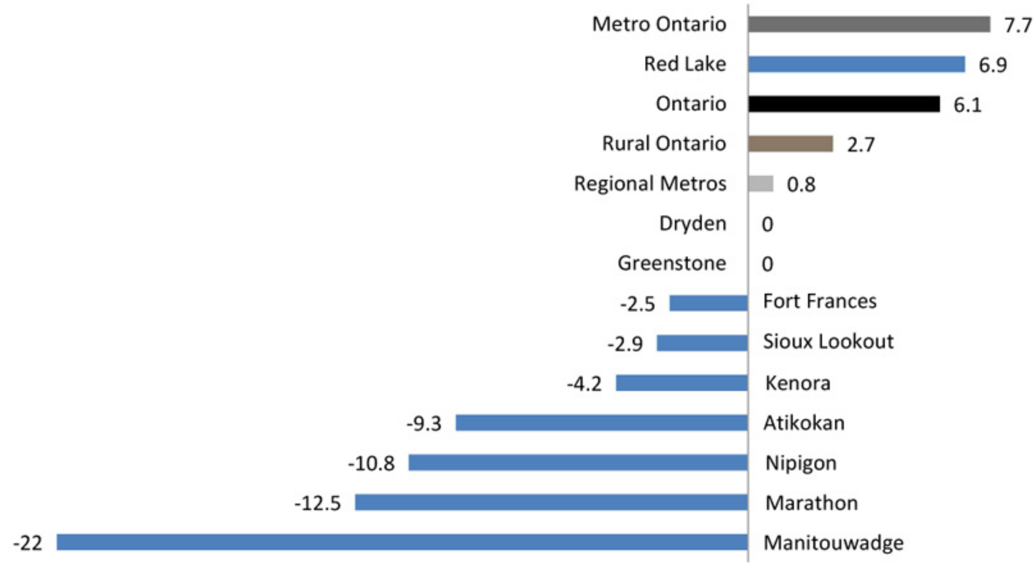


6.2 Population density

Dryden has a population density of 125.7 people per square kilometre, much higher than many of its peer regions and lower than only Fort Frances (301.8). Recall that Kenora (with a population of 72 per square kilometre) has nearly twice the number of residents of Dryden, yet is significantly less densely populated as demonstrated here. Three of the peer regions (Red Lake, Manitouwadge and Greenstone) have a population density of less than 10 people per square kilometre. These results are heavily influenced by the land area of the regions which is determined by Statistics Canada.

Population growth (2001–2006)

Exhibit 6.3

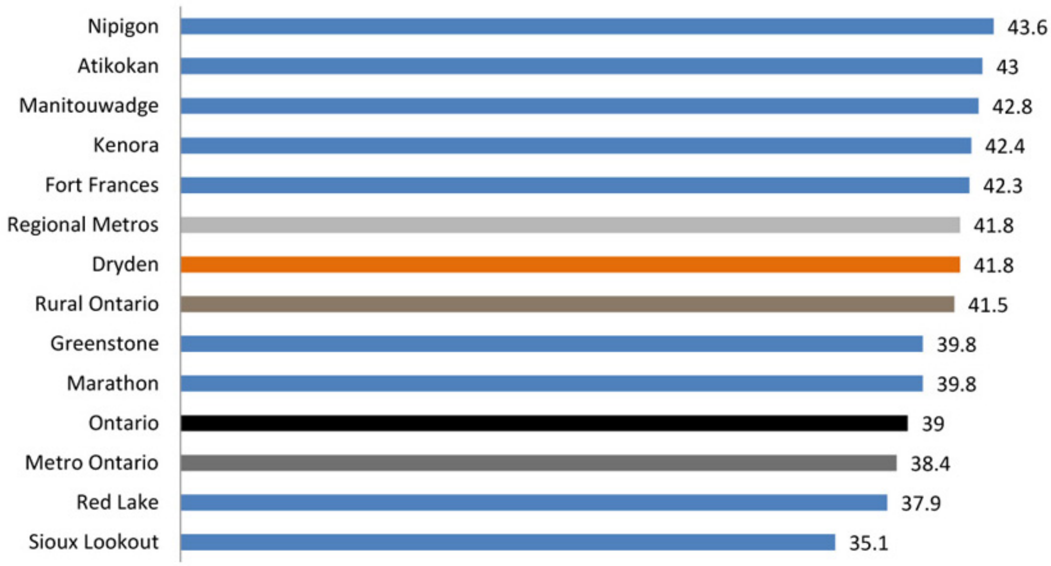


6.3 Population growth

Dryden experienced no population growth between 2001 and 2006, which is greater than seven of its peer regions which experienced population decline during that same time, including Fort Frances (-2.5%) which has a comparable population. Manitouwadge experienced the worst decline losing 22% of its population while Nipigon (-10.8%) and Marathon (-12.5%) also both experienced population decline greater than 10%. Red Lake was the only one of the peer regions to experience population growth during this period, growing 6.9%, perhaps due to expansions in the gold extraction industry. The average for rural Ontario was 2.7%, while metro Ontario cities grew 7.7% and Ontario experienced a growth rate of 6.1%.

Median age (2006)

Exhibit 6.4



6.4 Median age

Dryden's median age of 41.8 falls roughly in the middle of its benchmarking peers whose median ages range from 35.1 in Sioux Lookout to 43.6 in Nipigon. This is an older median than the averages for rural Ontario (41.5), and much older than the provincial median (39) which is influenced by the low 38.4 age of metro Ontario. However, a young population is not only exclusive to the big city. In fact, Sioux Lookout (35.1) and Red Lake (37.9), northwest counterparts of Dryden, both display lower median ages than metro Ontario.

6.6 Female age distribution

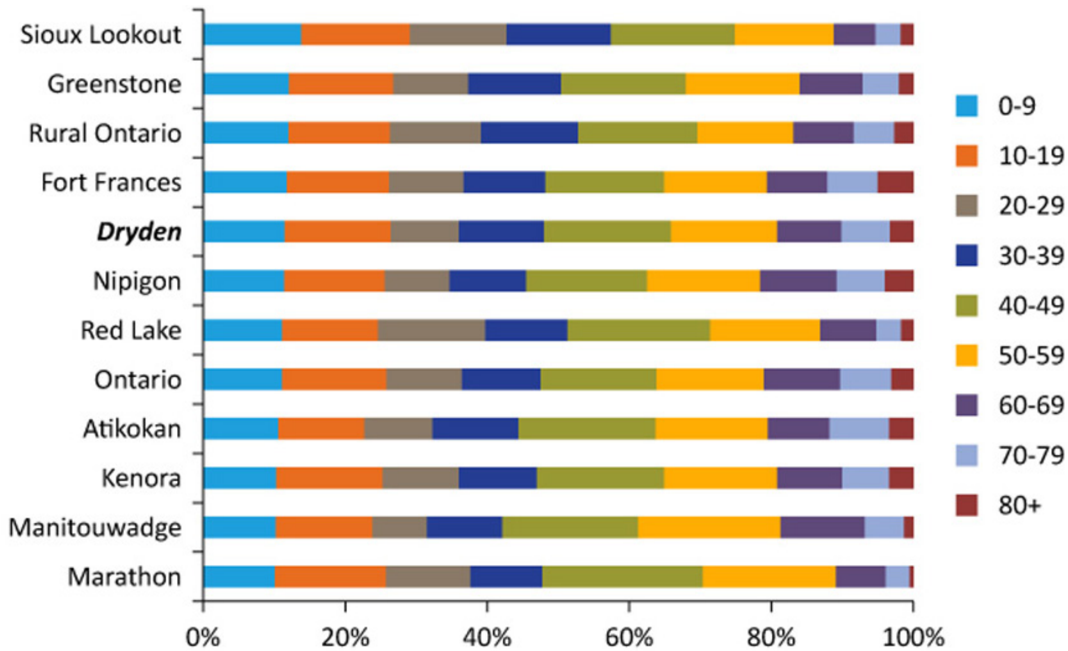
In Dryden, the largest cohort of the female population is also aged 40–49, as with the Ontario averages and the benchmarking communities. The female distribution is consistent with the male to show the dominance of the Baby Boomer generation. The under-20 population is similarly consistent, and the college-aged population to the 40-year mark (child rearing years) is similarly variable. However, Dryden is not as close to the provincial averages for female distribution. Dryden has a greater over 40 population than the provincial average, yet is younger than the rural Ontario average in the female distribution.

6.5 Male age distribution

In Dryden, the largest cohort of the male population is aged 40–49, as with the Ontario averages and the benchmarking communities. Together with the 50–59 cohorts, this graph shows that these communities are dominated by the Baby Boomer generation and to a lesser extent their Millennial generation children. In all communities studied, the under-20 population is relatively congruent. However, the college-aged population to the 40-year mark (child rearing years) is highly variable. Dryden sits very close to provincial averages, but appears to have an older population than rural Ontario which has a larger share of 20–39 year-old males.

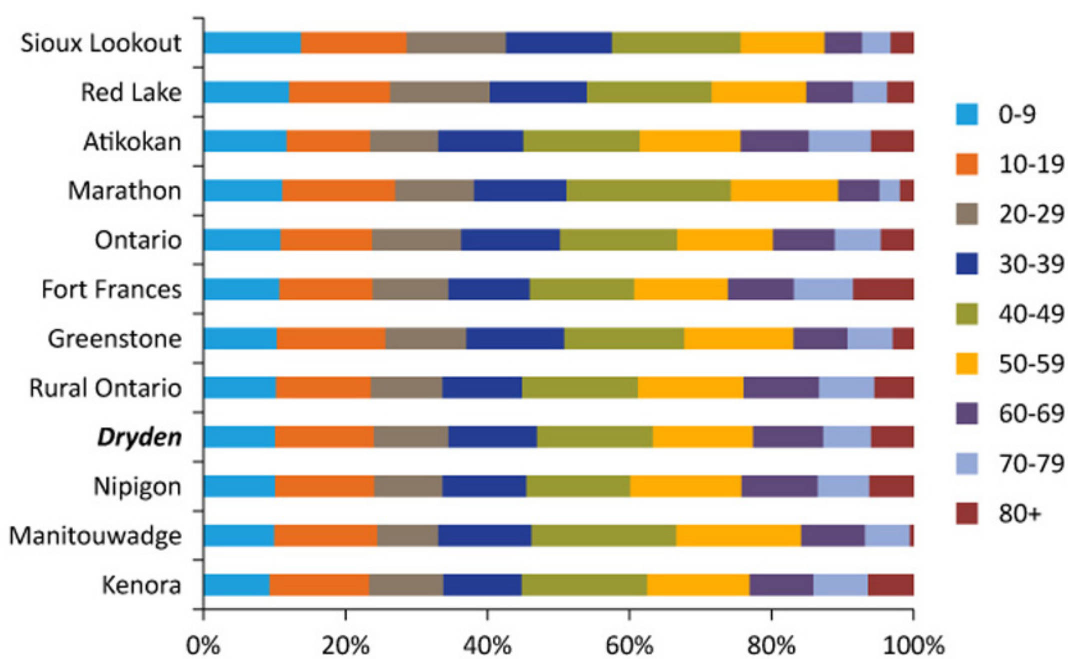
Male age distribution (2006)

Exhibit 6.5



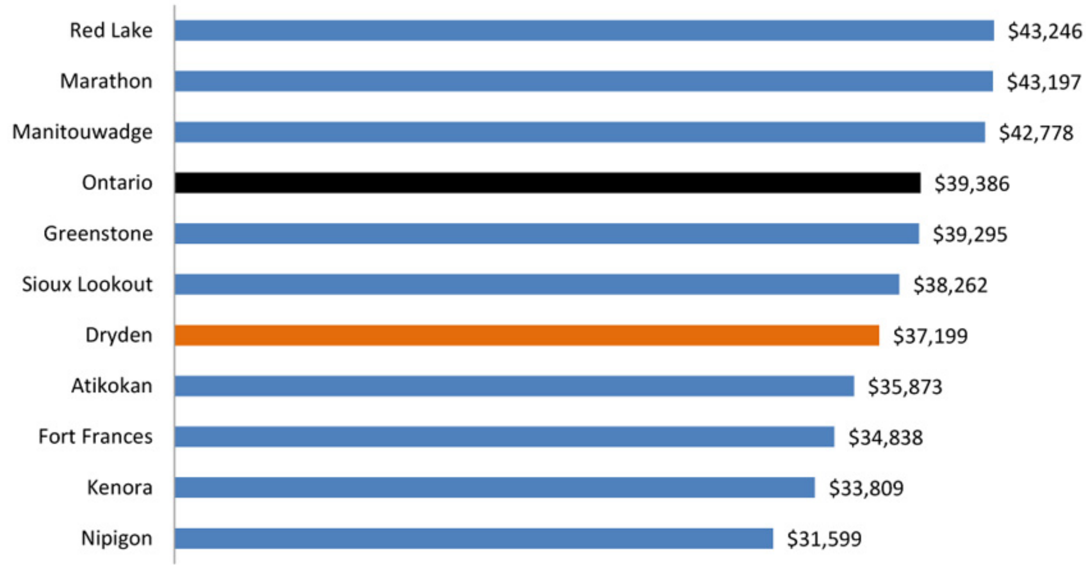
Female age distribution (2006)

Exhibit 6.6



Average employment income (2005)

Exhibit 6.7

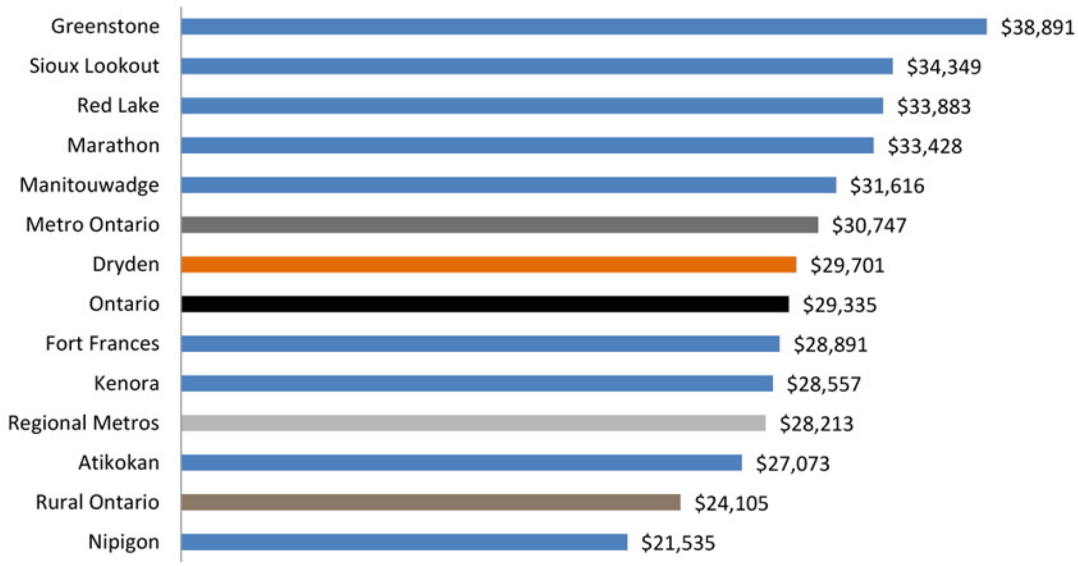


6.7 Average employment income

The average employment income in Dryden was $37,199 in 2005, slightly lower than the Ontario average income of $39,386. Red Lake topped the list of peer regions on this measure with an average employment income of $43,246, while Nipigon had the lowest ($31,599). Note that some of the highest average incomes are found in the communities experiencing the highest population loss (Refer to Exhibit 6.3). When measured on average, Dryden's employment income is middle of the pack in the sample of benchmark regions, comparable to Greenstone ($39,295) and Sioux Lookout ($38,262).

Median employment income (2005)

Exhibit 6.8

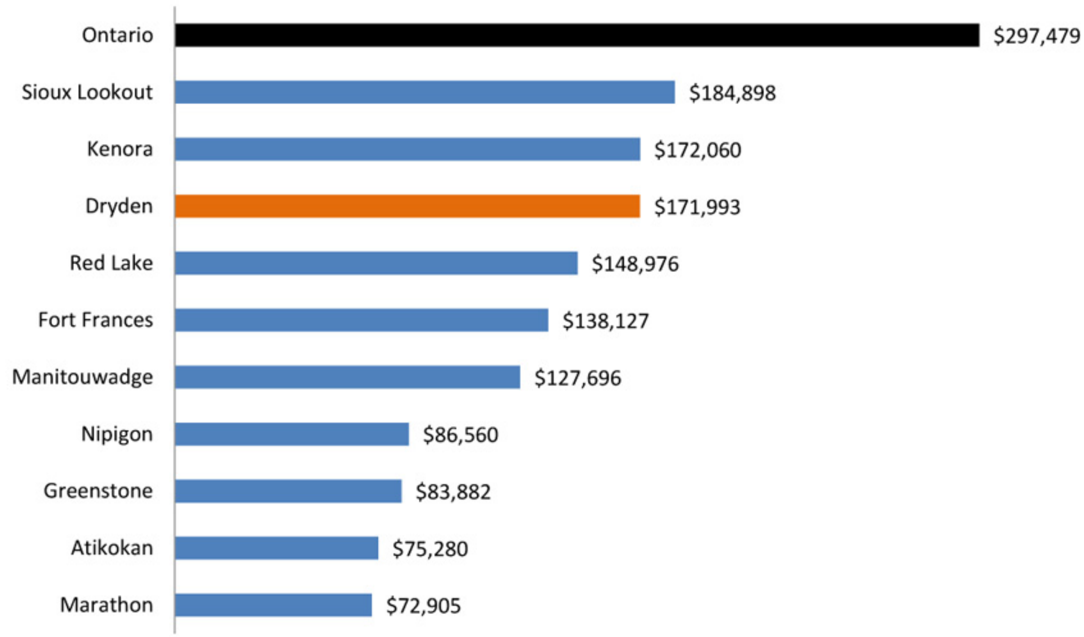


6.8 Median employment income

Dryden ranks slightly higher on the median income measure with a median income of $29,701, just above the Ontario median income of $29,335. Nipigon is again at the bottom of the list with a median income of $21,535, while Greenstone now tops the list with $38,891. All of the benchmarking regions have median employment incomes above the rural Ontario median of $24,105. The change in both the leading communities and Dryden's relative stability at the middle of the pack is significant. Median income is influenced less by high or low income outliers than is average income. The drop in rank of Red Lake, Marathon and Manitouwadge in the median income measure compared to the average income (refer to Exhibit 6.8) indicates that income disparity may be more prevalent than in those communities that maintained their rank, such as Dryden. Note that many of the northwest benchmarkers performed better than metro Ontario ($30,747) and all but one outperformed rural Ontario ($24,105). However, this graph does not display the cost of living nor quality of life.

Average value of dwelling (2006)

Exhibit 6.9

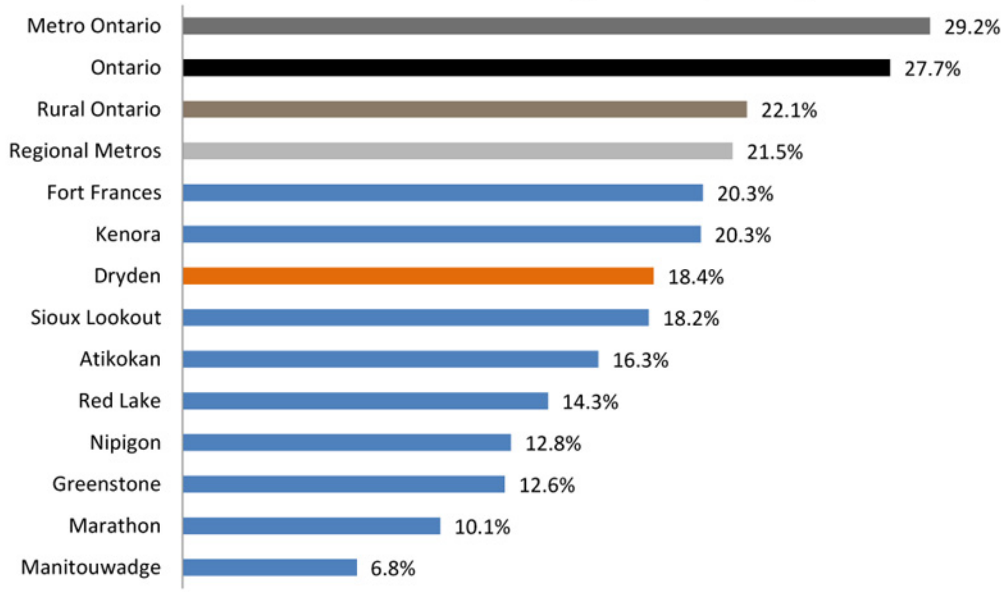


6.9 Average value of dwelling

The average value of a dwelling in Dryden is $171,993, 3rd amongst its benchmarking peers. Sioux Lookout tops the list with an average dwelling value of $184,898, while Marathon is at the bottom with an average value of $72,905; demonstrating there is a great deal of variation in the average value of a dwelling across the northwest region. Note that this graph is inconsistent with the income information displayed in Exhibits 6.7 and 6.8, suggesting that average and median incomes do not necessarily correlate with more expensive dwellings in this sample. Also, keep in mind that the average can be easily influenced by outliers.

Share of households spending 30% or more of income on housing costs (2006)

Exhibit 6.10

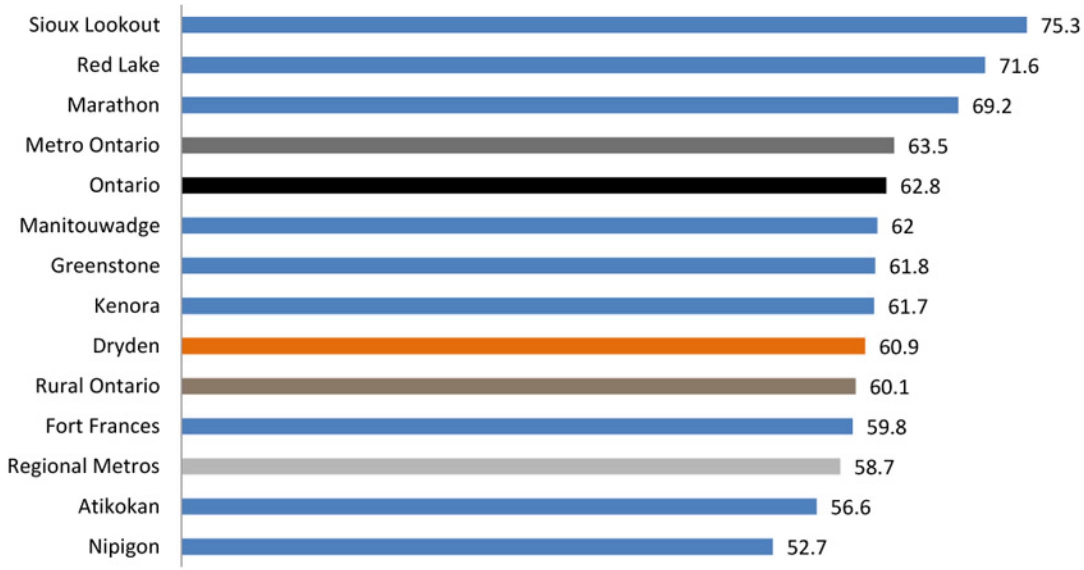


6.10 Share of households spending 30% or more of income on housing costs

18.4% of households in Dryden spend 30% or more of their income on housing costs. This is fairly consistent with the benchmarking communities in the region whose shares range from a low of only 6.8% (Manitouwadge) to 20.3% (Fort Frances). The striking feature of this graph is the dramatic difference in the share of households with 30% or more of income devoted to housing costs in the northwest region in comparison with the provincial average. The Ontario average is 27.7%, which grows to 29.2% in metro Ontario. This is 10% higher than nearly all of the benchmark communities and Dryden.

Employment rate (2006)

Exhibit 6.11

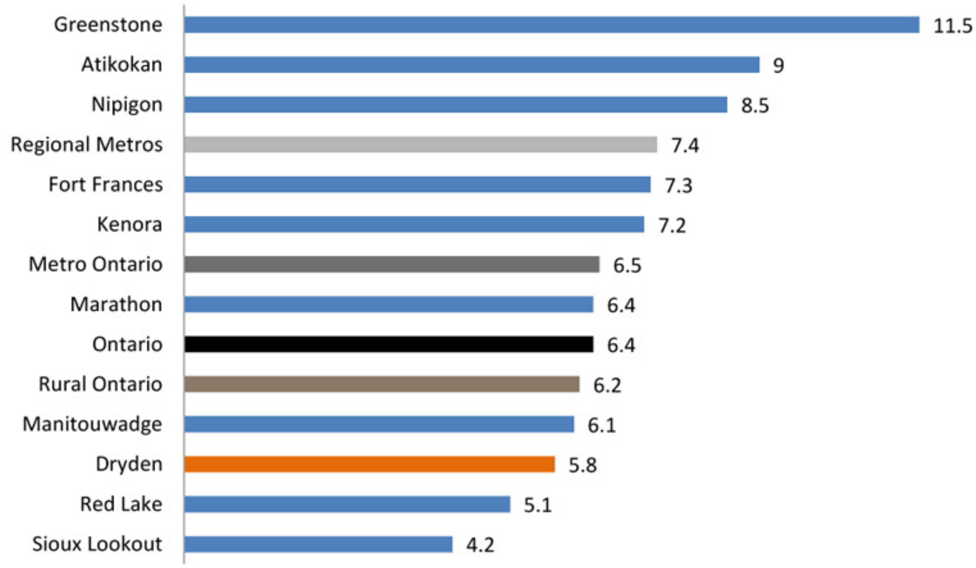


6.11 Employment rate

The 2006 employment rate in Dryden was 60.9%, consistent with most of its peers and just above the rural Ontario average of 60.1. Sioux Lookout had the highest employment rate in the region (75.3%) while Nipigon had the lowest (52.7%). Many of the benchmark communities fell below the metro Ontario (63.5%) and provincial average (62.8%); however Sioux Lookout, Red Lake and Marathon significantly outperformed both the averages and the other benchmarks. These communities are also among the higher ranked average and median incomes in Exhibits 6.7 and 6.8, respectively.

Unemployment rate (2006)

Exhibit 6.12



6.12 Unemployment rate

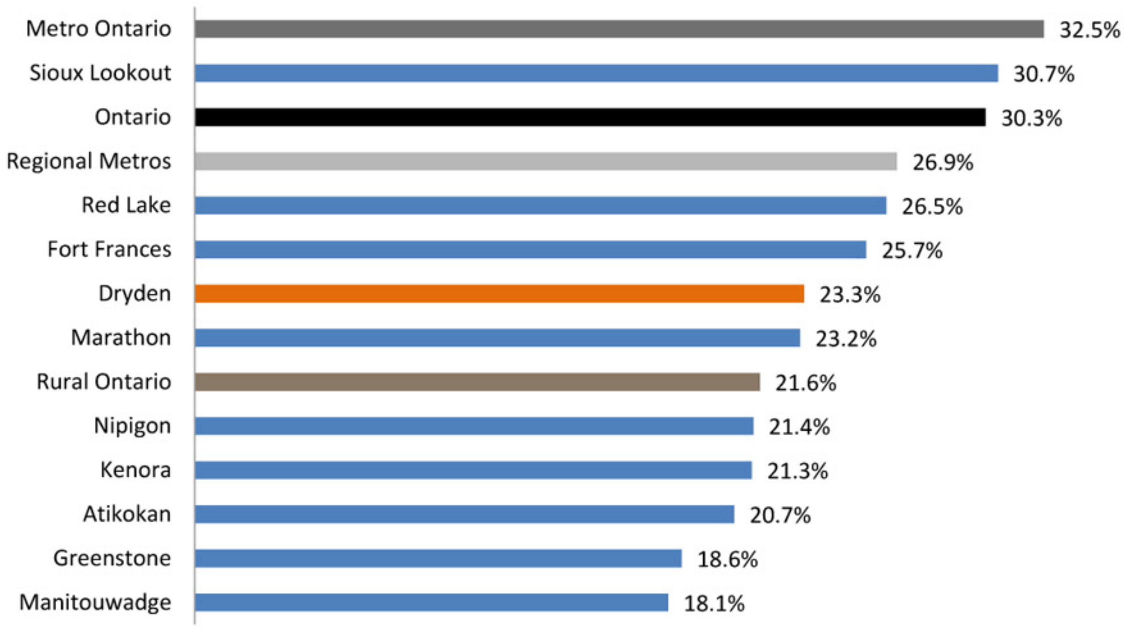
Dryden's unemployment rate in 2006 was 5.8%, lower than most of its peer regions and lower than the overall Ontario unemployment rate of 6.4%. Dryden performs better relative to benchmarks on the unemployment measure than the employment measure (refer to Exhibit 6.11). Dryden's unemployment rate is a full 5.7% lower than the highest of the benchmark communities, Greenstone (11.5%). While Dryden did not meet the employment rates of the provincial average, it outperforms all the provincial measures, with a lower unemployment rate. Sioux Lookout (4.2%) and Red Lake (5.1%) had the lowest unemployment rates in 2006.

OCCUPATIONAL CLASSES

This section examines the occupational structure in Dryden. 23.3% of Dryden's residents are employed in Creative Class occupations, 50.4% in the service class, 24.6% in the working class and 1.7% in the farming, fishing, and forestry class.

Creative Class share (2006)

Exhibit 6.13

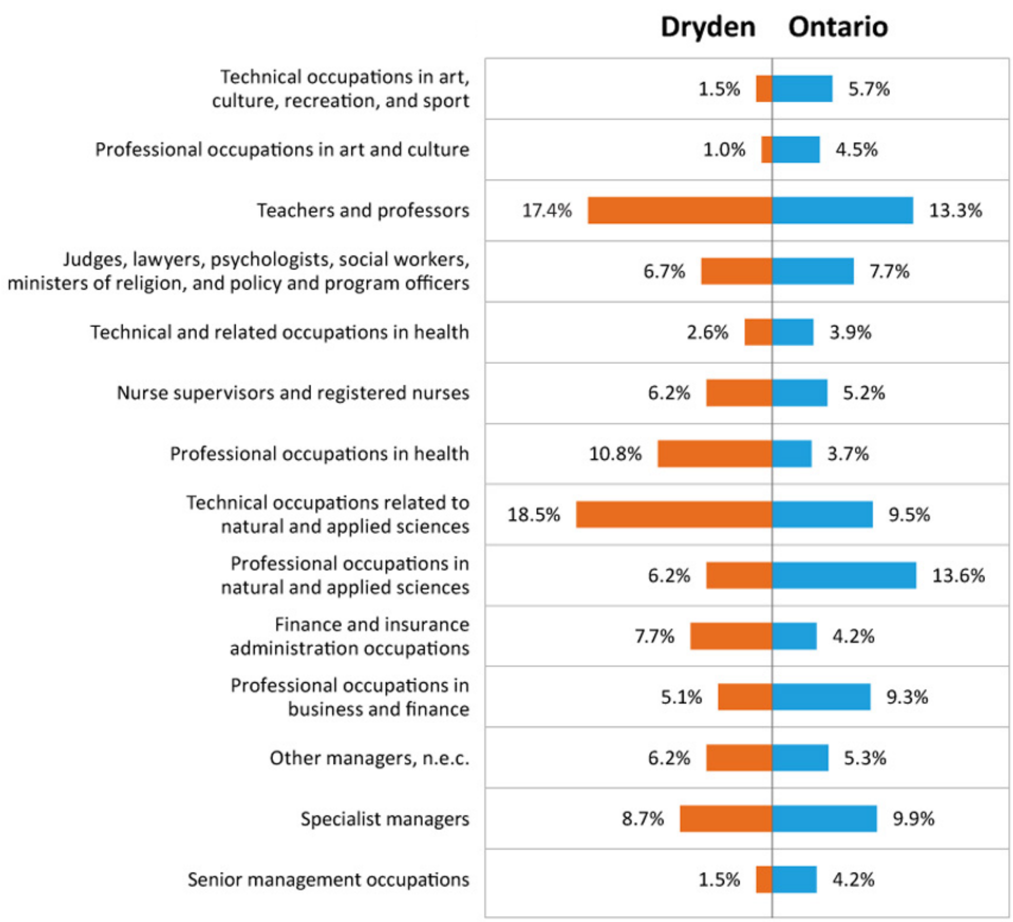


6.13 Creative Class share

At 23.3%, Dryden's Creative Class share is just above the rural Ontario average of 21.6% and ranks 4th among its peer regions. Sioux Lookout (30.7%) is on top of the list while Manitouwadge with 18.1% ranks at the bottom; matched closely to Greenstone (18.6%). Note that the rankings in this graph do not at all match the income rankings in Exhibits 6.7 and 6.8.

Creative Class breakdown (2006)

Exhibit 6.14

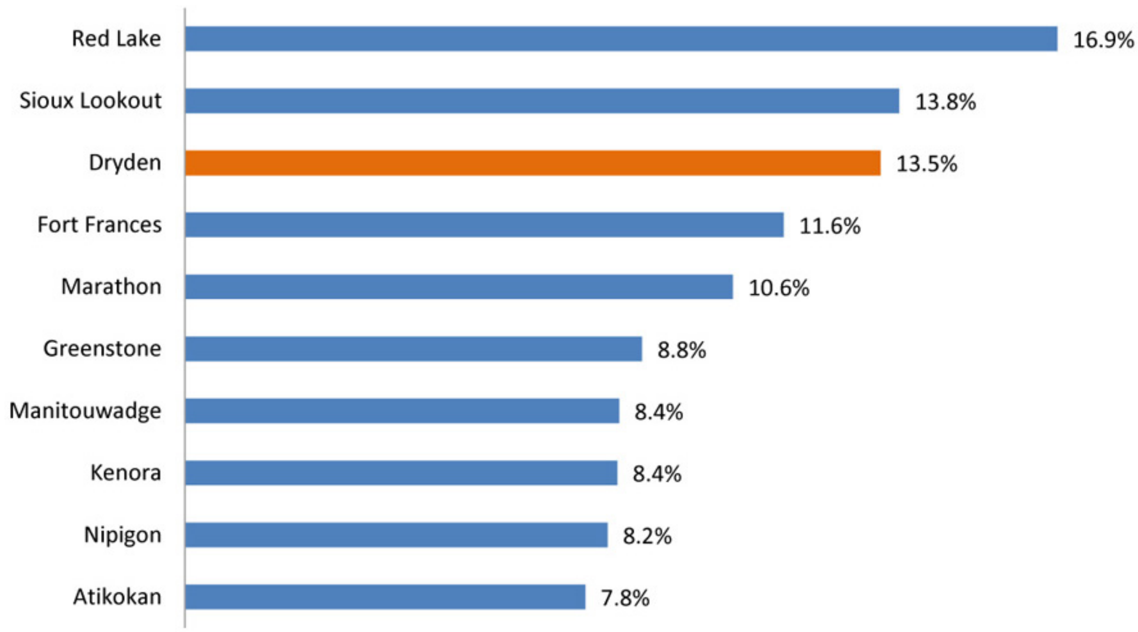


6.14 Creative Class breakdown

When Dryden's Creative Class is broken down into its different occupation groups, it becomes clear that much of its Creative Class is composed of teachers and professors (17.4%), technical occupations related to natural and applied sciences (18.5%), and health-related occupations (19.6%). This is a much different structure from Ontario overall, where only 13.3% of the Creative Class is composed of teachers and professors, 9.5% in technical occupations related to natural and applied sciences, and 12.1% in health-related occupations. It is, however, consistent with the key employers in Dryden, including Domtar (pulp & paper), Raleigh Falls Ltd. (timber), Keewatin-Patricia District School Board, Dryden Regional Health Centre, and the City of Dryden.

Adjusted Creative Class share (2006)

Exhibit 6.15

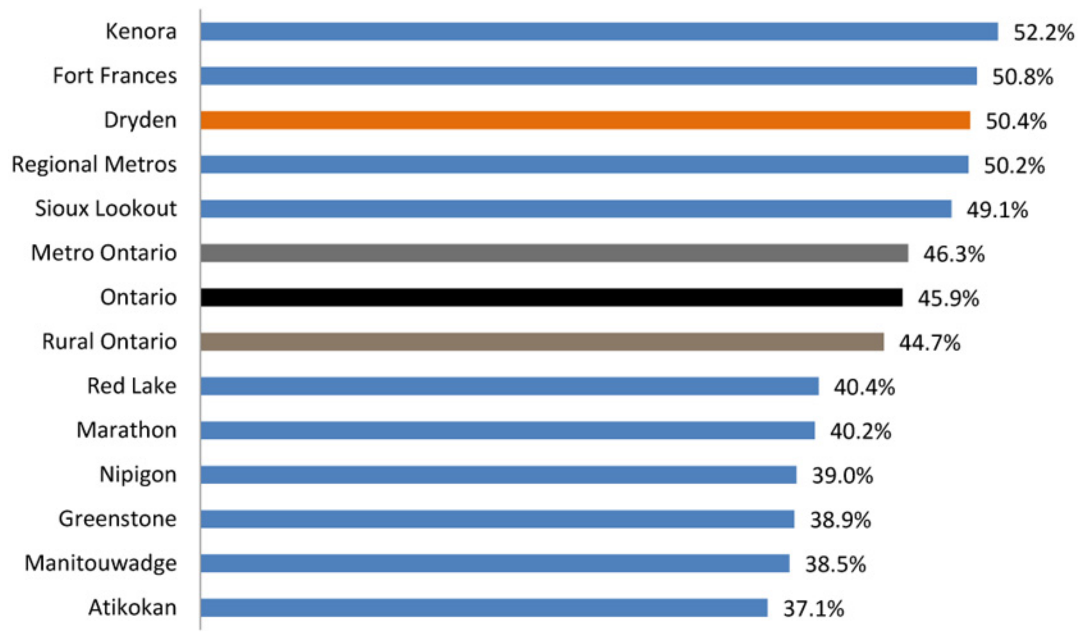


6.15 Adjusted Creative Class share

When occupations associated with economic reproduction (see Appendix) are taken out of the Creative Class group Dryden's Creative Class labour force share changes to 13.5% and moves up one spot ahead of Fort Frances in its peer regions. It is above the adjusted rural Ontario average of 12.7%. Red Lake now has the largest Adjusted Creative Class share, with 16.9%, followed by Sioux Lookout with 13.8%. Atikokan (7.8%), Nipigon (8.2%), Kenora and Manitouwadge (both 8.4%) have the lowest Adjusted Creative Class share.

Service class share (2006)

Exhibit 6.16

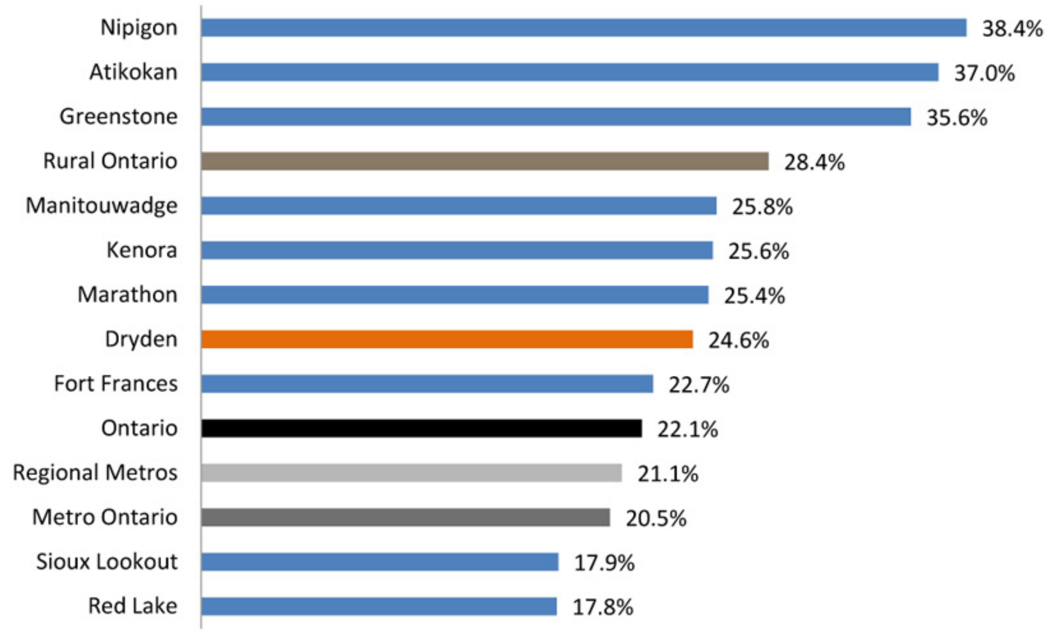


6.16 Service class share

Dryden has 50.4% of its labour force employed in service class occupations, 3rd among its peer regions. Kenora tops the list with 52.2%, while Atikokan is at the bottom with 37.1%. If one references Exhibit 6.13, it becomes clear that a high rank in the Creative Class measure does not directly correspond to a low rank in the service class share measure. Dryden has a higher share of service class than the rural, metro and general provincial averages. However this is not true of all the north-west benchmarks, as several communities have service class shares below these averages.

Working class share (2006)

Exhibit 6.17

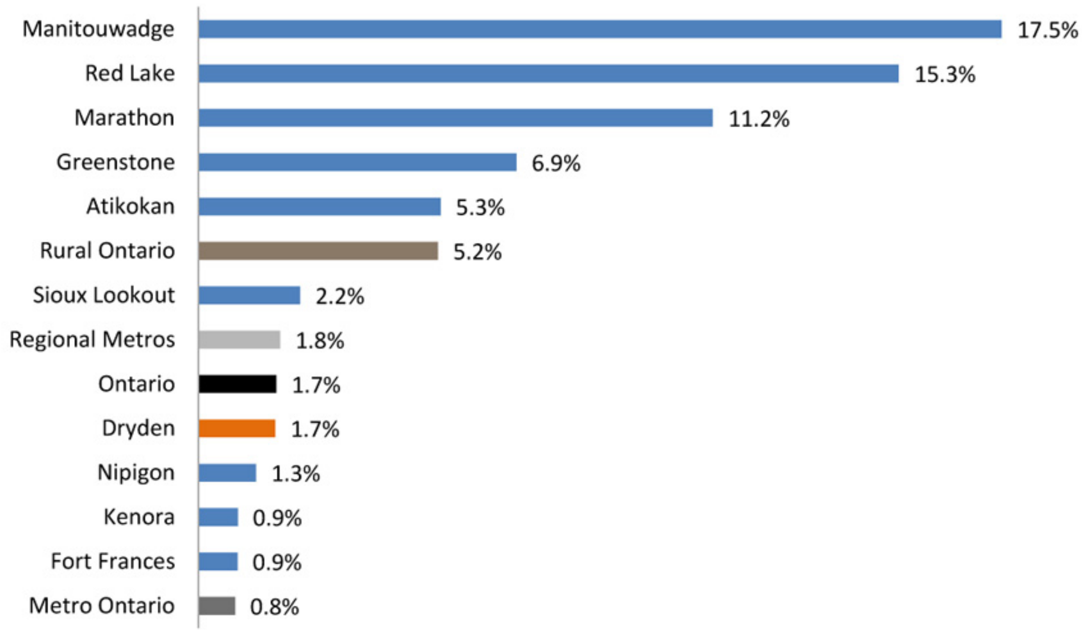


6.17 Working class share

24.6% of the labour force in Dryden is employed in working class occupations. This is below the rural Ontario average of 28.4% but above the Ontario average of 22.1%, the regional metros average of 21.1% and metro Ontario average of 20.5%. Nipigon has the highest share of its labour force in the working class (38.4%) out of the peer regions, while Red Lake has the lowest (17.8%). The working class share measure tends to an inverse rank as compared to the Creative Class share (Exhibit 6.13), as communities with a higher Creative Class share in this sample tend to rank lower in working class share.

Farming, fishing, and forestry class share (2006)

Exhibit 6.18



6.18 Farming, fishing, and forestry class share

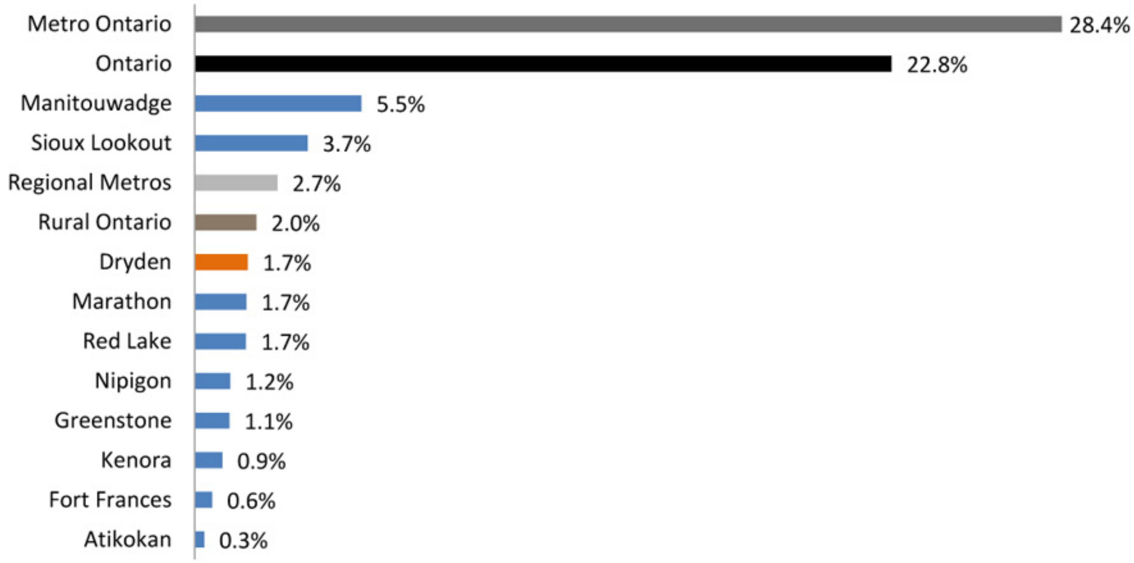
Dryden ranks 7th amongst its peer regions on share of labour force employed in farming, fishing, and forestry occupations with 1.7%. This is lower than the rural Ontario average of 5.2% but consistent with the Ontario average of 1.7%. Fort Frances has the lowest share with 0.9% while Manitouwadge tops the list with 17.5% of its labour force employed in farming, fishing, and forestry occupations. It is worth noting that Fort Frances also exhibited a dramatically higher population density than the other communities, perhaps suggesting a more urban lifestyle as opposed to resource based. It is also worth noting that the communities with the highest share of farming, fishing, and forestry class also ranked high in the income measures (Exhibits 6.7 and 6.8). These communities also exhibited lower average dwelling values (Exhibit 6.9) and lower shares of household income spent on housing costs (Exhibit 6.10). Dryden appears to have an economy far less dependent on resource-based industries than these other benchmarks, despite some of the largest employers being Domtar and Raleigh Falls, Ltd.

TOLERANCE

Tolerance has been repeatedly identified in the literature (see: Florida, 2002) as a vital requirement for the attraction, and retention, of Creative Class workers seeking a diverse and open environment, and is a facet of economic development that rural areas have been struggling to overcome. Tolerance will be examined through the shares of visible minority, immigrant, and Aboriginal populations in the ten benchmarking regions.

Visible minority population share (2006)

Exhibit 6.19

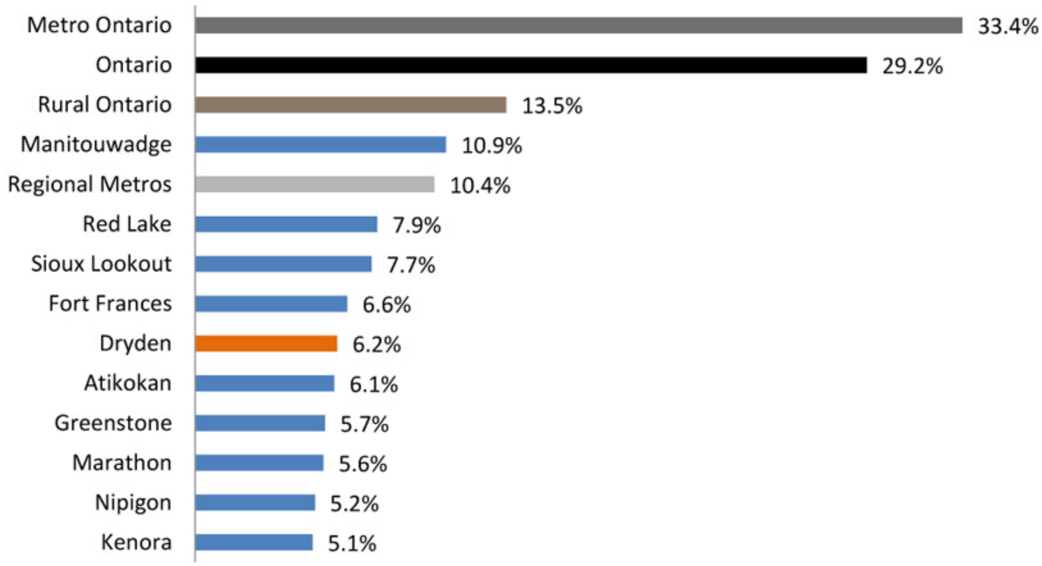


6.19 Visible minority population share

Most of Ontario's visible minority population is concentrated in the major metropolitan areas, 28.4% of the population in Ontario's metropolitan areas is a visible minority, compared with only 2% in rural Ontario. With 1.7% of its population a visible minority, Dryden falls just below the rural Ontario average and far below the general Ontario average. However, Dryden is among the most diverse its peer regions. Manitouwadge tops the list with 5.5% while Atikokan is at the bottom with 0.3%.

Immigrant population share (2006)

Exhibit 6.20

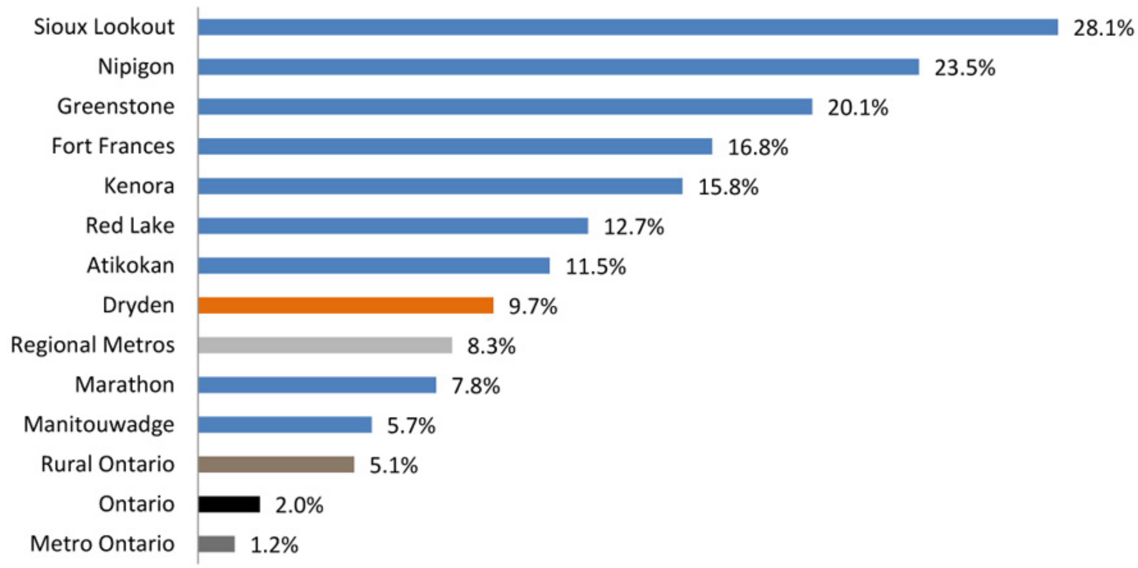


6.20 Immigrant population share

The share of immigrants in rural Ontario (13.5%) is also much lower than the Ontario average (29.2%) and especially the metro Ontario average (33.4%). Dryden has an immigrant population share of 6.2%, putting it 5th among its benchmarking peers. All of the northwest benchmarks sampled exhibit much lower immigrant population shares than the Ontario averages, and none of the benchmarks even measured a third of the share of metro Ontario. The community with the lowest share (Kenora, 5.1%) has half the share of the benchmark with the highest share (Manitouwadge, 10.9%).

Aboriginal population share (2006)

Exhibit 6.21



6.21 Aboriginal population share

The benchmark communities of the northwest region have a much higher Aboriginal population share than the rural (5.1%), metro (1.2%) and overall Ontario (2.0%) averages. While Dryden has the third lowest share (9.7%) of the benchmarking communities, this is still nearly five times the provincial average. There is significant diversity in the Aboriginal population shares of the benchmarks, from a low of 5.7% in Manitouwadge to a high of 28.1% in Sioux Lookout.

TALENT

The Talent Index measures the share of the population 25 and above with a Bachelor's degree or higher.

5.22 Talent Index

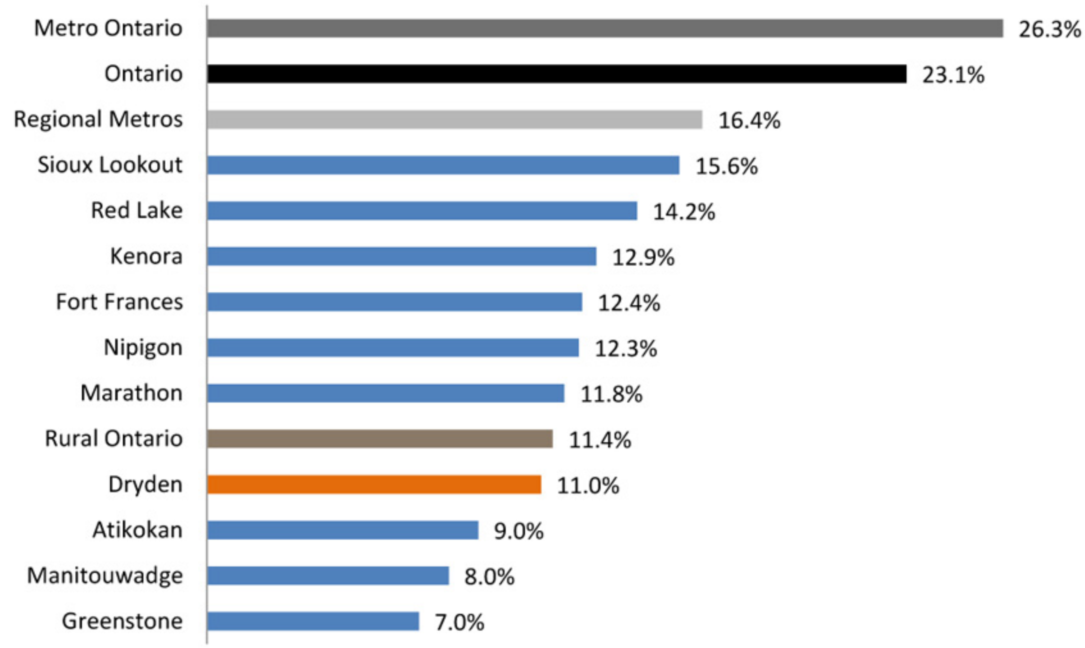
On the Talent Index, metropolitan Ontario (26.3% of the population 25 and above has a BA or higher) outperforms rural Ontario (11.4%) on this measure. 11% of Dryden's population 25 and above has a Bachelor's degree or higher, just less than the rural Ontario average of 11.4%. The benchmarking peers range from 7% (Greenstone) to 15.6% (Sioux Lookout) in the Talent Index. The Talent Index rankings bear more similarities with the Creative Class share rankings (Exhibit 6.13) than the income measures (Exhibits 6.7 and 6.8).

5.23 Highest certificate, diploma or degree

The next chart shows the distribution of the different education levels for each of the different benchmark communities as well as for Ontario. Dryden has a higher percentage of residents with no certificate, diploma or degree than the provincial average, however performs well among its peers and outperforms rural Ontario. Approximately half of Dryden's population has achieved education greater than a high school certificate.

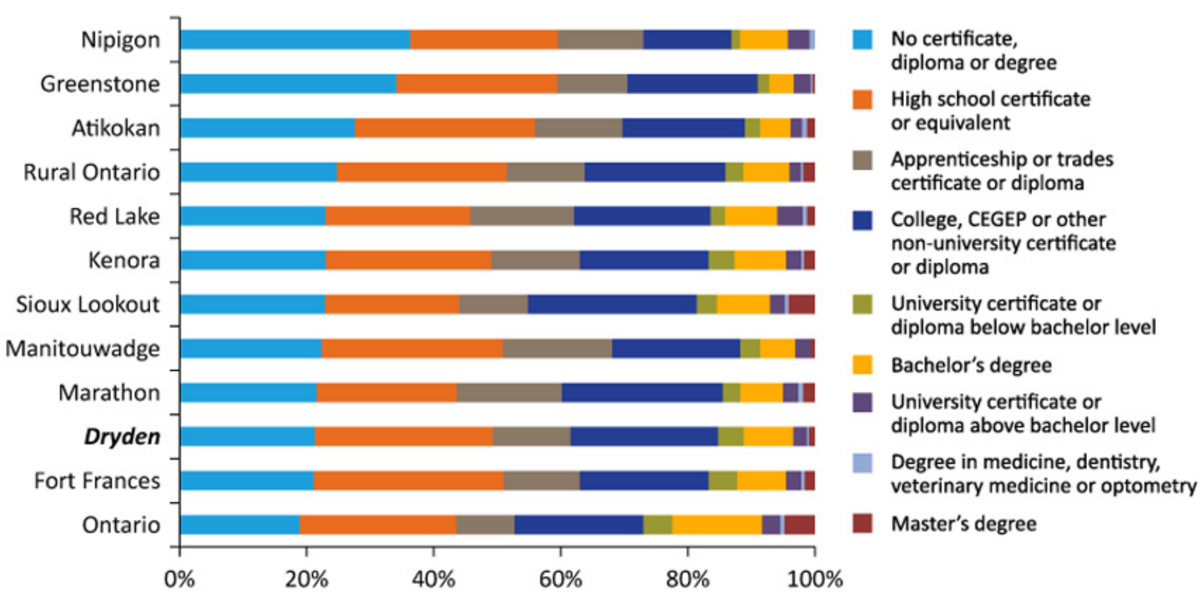
Talent Index (2006)

Exhibit 6.22



Highest certificate, diploma or degree (2006)

Exhibit 6.23

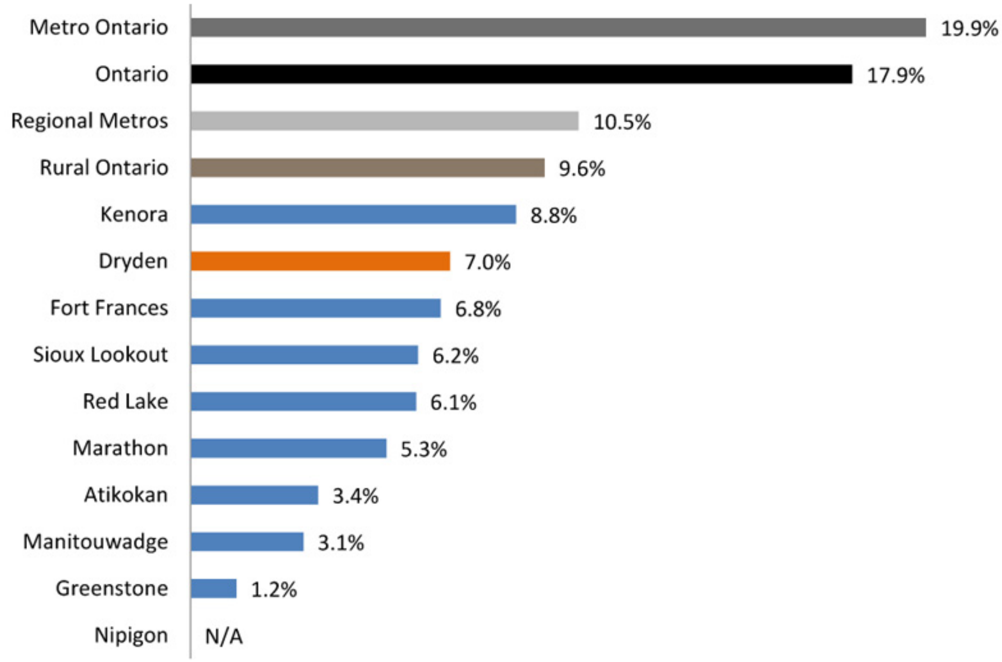


TECHNOLOGY

In examining the prevalence of high technology industries in our benchmark regions, the high-tech establishment share, high-tech location quotient (LQ) and Ontario Tech Pole Index will all be utilized.

High-Tech establishment share (2008)

Exhibit 6.24

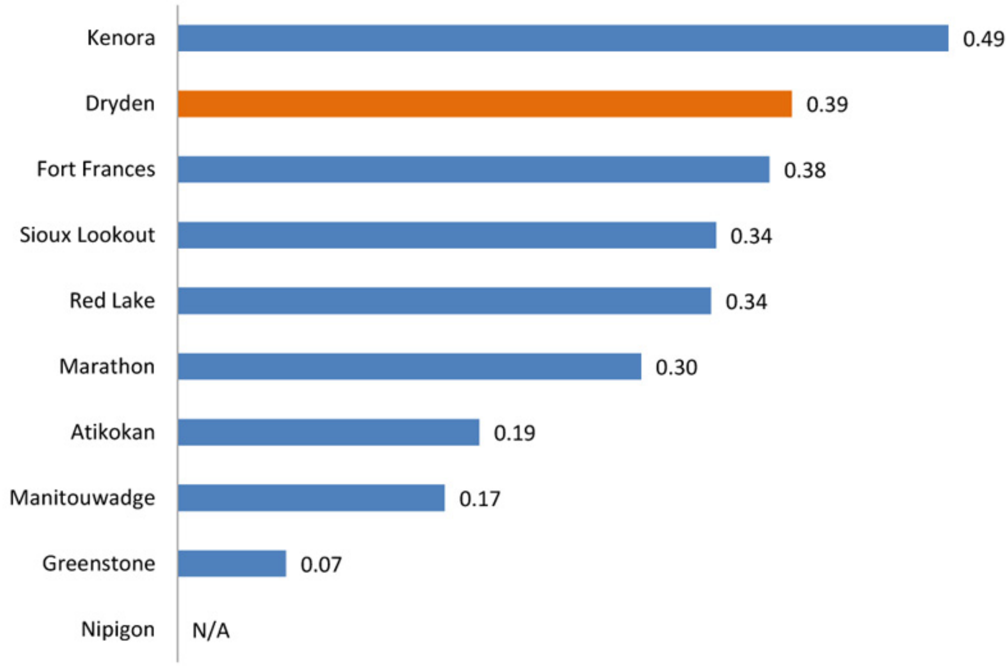


5.24 High-Tech establishment share

7% of Dryden's establishments in 2008 were considered to be in high-tech industries (see Appendix). This is well below the metro Ontario average of 19.9% and the Ontario average of 17.9%, Dryden is however, near the top of its peer regions on this measure. Only Kenora has a higher share of high-tech establishments (8.8%). Recall from Exhibit 6.1 that the most populous communities have the largest share of high-tech establishments. The benchmarks range from a share of 1.2% (Greenstone) to a share of 8.8% (Kenora); demonstrating a high level of variation across the region.

High-Tech LQ (2008)

Exhibit 6.25

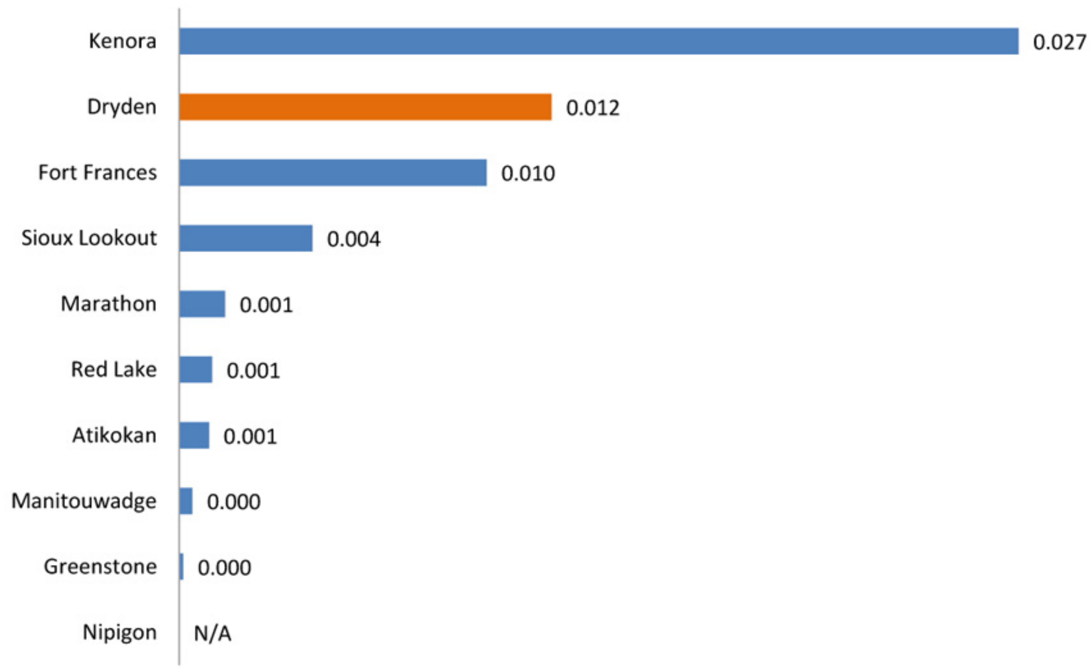


6.25 High-Tech LQ

A high-tech location quotient was calculated to further examine the presence of high-tech establishments in the region. Again, Dryden scores higher (0.39) than most of its peer regions, but even the highest scoring community in that region (Kenora at 0.49) has a very low LQ. At the other end of the spectrum, Atikokan (0.19), Manitouwadge (0.17) and Greenstone (0.07) have the lowest high-tech LQs.

Ontario Tech Pole Index (2008)

Exhibit 6.26



6.26 Ontario Tech Pole Index

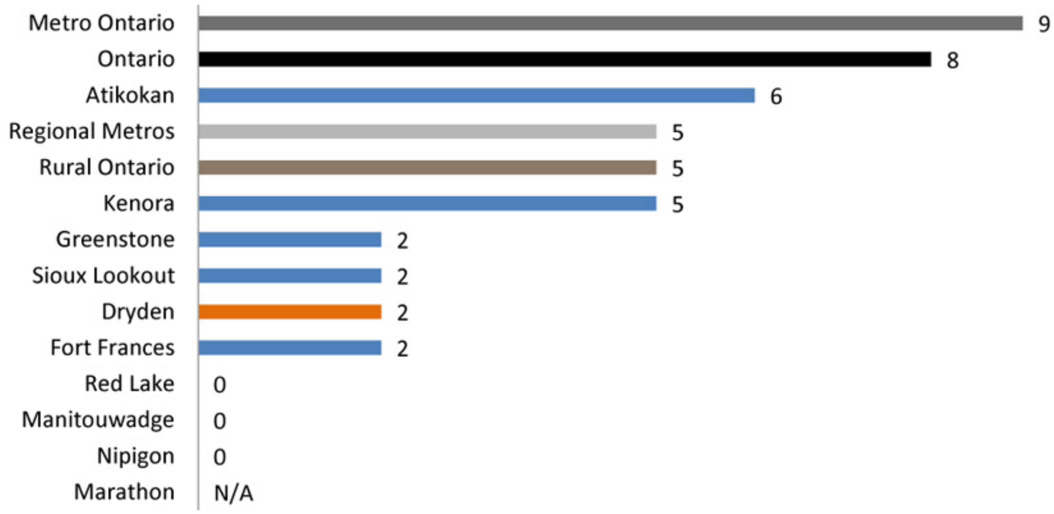
Finally, we can examine the benchmark regions through utilizing the Ontario Tech Pole Index, which examines the total high-tech employment in a region, using Ontario as a base, which is in turn adjusted for city size and compared to the Ontario base (for a complete description, please see the Appendix). Utilizing this index, we see a great deal of variation across the benchmarking communities. On the higher end of the scale, we have Kenora (0.027) and Dryden (0.012), and alternatively, on the very low end of the scale, have Manitouwadge and Greenstone (0.000).

TERRITORIAL ASSETS

The territorial assets discussed in this section are an attempt to quantify indicators of quality of place and civic engagement. The territorial assets that will be examined include: Arts & Entertainment establishments, recreation facilities, restaurants and bars, healthcare professionals, voter turnout, and crime rate per 10,000. Finally, the Creativity Index will be examined.

Arts & Entertainment establishments per 10,000 (2008)

Exhibit 6.27

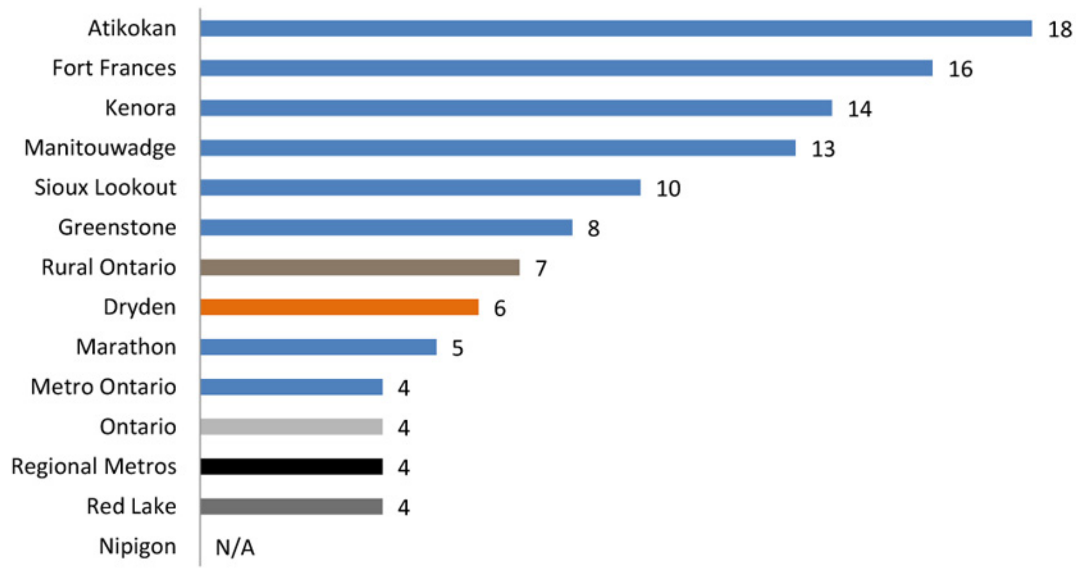


6.27 Arts & Entertainment establishments per 10,000

Dryden has 2 arts, culture and entertainment related establishments per 10,000, similar to that of Greenstone, Sioux Lookout and Fort Frances, putting it below the rural Ontario average of 5, and 5th among its peer regions. All of the benchmarking regions are below the metro Ontario (9) and Ontario (8) averages, above Atikokan (6) which has the largest number of Arts & Entertainment establishments of the peer communities. Several communities (Manitouwadge, Marathon and Red Lake) all have no reported Arts & Entertainment establishments.

Recreation facilities per 10,000 (2008)

Exhibit 6.28

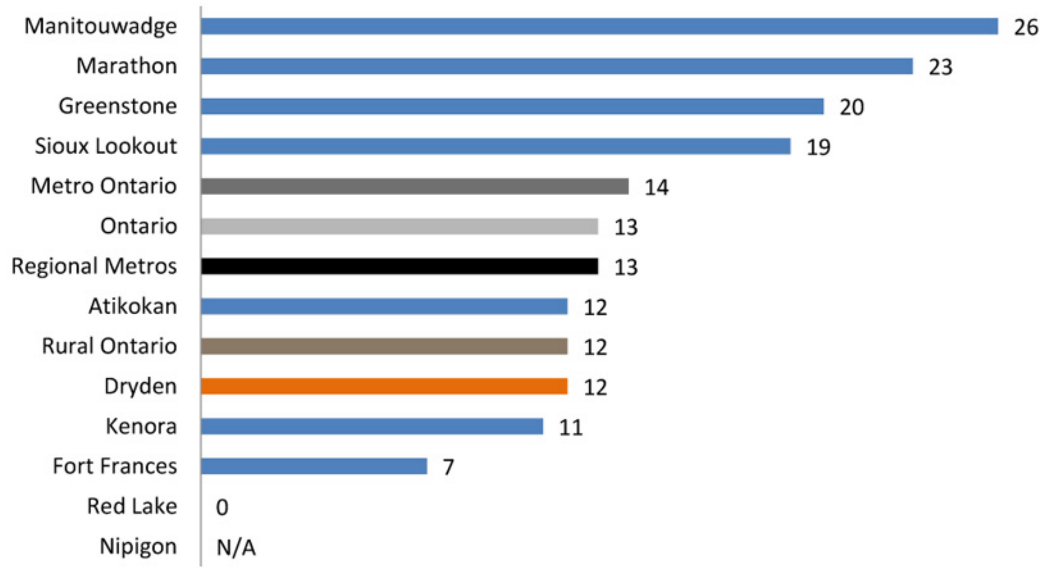


6.28 Recreation facilities per 10,000

Dryden has 6 recreation facilities per 10,000 people, just below the rural Ontario average (7) and 7th among its peer regions. However, this is higher than the metro and general provincial average, and the average of regional metros. In fact, some of the benchmark communities, including the more populous regions (for example; Kenora and Fort Frances, refer to Exhibit 6.1), have more than three times the recreational facilities than the Ontario average. Atikokan (18), Fort Frances (16) and Kenora (14) all have largest number of recreation facilities per 10,000.

Restaurants and bars per 10,000 (2008)

Exhibit 6.29

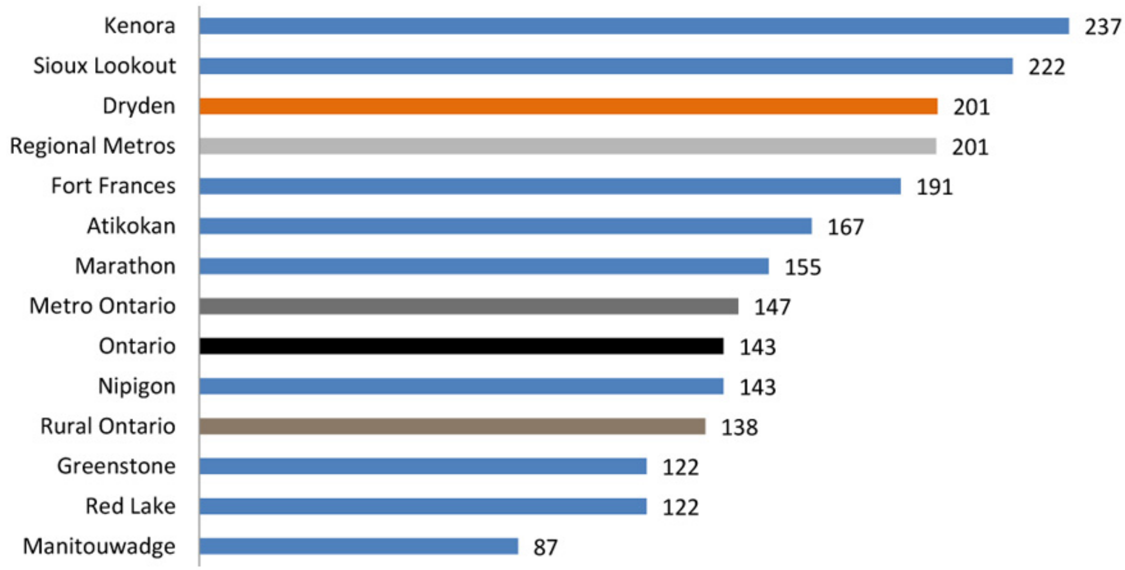


6.29 Restaurants and bars per 10,000

Dryden has 12 bars and restaurants per 10,000 residents, consistent with the rural Ontario average, and is just less than the measures for regional metros (13) and the provincial average (13). Some of the benchmarking communities have far more restaurants and bars than the provincial averages, including Manitouwadge and Marathon with 26 and 23 restaurants and bars per 10,000 respectively. Following Fort Frances (7), Red Lake has no reported restaurants or bars.

Healthcare professionals per 10,000 (2006)

Exhibit 6.30

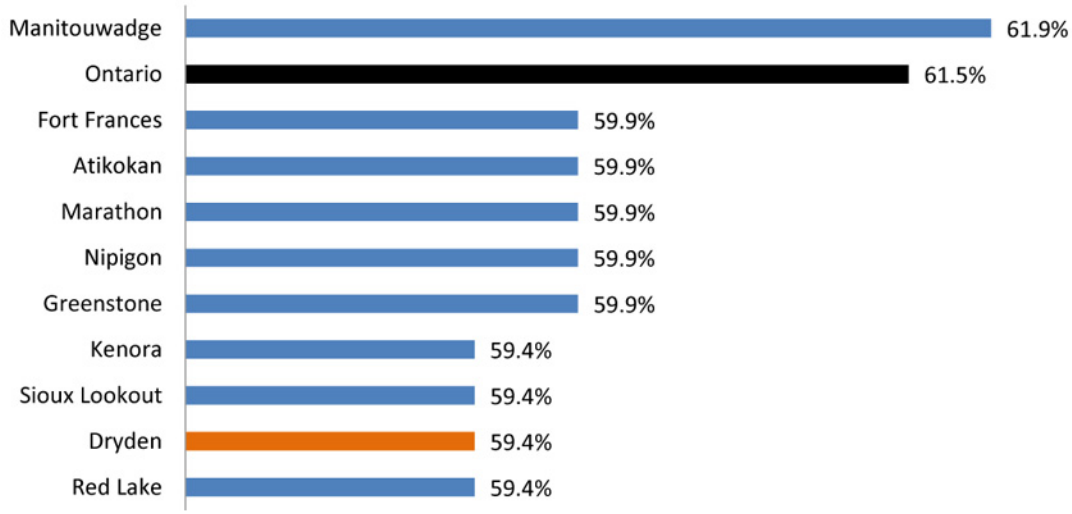


6.30 Healthcare professionals per 10,000

Dryden has 201 healthcare professionals, such as doctors, dentists, and nurses, per 10,000 people. This is higher than the rural Ontario average of 130 and near the top of its benchmarking peers. Recall that one of the major employers in Dryden is the Dryden Regional Health Centre, and that Confederation College offers training in health services. However, Kenora (237) and Sioux Lookout (222) have a considerably larger number of healthcare professionals. At the other end of the spectrum, Greenstone and Red Lake (122), along with Manitouwadge (87) all have fewer healthcare professionals per 10,000 than the rural Ontario average of 138.

Voter turnout 2011 General Election

Exhibit 6.31

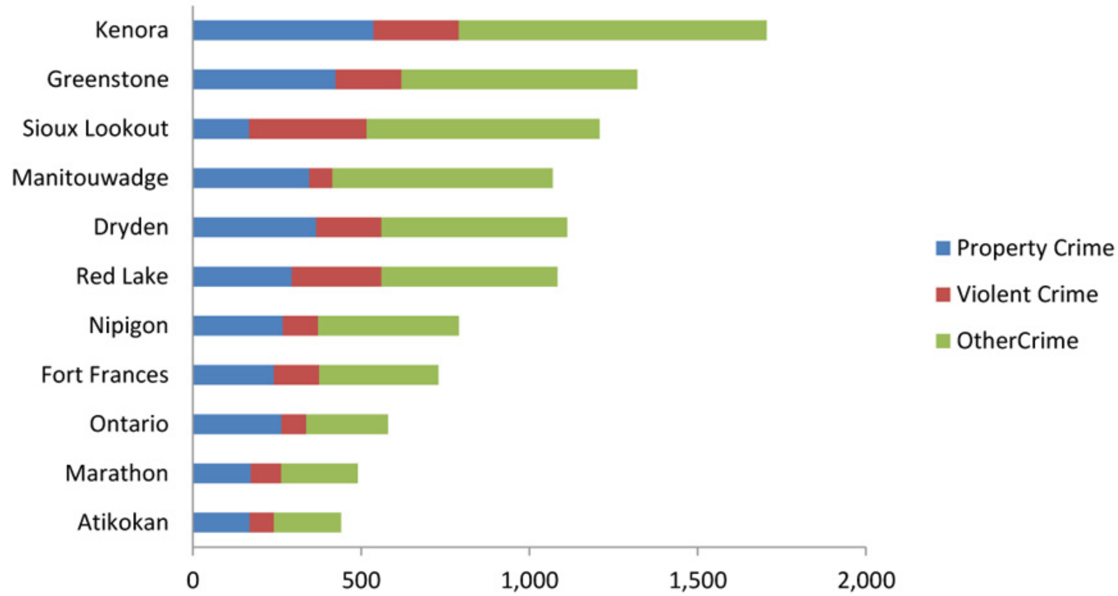


6.31 Voter turnout 2011 General Election

Dryden is a part of the Kenora Federal Electoral District (along with Kenora, Sioux Lookout and Red Lake). It had a voter turnout of 59.4% in the 2011 Federal Election, lower than the overall Ontario turnout of 61.5%.

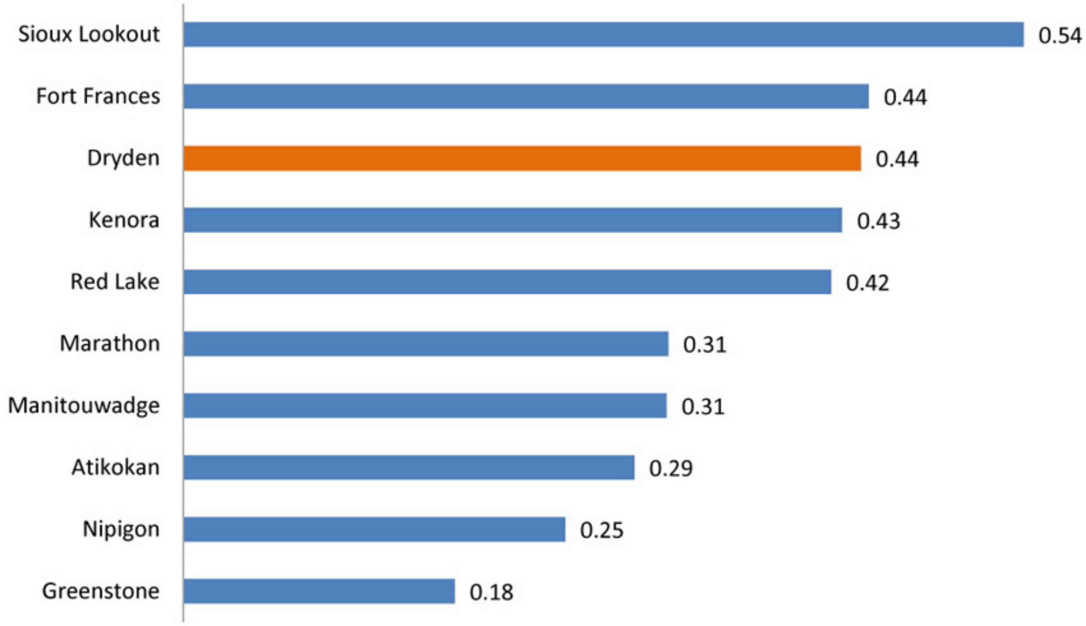
Crimes per 10,000 (2007)

Exhibit 6.32



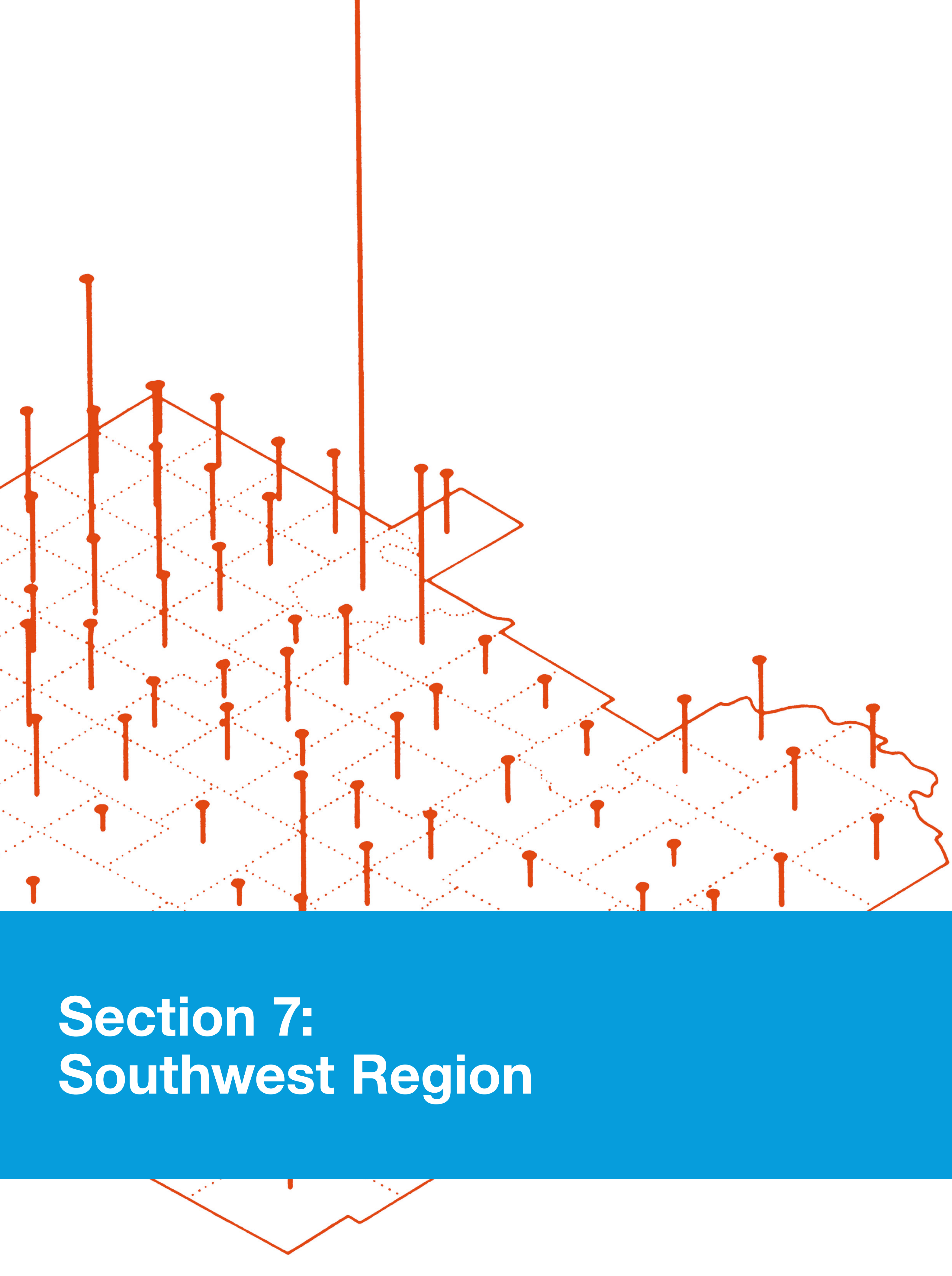
6.32 Crimes per 10,000

In 2007 the Dryden area had 1,112 reported crimes per 10,000 people. Of this 17.4% were violent crimes and 33% were property crimes. The benchmark communities in the northwest region largely exhibited more violent crime per capita than the provincial average. Moreover, all of the benchmarking communities, with the exceptions of Marathon and Atikokan, have a higher total number of crimes per 10,000 residents.



6.33 Creativity Index

When compared to its northwestern Ontario peer regions Dryden ranks near the top, with a ranking identical to that of Fort Frances, and is only behind Sioux Lookout, which has a ranking of 0.54. Dryden also scores 0.44 on the Creativity Index, 193rd out of 347 census subdivisions in Ontario (rural and metro). While Kenora and Red Lake have Creativity Index scores similar to Dryden (0.43 and 0.42 respectively), the remaining benchmarking regions have scores generally below 0.30. In particular, Greenstone has the lowest Creativity Index ranking, with a score of 0.18.

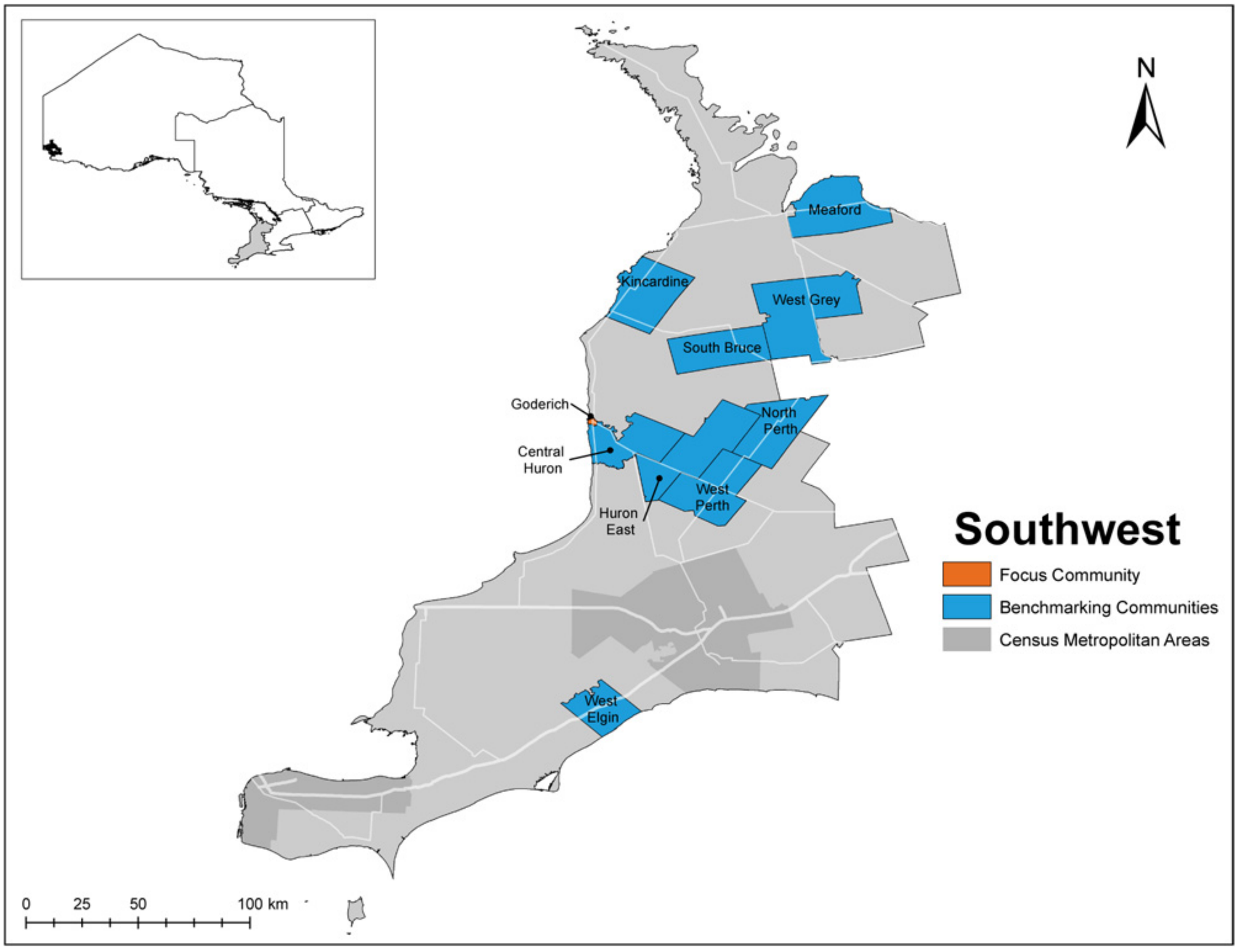


Section 7: Southwest Region

INTRODUCTION

Southwest region

Exhibit 7.0



The southwest region of Ontario has a population of 1,591,240 (2006). It includes the metropolitan areas of London and Windsor. These metropolitan areas make up 49.1% of its total population. The unemployment rate in 2010 was 9.0%.

The town of Goderich was selected as the Focus Community for this region. Located on Lake Huron, Goderich has a population of just over 7,500 residents and is often referred to as "Canada's prettiest town." Goderich is most easily accessed by highway, although a small airport is available to individuals who can fly their own planes in. As Goderich is only 100km north of London and 230km west of Toronto, larger international airports are also within driving distance. Goderich also has a harbor on Lake Huron.

The major industry in Goderich is the Sifto Salt Mine, although the town was formerly home to a Volvo motor grader manufacturing plant which closed in 2010 (500 jobs were lost). Sadly, in summer 2011, a powerful tornado tore through Goderich, leaving considerable infrastructural damage. (More information is available at: http://www.cbc.ca/news/canada/toronto/story/2011/08/21/ontario-weather-watch.html).

Nine benchmarking communities in the southwest region were selected to compare with Goderich: Central Huron, Meaford, Kincardine, West Grey, North Perth, West Perth, Huron East, Central Huron, and West Elgin. These benchmarking communities are included to give an idea of how Goderich is performing compared to its regional rural Ontario peers. Data for regional metros (Windsor & London) are also included for most indicators as well as averages for all of Ontario, metropolitan Ontario and rural Ontario.

Findings

Goderich as a community has a fascinating position among the benchmarking peers studied. Goderich is considerably more densely populated than the other communities, with a large share of the workforce employed in the service class, perhaps to fill the demands of its abundant restaurants and bars. However, Goderich performs well among peers in the Creative Economy as well, largely owing to its teachers, professors, judges, lawyers, and social workers. Its population is relatively more highly educated than many of its peers, and it scores better than most benchmarks in the Creativity Index. However, Goderich is also an aging community, with a higher median age of population than the provincial average. Goderich is experiencing mild population loss and has both low employment rates and high unemployment rates. Goderich also experiences higher crime rates than the provincial average and the benchmark communities.

SUMMARY

Goderich strengths:

- Much higher population density than peers
- High service class share/lots of restaurants/bars
- High share of population with post-secondary education

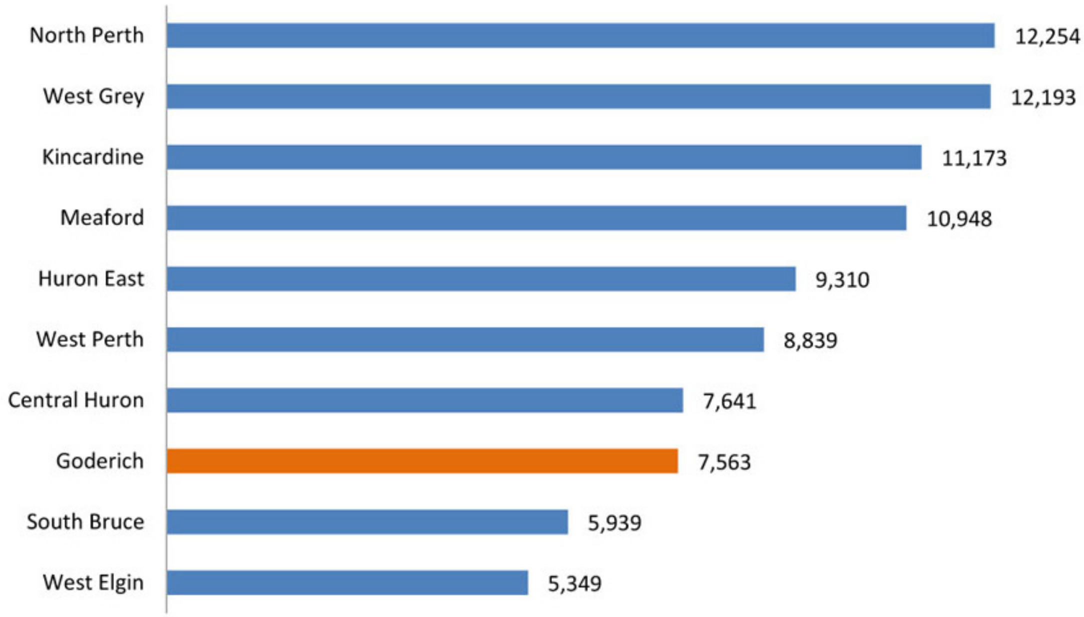
Goderich weaknesses:

- Experienced population decline between 2001 and 2006
- Low employment rate/high unemployment rate
- Tornado recovery cost

OBSERVATIONS, KEY FINDINGS & OPPORTUNITIES

- Demographics: Goderich's older population creates an opportunity in the region for specialized healthcare services in the region; making it a regional leader in these services.
- Occupational Composition: Goderich has a notable strength in medical, education and social service occupations, but these cannot merely be relied on. There is a need in Goderich to build upon Creative, knowledge and skill driven jobs, as Goderich is currently below the provincial average in these jobs.
- Service Class: Goderich has a both a high level of service class employment, and a reasonable ranking on income indicators, suggesting the region is home to higher wage service class jobs. This should be investigated more in depth, and those jobs should be expanded if possible.
- Working Class: The high unemployment and low working class share in this region shows that Goderich has started the painful process of transitioning away from a dependence on manufacturing work. In this context, Goderich should not exacerbate the situation by chasing new manufacturing establishments without long term commitments, and a high demand for highly skilled workers.
- Diversity: Goderich should leverage its existing immigrant populations to attract more immigrants.
- Education: Efforts should continue to be made to enhance high school graduation rates and increase access to, and completion, of post-secondary education at all levels
- Technology: Goderich has a strong showing on Technology levels relative to its benchmarks. It can use that and its relative proximity to Kincardine (and the Bruce Nuclear Station) to attract more high-tech firms.

Population (2006) Exhibit 7.1

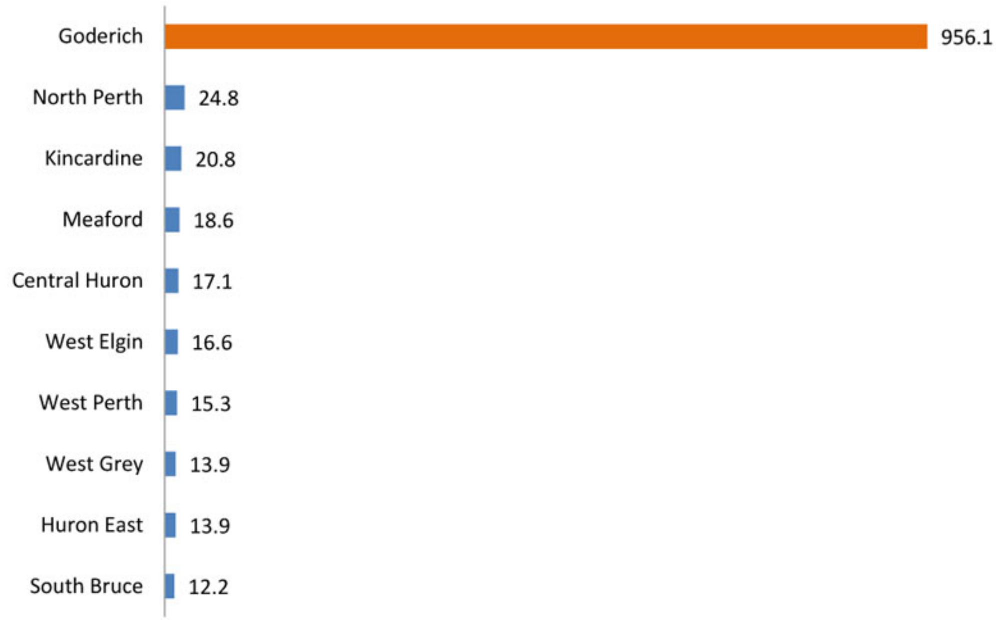


7.1 Population

The benchmark communities and Goderich range in population from 5,349 (West Elgin) to 12,254 (North Perth). Goderich is about three quarters the size of the largest communities in the sample, and is comparable in size to Central Huron (7,641).

Population density (2006)

Exhibit 7.2

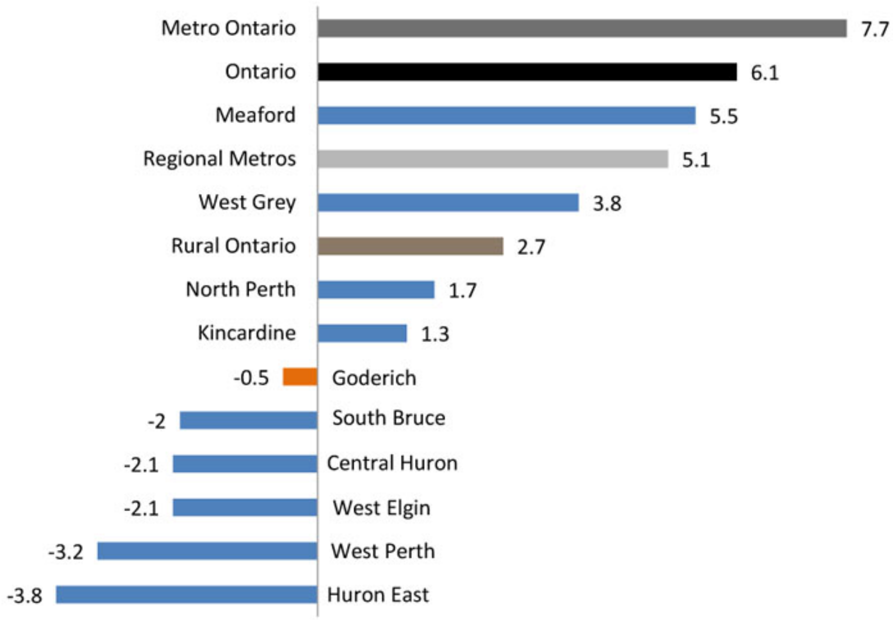


7.2 Population density

Although similar to its peer regions in population and other attributes, Goderich has a much higher population density than any of its peer regions (956.1 people per square km). The next highest population density is North Perth with 24.8 people per square km. At the bottom of the list is South Bruce with 12.2. This suggests that the other communities may not have as much housing available in their core community in the same way that Goderich does. Most of this difference is from the tremendous difference in total land area for the regions as defined by Statistics Canada.

Population growth (2001–2006)

Exhibit 7.3

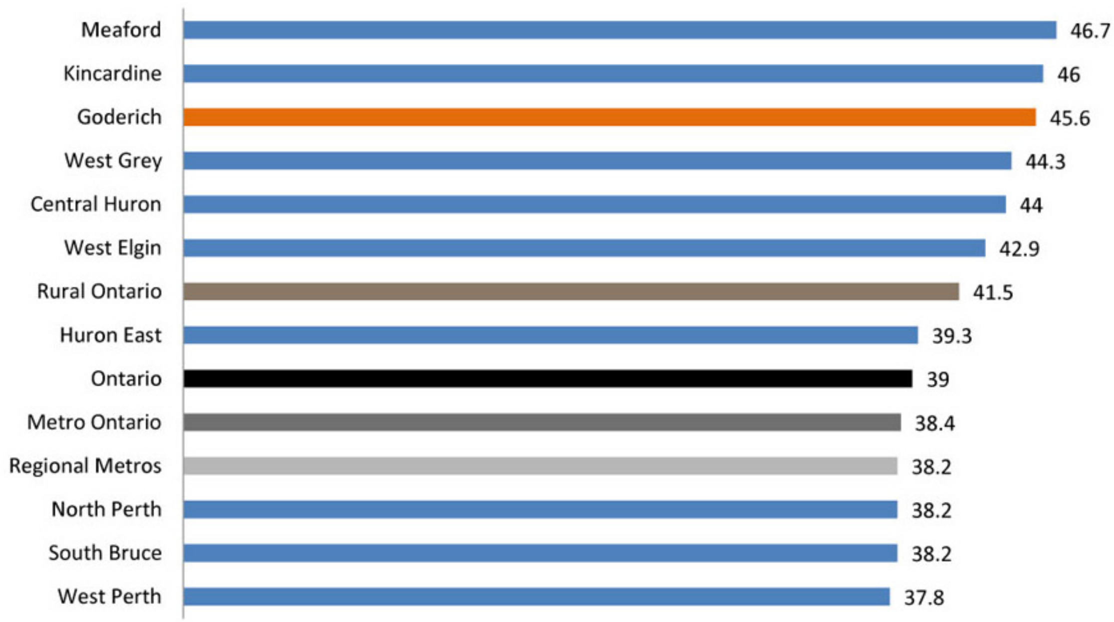


7.3 Population growth

Despite its considerable population density, Goderich has experienced a modest population decline of -0.5% between 2001 and 2006. In addition to Goderich, several of the benchmark communities experienced more dramatic population loss (-2% in South Bruce, -2.1% in Central Huron and West Elgin, -3.2 in West Perth and -3.8% in Huron East). Moreover, all of the benchmarking communities fall short of the growth rates in metro Ontario (7.7%). Only two of the benchmarks (West Grey and Meaford) exceeded the population growth of rural Ontario (2.7%). Meaford led the peer regions with population growth of 5.5%, above the 5.1% experienced by the regional metros and just below the Ontario average of 6.1%.

Median age (2006)

Exhibit 7.4



7.4 Median age

Goderich's median age of 45.6 is the third highest of its benchmarking peers which range from 37.8 (West Perth) to 46.7 (Meaford). The average for rural Ontario in 2006 was 41.5. This suggests Goderich is a much older community than metro Ontario or even regional metros. Some benchmark communities did prove younger than the metros sampled (North Perth, South Bruce and West Perth), but most were older than the provincial average (39). Meaford is experiencing the highest population growth of the benchmarks (refer to Exhibit 7.3), yet is considerably older than the other communities that exhibit higher growth (metro regions and the provincial average). This suggests that Meaford is a retirement destination.

7.6 Female age distribution

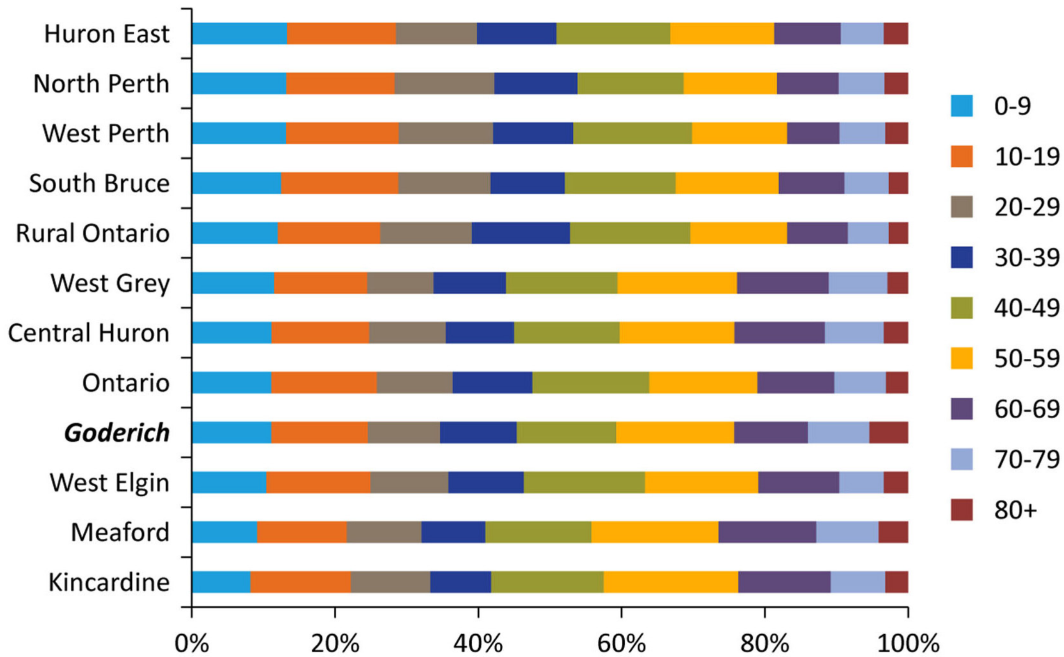
The female age distribution shares some similarities with the male distribution (Exhibit 7.5). Again, the largest age cohort in Goderich was the 50–59 group with 15.8% of the female population falling into this category. Goderich has a higher share of its female population in the 70–79 (10.1%) and 80+ (8.9%) categories than any of the other peer regions. The most impressive difference between the male and female distributions is the increased share of 70+ population in the female graph. The Baby Boomer generation (age 40–59) again dominates. Female rural Ontario is older than male rural Ontario and Goderich is once again older than the rural and provincial average. Meaford is again the oldest community, consistent with the results of Exhibit 7.4.

7.5 Male age distribution

The largest male age cohort in Goderich was 50–59 with 16.5% of the male population. Goderich has higher share of its male population (5.4%) in the 80+ age group than any of the other peer regions. All communities and provincial averages illustrate that the Baby Boomer population captured in the 40–49 and 50–59 cohorts dominates the graph. While several of the benchmark communities are notably older than the provincial average, others display an even larger under-29 population than rural Ontario which is younger than the provincial average.

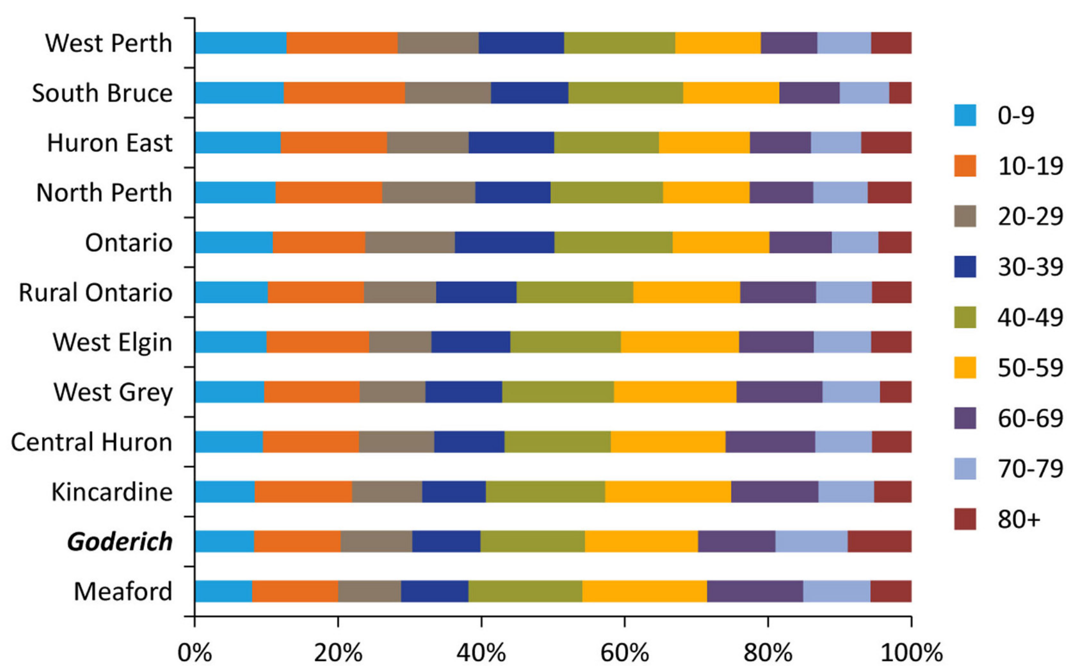
Male age distribution (2006)

Exhibit 7.5



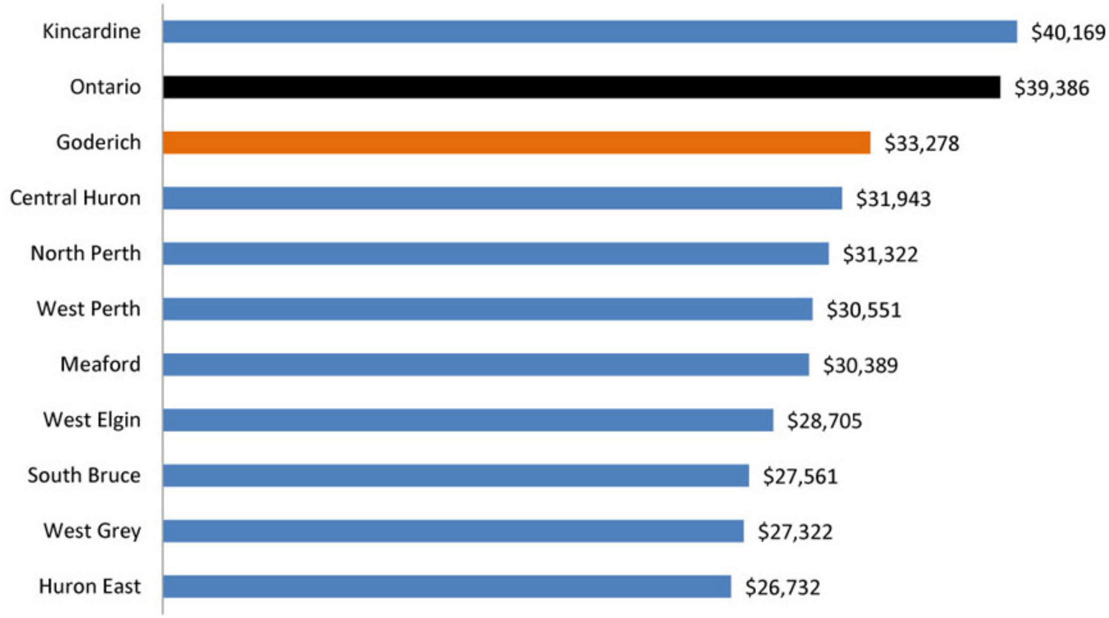
Female age distribution (2006)

Exhibit 7.6



Average employment income (2005)

Exhibit 7.7

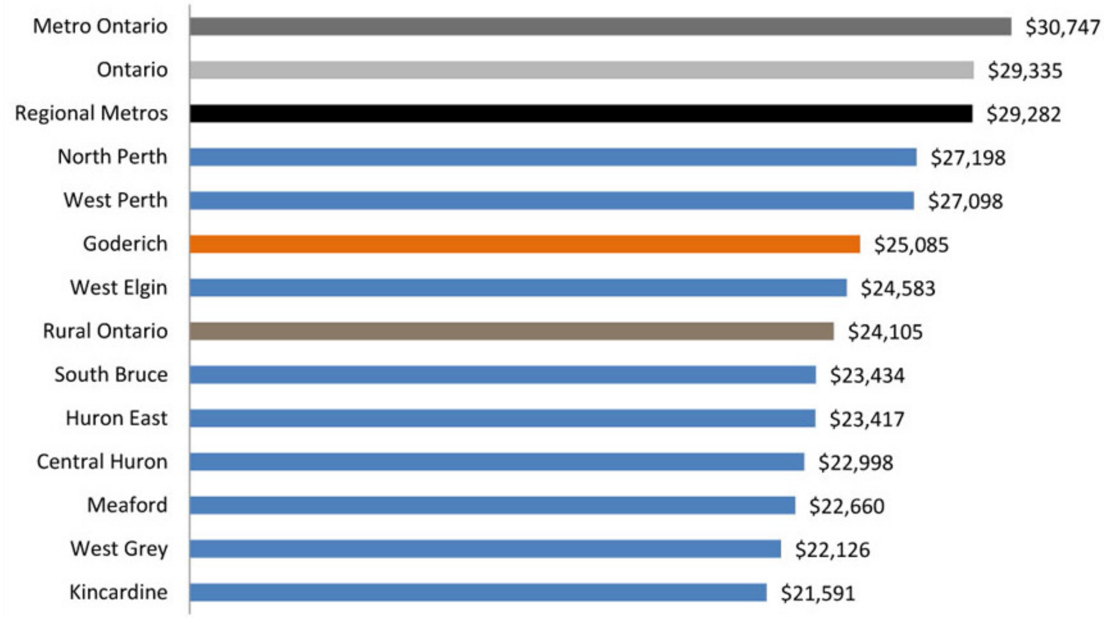


7.7 Average employment income

The average employment income in Goderich is $33,278, putting it near the top of its peer regions. This figure is still much lower than the Ontario average of $39,386 and the Kincardine income of $40,169. With the exception of Kincardine, all of the benchmarks significantly underperform when compared to the provincial average. South Bruce ($27,561), West Grey ($27,322), and Huron East ($26,732) have the lowest average employment incomes. However, cost of living and quality of life can not be determined from this measure.

Median employment income (2005)

Exhibit 7.8

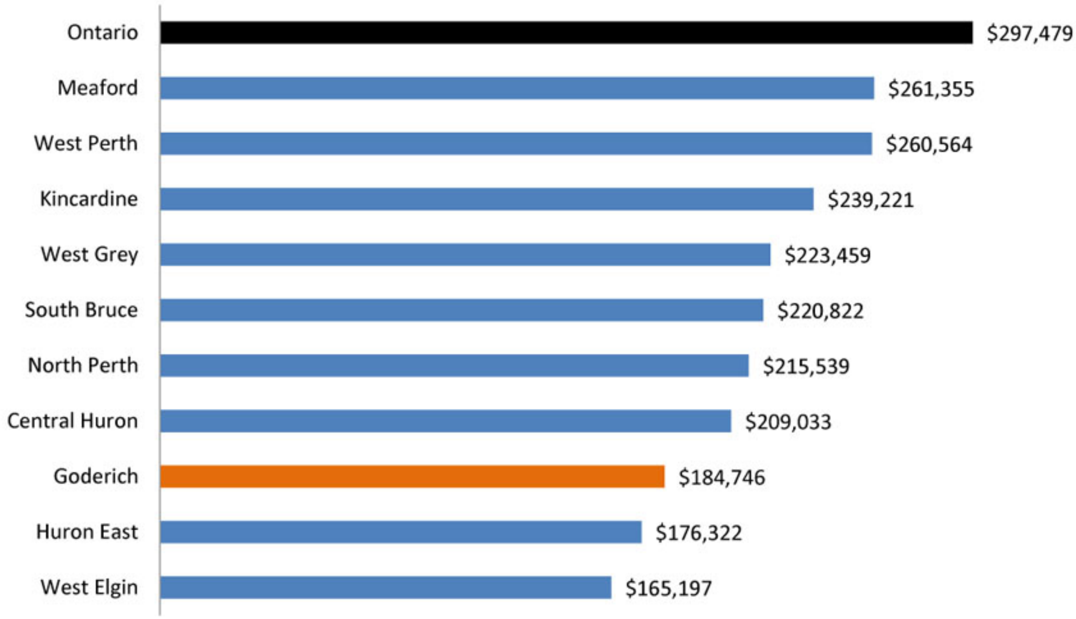


7.8 Median employment income

Goderich's median income of $25,085 puts it in the top half of its benchmarking peers, just above the rural Ontario median of $24,105. In this measure, all of the southwest region benchmarks and regional metros fall below the Ontario median ($29,355). Very interestingly, while Kincardine dominated its peers in average income (see Exhibit 7.7), it ranks lowest among its peers in median income. This suggests that Kincardine is home to very high income outliers that pulled up the average. Goderich on the other hand, consistently does well among peers in both average and median income measures.

Average value of dwelling (2006)

Exhibit 7.9

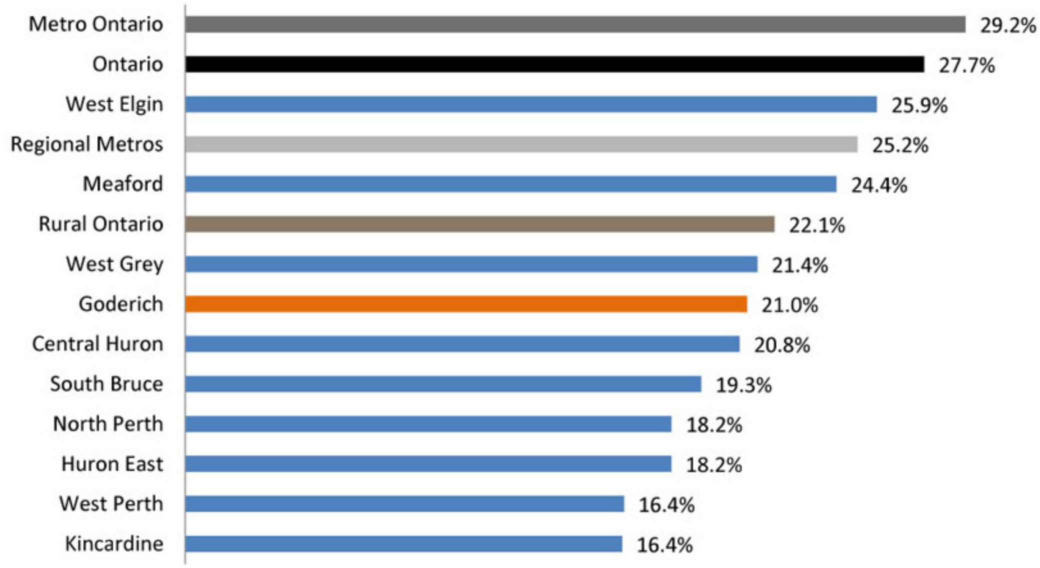


7.9 Average value of dwelling

The average value of a dwelling in Goderich is $184,746, putting it near the bottom of its peer regions and well below the Ontario average of $297,479. Meaford tops the peer region list with an average dwelling value of $261,355 while West Elgin is at the bottom with a value of $165,197. The ranking of this graph does not directly correlate with the income measures displayed in Exhibits 7.7 and 7.8.

Share of households spending 30% or more of income on housing costs (2006)

Exhibit 7.10

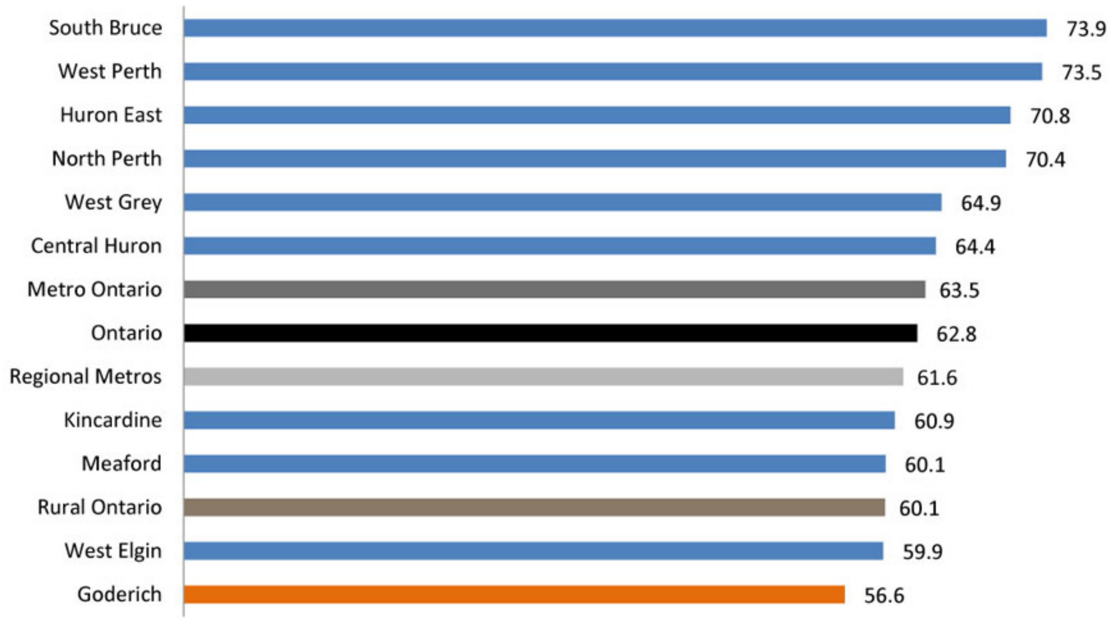


7.10 Share of households spending 30% of more of income on housing costs

21.0% of households in Goderich spend more than 30% of their income on housing costs. This puts Goderich on par with its benchmarking peers, but below the rural Ontario average of 22.1%. The share of households spending 30% or more of their income on housing costs is highest in West Elgin (25.9%) and lowest in Kincardine (16.4%).

Employment rate (2006)

Exhibit 7.11

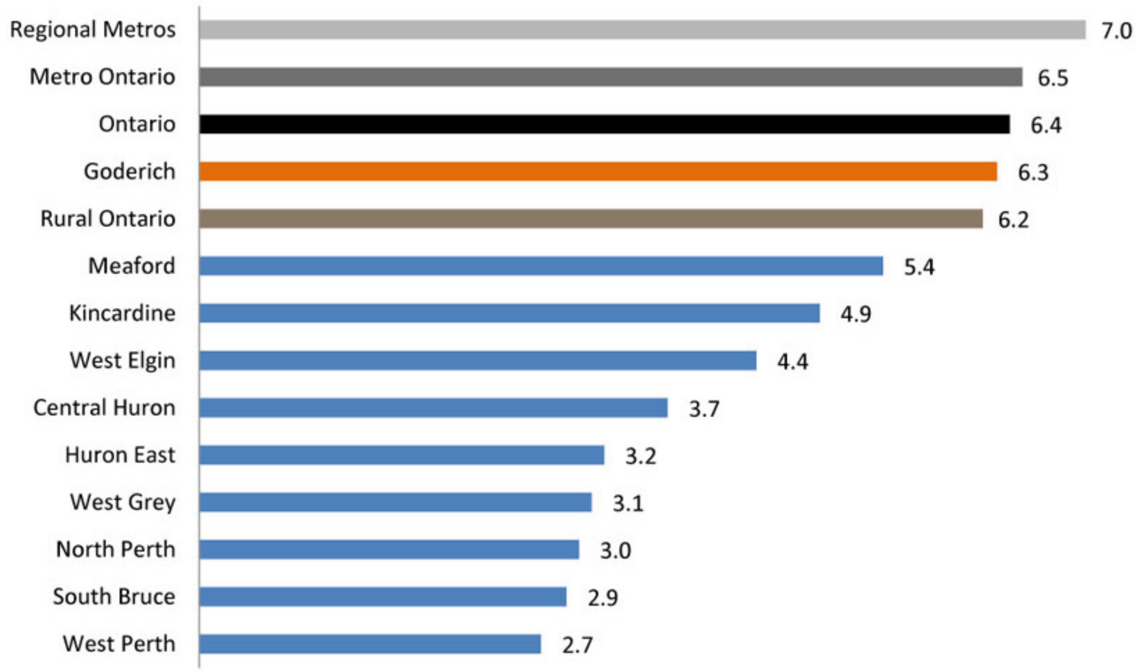


7.11 Employment rate

The 2006 employment rate in Goderich was 56.6%, the lowest of all benchmarked peers in the southwest region and below the overall rural Ontario average of 60.1%. Four of the peer regions — including South Bruce, West Perth, Huron East and North Perth — all had employment rates over 70%. These four communities are also some of the youngest in the sample according to Exhibits 7.4, 7.5, and 7.6.

Unemployment rate (2006)

Exhibit 7.12



7.12 Unemployment rate

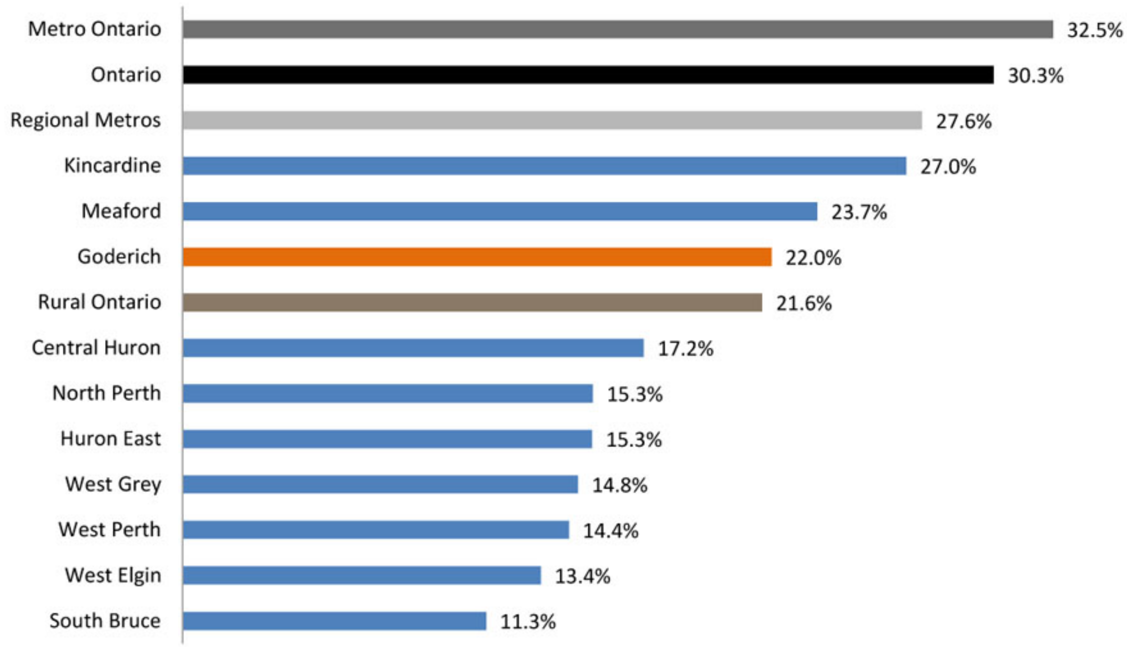
In addition to displaying the lowest employment rate in the sample, Goderich had the highest unemployment rate of the benchmarks (6.3%) in 2006. This level of unemployment is still lower than the 7% of its regional metros, 6.5% metro Ontario average, and 6.4% provincial average. The older communities according to Exhibit 7.4, 7.5, and 7.6 display higher rates of unemployment than the younger ones. In fact, West Perth (the youngest median age according to Exhibit 7.4) has a full half the unemployment rate of the oldest community, Meaford. However, all sampled in the southwest region perform better than the province at large. Interestingly, all of the benchmarking regions have unemployment rates below the regional metros (7%), metro Ontario (6.5%) and Ontario (6.4%) averages.

OCCUPATIONAL CLASSES

This section examines the occupational structure of Goderich. 22% of Goderich's residents are employed in Creative Class occupations, 52% in the service class, 22.1% in the working class and 3.9% in the farming, fishing, and forestry class.

Creative Class share (2006)

Exhibit 7.13

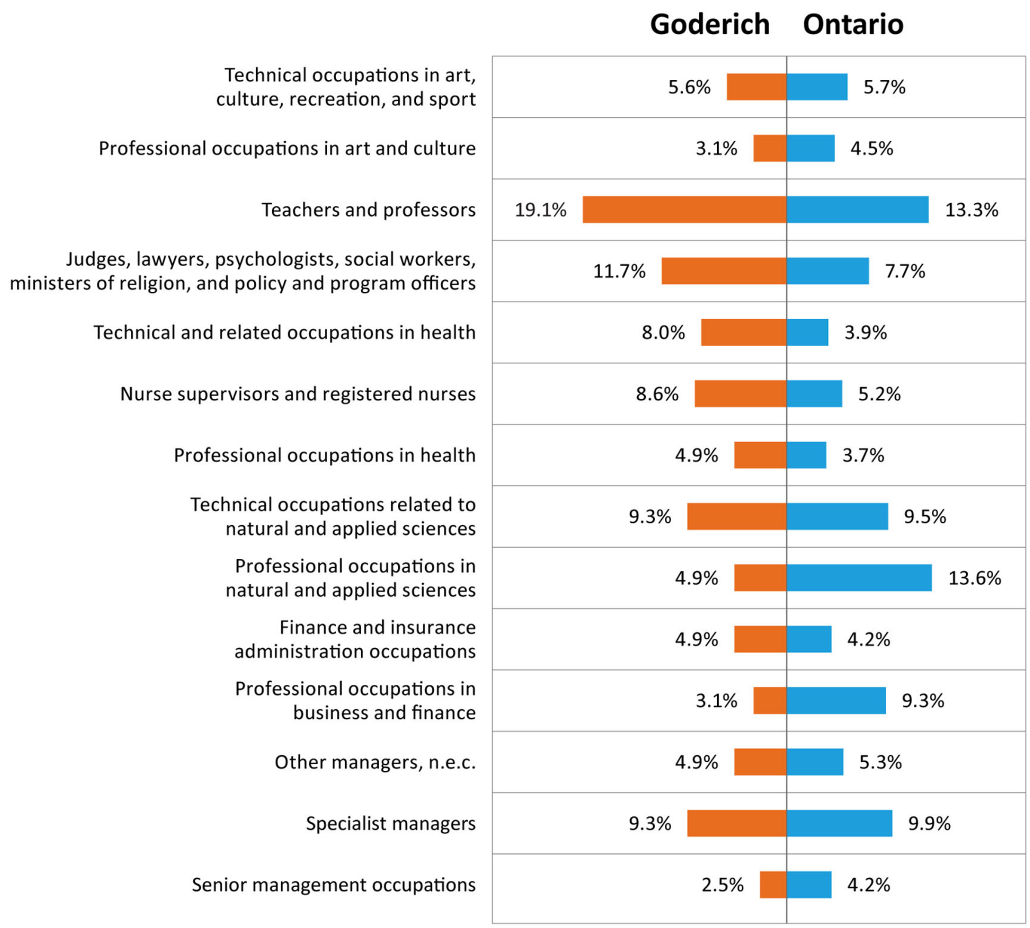


7.13 Creative Class share

At 22%, Goderich's Creative Class share is just above the rural Ontario average of 21.6% and ranking third amongst its peer regions. Kincardine (27%) and Meaford (23.7%) are on the top of the list while South Bruce with 11.3% ranks at the bottom. Goderich exhibits a Creative Class share that is a full 10% lower than that of metro Ontario, but slightly above the Ontario rural average.

Creative Class breakdown (2006)

Exhibit 7.14

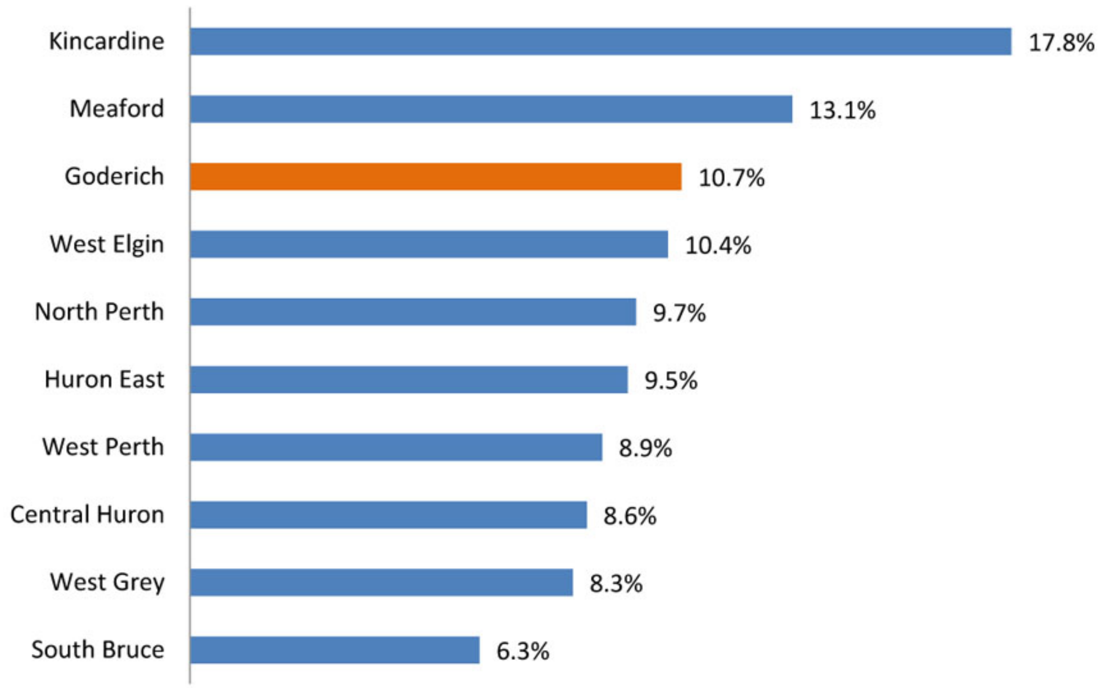


7.14 Creative Class breakdown

When Goderich's Creative Class is broken down into its different occupation groups it becomes clear that much of Goderich's Creative Class comprises mostly teachers and professors (19.1% of the Creative Class in Goderich) and judges, lawyers, social workers, etc (11.7%). This is a much different structure than Ontario overall where only 13.3% of the Creative Class is composed of teachers and professors. Goderich's Creative Class in professional occupations in natural and applied sciences is disproportionately lower than the provincial figures.

Adjusted Creative Class share (2006)

Exhibit 7.15

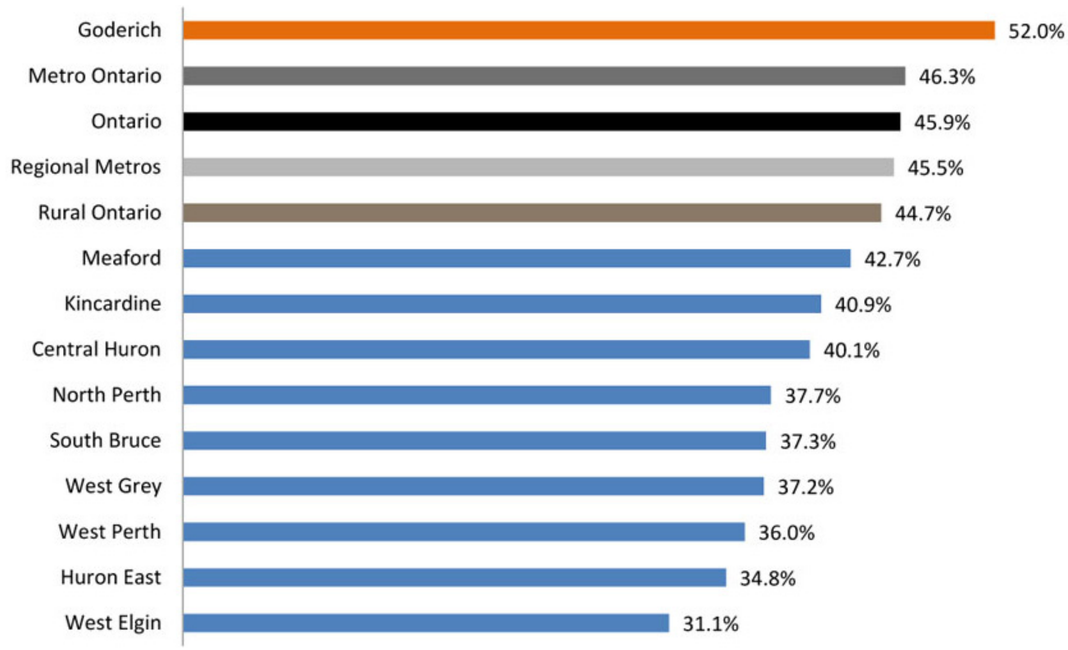


7.15 Adjusted Creative Class share

When occupations associated with economic reproduction (see Appendix) are taken out of the Creative Class group, Goderich's Creative Class labour force share changes to 10.7% but its ranking amongst its peer regions stays the same. It is still below the adjusted rural Ontario average of 12.7%. However, West Elgin (10.4%) jumps the ranks in this adjustment, while South Bruce has the lowest Adjusted Creative Class share (6.3%).

Service class share (2006)

Exhibit 7.16

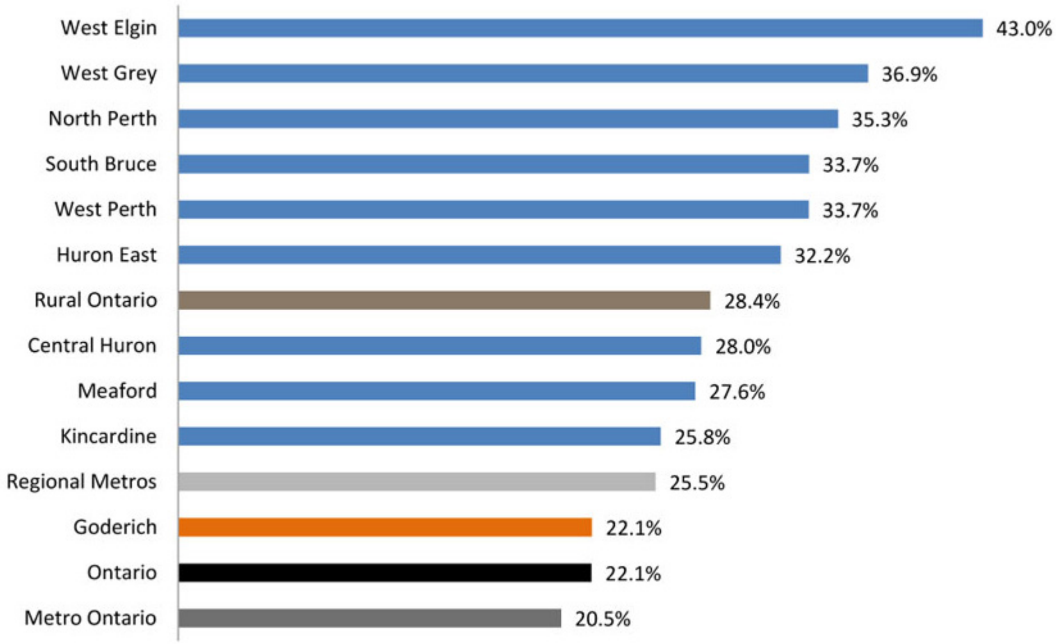


7.16 Service class share

Goderich has the majority (52%) of its labour force employed in service class occupations. This puts it at the top of the list among its peers and above the metro Ontario average of 46.3%, as well as the Ontario average (45.9%), regional metros (45.5%) and rural Ontario average (44.7%). Meaford comes in second with 42.7% employed in service class occupations, almost 10% points less than Goderich. At the other end of the spectrum, Huron East (34.8%) and West Elgin (31.1%) have the lowest service class shares.

Working class share (2006)

Exhibit 7.17

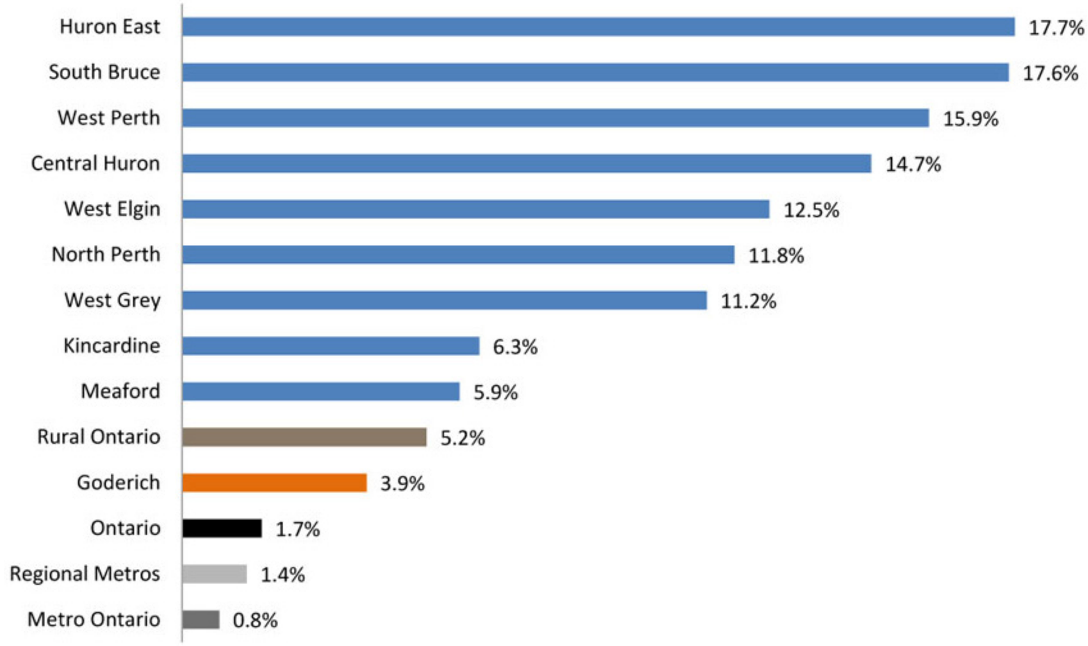


7.17 Working class share

While it soared above the others in service class, Goderich has the lowest working class share of any of its peers with 22.1%. This is identical to the overall Ontario average. West Elgin has the highest working class share of any of the south-west region benchmarks at 43%, with several regions (West Elgin, North Perth, South Bruce, West Perth and Huron East) all with working class shares above the rural Ontario average of 28.4%. Goderich has less than half this share; identical to the Ontario working class share average and slightly above the metro Ontario average of 20.5%.

Farming, fishing, and forestry class share (2006)

Exhibit 7.18



7.18 Farming, fishing, and forestry class share

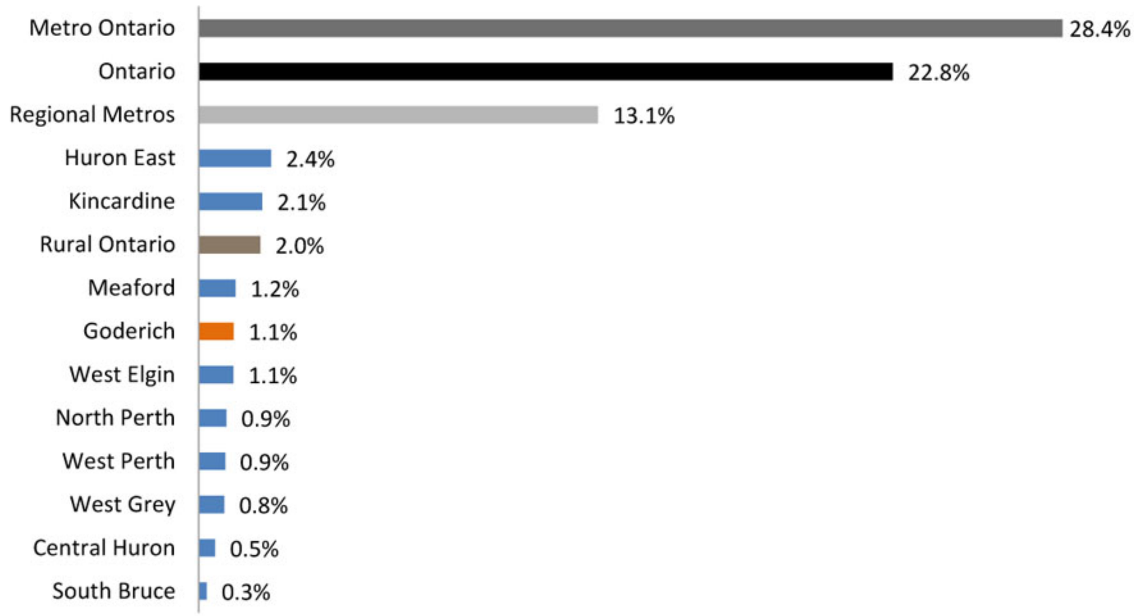
Goderich also has a lower share of its labour force employed in farming, fishing, and forestry occupations than all of its peer regions with only 3.9%. This is lower than the rural Ontario average of 5.2% but still above the Ontario average of 1.7%. Meaford has the next lowest share with 5.9% while Huron East tops the list with 17.7% of its labour force employed in farming, fishing, and forestry occupations. Understandably, the communities with the highest population density also have the fewest share of people in farming, fishing, and forestry (refer to Exhibit 7.2). The communities with the highest share of farming, fishing, and forestry class also ranked high in employment rates and young in age distribution (refer to Exhibits 7.11, 7.5, and 7.6 respectively).

TOLERANCE

Tolerance has been repeatedly identified in the literature (see: Florida, 2002) as a vital requirement for the attraction, and retention, of Creative Class workers seeking a diverse and open environment, and is a facet of economic development that rural areas have been struggling to overcome. Tolerance will be examined through the shares of visible minority, immigrant, and Aboriginal populations in the ten benchmarking regions. Most of Ontario's visible minority population is concentrated in the major metropolitan areas — 28.4% of the populations in Ontario's metropolitan areas are a visible minority compared with only 2% in rural Ontario.

Visible minority population share (2006)

Exhibit 7.19

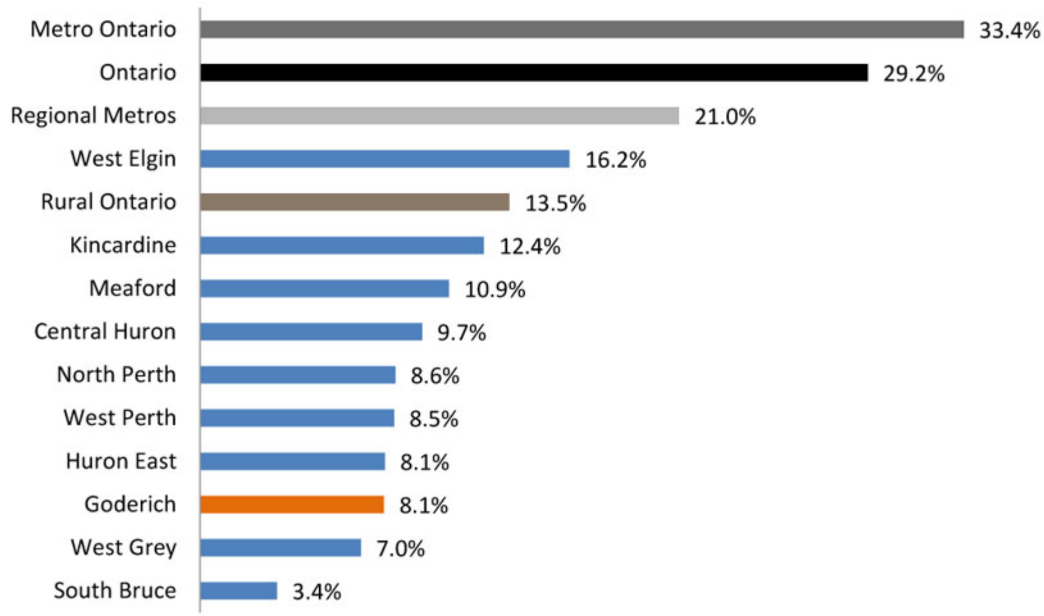


7.19 Visible minority population share

With 1.1% of its population a visible minority, Goderich falls below the rural Ontario average (2%) and in the middle of its peer regions. Huron East tops the list with 2.4% while South Bruce is at the bottom with 0.3%. The diversity in the benchmark communities and Goderich is a fraction of that displayed in metro Ontario (28.4%), provincial average (22.8%), and regional metros average (13.1%).

Immigrant population share (2006)

Exhibit 7.20

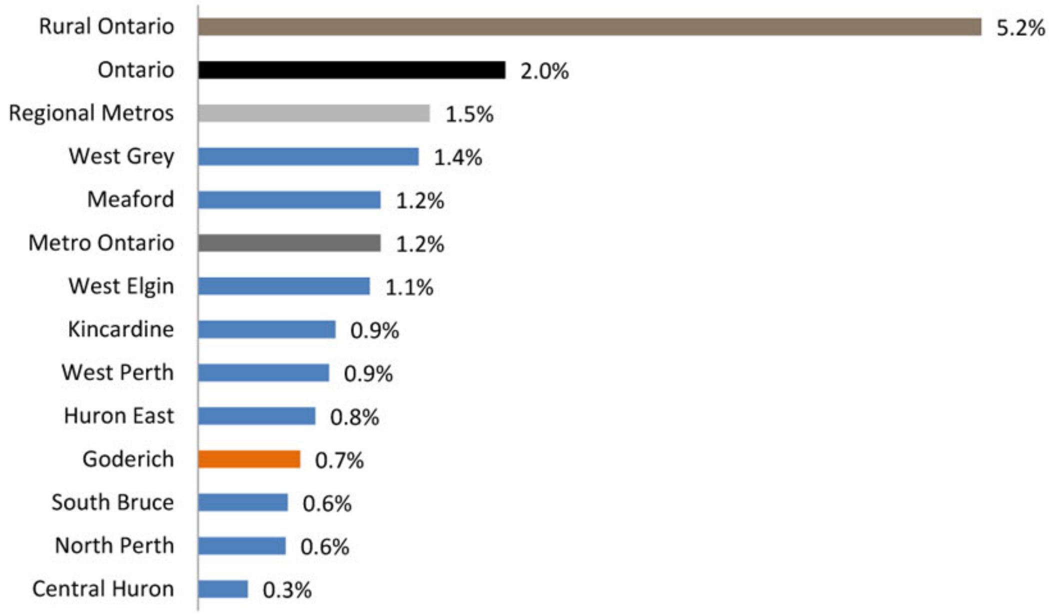


7.20 Immigrant population share

The share of Immigrants in rural Ontario (13.5%) is also much lower than the Ontario average (29.2%) and especially the metro Ontario average (33.4%). Goderich has an immigrant population share of 8.1%, higher than only two of its benchmarking peers (West Grey and South Bruce). It is well below its top peer — West Elgin with 16.2% — and the rural Ontario average. Again, all of the benchmarking regions are below the metro Ontario (33.4%), Ontario (29.2%) and regional metros (21%) immigrant population share.

Aboriginal population share (2006)

Exhibit 7.21



7.21 Aboriginal population share

The Aboriginal population share in all of the southwest region benchmarks is well below the rural Ontario average (5.2%) and is also somewhat lower than the Aboriginal population share in the surrounding regional metros (1.5%), in addition to the Ontario average of 1.5%. Goderich has among the lowest shares of the sample with 0.7% of the population being Aboriginal.

TALENT

The Talent Index measures the share of the population 25 and above with a Bachelor's degree or higher.

5.22 Talent Index

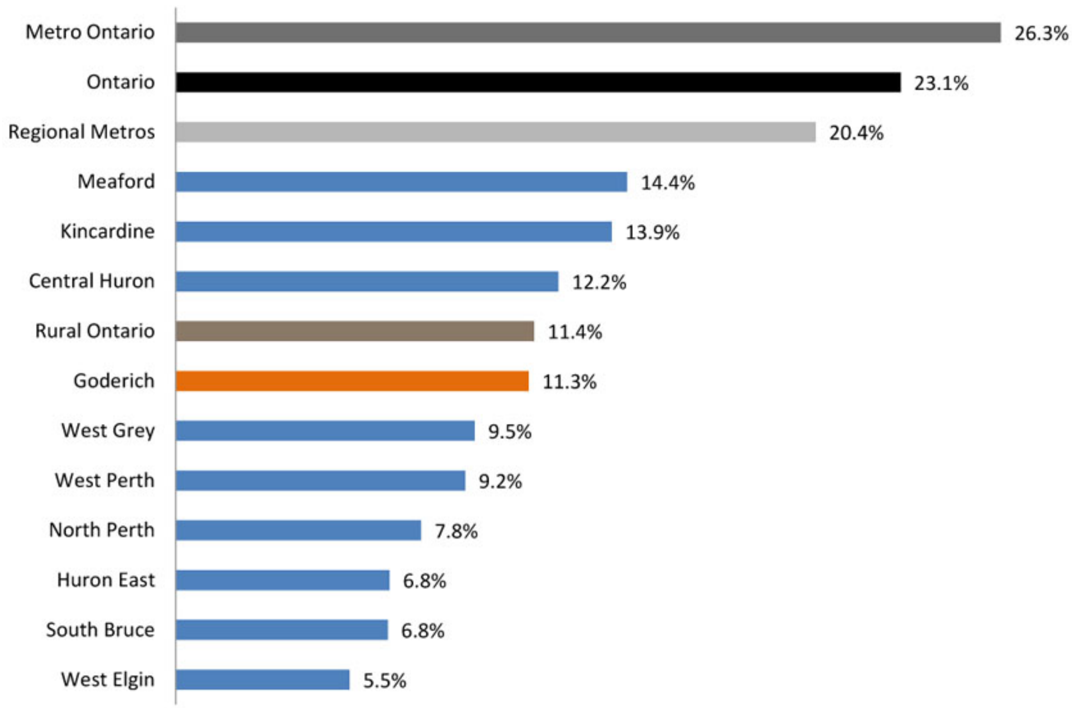
Metropolitan Ontario (26.3% of the population 25 and above has a BA or higher) outperforms all of the benchmarking regions on this index. In Goderich, 11.3% of the population 25+ have a Bachelor's degree or higher. Its benchmarking peers who range from a high of 14.4% (Meaford) to a low of 5.5% (West Elgin) of the population with a Bachelor's degree and above. While Goderich is comparable to the rural Ontario average (11.4%), several of the benchmarking regions fall below this average (West Grey, West Perth, North Perth, Huron East, South Bruce, and West Elgin).

5.23 Highest certificate, diploma or degree

The next chart shows the distribution of the different education levels for each of the different regions as well as for Ontario. 23.2% of Goderich's population 25 and above has a college, CEGEP or other non-university certificate or diploma as their highest form of education. This is just above the Ontario average of 20.1%. Only one peer region, Kincardine, has a higher share of its population with this type of degree. Several of the benchmarking communities have over 20% population with no certificate, diploma or degree. When compared with the provincial average, the benchmarks in this region have few residents with a college certificate or diploma or higher.

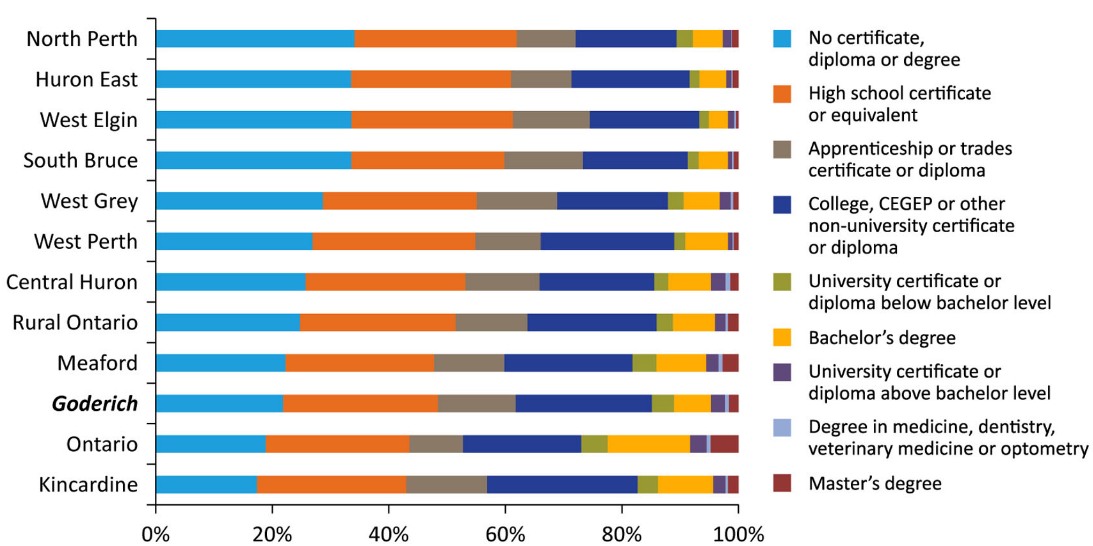
Talent Index (2006)

Exhibit 7.22



Highest certificate, diploma or degree (2006)

Exhibit 7.23

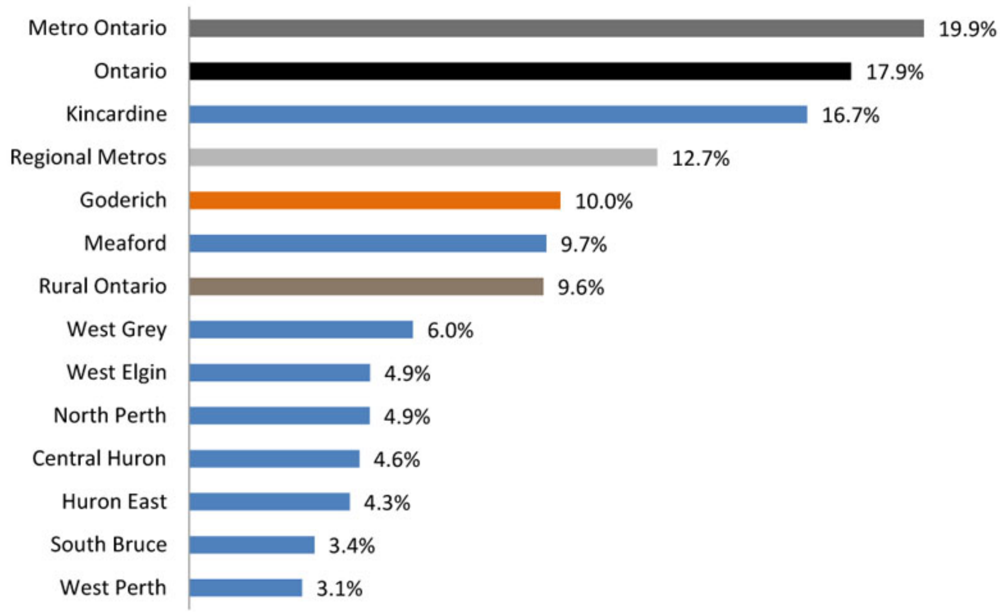


TECHNOLOGY

In examining the prevalence of high technology industries in our benchmark regions, the high-tech establishment share, high-tech location quotient (LQ) and Ontario Tech Pole Index will all be examined.

High-Tech establishment share (2008)

Exhibit 7.24

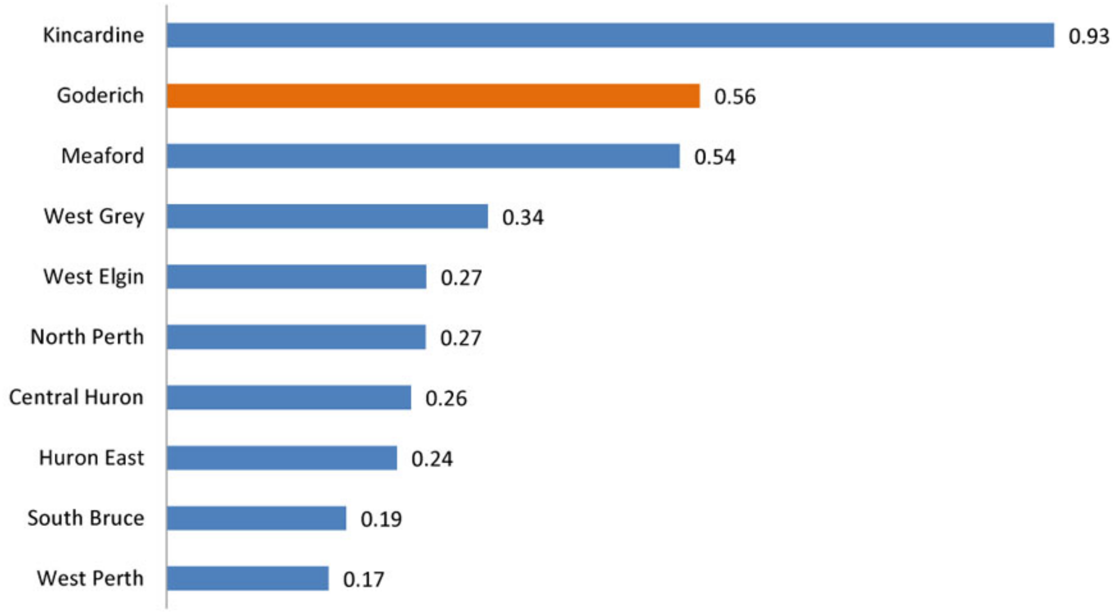


5.24 High-Tech establishment share

10% of Goderich's establishments in 2008 were considered to be in high-tech Industries (see Appendix). While well below the Ontario average of 17.9%, Goderich is near the top of its peer regions on this measure. Only Kincardine has a higher share (16.7%). Many of the southwest benchmark communities have a noticeably lower high-tech establishment share than even the rural Ontario average (9.6%). All of the benchmarking communities fall below both the metro Ontario (19.9%) and Ontario (17.9%) high-tech establishment shares.

High-Tech LQ (2008)

Exhibit 7.25

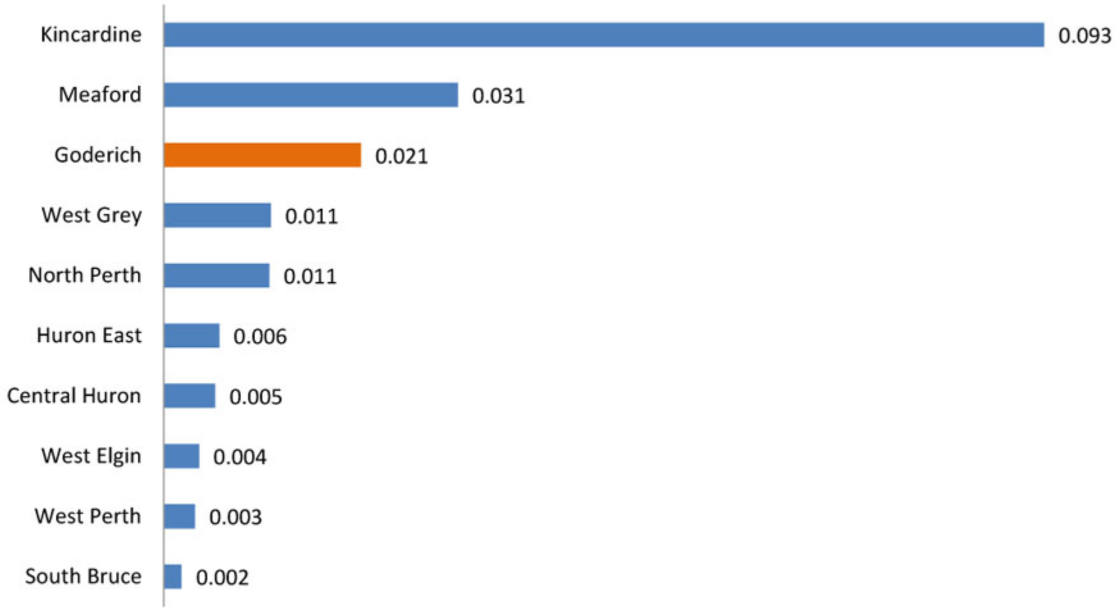


7.25 High-Tech LQ

A High-Tech LQ was calculated to further examine the presence of high-tech establishments in the region. Again, Goderich scores higher (0.56) than most peer regions but not any higher than expected for a region of its size. Kincardine's high share and LQ is likely due to the presence of the Bruce Nuclear Generating Station in the area. Also recall that the other graph in which Kincardine performed remarkably was average income (Exhibit 7.7). The high-tech LQ for Kincardine is related to the presence of the Bruce Station.

Ontario Tech Pole Index (2008)

Exhibit 7.26



7.26 Ontario Tech Pole Index

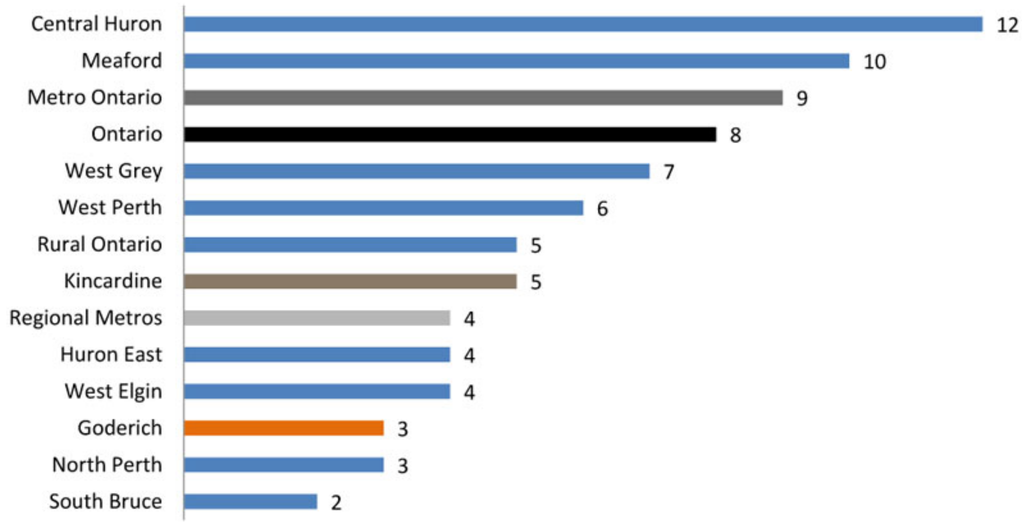
Finally, we can examine the benchmark regions through utilizing the Ontario Tech Pole Index, which examines the total high-tech employment in a region, using Ontario as a base, which is in turn adjusted for city size and compared to the Ontario base (for a complete description, please see the Appendix). Using this measure, Kincardine scores highest, with a score of 0.093. The remaining regions all fall below 0.032, with South Bruce having the lowest score on the Ontario Tech Pole Index with 0.002. Goderich ranks third with 0.021.

TERRITORIAL ASSETS

The territorial assets discussed in this section are an attempt to quantify indicators of quality of place and civic engagement. The territorial assets that will be examined include: Arts & Entertainment establishments, recreation facilities, restaurants and bars, healthcare professionals, voter turnout, and crime rate per 10,000. Finally, the Creativity Index will be examined.

Arts & Entertainment establishments per 10,000 (2008)

Exhibit 7.27

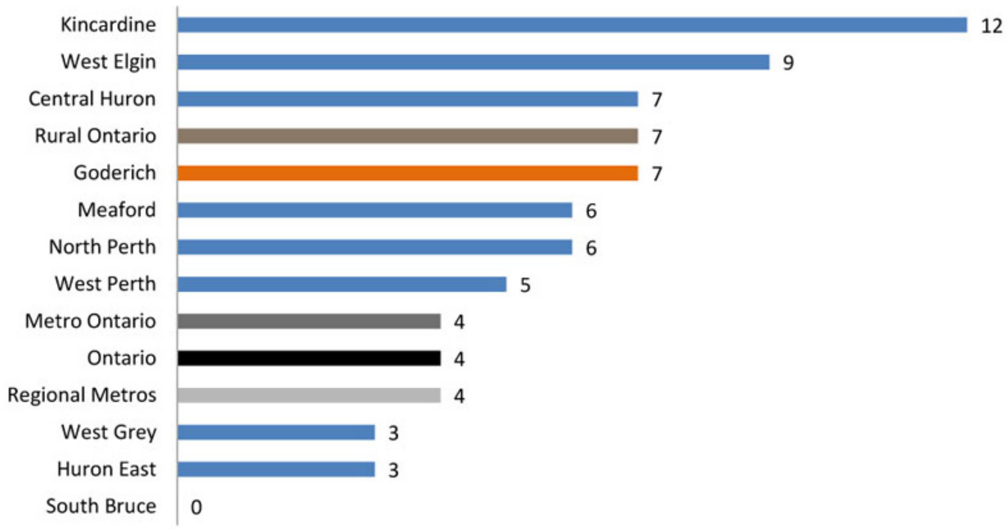


7.27 Arts & Entertainment establishments per 10,000

In examining the number of Arts & Entertainment establishments per 10,000 people, it is interesting to note that two of the benchmark regions (Central Huron and Meaford) fall above the metro Ontario average (9). Goderich with 3 Arts & Entertainment establishments per 10,000 is in near the bottom of the pack, along with North Perth (3) and South Bruce (2).

Recreation facilities per 10,000 (2008)

Exhibit 7.28

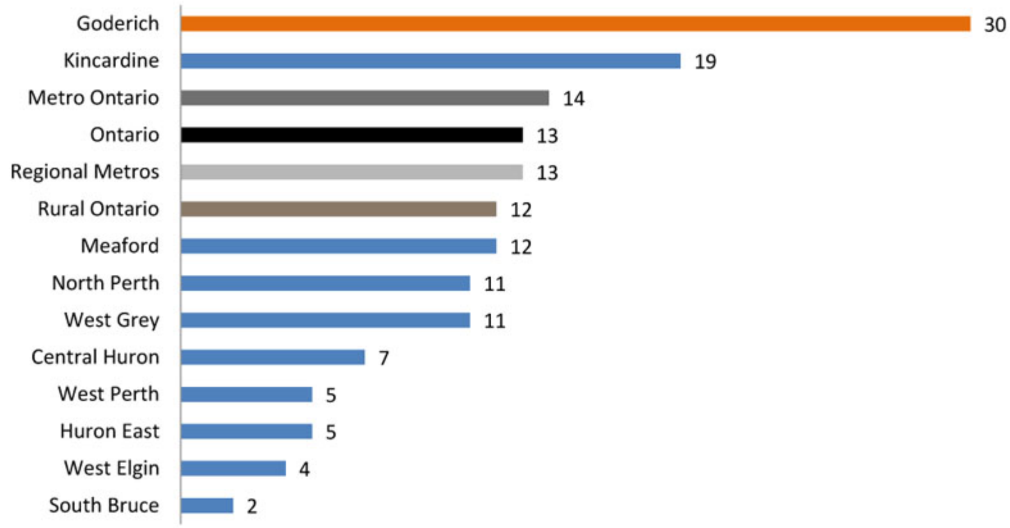


7.28 Recreation facilities per 10,000

Goderich has 7 recreation facilities per 10,000, on par with the rural Ontario average and roughly in the middle of its peer regions. Kincardine performs exceptionally in this measure, with 12 facilities per 10,000; followed by West Elgin with 9. Most of the southwest benchmark communities measured have more facilities per 10,000 than the Ontario average, or that of regional metros and metro Ontario. Alternatively, there are no recreation facilities in South Bruce, and only 3 per 10,000 in West Grey and Huron East.

Restaurants and bars per 10,000 (2008)

Exhibit 7.29

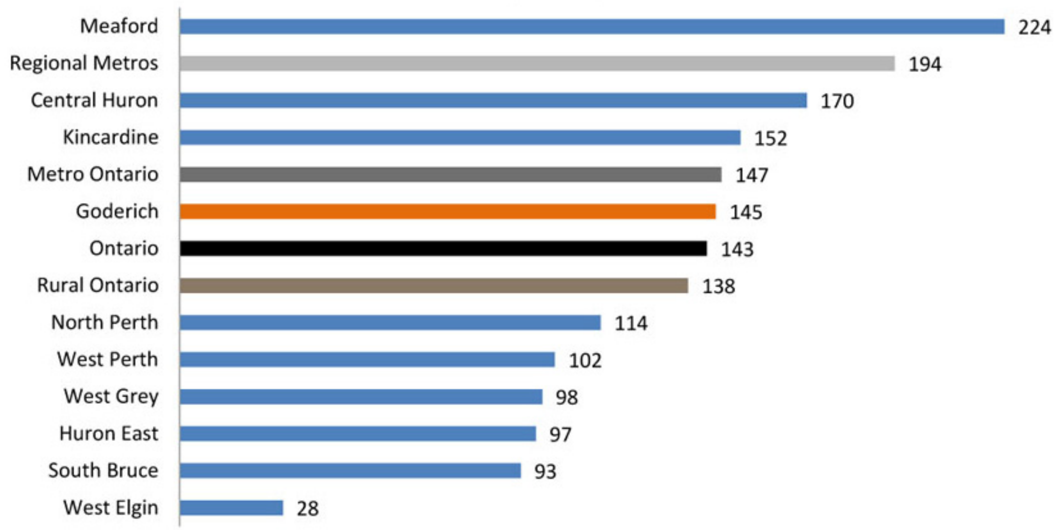


7.29 Restaurants and bars per 10,000

Goderich tops the list in terms of bars and restaurants per 10,000 with 30; more than double the rural Ontario average of 12. Goderich soars above all the benchmark communities. Recall from Exhibit 7.2 that Goderich also exhibits a profoundly higher population density than the other communities in the sample. Goderich also had the highest share of service class workers which is consistent with the employment patterns of restaurants and bars. As "Canada's Prettiest Town," it behooves Goderich to have an economy that appeals to tourists. Kincardine, with 19 restaurants and bars per 10,000 comes second to Goderich, and is above the metro Ontario (14), Ontario and regional metros average (13), as well as the rural Ontario average (12) number of restaurants and bars. South Bruce also scores lowest on this territorial asset measure, with 2 restaurants and bars per 10,000.

Healthcare professionals per 10,000 (2006)

Exhibit 7.30

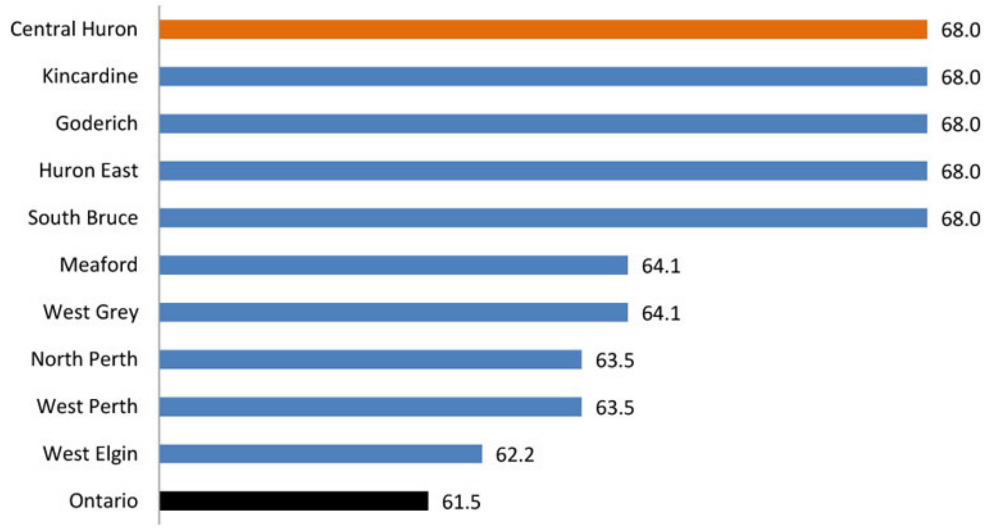


7.30 Healthcare professionals per 10,000

Goderich has 145 healthcare professionals per 10,000 people. These include doctors, dentists, nurses, etc. This is higher than the rural Ontario (138) and Ontario average (143), but falls far short of the regional metros (194). Keep in mind that London, Ontario is among the regional metros measured, which is home to a robust medical education and service economy. Many of the communities with the highest number of healthcare professionals are also ranked the oldest (refer to Exhibit 7.4). West Elgin does extremely poor on this measure, with only 28 healthcare professionals per 10,000, which is nearly 200 less than benchmarking community Meaford (224), and falls well below the Ontario average (143).

Voter turnout 2011 General Election

Exhibit 7.31

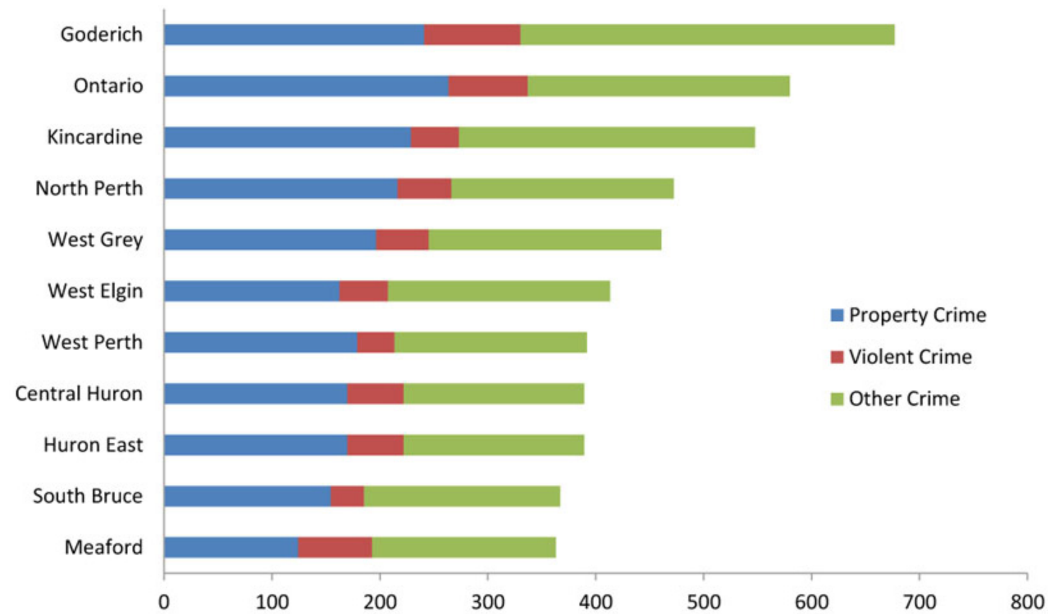


7.31 Voter turnout 2011 General Election

Goderich is part of the Huron South Electoral District along with 4 of its peer regions, and had a voter turnout of 68% in the 2011 Federal Election, much higher than the overall Ontario turnout of 61.5%. Every community in the sample displayed higher participation than the provincial average (61.5%).

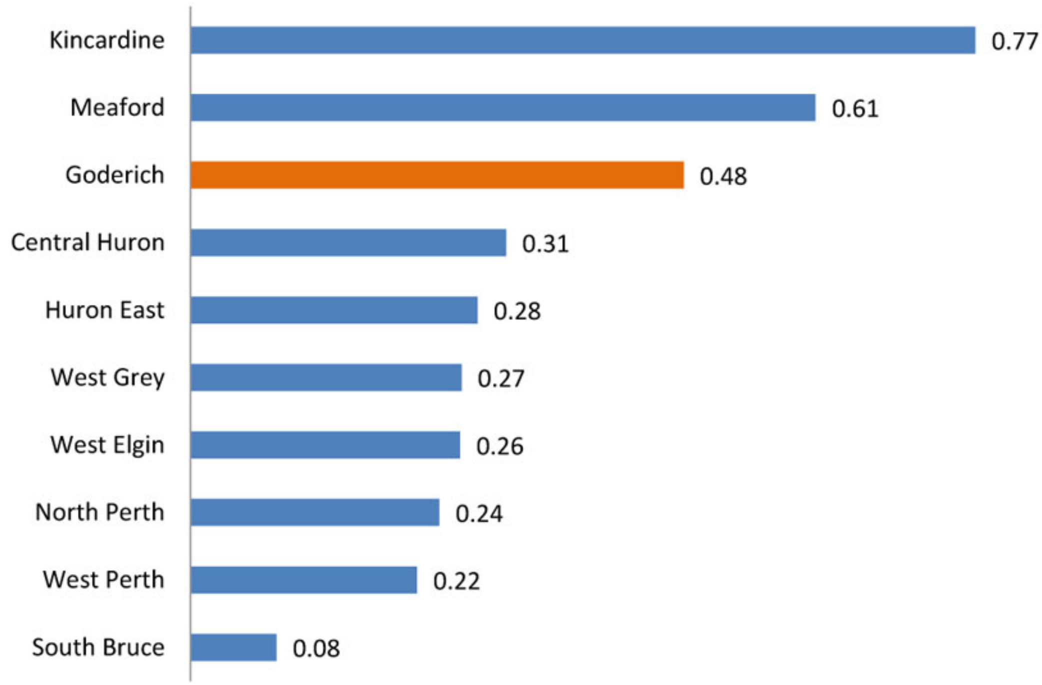
Crimes per 10,000 (2007)

Exhibit 7.32



7.32 Crimes per 10,000

In 2007, the Goderich area had 677 reported crimes per 10,000. Of this 13.2% were violent crimes and 35.6% were property crimes. Goderich is the only community in the south-west region sample that exhibits more crime than the provincial average, and also has a distinctly higher number of violent crimes per capita than any of the other benchmark communities. Meaford experiences the lowest crime levels of all the benchmarking communities examined.



7.33 Creativity Index

When compared to its eastern Ontario peer regions, Goderich ranks near the top in the Creativity Index. However, Goderich's score is much lower than the top two peer regions, Kincardine (0.77) and Meaford (0.61). It scores 0.48 on the Creativity Index, 169th out of 347 census subdivisions in Ontario (rural and metro). South Bruce scores lowest on the Creativity Index with a score of 0.08, well below the majority of the benchmarking regions that clustered around a Creativity Index score of approximately 0.25.

APPENDIX

GEOGRAPHY DEFINITIONS

Economic Region (ER)
Defined by Statistics Canada as "a grouping of complete census divisions (CDs) created as a standard geographic unit for analysis of regional economic activity."

Census Subdivision (CSD)
Defined by Statistics Canada as an "area that is a municipality or an area that is deemed to be equivalent to a municipality for statistical reporting purposes (e.g., as an Indian reserve or an unorganized territory). Municipal status is defined by laws in effect in each province and territory in Canada."

Census Metropolitan Area (CMA)
Defined by Statistics Canada as an "area consisting of one or more neighbouring municipalities situated around a major urban core. A census metropolitan area must have a total population of at least 100,000 of which 50,000 or more live in the urban core."

Metro Ontario
Metro Ontario is defined in this report as any place that falls within a CMA.

Rural Ontario
Rural Ontario is defined in this report as any place that falls outside of a CMA.

Region
The five regions that make up the sections in this report are amalgamations of the Economic Regions defined by Statistics Canada.

The five regions are:

- Northwest (economic region)
- Northeast (economic region)
- East (includes the economic regions of Ottawa and Kingston-Pembroke)
- Central (includes the economic regions of Muskoka - Kawarthas, Toronto, Kitchener-Waterloo-Barrie, and Hamilton-Niagara Peninsula)
- Southwest (includes the economic regions of Stratford-Bruce Peninsula, London and Windsor-Sarnia)

Focus Communities
One community (CSD) was selected from each region of Ontario for in-depth analysis in this report.

Benchmarking communities
Nine peer regions (CSDs) were chosen for each Focus Community. These communities were selected based on both population size and location within the Focus Community's economic region.

Regional metros
Regional metros are the CMAs that fall within a specific region. Data for these individual metros are added together to create an overall regional metro value. (For example the regional metro value in the southwest region is the sum of the values of the London and Windsor CMAs).

METRIC DEFINITIONS

Population
The total number of people residing in a census area in 2006.

Source: Statistics Canada, Census of Population, 2006

Population density
The total number of people per square kilometre in a census area in 2006.

Source: Statistics Canada, Census of Population, 2006

Population growth
The percentage change between the 2001 and 2006 populations of a census area.

Source: Statistics Canada, Census of Population, 2006

Median age
The median age of the population in a census area.

Source: Statistics Canada, Census of Population, 2006

Male & female age distribution

A breakdown of the male and female population by age group.

Source: Statistics Canada, Census of Population, 2006

Average employment income

The average income from employment for the population 15 years of age and over with employment income. Values are based on income reported for 2005.

Source: Statistics Canada, Census of Population, 2006

Median employment income

The median income from employment for the population 15 years of age and over with employment income. Values are based on income reported for 2005.

Source: Statistics Canada, Census of Population, 2006

Average Value of Dwelling

The average of value of a dwelling in the specified census area in 2006.

Source: Statistics Canada, Census of Population, 2006

Share of population spending 30% or more of household income on housing costs

The percentage of households that spend more than 30% of income on owner's major payments or on gross rent.

Source: Statistics Canada, Census of Population, 2006

Employment rate

The percentage of the total populated 15 years of age and over that is employed in the week prior to Census Day (2006).

Source: Statistics Canada, Census of Population, 2006

Unemployment rate

The percentage of the labour force that is unemployed in the week prior to Census Day (2006).

Source: Statistics Canada, Census of Population, 2006

OCCUPATIONAL CLASSES

Creative Class share

Creativity-oriented occupations are high autonomy jobs where workers are paid to think (e.g., artists, doctors, nurses, senior managers, architects).

For this report the Creative Class was calculated using the following occupations:

- Senior management occupations
- Specialist managers
- Other managers, n.e.c. (50%)
- Professional occupations in business and finance
- Finance and insurance administration occupations
- Professional occupations in natural and applied sciences
- Technical occupations related to natural and applied sciences
- Professional occupations in health
- Nurse supervisors and registered nurses
- Technical and related occupations in health
- Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers
- Teachers and professors
- Professional occupations in art and culture
- Technical occupations in art, culture, recreation and sport

Source: Statistics Canada, Census of Population, 2006 with MPI analysis.

Adjusted Creative Class share

A modified version of the Creative Class measure that excludes occupations that are generally found in all communities regardless of size (i.e. teachers, nurses, lawyers, etc.).

For more information see: "Recasting the Creative Class to Examine Growth Processes in Rural and Urban Counties" by David Mcgranahan and Timothy Wojan (http://ddr.nal.usda.gov/bitstream/10113/38102/1/IND44318667.pdf)

The Adjusted Creative Class share includes the following Creative Class occupations:

- Senior management occupations
- Specialist managers
- Other managers, n.e.c. (50%)
- Professional occupations in business and finance
- Finance and insurance administration occupations
- Professional occupations in natural and applied sciences
- Technical occupations related to natural and applied sciences
- Professional occupations in art and culture
- Technical occupations in art, culture, recreation and sport

Source: Statistics Canada, Census of Population, 2006 with MPI analysis.

Service class share

The service class (routine-oriented service occupations) is comprised of occupations in the service sector (e.g., food service workers, janitors, grounds keepers, secretaries, clerks) where workers enjoy lower levels of autonomy than in the Creative Class. service class workers are paid to perform routine work directly for, or on behalf of, clients.

For this report the service class was calculated using the following occupations:

- Managers in retail trade, food and accommodation services
- Other managers, n.e.c (50%)
- Secretaries

- Administrative and regulatory occupations
- Clerical supervisors
- Clerical occupations
- Assisting occupations in support of health services
- Paralegals, social services workers and occupations in education and religion, n.e.c.
- Sales and service supervisors
- Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers
- Retail salespersons and sales clerks
- Cashiers
- Chefs and cooks
- Occupations in food and beverage service
- Occupations in protective services
- Occupations in travel and accommodation, including attendants in recreation and sport
- Child care and home support workers
- Sales and service occupations, n.e.c.

Source: Statistics Canada Census, of Population, 2006 with MPI analysis.

Working class share

The working class is comprised of occupations that depend on physical skills and repetitive tasks. (e.g., construction trades, mechanics, crane operators, and assembly line workers).

For this report the working class was calculated using the following occupations:

- Contractors and supervisors in trades and transportation
- Construction trades
- Stationary engineers, power station operators and electrical trades and telecommunications occupations
- Machinists, metal forming, shaping and erecting occupations
- Mechanics
- Other trades, n.e.c.
- Heavy equipment and crane operators, including drillers
- Transportation equipment operators and related workers, excluding labourers
- Trades helpers, construction and transportation labourers and related occupations
- Primary production labourers
- Supervisors in manufacturing
- Machine operators in manufacturing
- Assemblers in manufacturing
- Labourers in processing, manufacturing and utilities

Source: Statistics Canada Census, of Population, 2006 with MPI analysis.

Farming, fishing and forestry class share

The farming, fishing, and forestry class is comprised of occupations where workers are paid to extract natural resources from the ground or seas.

For this report the farming, fishing, and forestry class was calculated using the following occupations:

- Occupations unique to agriculture, excluding labourers
- Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers

Data Source: Statistics Canada Census of Population (2006) with MPI analysis.

TOLERANCE

Visible minorities population share

The percentage of the population that is non-white.

Source: Statistics Canada, Census of Population, 2006

Immigrant population share

The percentage of the population that is foreign born.

Source: Statistics Canada, Census of Population, 2006

Aboriginal population share

The percentage of the population that reported identifying with at least one Aboriginal group.

Source: Statistics Canada, Census of Population, 2006

TALENT

Talent Index

The Talent Index measures the percentage of the population age 25 and over with a Bachelor's degree or above.

Source: Statistics Canada, Census of Population, 2006 with MPI Analysis.

Highest certificate, diploma or degree

The highest educational certification attained by a person (i.e. High School Certificate, College Diploma, Master's Degree, etc.)

Source: Statistics Canada, Census of Population, 2006

TECHNOLOGY

High-Tech establishments (%)

This report uses the North American Industry Codes (NAICS) to calculate the percentage of high-tech establishments in a geographic area relative to all industries. The following are the codes aggregated for the 'high-tech' measurement:

325 – Chemical manufacturing
334 – Computer and electronic product

manufacturing
339 – Miscellaneous manufacturing
511 – Publishing industries (except Internet)
512 – Motion picture and sound recording industries
515 – Broadcasting (except Internet)
516 – Internet publishing and broadcasting
517 – Telecommunications
518 – Internet service providers, web search portals, and data processing
519 – Other information services
541 – Professional, scientific, and technical services

Source: Statistics Canada, Canadian Business Patterns, June 2008

High-Tech LQ

A location quotient (LQ) captures the difference between a specific regions concentration of a characteristic and the average concentration across the entire country or larger regions. The high-tech LQ measures the concentration of high technology among employment for a region against the concentration of high technology among employment for Ontario.

Source: Statistics Canada, Canadian Business Patterns, June 2008 with MPI Analysis

Ontario Tech Pole Index

Combination of two factors (1) the share of a region's employment that is high-tech and (2) the region's high-tech LQ.

Source: Statistics Canada, Canadian Business Patterns, June 2008 with MPI Analysis.
Based on the Tech Pole Index developed by the Milken Institute.

TERRITORIAL ASSETS

Arts & Entertainment establishments

The number of arts and culture related establishments per 10,000 residents.

Source: Statistics Canada, Canadian Business Patterns, June 2008

Recreation facilities

The number of recreation facilities per 10,000 residents.

Source: Statistics Canada, Canadian Business Patterns, June 2008

Restaurants and bars

The number of restaurants and bars per 10,000 residents.

Source: Statistics Canada, Canadian Business Patterns, June 2008

Healthcare professionals

The number of healthcare professionals per 10,000 residents (includes doctors, dentists, nurses, etc.).

Source: Statistics Canada, Census of Population, 2006

Voter turnout (2011 General Election)

The share of registered voters who voted in the 2011 Federal Election. Reported by Federal Electoral District.

Source: Elections Canada

Crimes per 10,000 people

The number of reported total, violent and property crimes per 10,000 people in 2007. Regions are approximate and do not match CSD definitions exactly.

Source: Statistics Canada, Canadian Centre for Justice Statistics Uniform Crime Reporting Survey, 2008 ed.

CREATIVITY INDEX

The Creativity Index is an overall ranking of all census subdivisions in Ontario based on how well they score on the Talent, Technology and Tolerance indicators.

Technology – Tech Pole and share of establishments that are high-tech
Tolerance – Arts & Entertainment establishments, visible minority share and immigrant population share
Talent – Creative Class share

Each indicator accounts for 1/3 of the Creativity Index.

Source: Statistics Canada, Canadian Business Patterns, June 2008 and Census of Population, 2006 with MPI Analysis.

The 2010 and 2006 population and unemployment numbers reported for the regions are calculated from the Statistics Canada Labour Force Survey (2011).

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ACKNOWLEDGMENTS

OUR TEAM

Authors

Kevin Stolarick
Zara Matheson
Taylor Brydges

Project Team

Vasiliki Bednar
Mark Denstedt
Shawn Gilligan
Michelle Hopgood
Gracen Johnson
Kate Johnson
Karen King
Kim Silk
Shana Wang

CONTACT US

Phone: (416) 673-8580
Fax: (416) 673-8599
Email: info@martinprosperity.org

Martin Prosperity Institute
Joseph L. Rotman School of Management
University of Toronto
MaRS Centre, Heritage Building
101 College Street, Suite 420
Toronto, Ontario, Canada M5G 1L7

Richard Florida, Director

Design by **Michelle Hopgood**.
Maps by **Zara Matheson**.

MARTIN Prosperity *Institute*

Rotman School of Management
UNIVERSITY OF TORONTO