AZARBEHI

The Training Centre

Northern York Region Community Action Project

NORTHERN YORK REGION COMMUNITY LABOUR MARKET STUDY

Final Report

This is an Employment Ontario project that has been funded by the Ontario Ministry of Training, Colleges, and Universities (MTCU) Labour Market Partnership (LMP) program.

This study is led by the Training Centre (GTTI) in partnership with the Town of East Gwillimbury, Town of Georgina, York Region, Workforce Planning Board for York Region and Bradford West Gwillimbury, and South Lake Community Futures Development Corporation

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Executive Summary

To remain economically viable and sustainable, the Towns of Georgina and East Gwillimbury need to work on the challenge of creating economic growth that will allow a greater percentage of their residents to access high value skilled employment opportunities in the local economy. To accomplish this, more proactive economic development is required to generate new high value skilled employment, retain and expand the current employment opportunities, and increase new business opportunities.

The current Labour Market Partnership (LMP) project included a survey to inventory the skills of the workforce that are being exported on a daily basis from East Gwillimbury and Georgina – the municipalities that comprise the Northern York Region Communities (NYRC). It also included a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis, review of best practices in similar communities, and the synthesis of recommendations that can help the NYRC with its goal to retain and expand the current employment opportunities, generate new high value skilled employment and create new business opportunities.

The study revealed that 33% of the total surveyed workforce in NYRC travelled to Toronto for employment, 25% travel to Georgina, and nearly 15% travel to Newmarket for employment. Upon closer review of each town, only 5% of East Gwillimbury residents who were surveyed indicated commuting within East Gwillimbury for employment, and 31% of Georgina residents who were surveyed commuted within Georgina for work. A breakdown of the surveyed workforce by industry revealed that over 15% of those surveyed worked in the manufacturing industry, another 15% worked in the health care and social assistance industry, and 10% were in the professional/ scientific and technical services.

The data for the SWOT analysis came from multiple sources which included but was not limited to the Ontario Ministry of Agriculture, Food and Rural Affairs, Statistics Canada, the towns, Transportation Tomorrow Survey, York Region, and the current study. Some of the strengths of the NYRC that the SWOT analysis found were a ready and skilled health care workforce, expected population growth, low cost of living and housing, large amount of natural green and forested space, close proximity to larger municipalities and major transportations routes, and a local community futures development corporation presence. These strengths were offset by a lack of commercial and industrial buildings, insufficient hard and soft infrastructure, inadequate public transportation services and offerings, insufficient information for a well developed investment package (i.e., town and community profiles, products and services inventory, and an up-to-date comprehensive business inventory), fractured communities, lack of agriculture inventory, limited business services and support offerings, “red tape”, inadequate planning and support for young adults and newcomers, and a lack of economic and labour performance measures.

Despite these findings, the NYRC has the opportunity for creating a brand for itself because it is seen as a blank slate, it has a good skilled workforce that will attract new business to the area, a growing workforce that will need its own health centre or hospital, undeveloped business parks that can be developed to match the needs of the employer, allying with public and private organizations to better promote and leverage the area, potential for post secondary campus and a water innovation & research centre, and ample green space for any green industry. These opportunities have a lot of potential for the NYRC, but it is important that the municipalities are also able to manage internal issues and external threats that may impact their ability for success.

The review of other communities best practices found commonalities in their policies, programs, and strategies, that included: marketing their municipality in terms of offering a type of lifestyle not just a product; identifying niche markets and sectors to target; developing marketing capital; centralizing marketing efforts to avoid duplication of message; making tourism a very important component of economic development; a “no walls” mentality helping to increase potential markets and support; helping entrepreneurs get started; supporting local agriculture; improving municipal communication with citizens; and unifying citizens to support municipal projects. In addition to reviewing best practices, the cities of Stratford and St. Catharines, and towns of Milton and Innisfil were visited, where valuable information was gained through discussions with their economic development departments.

In response to the information gathered, a series of recommendations were synthesized for the NYRC that focused on communication, post secondary education, health care, the water innovation and research centre, programs, services and policies, business service offerings, and addressing underserved population groups within the communities.

1 Introduction

The municipalities of East Gwillimbury and Georgina are the two most northern and rural municipalities of the nine municipalities within York Region. Population estimates for the towns of East Gwillimbury and Georgina, respectively, were approximately 22,000 and 47,000 in 2010 (Manifold Data Mining, 2010). These two towns have observed an increased influx of people in recent years that have seen their population expand. The reason for this growth is due to the general continued growth of York Region's population, which has meant that many of the southern York Region municipalities have reached or are nearing capacity in terms of buildable land area. This in turn has caused housing prices to increase and more families are looking further north for affordable housing while staying in close commuting proximity to the Greater Toronto Area (GTA) and southern York Region. This trend of more families settling further north has been identified in York Region's Official Plan (2011) which is predicting even greater migration rates to northern York region. The Region estimates that the population in the Town of East Gwillimbury will grow by four fold to approximately 88,000 and nearly double to 70,700 in the Town of Georgina within the next twenty (20) years. Although the population growth is welcomed, there is concern that there is a potential lack of growth in employment opportunities in the Northern York Region Communities (NYRC) to sustain the increase in the population.

The NYRC consists of the Town of East Gwillimbury and the Town of Georgina. Reviews of the current opportunities have shown that growth has been mainly in retail and service employment, or seasonal employment related directly to the tourism sector. The concern stems from the possibility that families may be moving to the Towns of East Gwillimbury and Georgina for affordable housing, and then traveling outside to other municipalities for employment, such as to the municipalities of Newmarket or Markham for employment in health centres and hospitals. There is concern that the municipalities that make up the NYRC may become bedroom communities and may struggle with economic viability and sustainability. This problem may be exacerbated with the extension of highway 404 through the Town of East Gwillimbury to the southern end of the Town of Georgina, which may fuel even greater daily commuting traffic southerly for employment outside of the towns. The extension is slated for opening in December 2012. Furthermore, the extension may impact local small and medium sized enterprises (SME) located on existing commuting routes as commuters will likely rely on SMEs located at points of entry and exit on their daily commute on the highway.

Thus, to remain economically viable and sustainable, the Towns of Georgina and East Gwillimbury must focus on the challenge of creating economic growth that will allow a greater percentage of their local population access to local high value employment opportunities in the local economy. To accomplish this, there is a need for active economic development that will generate new business opportunities, retain and expand the current business opportunities, and generate new high value employment.

1.1 Purpose

The purpose of the current Labour Market Partnership (LMP) project is the following:

- to take an inventory of the workforce and their skills that are being exported daily from these municipalities
- conduct a Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis of the NYRC
- identify best practices in similar communities
- analyze this information to develop recommendations for the towns of East Gwillimbury and Georgina
- provide a framework for the development of a Northern York Region Communities Action Consortium (NYRCAC) who will monitor and help with the implementation of the recommendations of this report within NYRC

2 Labour Force

The data for the labour force in the municipalities of East Gwillimbury and Georgina came from a variety of sources, and so are broken into major components that review the specific characteristics of the workforce. Much of the data utilized relies on the 2006 Census, which after five years may not provide an accurate picture of the current demographic profile for these municipalities. Therefore, multiple data sets and profiles are used to provide an accurate picture of the current market. Data for the 2006 Census was provided by Statistics Canada.

2.1 General Profile

Statistics Canada collects labour force data for the Canadian population aged 15 years of age and older. To provide a thorough understanding of the labour force profile in NYRC, and the towns of East Gwillimbury and Georgina, Table 1 to 3 demonstrate labour force activity in terms of Census data from 2006 combined with Manifold Data Mining, which are 2010/2011 projections of the 2006 Census data. The data values are also compared to information obtained from the Rural Community Development branch of the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA). The general population profile shows a marked increase in the population for NYRC from 2006 to 2010. Specific to the labour market, there is an increase of approximately 4,692 additional individuals who have joined the workforce. This increase shows that for employment within NYRC, a total of 4,692 employment opportunities that relate directly to those individuals current skill sets are necessary to retain them in their hometowns. Specifically, in East Gwillimbury 1,254 new employment opportunities would be necessary, and 3,438 would be necessary in Georgina. In total, nearly 41,000 individuals are in the labour market as of 2010, with 13,754 individuals living in East Gwillimbury and 27,143 living in Georgina.

Table 1: *Comparative Labour Force Profile, 2006 and 2010, for Northern York Region Communities*

Description	2006	2010
TOTAL POPULATION 15 YEARS AND OVER	49,970	56,104
IN THE LABOUR FORCE	36,205	40,897
EMPLOYED	34,390	38,098
UNEMPLOYED	1,805	3,592
NOT IN THE LABOUR FORCE	13,775	15,206
PARTICIPATION RATE	72.5	72.9
EMPLOYMENT RATE	68.8	67.9
UNEMPLOYMENT RATE	5.0	6.4
TOTAL POPULATION 15-24 YEARS BY LABOUR FORCE ACTIVITY	8,370	9,081
IN THE LABOUR FORCE	5,755	6,139
EMPLOYED	4,980	5,376
UNEMPLOYED	770	762
NOT IN THE LABOUR FORCE	2,615	2,943
PARTICIPATION RATE	68.8	67.6
EMPLOYMENT RATE	59.5	59.2
UNEMPLOYMENT RATE	13.4	8.4
TOTAL POPULATION 25 YEARS AND OVER BY LABOUR FORCE ACTIVITY	41,605	47,021
IN THE LABOUR FORCE	30,445	34,780
EMPLOYED	29,410	32,740
UNEMPLOYED	1,030	2,040
NOT IN THE LABOUR FORCE	11,155	12,241
PARTICIPATION RATE	73.2	74.0
EMPLOYMENT RATE	70.7	69.6
UNEMPLOYMENT RATE	3.4	4.3

Source: Adapted from Statistics Canada (2006 Cumulative Profile, 2006 Census of Population) and Manifold Data Mining, Custom Demographic Report, 2010.

Table 2: *Comparative Labour Force Profile, 2006 and 2010, for the Town of East Gwillimbury*

Description	2006	2010
TOTAL POPULATION 15 YEARS AND OVER	16,705	18,352
IN THE LABOUR FORCE	12,500	13,754
EMPLOYED	11,945	12,993
UNEMPLOYED	550	761
NOT IN THE LABOUR FORCE	4,210	4,598
PARTICIPATION RATE	74.8	75.0
EMPLOYMENT RATE	71.5	70.8
UNEMPLOYMENT RATE	4.4	5.5
TOTAL POPULATION 15-24 YEARS BY LABOUR FORCE ACTIVITY	3,005	3,197
IN THE LABOUR FORCE	2,180	2,173
EMPLOYED	1,925	1,923
UNEMPLOYED	255	250
NOT IN THE LABOUR FORCE	825	1,025
PARTICIPATION RATE	72.5	68.0
EMPLOYMENT RATE	64.1	60.1
UNEMPLOYMENT RATE	11.7	11.5
TOTAL POPULATION 25 YEARS AND OVER BY LABOUR FORCE ACTIVITY	13,700	15,154
IN THE LABOUR FORCE	10,315	11,581
EMPLOYED	10,020	11,070
UNEMPLOYED	295	511
NOT IN THE LABOUR FORCE	3,380	3,573
PARTICIPATION RATE	75.3	76.4
EMPLOYMENT RATE	73.1	73.1
UNEMPLOYMENT RATE	2.9	4.4

Source: Adapted from Statistics Canada (2006 Cumulative Profile, 2006 Census of Population) and Manifold Data Mining, Custom Demographic Report, 2010.

Table 3: *Comparative Labour Force Profile, 2006 and 2010, for the Town of Georgina*

Description	2006	2010
TOTAL POPULATION 15 YEARS AND OVER	33,265	37,752
IN THE LABOUR FORCE	23,705	27,143
EMPLOYED	22,445	18,050
UNEMPLOYED	1,255	9,093
NOT IN THE LABOUR FORCE	9,565	10,608
PARTICIPATION RATE	71.3	71.9
EMPLOYMENT RATE	67.5	66.5
UNEMPLOYMENT RATE	5.3	7.5
TOTAL POPULATION 15-24 YEARS BY LABOUR FORCE ACTIVITY	5,365	5,884
IN THE LABOUR FORCE	3,575	3,965
EMPLOYED	3,055	2,327
UNEMPLOYED	515	1,637
NOT IN THE LABOUR FORCE	1,790	1,918
PARTICIPATION RATE	66.6	67.4
EMPLOYMENT RATE	56.9	58.7
UNEMPLOYMENT RATE	14.4	13.0
TOTAL POPULATION 25 YEARS AND OVER BY LABOUR FORCE ACTIVITY	27,905	31,867
IN THE LABOUR FORCE	20,130	23,199
EMPLOYED	19,390	15,775
UNEMPLOYED	735	7,423
NOT IN THE LABOUR FORCE	7,775	8,667
PARTICIPATION RATE	72.1	72.8
EMPLOYMENT RATE	69.5	68.0
UNEMPLOYMENT RATE	3.7	6.6

Source: Adapted from Statistics Canada (2006 Cumulative Profile, 2006 Census of Population) and Manifold Data Mining, Custom Demographic Report, 2010.

2.2 Profile by Industry

This data breaks down the current labour force by industry for the individuals living in the municipalities of East Gwillimbury and Georgina (see Table 4). The data below is provided from the OMAFRA Labour Flow Analysis by industry. Their industry data is used here to provide a picture of the towns' 2011 labour profile by industry. Industries are classified using the North American Industry Classification System (NAICS; 2002). Please see Appendix I for NAICS classification definitions. The largest represented industry by current labour force in NYRC is manufacturing (14.18%).

Table 4: *Comparative Labour Force Profile by Industry for NYRC, the Town of East Gwillimbury, and the Town of Georgina*

	NYRC		East Gwillimbury		Georgina	
All Industries	34,390	100.00%	11,945	100.00%	22,445	100.00%
11 Agriculture, forestry, fishing and hunting	540	1.57%	210	1.76%	330	1.47%
21 Mining and oil and gas extraction	95	0.28%	55	0.46%	40	0.18%
22 Utilities	305	0.89%	110	0.92%	195	0.87%
23 Construction	3,535	10.28%	1,090	9.13%	2,445	10.89%
31-33 Manufacturing	4,875	14.18%	1,515	12.68%	3,360	14.97%
41 Wholesale trade	2,145	6.24%	830	6.95%	1,315	5.86%
44-45 Retail trade	3,955	11.50%	1,320	11.05%	2,635	11.74%
48-49 Transportation and warehousing	1,725	5.02%	490	4.10%	1,235	5.50%
51 Information and cultural industries	885	2.57%	355	2.97%	530	2.36%
52 Finance and insurance	1,240	3.61%	430	3.60%	810	3.61%
53 Real estate and rental and leasing	555	1.61%	235	1.97%	320	1.43%
54 Professional, scientific and technical services	1,930	5.61%	835	6.99%	1,095	4.88%
55 Management of companies and enterprises	30	0.09%	20	0.17%	10	0.04%
56 Administrative and support, waste management and remediation services	1,855	5.39%	540	4.52%	1,315	5.86%
61 Educational services	2,120	6.16%	745	6.24%	1,375	6.13%
62 Health care and social assistance	3,000	8.72%	1,150	9.63%	1,850	8.24%
71 Arts, entertainment and recreation	710	2.06%	320	2.68%	390	1.74%
72 Accommodation and food services	1,515	4.41%	485	4.06%	1,030	4.59%
81 Other services (except public administration)	1,690	4.91%	540	4.52%	1,150	5.12%
91 Public administration	1,655	4.81%	655	5.48%	1,000	4.46%

Source: Adapted from OMAFRA (2006 Labour Flow Analysis-Industry).

2.3 Commuter Profile

The commuter profile is used to reveal travel patterns of the labour force to work. The data source for this information is the Transportation Tomorrow Survey (TTS; 2006). The TTS provides a glimpse of the workforce travel patterns for employment (see Table 5). The TTS is funded by the Ministry of Transportation Ontario and involves a total of 23 local, regional, provincial and transit operating agencies. The data collection and analysis is done in conjunction with the University of Toronto. The TTS provides travel patterns for a variety of activities, such as work, extracurricular, shopping, and so on. For the purpose of the current study, the occupation table was used with a filter for the Town of East Gwillimbury and the Town of Georgina as points of origin.

The travel patterns indicate that a major commuter destination for the NYRC labour force is Newmarket (21%), Georgina (19%), Toronto (14%), and East Gwillimbury (10%). A closer look at each community shows that intra-commute rates are much higher within each municipality. For example, the NYRC labour force commute to East Gwillimbury is 10%, but the East Gwillimbury labour force commute within East Gwillimbury is 21%. The same pattern is visible for Georgina, where the NYRC commute to it is 19%, but 28% of the Georgina labour force commute to a location in Georgina. This is an encouraging pattern, but it does highlight that nearly 73% of the NYRC workforce commute outside of the area for work.

Table 5: *Commuter Travel Patterns for Northern York Region Communities (NYRC), East Gwillimbury, and Georgina*

	NYRC		East Gwillimbury		Georgina	
Totals	32,301	100.00%	11,437	100.00%	20,864	100.00%
Toronto	4,376	13.55%	1,760	15.39%	2,616	12.54%
Brock	90	0.28%	0	0.00%	90	0.43%
Uxbridge	226	0.70%	135	1.18%	91	0.44%
Scugog	34	0.11%	17	0.15%	17	0.08%
Pickering	120	0.37%	51	0.45%	69	0.33%
Whitby	54	0.17%	0	0.00%	54	0.26%
Oshawa	122	0.38%	49	0.43%	73	0.35%
Clarington	18	0.06%	0	0.00%	18	0.09%
Georgina	6,051	18.73%	191	1.67%	5,860	28.09%
East Gwillimbury	3,152	9.76%	2,392	20.91%	760	3.64%
Newmarket	6,701	20.75%	2,735	23.91%	3,966	19.01%
Aurora	1,689	5.23%	779	6.81%	910	4.36%
Richmond Hill	1,517	4.70%	588	5.14%	929	4.45%
Whitchurch-Stouffville	576	1.78%	267	2.33%	309	1.48%
Markham	2,460	7.62%	734	6.42%	1,726	8.27%
King	142	0.44%	104	0.91%	38	0.18%
Vaughan	1,329	4.11%	575	5.03%	754	3.61%
Caledon	123	0.38%	69	0.60%	54	0.26%
Brampton	229	0.71%	103	0.90%	126	0.60%
Mississauga	617	1.91%	172	1.50%	445	2.13%
Oakville	94	0.29%	36	0.31%	58	0.28%
Burlington	19	0.06%	0	0.00%	19	0.09%
Hamilton	19	0.06%	0	0.00%	19	0.09%
Barrie	108	0.33%	34	0.30%	74	0.35%
Innisfil	55	0.17%	0	0.00%	55	0.26%
Bradford-West Gwillimbury	345	1.07%	71	0.62%	274	1.31%
New Tecumseth	35	0.11%	16	0.14%	19	0.09%
Lindsay	17	0.05%	0	0.00%	17	0.08%
Peterborough	19	0.06%	0	0.00%	19	0.09%
Cavan	18	0.06%	18	0.16%	0	0.00%
Asphodel	18	0.06%	0	0.00%	18	0.09%
Ramara	35	0.11%	17	0.15%	18	0.09%
Orillia	35	0.11%	0	0.00%	35	0.17%
East Garafraxa	17	0.05%	0	0.00%	17	0.08%
Brantford	19	0.06%	0	0.00%	19	0.09%
No usual place	1,804	5.58%	524	4.58%	1,280	6.13%
External undefinied	18	0.06%	0	0.00%	18	0.09%
External	19	0.06%	0	0.00%	19	0.09%

Source: Ministry of Transportation Ontario (Transportation Tomorrow Survey, 2006)

3 Workforce Survey

The purpose of the workforce survey was to build on the labour force data and commuter patterns that are already available to the Northern York Region Communities (NYRC). Prior to this survey, the most complete data set was from the 2006 Census Community Profiles. Since then, the NYRC has grown and certain economic events, such as the economic downturn in 2008, may have altered the reliability of the results of the census data. Thus, a more current data set is required. Another data set available to the NYRC is the York Region Employment and Industry survey. This survey is carried out by the region of York in which they send researchers to every store front in York Region and carry out a brief survey about the organization and its employees. This survey provides information mainly about the organizations, the industries to which they belong, and the type of services they provide.

There are two drawbacks of this study. First, its focus is not directly on the employees or the skills they provide to the organization, but rather the organization itself and the services it offers. In other words, this is an employer focused survey, not employee. Second, this survey is focused on York Region businesses, so the labour force from NYRC that go to Toronto, Mississauga, or other areas outside of York Region are missed by the survey. In addition, the data set is dependent on a business having a store front that can be visited, thus, home offices and rural locales are missed. The purpose of the workforce survey was to directly collect information about the current labour force and their skill sets, while addressing the concerns of using the data from the census and the York Region Employment and Industry survey.

3.1 Method

The project collected data directly from those who were travelling to or from work through a short survey. The most current data presented is based on the workforce survey that was employed for this study. The survey was comprised of five (5) questions that related to where a person lived, worked, occupation, industry of business, and transportation method used to travel to work (see Appendix II for survey). Research assistants (RAs) surveyed individuals at gas stations, car pool lots, transit hubs (e.g., East Gwillimbury and Bradford Go Train Stations), and retail locations such as grocery stores to maximize sampling from commuter population. The surveys were also posted in the local newspapers, sent home in school newsletters, emailed through several

Ontario colleges and registries, and were made available online. Survey completion was also encouraged at Economic Development Committee meetings in the towns of East Gwillimbury and Georgina, and at their Chambers of Commerce. RAs also attended all major events within the towns, such as the Highland Games, Farmers Markets, and Splash Festival to survey individuals that attended those events. Survey collection started in July and lasted until the end of October.

To maximize data collection, thirty one (31) survey drop boxes were coloured bright blue with clear “Workforce Survey Drop box” labels on all three sides. Tear away surveys were also affixed to the drop boxes for participants to access. Drop boxes were located in public spaces such as civic centres, libraries, and business associations like the Georgina Chamber of Commerce offices and the Training Centre (GTTI). Drop boxes were also located in the main offices of every primary and secondary educational institution within the towns of East Gwillimbury and Georgina. A list of all the drop box locations was available online for anyone interested in dropping off a survey, but was not sure of where to locate the nearest drop box.

3.2 Results

A total of 2,124 surveys were completed, from which 468 indicated living in East Gwillimbury, and 1,656 indicated they lived in Georgina. A review of the industries that individuals were employed in revealed that over 15% of those surveyed worked in the manufacturing industry, another 15% worked in the health care and social assistance industry, and 10% were in the professional/ scientific and technical services (see Table 6). These three industry sectors accounted for nearly 40% of the overall surveyed individuals. This pattern was consistent across both communities, but it should be noted that in Georgina, there was a significant number of individuals in education services (9%) as well.

The labour force commuter patterns revealed that 33% travel to Toronto for employment, 25% travel to Georgina, and nearly 15% travel to Newmarket for employment. This is similar to the TTS (2006) data which showed that the three largest commute patterns were to Toronto (14%), Georgina (19%), and Newmarket (21%). See Table 7 for a complete listing of commuting patterns with an initial starting point in NYRC, and towns of East Gwillimbury and Georgina. In the current workforce survey, these three destinations accounted for nearly 73% of the total number of individuals that were surveyed. Upon closer review of each town, nearly 50% of individuals who indicated they live in East Gwillimbury commuted to Toronto for work and over 15% travelled to Newmarket for work.

The TTS data for East Gwillimbury showed that over 20% of their labour force commuted within the town for work, so it was expected that there would be a similar significant number of individuals commuting within East Gwillimbury in the current study. However, that was not found in the workforce survey. Only 5% indicated commuting within East Gwillimbury, whereas the TTS indicated over 20% in 2006. A comparison of the two indicates a large shift in employment travel patterns from East Gwillimbury to Toronto. A potential reason for the lack of commute patterns in East Gwillimbury may be that individuals in home offices may not have been fully captured in the current survey because it required individuals to travel to be potentially surveyed. Another possibility may be a reduction in employment opportunities to neighbouring communities, such as Newmarket and Georgina. Commuter patterns for Georgina were consistent with the data from TTS. Specifically, 29% of Georgina residents who were surveyed commuted to Toronto for work, 31% commuted within Georgina for work, 4% commute to East Gwillimbury, and 15% commute to Newmarket. Although, the percentage of commuters from Georgina to Toronto increased by nearly 16%, it is encouraging to see that there was also a 3% increase in the number of individuals who stayed in Georgina for work, while there was a 4.5% decrease in commuters to Newmarket.

To determine commuter patterns by industry sector, the data to the communities with the highest commuting densities were reviewed (see Table 8). The top destinations in alphabetical order were Aurora (A), East Gwillimbury (EG), Georgina (G), Markham (M), Newmarket (NM), Richmond Hill (RH), and Toronto (T). An industry that ranked consistently high was Health Care and Social Assistance. In all top seven destinations, this industry sector was ranked either first or second as the reason why individuals commute to those communities. The highest ranking industry sector that individuals commute to in Markham, Toronto, and Aurora was Professional, Scientific, and Technical services. In Aurora, the other sector was manufacturing. In Georgina, Newmarket, and Richmond Hill it was health care and social assistance. Georgina also ranked high on retail and education services industries as well.

An inventory of current occupations was generated for the workforce survey responses. The National Occupational Codes (2006) from the Human Resources and Skills

Development Canada (HRDSC) Employers handbook was used to classify jobs (see Appendix III for NOC definitions). Each digit in the NOC represents a specific piece of information. The first digit in a NOC represents the skill type (see Table 9), and the second digit represents skill level (see Table 10). The NOC is different from the NAICS in terms of the type of information being reviewed. The NAICS focuses on the industries of the workforce, while the NOC reviews their occupations irrespective of the industry. Reviewing both provides a better understanding of not only the specific industries represented in the commuting workforce, but also their likely level of education and employment position.

From the workforce survey data, a frequency table of occupations based on NOC was derived to determine occupational grouping. Appendix III provides a frequency distribution table of the NOC categories. The most frequent occupation were management occupations where individuals usually require a university degree (NOC: 01), with 16.0% of respondents indicating an occupation in this group. The specific occupations that fall under this group are legislators, senior management occupations, and middle and other management occupations. These occupations span all industries. The next most frequent at 9.7% were sales and service occupations where a four year secondary school education or up to two years on-the-job training or specialized training course was required (NOC: 64). Childcare and Home Support Workers (NOC: 647) which includes: 1) visiting homemakers, housekeepers, and related occupations, 2) elementary and secondary school teacher assistants, and 3) babysitters, nannies and parents' helpers were the specific occupations that ranked highest in this category. A close third with 8.4% were occupations in social sciences, education, government services, and religion where individuals are usually required to have a university degree (NOC: 41). This category includes professionals such as lawyers, university professors, counsellors, psychologists, and consultants.

A more detailed analysis of NOC codes and commuter patterns for the top six travelled municipalities was conducted (see Appendix IV for frequency distribution). The data show that the largest occupational group to travel to Toronto, Newmarket, Markham, Aurora were management occupations which usually require university degrees (NOC: 01). The largest occupational group that commuted to Georgina were sales and service occupations that required a four year secondary school education or up to two years of on-the-job training (NOC: 64). A more detailed review found that the specific occupations were Childcare and Home Support Workers (NOC: 647). The largest occupational group for those commuting to East Gwillimbury for work were business, finance, and administration where individuals required either a four year secondary school education or up to two years of on-the-job training (NOC: 14) . This occupational group consists of individuals who might have clerical, mail related, or scheduling & distribution related occupations. Though this occupational group stands out as the largest, it should be noted that only 13 individuals matched this occupational group.

Table 6: *Labour Force by Industry for Northern York Region Communities (NYRC), East Gwillimbury, and Georgina.*

	NYC		East Gwillimbury		Georgina	
All Industries	2124	100.00%	468	100.00%	1656	100.00%
11 Agriculture, forestry, fishing and hunting	26	1.22%	7	1.50%	19	1.15%
21 Mining and oil and gas extraction	3	0.14%	2	0.43%	1	0.06%
22 Utilities	18	0.85%	9	1.92%	9	0.54%
23 Construction	146	6.87%	40	8.55%	106	6.40%
31-33 Manufacturing	322	15.16%	63	13.46%	259	15.64%
41 Wholesale trade	43	2.02%	15	3.21%	28	1.69%
44-45 Retail trade	159	7.49%	23	4.91%	136	8.21%
48-49 Transportation and warehousing	62	2.92%	11	2.35%	51	3.08%
51 Information and cultural industries	43	2.02%	23	4.91%	20	1.21%
52 Finance and insurance	167	7.86%	55	11.75%	112	6.76%
53 Real estate and rental and leasing	16	0.75%	1	0.21%	15	0.91%
54 Professional, scientific and technical services	225	10.59%	69	14.74%	156	9.42%
55 Management of companies and enterprises	0	0.00%	0	0.00%	0	0.00%
56 Administrative and support, waste management and remediation services	78	3.67%	9	1.92%	69	4.17%
61 Educational services	181	8.52%	32	6.84%	149	9.00%
62 Health care and social assistance	321	15.11%	55	11.75%	266	16.06%
71 Arts, entertainment and recreation	54	2.54%	13	2.78%	41	2.48%
72 Accommodation and food services	67	3.15%	8	1.71%	59	3.56%
81 Other services (except public administration)	36	1.69%	1	0.21%	35	2.11%
91 Public administration	157	7.39%	32	6.84%	125	7.55%

Table 7: *Labour Force Travel Patterns for Northern York Region Communities (NYRC), East Gwillimbury, and Georgina*

	NYRC		East Gwillimbury		Georgina	
Totals	2,123	100.00%	467	100.00%	1,656	100.00%
Markham	114	5.37%	25	5.35%	89	5.37%
Toronto	702	33.07%	230	49.25%	472	28.50%
Georgina	540	25.44%	21	4.50%	519	31.34%
Newmarket	315	14.84%	72	15.42%	243	14.67%
East Gwillimbury	65	3.06%	24	5.14%	41	2.48%
Stouffville	25	1.18%	4	0.86%	21	1.27%
Aurora	57	2.68%	12	2.57%	45	2.72%
York Region	17	0.80%	6	1.28%	11	0.66%
Unionville	3	0.14%	0	0.00%	3	0.18%
Hamilton	4	0.19%	2	0.43%	2	0.12%
Richmond Hill	67	3.16%	15	3.21%	52	3.14%
Vaughan	29	1.37%	10	2.14%	19	1.15%
Mississauga	35	1.65%	9	1.93%	26	1.57%
Ajax	1	0.05%	1	0.21%	0	0.00%
Oak Ridge	3	0.14%	1	0.21%	2	0.12%
Bolton	5	0.24%	1	0.21%	4	0.24%
Kingston	3	0.14%	1	0.21%	2	0.12%
Holt	3	0.14%	1	0.21%	2	0.12%
Thornhill	6	0.28%	0	0.00%	6	0.36%
Beaverton	11	0.52%	2	0.43%	9	0.54%
Concord	19	0.89%	2	0.43%	17	1.03%
King City	4	0.19%	0	0.00%	4	0.24%
Uxbridge	3	0.14%	0	0.00%	3	0.18%
Oshawa	6	0.28%	2	0.43%	4	0.24%
Bradford	11	0.52%	4	0.86%	7	0.42%
Maple	2	0.09%	0	0.00%	2	0.12%
Argyle	2	0.09%	0	0.00%	2	0.12%
Lindsey	4	0.19%	2	0.43%	2	0.12%
Durham Region	4	0.19%	0	0.00%	4	0.24%
Gromley	2	0.09%	0	0.00%	2	0.12%
Oakville	9	0.42%	1	0.21%	8	0.48%
Timmins	2	0.09%	0	0.00%	2	0.12%
Innisfil	2	0.09%	0	0.00%	2	0.12%
Alliston	5	0.24%	2	0.43%	3	0.18%
Orillia	1	0.05%	0	0.00%	1	0.06%
Woodbridge	6	0.28%	1	0.21%	5	0.30%
Weston	3	0.14%	2	0.43%	1	0.06%
Ballantrae	1	0.05%	0	0.00%	1	0.06%
Haliburton	4	0.19%	0	0.00%	4	0.24%
Tottenham	2	0.09%	2	0.43%	0	0.00%
Schomberg	4	0.19%	4	0.86%	0	0.00%
Kirkfield	2	0.09%	2	0.43%	0	0.00%
London	2	0.09%	2	0.43%	0	0.00%
St. Catherines	2	0.09%	0	0.00%	2	0.12%
Sudbury	2	0.09%	0	0.00%	2	0.12%
Sunderland	2	0.09%	0	0.00%	2	0.12%
Barrie	4	0.19%	0	0.00%	4	0.24%
Etobicoke	4	0.19%	4	0.86%	0	0.00%
Burlington	1	0.05%	0	0.00%	1	0.06%
Pickering	2	0.09%	0	0.00%	2	0.12%
Orangeville	1	0.05%	0	0.00%	1	0.06%

Table 8: *Labour Force Travel Patterns for Northern York Region Communities (NYRC) by Industry Sector for Top Six Commuted to Municipalities*

	M	T	G	NM	EG	A	RH
All Industries	114	702	536	315	65	57	67
11 Agriculture, forestry, fishing and hunting	0	7	2	1	6	0	0
21 Mining and oil and gas extraction	0	1	2	0	0	0	0
22 Utilities	4	4	1	0	1	1	0
23 Construction	6	73	21	10	11	4	2
31-33 Manufacturing	18	79	69	54	7	10	6
41 Wholesale trade	0	12	10	3	3	0	2
44-45 Retail trade	4	16	85	26	4	5	12
48-49 Transportation and warehousing	5	22	5	10	4	2	0
51 Information and cultural industries	5	25	7	2	0	2	0
52 Finance and insurance	8	96	15	16	0	4	8
53 Real estate and rental and leasing	0	6	7	1	0	0	0
54 Professional, scientific and technical services	31	104	28	25	1	10	9
55 Management of companies and enterprises	0	0	0	0	0	0	0
56 Administrative and support, waste management and remediation services	1	26	28	15	1	2	1
61 Educational services	6	39	71	20	7	4	10
62 Health care and social assistance	12	102	85	74	9	8	13
71 Arts, entertainment and recreation	0	17	27	2	0	0	2
72 Accommodation and food services	5	13	27	13	1	0	2
81 Other services (except public administration)	3	5	16	0	2	0	0
91 Public administration	6	55	30	43	8	5	0

Table 9: *NOC Skills Type Matrix represents the first digit in a NOC code.*

NOC Skill Types	
Skill Type	Occupation
0	Management Occupations
1	Business, Finance and Administration Occupations
2	Natural and Applied Sciences and Related Occupations
3	Health Occupations
4	Occupations in Social Science, Education, Government Service and Religion
5	Occupations in Art, Culture, Recreation and Sport
6	Sales and Service Occupations
7	Trades, Transport and Equipment Operators and Related Occupations
8	Occupations Unique to Primary Industry
9	Occupations Unique to Processing, Manufacturing and Utilities

Table 10: *NOC Skill Level Matrix, represents the second digit in a NOC code.*

NOC Skill Levels		
Skill Level (alpha)	Skill Level (digit)	Nature of Education/ Training
A **Occupations usually require university education.**	1	University degree at the bachelor's, master's or doctorate level.
B **Occupations usually require college or vocational education or apprenticeship training.**	2 or 3	Two to three years of post-secondary education at a community college, institute of technology or CEGEP *or* Two to five years of apprenticeship training *or* Three to four years of secondary school and more than two years of on-the-job training, specialized training courses or specific work experience. Occupations with supervisory responsibilities and occupations with significant health and safety responsibilities, such as firefighters, police officers and registered nursing assistants are all assigned the Skill Level B.
C **Occupations usually require secondary school and/or occupation-specific training.**	4 or 5	One to four years of secondary school education *or* Up to two years of on-the-job training, specialized training courses or specific work experience.
D **On-the-job training is usually provided for occupations.**	6	Short work demonstration or on-the-job training *or* No formal educational requirements.

4 Focus Groups

As part of the current project, five focus groups were held to gather input from individuals within the communities of East Gwillimbury and Georgina. The focus groups were open to citizens, business owners, and key stakeholders. Their purpose was to provide interested individuals with information about the project, collect valuable information, and help build support.

4.1 Methods

To ensure equal access to individuals from the two towns that are part of this study, two of the focus groups were held in the Town of East Gwillimbury, and three were held in the Town of Georgina.

4.1.1 Recruitment

Participants for the focus groups were recruited through a variety of methods. The most effective method was via recruiting individuals while carrying out the Workforce Survey (See section 3). While participants were completing the workforce survey, the RAs would also inquire if individuals were interested in providing additional input via a focus group. If participants agreed, then they provided their contact information and selected which focus group they wanted to attend. The other methods that were used for recruitment included advertising in local news papers, promoting the focus groups at Economic Development Committee meetings, Chamber of Commerce events, and community events. The registration for focus groups was also available online, and was promoted on the towns of East Gwillimbury and Georgina's websites, and Georgina Trades Training Inc.'s website.

Prior to the focus groups, individuals were contacted to provide them with information about the location, time, and confirm their participation. Participation rates from East Gwillimbury residents at the focus groups were lower than what was anticipated.

4.1.2 Participants

There were a total of 71 participants in all five groups (N=71), of which 17 were from East Gwillimbury, and 59 were from Georgina. The majority of the participants had a grade 12 or college degree (See Table 11). The general trend in the focus groups was of participants with higher levels of education. This was consistent for both the East Gwillimbury and Georgina groups. When participants were categorized by industry, the majority worked in the Health Care / Social Assistance industry (14%). There were also a good proportion in the Other Services (except public administration; 12%), Professional / Scientific / Technical Services (10%), Administrative and Support / Waste

Management and Remediation Services (10%), and Public Administration (10%; See Table 12). Industries are classified using the North American Industry Classification System (NAICS; 2002).

Table 11. *Frequency Distribution of Highest Level of Education for Focus Group Participants*

Highest Level of Education	Total		East Gwillimbury		Georgina	
Total	69	100.00%	16	100.00%	53	100.00%
Grade 1	0	0.00%	0	0.00%	0	0.00%
Grade 2	0	0.00%	0	0.00%	0	0.00%
Grade 3	1	1.45%	0	0.00%	1	1.89%
Grade 4	0	0.00%	0	0.00%	0	0.00%
Grade 5	0	0.00%	0	0.00%	0	0.00%
Grade 6	2	2.90%	0	0.00%	2	3.77%
Grade 7	0	0.00%	0	0.00%	0	0.00%
Grade 8	0	0.00%	0	0.00%	0	0.00%
Grade 9	1	1.45%	0	0.00%	1	1.89%
Grade 10	5	7.25%	0	0.00%	5	9.43%
Grade 11	3	4.35%	1	6.25%	2	3.77%
Grade 12	23	33.33%	4	25.00%	19	35.85%
College Diploma	21	30.43%	5	31.25%	16	30.19%
University Degree	13	18.84%	6	37.50%	7	13.21%

Table 12. *Frequency Distribution of Labour Force by Industry for Focus Group Participants.*

	Total		East Gwillimbury		Georgina	
All Industries	50	100.00%	14	100.00%	36	100.00%
11 Agriculture, forestry, fishing and hunting	0	0.00%	0	0.00%	0	0.00%
21 Mining and oil and gas extraction	0	0.00%	0	0.00%	0	0.00%
22 Utilities	0	0.00%	0	0.00%	0	0.00%
23 Construction	1	2.00%	0	0.00%	1	2.78%
31-33 Manufacturing	2	4.00%	1	7.14%	1	2.78%
41 Wholesale trade	1	2.00%	0	0.00%	1	2.78%
44-45 Retail trade	4	8.00%	0	0.00%	4	11.11%
48-49 Transportation and warehousing	1	2.00%	1	7.14%	0	0.00%
51 Information and cultural industries	1	2.00%	0	0.00%	1	2.78%
52 Finance and insurance	3	6.00%	0	0.00%	3	8.33%
53 Real estate and rental and leasing	2	4.00%	1	7.14%	1	2.78%
54 Professional, scientific and technical services	5	10.00%	2	14.29%	3	8.33%
55 Management of companies and enterprises	2	4.00%	1	7.14%	1	2.78%
56 Administrative and support, waste management and remediation services	5	10.00%	1	7.14%	4	11.11%
61 Educational services	4	8.00%	0	0.00%	4	11.11%
62 Health care and social assistance	7	14.00%	3	21.43%	4	11.11%
71 Arts, entertainment and recreation	1	2.00%	1	7.14%	0	0.00%
72 Accommodation and food services	0	0.00%	0	0.00%	0	0.00%
81 Other services (except public administration)	6	12.00%	1	7.14%	5	13.89%
91 Public administration	5	10.00%	2	14.29%	3	8.33%

4.1.2 Procedure

The focus groups were broken down into four components, the first component of the focus groups involved an information session where knowledge about the current state of the communities, expected growth, and the purpose of the project was provided to participants. The next component entailed an individual questionnaire that requested information from individuals about their demographic profile, current employment status and profile, ratings of town services and opportunities, and the weaknesses and strengths of those services and opportunities (See Appendix V for complete questionnaire). The third section of the focus group involved a group discussion about four main topics related to the project: 1) “What are some of the positives of the town that are attractive to people and businesses?”, 2) “Are there any services that you think are missing in the town?”, 3) “Are there any types of business that you think would do well in the town? Not including retail.”, and 4) “About 85% of the land is zoned as agriculture or rural, can you think of any creative uses of those areas?”

Each question was reviewed in order for all five groups, and participants were given 5 minutes individually to brainstorm ideas and suggestions, and another 15-30 minutes as a group to share, promote, and build upon those ideas. Participants were provided response booklets to record all of their ideas including ones they may not have wanted to share with the group. Those suggestions were also coded and graded for analysis. The final section of the focus groups involved a debriefing of the focus group, recruitment for the Northern York Region Community Commitment to Action Consortium, and the provision of thank you gift cards for participation.

4.2 Results

The analysis of the questionnaires showed that the average travel time for participants in the focus groups from home to work was 31.2 minutes +/-29.7 minutes. Across each town, East Gwillimbury participants who travel to work spent an average of 37.8 minutes +/- 34.9 minutes getting to work, and those living in Georgina spent an average of 28.9 minutes +/- 27.7 minutes getting to work. In general, the majority of the travel to work was to Georgina. However, a review of the travel patterns revealled that for participants living in East Gwillimbury, they tended to work in East Gwillimbury, and Georgina participants travelled mostly within Georgina for work (see Table 13). As to how they get to work, almost all but three individuals use cars, two participants car pool to work, and one person who travels to Toronto for work uses the train. It should be noted that there are uneven numbers of sample responses for some of the questions because participant responses to the questionnaire were voluntary and dependent on the participant’s exposure or experience towards the specific question. Thus, there were questions which if not applicable to the participant were left blank.

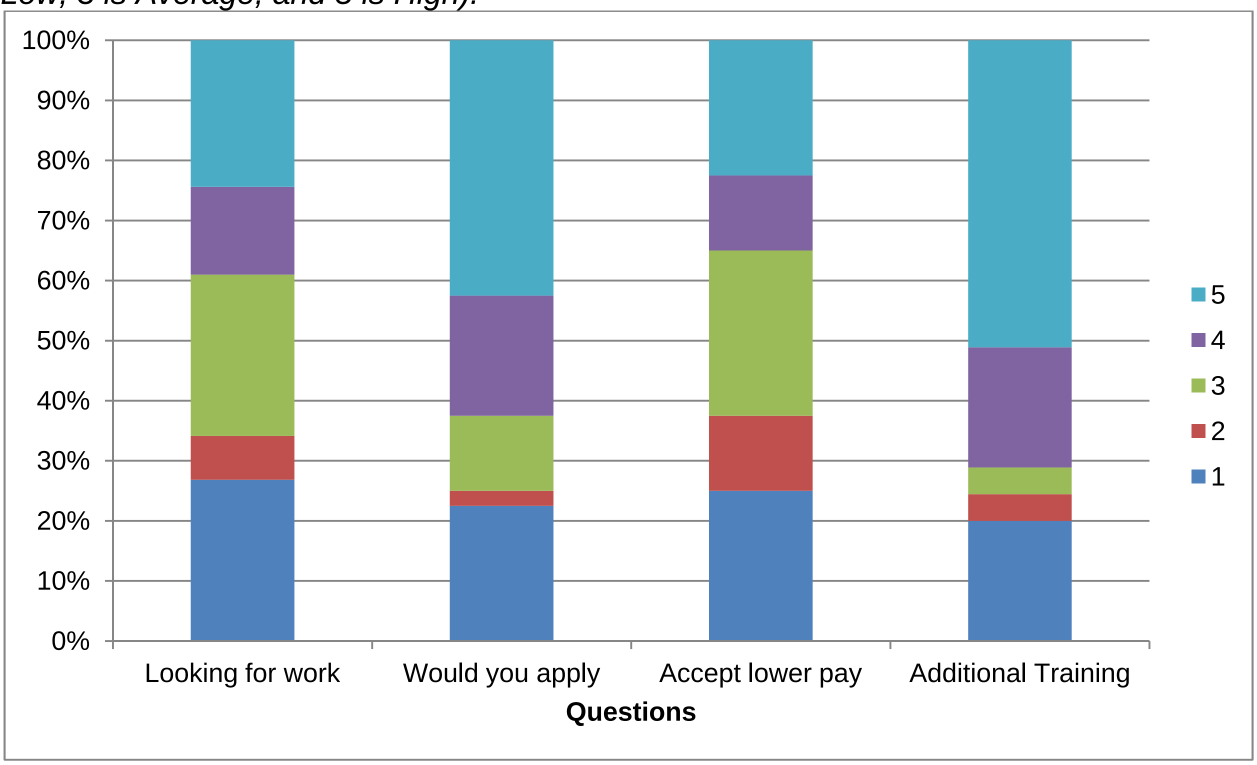
A section of the questionnaire reviewed the individual’s level of interest for employment in their town, and how willing they would be to participate in any opportunities available to them. On these questions, participants used a 5 point Likert Scale. The scale ranged from 1 to 5, where 1 was low, 3 was average, and 5 was high. For the results of the response, see Figure 1. On the question related to actively looking for work, participants were fairly split with not actively looking, sometimes looking, and actively looking. In regards to the question relating to whether they would apply to a new employment opportunity in the their town, more than 60% of participants rated a 4 or 5, indicating a likely or very likely chance they would apply to the opportunity. When participants were asked if they would be willing to accept a lower wage if it meant to work within their town, approximately 35% said they would be willing to accept a lower wage, approximately 30% rated a 3 (medium likelihood), and 35% said it was unlikely or not likely they would accept a lower wage. Whether individuals were willing to participate in additional training for employment opportunities within the town, over 70% of participants responded they were willing or highly willing to take additional training for employment opportunities within their town. Participants were also asked how much of a wage difference they were willing to accept if it meant they could find employment within their town. Although a variety of values were given, the modal value was a 15% difference, meaning participants would be willing to accept an employment opportunity within their town even if the wage was 15% lower than their current employment.

Table 13. *Frequency Distribution of Labour Force Travel Patterns for Focus Group Participants*

	Total		East Gwillimbury		Georgina	
Total	51	100.00%	14	100.00%	37	100.00%
Georgina	20	39.22%	2	14.29%	18	48.65%
Newmarket	9	17.65%	4	28.57%	5	13.51%
East Gwillimbury	7	13.73%	6	42.86%	1	2.70%
Toronto	4	7.84%	1	7.14%	3	8.11%
Aurora	3	5.88%	0	0.00%	3	8.11%
Oshawa	2	3.92%	0	0.00%	2	5.41%
Mississauga	1	1.96%	1	7.14%	0	0.00%
Markham	1	1.96%	0	0.00%	1	2.70%
Montreal	1	1.96%	0	0.00%	1	2.70%
Sudbury	1	1.96%	0	0.00%	1	2.70%
Whitby	1	1.96%	0	0.00%	1	2.70%
Ajax	1	1.96%	0	0.00%	1	2.70%

For questions related to rating potential town weaknesses as a place to work/ do business, several issues seem to stand out to participants (see Figure 2). Issues that participants ranked the town as being weak on were public transportation (Transit), Access to skilled labour (Skilled Workers), Bureaucracy/ restrictive bylaws (Bylaws), Traffic Congestion (Traffic), Government support/ incentives for business (Bus. Support), Hydro Interruptions (Hydro System), Poor/ limited municipal services/ infrastructure (Infrastructure), and local customer base (Customer Base). These questions used the 5 point Likert Scale ranging from 1 to 5, where 1 was very weak, 3 was average, and 5 was very strong. In particular, Transit was rated as very weak by more than 50% of the participants, and weak by another 15% of participants, which accounted for over 65% of the participants who responded. Over 50% of the participants ranked skilled labour availability and business support as either weak or very weak. These are significant issues that need to be addressed by the municipalities and the region. Although it was close, lack of local customer base also ranked fairly high as a weakness of the NYRC, with 45% of the participants rating it as weak or very weak.

Figure 1. *Response Ratings for Questions 12 to 15 on Focus Group Questionnaire (1 is Low, 3 is Average, and 5 is High).*



In contrast, over 40% of participants rated property/ real estate/ housing costs (Housing Cost), rental cost (Rent Cost), cost of doing business (Cost of Bus.), and hydro/ utility cost (Hydro Cost) as strong or very strong.

To ensure reliability in the questionnaire, another set of prospective items were listed to participants and they were asked to rate the Strengths of their town using a 5 point Likert Scale ranging from 1 to 5, where 1 was very weak, 3 was average, and 5 was very strong (see Figure 3).

Overwhelmingly, almost every participant considered their town as a Nice Place to Live. Nearly 70% of the participants rated the question Nice Place to Live as very strong, and 15% rated it as strong. That accounted for approximately 95% of all ratings for that question. Other items that received more than 50% of ratings as strong and very strong were close to home/ easy commute (Commuting), proximity/ good access to Toronto/ GTA (Proximity to GTA), and growth/ good growth potential (Growth Potential). There were also several items that 50% or more of the participants ranked either weak or very weak. They were access to suppliers/ service providers (Access to Suppliers), manufacturing/ high tech industry hub (Manu./ Tech Hub), proximity to other businesses (B2B Proximity), financial incentives (Financial Incentives), and proximity to rail/ air service (Rail/ Air Service). The item related to manufacturing and tech hub received a resounding 85% of weak and very weak ratings. This is consistent with many of the concerns participants raised during the discussion which was about issues of limited or unavailable infrastructure. This limited availability includes soft infrastructure such as high-speed broadband internet access. Several participants reiterated the same fact that almost all businesses now need access to high-speed broadband internet for their organizations, and if they cannot get it here, they will not come to their town. This was highlighted by the question related to access to infrastructure (Infra. Access) which received weak or very weak ratings by 45% of the participants. Another item that received more than 45% of the weak or very weak ratings was low taxes (Low Taxes). Many individuals voiced frustration with their taxes increasing, specifically property taxes and water utilities constantly increasing, but not seeing any significant improvement to their services and to the town.

When reviewing the group discussions, it became apparent that the responses and opinions for participants from East Gwillimbury were different from those who were from Georgina. In an attempt to combine the data, it was clear that trying to combine the information from the two towns would lead to a lot of noise and make it difficult to review the specific needs and opinions of each community. Thus, for the group discussions, participant discussions for each municipality are reviewed separately. During group discussions, participants were encouraged to brainstorm ideas related to the question presented to them (see Appendix VI for a complete listing of items). The ideas were clustered into items for easier discussion. At the end of each question, participants were also asked to pick three items they considered to be the most important from the list, and rank them from 1 to 3, where 1 was most important to 3 being the 3rd most important. This provided useful discussion from participants, and what issues they considered to be the most important to them.

Figure 2. *Response Ratings for Questions 20 to 34 on Focus Group Questionnaire (1 is Very Weak, 3 is Average, and 5 is Very Strong).*

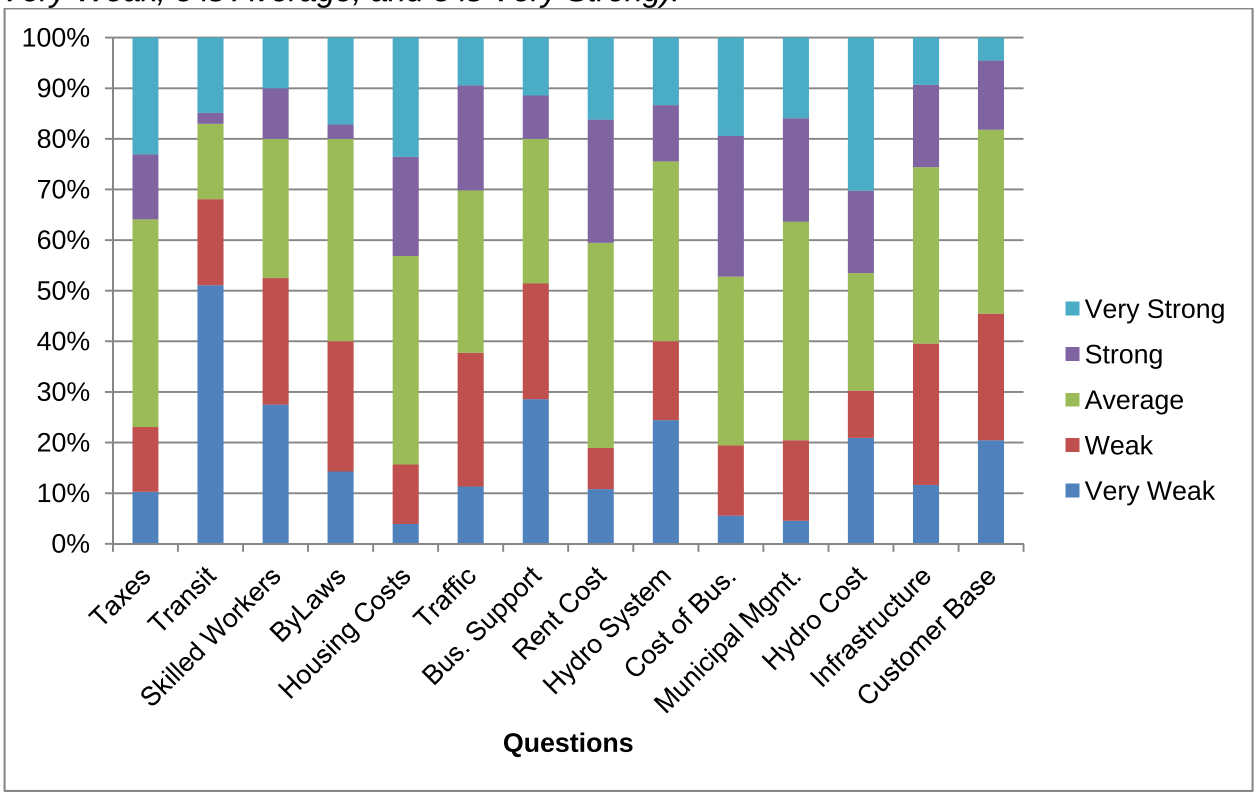
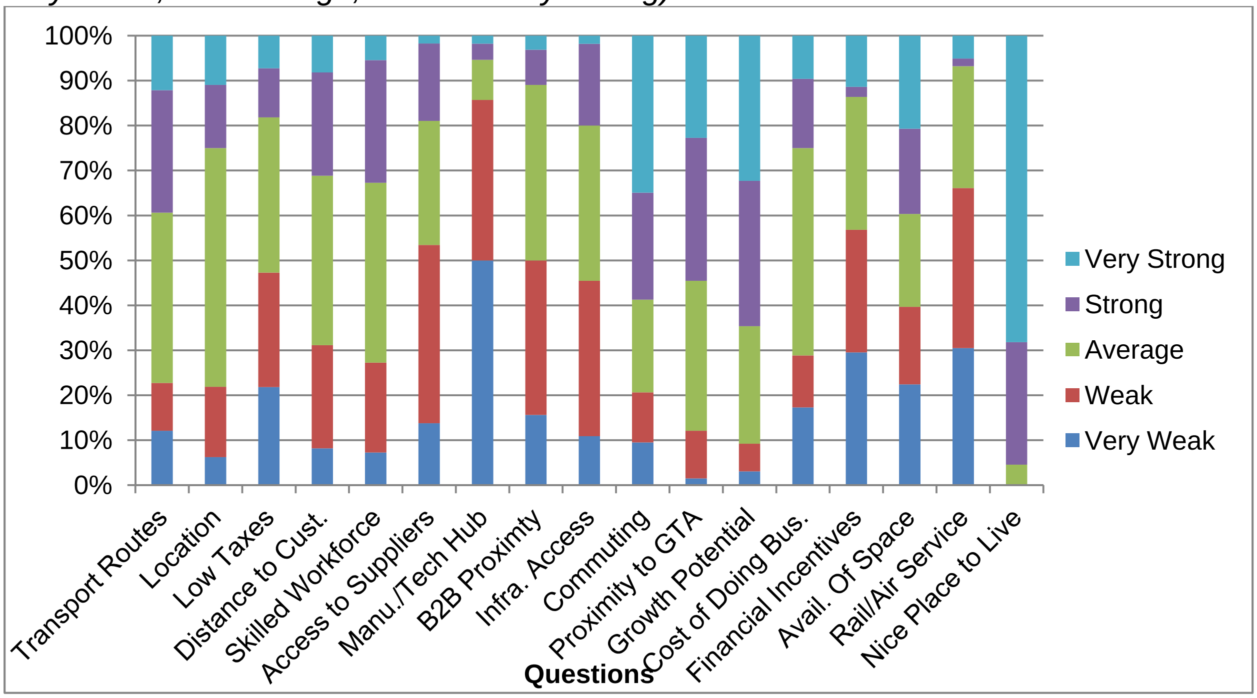


Figure 3. *Response Ratings for Questions 35 to 51 on Focus Group Questionnaire (1 is Very Weak, 3 is Average, and 5 is Very Strong).*



4.2.1 Group Discussion – East Gwillimbury

The first question in group discussions involved indentifying and discussing positives of the town that are attractive to people and businesses. The discussion items and their rankings are presented in Figure 4. Items with a total number of rankings of four or higher were considered significant. These items were then clustered based on common themes. The themes that arose related to green/ rural environment with lots of space (Items 2 & 5), value for money (Item 6), friendly/ welcoming community (Items 4 & 7), and no specific industry niche/ potential for any sector/ clean slate (Items 1 & 3). The idea of a clean slate was the only discussion item that was ranked the most important attraction of the town of East Gwillimbury by at least 4 people. It is important to highlight that participants felt that the town has not been branded as a specific industry sector town, such as Oshawa being known for automotive, or Waterloo for technology. The participants felt that this allows East Gwillimbury the ability to target any industry sector that fits with the towns' vision and its assets.

The second question related to services that participants thought were missing in their town. This question resulted in many suggestions (see Figure 5). The three items that really stood out were issues related to transportation (Item 5), infrastructure (Item 3), and lack of space for industries (Item 2). Issues related to transportation ranked as a priority of services lacking in the Town of East Gwillimbury. Participants agreed that unless an individual has a vehicle, they are very limited in their ability to travel within the town, or to get to transit hubs, such as the East Gwillimbury GO Train station. It becomes particularly hard for younger adults and teenagers who are interested in pursuing a part time employment opportunity, but have no means of travelling to work other than the reliance on others for a drive to their employer. Additionally, at the time of the focus groups, there was no dedicated transportation system to move individuals between the various urban centres in East Gwillimbury. Again, individuals have to rely on their own vehicles, or on a ride from someone else. This highlights transportation as major weakness for the town that needs to be addressed with York Region and the province.

A concern that came up during the discussion of question two, and as a general theme of the focus groups in East Gwillimbury was the continued belief that each of the specific communities in East Gwillimbury still see themselves as separate. For example, individuals from Mount Albert expected services for themselves, and the same was true for Sharon and Holland Landing. Individuals could not understand why all of the current development was occurring at the southern edge of East Gwillimbury, near Newmarket, and not in Mount Albert, or Holland Landing, or Mount Albert. The specific community mentioned directly related to where the participant lived in East Gwillimbury. After explaining to participants that this was the only place of growth available to the town, participants were a bit more understanding and this may be something that needs to be better communicated by the town as developments continue to focus in one location. This can cause the other areas of the town to feel left out and bitter towards the town. It is also important to recognize that the town itself is not fully recognized by some members of the community and more effort needs to be made in unifying the citizens. Otherwise, conflicts may arise in the future which can threaten the general economic development in the town of East Gwillimbury.

Figure 4. *No. of Responses by Rank Order for Discussion Question One Ideas (Rank 1 is most important).*

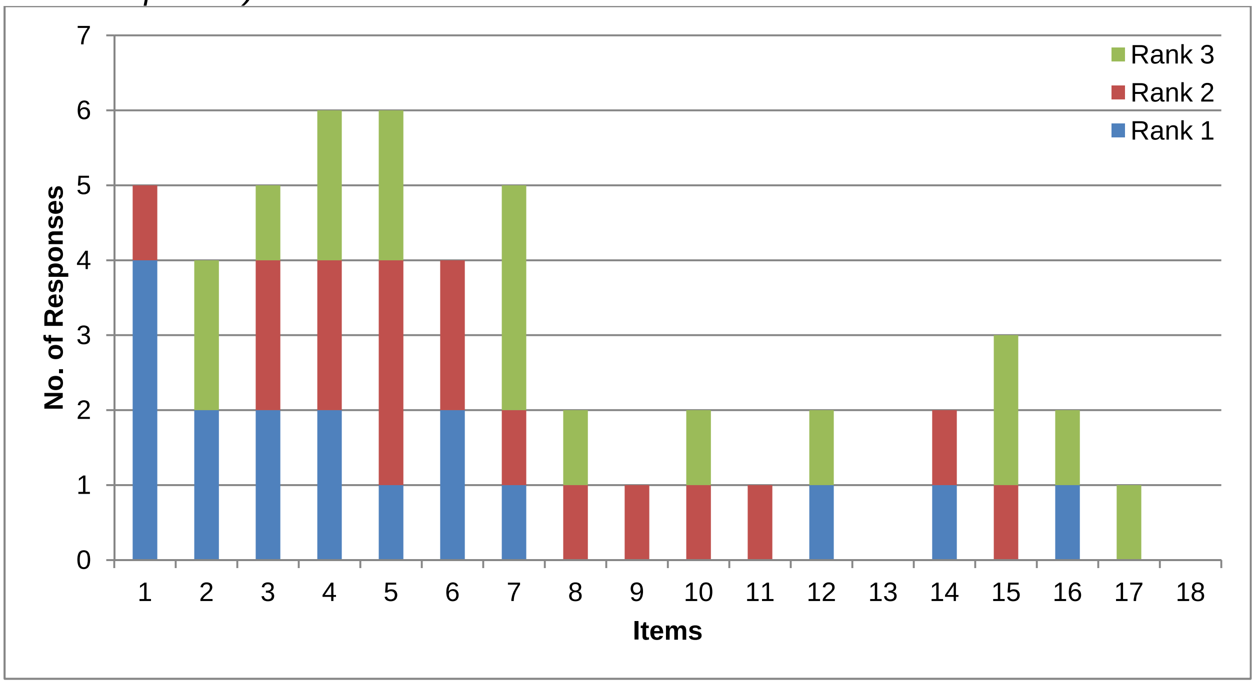
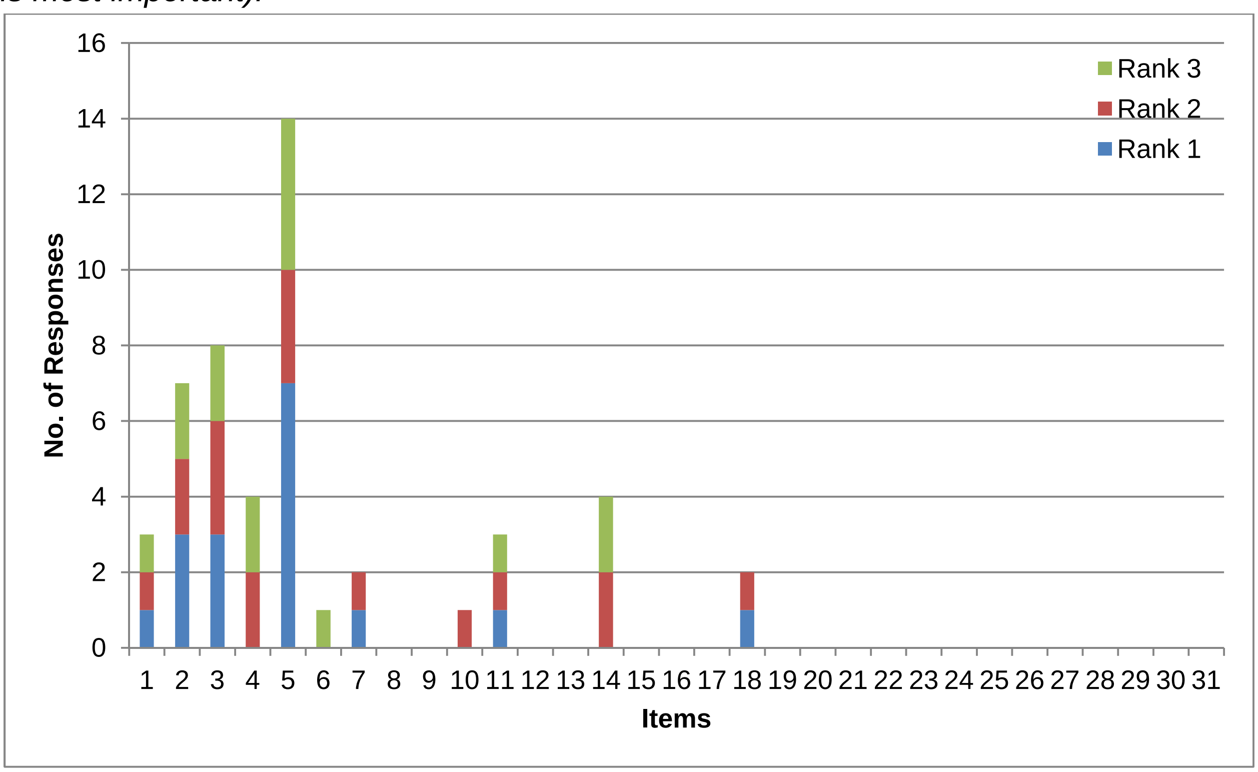


Figure 5. *No. of Responses by Rank Order for Discussion Question Two Ideas (Rank 1 is most important).*



The third question posed to participants related to what types of businesses they thought would do well in the town; excluding retail (see Figure 6). The three industry sectors that were identified by the participants were knowledge based institutions (Item 6), government/ public services institution (Item 7), and health care (Item 9). Many participants were aware that a Queensville site has been set aside for a post secondary institution campus, but they held a lot of skepticism about whether one would ever be built as the idea of a post secondary institution has been presented to citizens for years, and nothing has ever been done. Still, many believe it is important that a post secondary institution is located in East Gwillimbury to retain many of the young adults who are emigrating to other towns/ cities for higher education. This threatens the current workforce as many of these young individuals will likely settle near the post secondary institution they attend rather than return to East Gwillimbury for employment.

The most interesting debate was on what size firms participants wanted to see in their town. Though many agreed that a large firm that employed 500+ employees (Item 1) would be a huge boon to the town, they were sceptical if that was the most economically sound idea. Their argument was towards more medium sized organizations that may not employ as many individuals, but there would be more of them. Their reasoning being that if one large employer failed, it would considerably impact the town, whereas, if a medium sized organization failed or moved, the economic and labour impact on the town would not be as significant. Furthermore, the town could target multiple medium sized firms in multiple industry sectors, so that the likelihood of one industry sector being impacted could be offset by the other industries in the town. However, if the large firms industry collapsed, such as the automotive industry, it could be detrimental not only to them, but also to the other businesses created to support them.

Those who owned small businesses also voiced concern that there is currently not enough support for small businesses. They were aware that there are support services for small businesses at different levels of government, but they felt that there was no single place in their local government that they could find this information, and that it was up to the individual business owner to source out this information. They would prefer to see a unified service centre in their town that could accommodate all their needs and requirements. In other words, they wanted some kind of small business enterprise centre accessibility that does not require driving to Newmarket.

Since a large swath of the lands in East Gwillimbury are zoned agricultural and rural, these lands are either used for farming, “junk yards”, personal property, or personal property with on site business. Farmers in particular have shown interest in potential secondary or ancillary businesses on their properties that could supplement their primary revenue from farming. The question posed to participants was to generate ideas that could be presented to farmers who have shown interest in ideas for a secondary business.

Participants considered solar farms (Item 11) to provide the most viable long term opportunity (see Figure 7). They also considered ecotourism (Item 5) to be a good potential as demonstrated by Brooke’s Farms which has been a very profitable farm/ tourism centre where families can come and enjoy outdoor activities and shows, such as pig races, and pumpkin cannon launches. Other ideas that participants considered promising were education centres/ tours (Item 3), selling locally or on-site to consumers (Item 8), and organic farming (Item 9). As pointed out by several of the participants, the price difference in grocery stores between regular and organically grown products made it an idea that farmers should seriously consider it as an opportunity. When explained about the long term process required to gain organic producer status, participants agreed that it should be the town that should be helping its local producers through the “paperwork and red tape.” The current organic producer licensing in Ontario requires nearly three years of verification by the Ontario Government. This will then allow farmers to distribute their products outside of Ontario. However, this lengthy licensing process is not required to sell within the province. Farmers can sell their products locally without a completed verification process. Farmers would, however, have to provide verification to the local purchaser that their product is organic.

Figure 6. *No. of Responses by Rank Order for Discussion Question Three Ideas (Rank 1 is most important).*

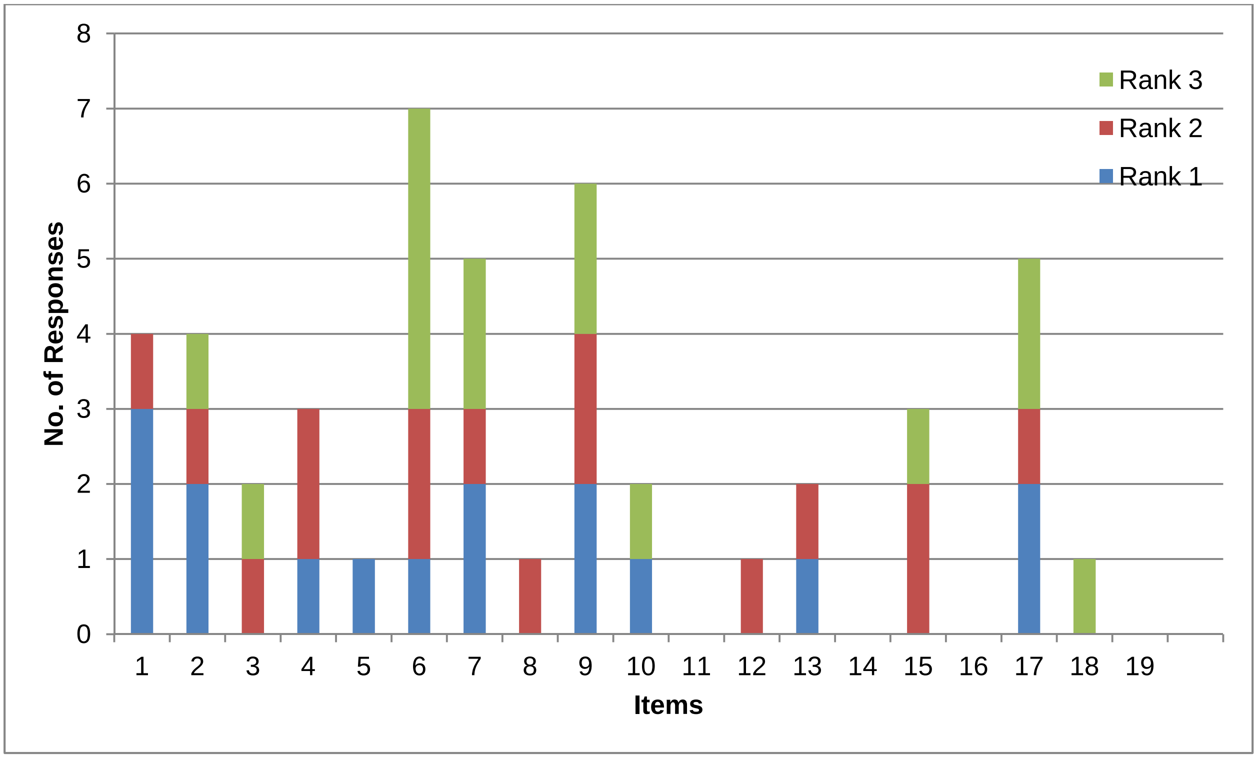
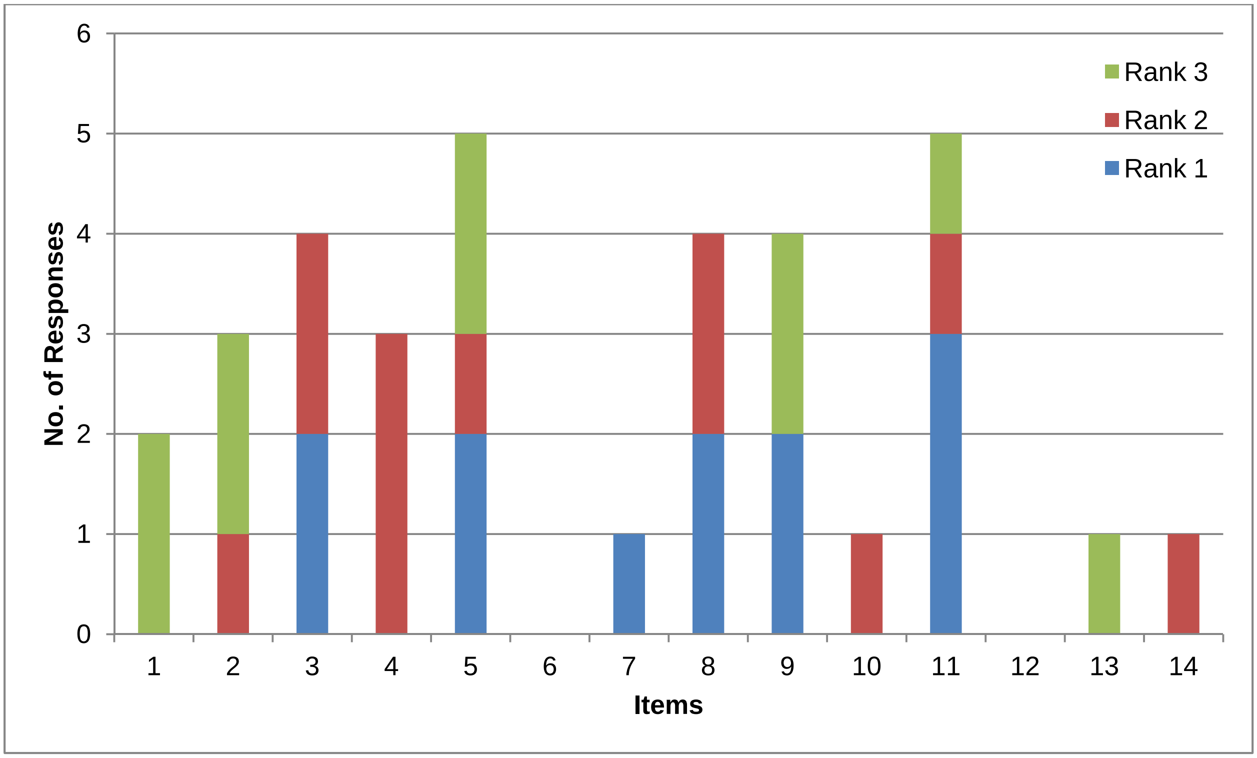


Figure 7. *No. of Responses by Rank Order for Discussion Question Four Ideas (Rank 1 is most important).*



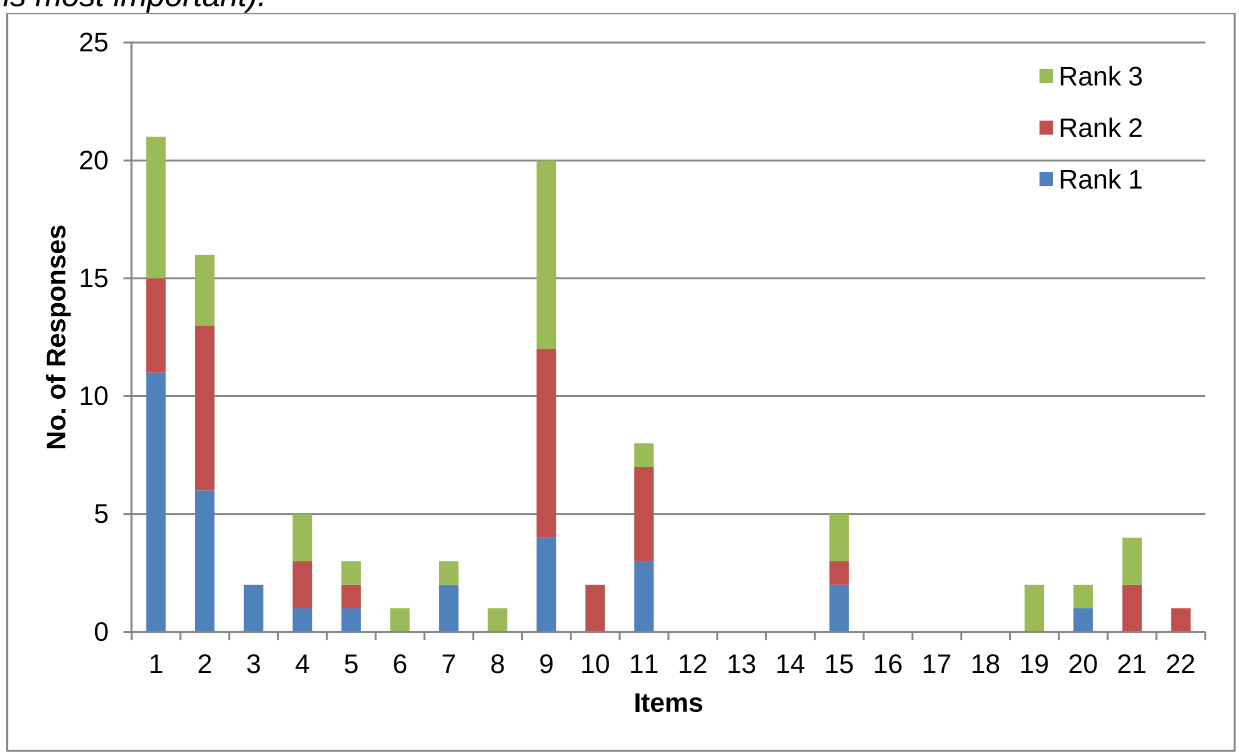
4.2.2 Group Discussion - Georgina

The larger number of participants in the Georgina's focus groups meant that more ideas and suggestions were generated. While an effort was made to condense them, there was still a larger pool of items offered than from the East Gwillimbury focus groups. The same questions that were presented to the focus groups in East Gwillimbury were also presented to participants in the Georgina focus groups.

As to the first question about positives of the town that would attract businesses and people to the town, overwhelmingly, participants considered the multitude of attractions available within Georgina (Item 1) as the best aspect of the town (see Figure 8). Most of the attractions they listed centered around Lake Simcoe, and other natural locales that are available to individuals who visit the town. Although, the Recreation Outdoor Centre (ROC), a multi-million dollar outdoor facility, was not yet completed at the time of the focus groups, many do agree that the facilities will increase seasonal visitors to the town. The main attraction to the town, as noted by many, was "...ice fishing!" The general feeling by participants was that the town does not fully utilize ice fishing's draw to promote itself. Also, there was consensus that the town's proximity to Toronto (Item 9), and other major census metropolitan areas, such as Newmarket, Barrie, Markham, Richmond Hill, and Aurora make it an ideal location for any business, especially once Highway 404 will be extended to the southern boundary of Georgina by December 2012. There was one individual who pointed out that relocation to Georgina is in the benefit of any organization for the following reasons: the cheaper cost of land, for those commuting to Georgina for work, to drive "...is against traffic as they are entering the town in the morning, and leaving the town in the evening."

Finally, the majority of participants also considered cheaper housing costs (Item 2) as another reason that Georgina is attractive to people and businesses. One individual said "... I moved to Georgina because it was way cheaper to buy a house here and drive to Markham where houses are three times more expensive ..." Several others agreed with that statement.

Figure 8. *No. of Responses by Rank Order for Discussion Question One Ideas (Rank 1 is most important).*



In response to question two, the top two suggestions made by participants that really considered shortcomings of Georgina were health services/ centre (Item 2) and transportation (Item 1; see Figure 9). Similar to East Gwillimbury, participants in Georgina felt there is no unified transit system. “If you don’t have a car, you ain’t going anywhere fast...” Those who specifically live Keswick were not happy that the town has added so many new housing developments but has not provided any form of public transit. Similar to East Gwillimbury, Georgina is made up of several isolated communities, and participants considered no inter-community transportation system a weakness as well, especially during hours when children need to get to school, or when adults need to get to work. The schedule of the current transit system, at the time of the focus groups, was not properly aligned with the needs of the community.

The other weakness pointed out by participants was the lack of a nearby health centre. The town of nearly 47,000 people is currently serviced by South Lake Regional Health Centre located on the southern end of Newmarket. As one individual put it, “...if I have an emergency, it will take over 30 minutes for me to get to the hospital, and god forbid there is traffic...” Their concerns were exacerbated with the statistics of growth provided to them from York Region which suggested that the town will double in size with no health care facilities to service those individuals.

Though it did not rank well, an item that did receive a lot of attention as a weakness by participants in all three focus groups was tourism (Item 21). Participants complained that not enough is done to highlight the town and its attractions, such as “...the Briars”, “...nature hikes and walking paths..” There was also concern that there are currently no full featured accommodation facilities to provide overnight stays in the town. Thus, all the tourism is day visitors which impacts local tourism trades and services, and traffic congestion in the town during seasonal summer months.

The two industry sectors that received overwhelming support by participants were manufacturing (Item 4) and public sector/ government opportunities (Item 10; see Figure 10). There was also a request for a health care centre (Item 9) which included a specialization, such as a long term care facility. The current population in Georgina and East Gwillimbury does warrant a business and health case study into an opportunity for a small to medium sized health centre/ hospital.

The participants' responses to question four were very interesting. There was diversity in the responses provided, and some, though did not receive a lot of support, are still interesting and valid ideas that should be studied further (see Figure 11). However, the majority ranked training facilities/ education centre (Item 1) as the best suggestion for a secondary revenue source that could be provided by farmers and rural land owners. Some of the other interesting ideas were community gardens (Item 4), on-site processing facilities (Item 11), and a cultural experience centre (Item 15). There was also the suggestion of farm land being used by research centres, like universities, to conduct research and develop new technological advances in farming (Item 14).

Figure 9. *No. of Responses by Rank Order for Discussion Question Two Ideas (Rank 1 is most important).*

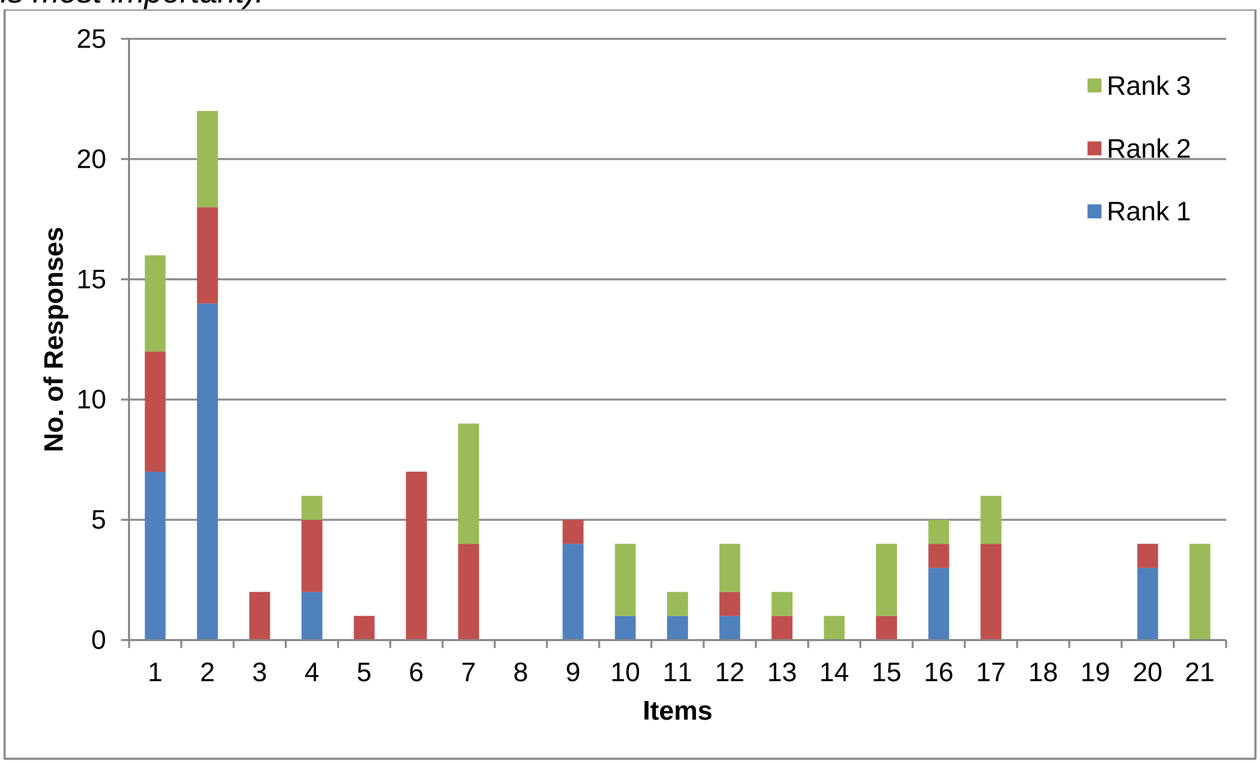


Figure 10. *No. of Responses by Rank Order for Discussion Question Three Ideas (Rank 1 is most important).*

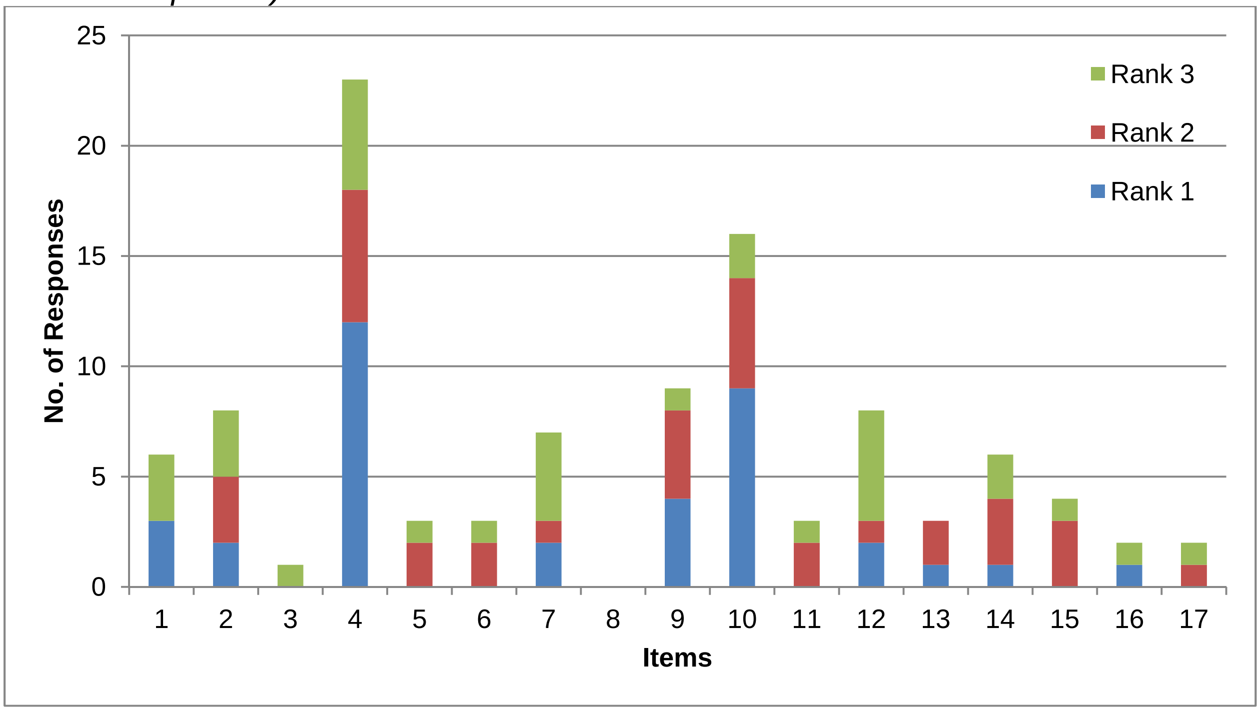
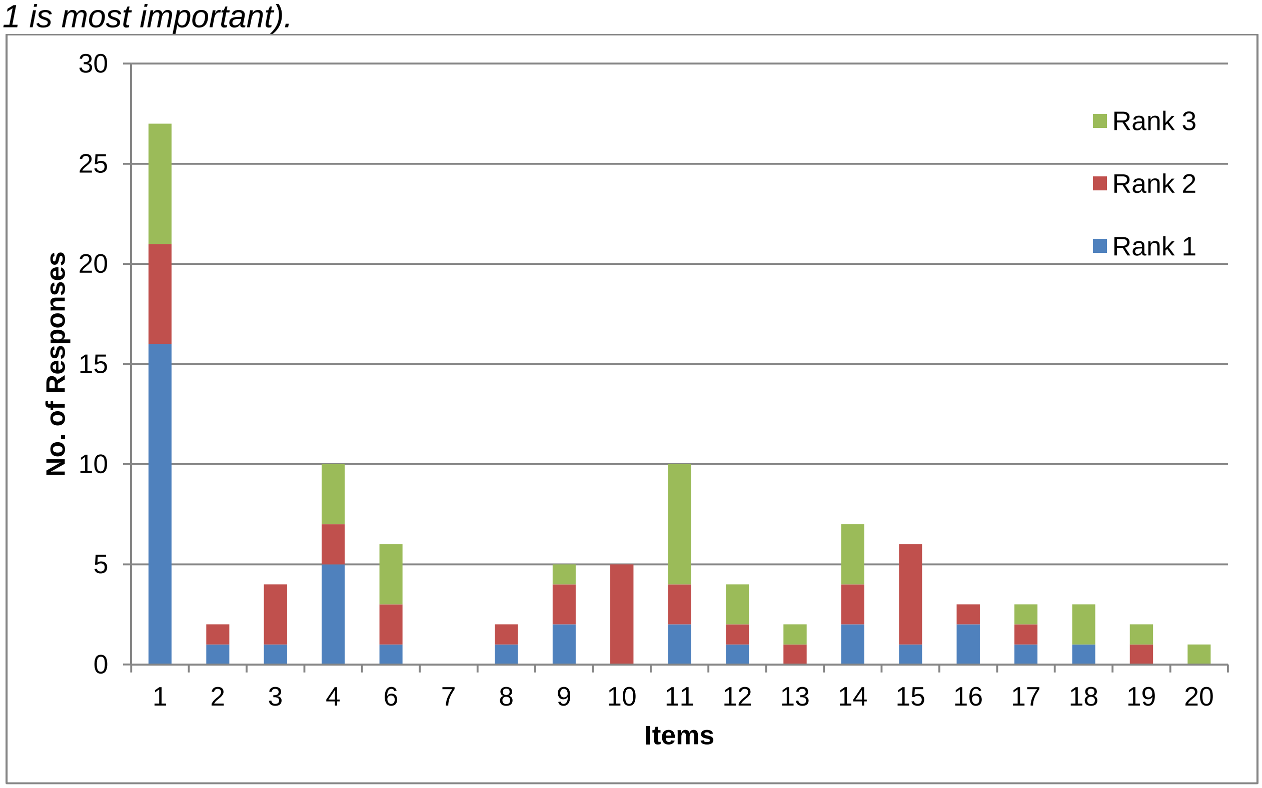


Figure 11. *No. of Responses by Rank Order for Discussion Question Four Ideas (Rank 1 is most important).*



5 SWOT Analysis

The SWOT analysis provides an opportunity to examine the internal strengths and weaknesses of the NYRC. It also examines the opportunities presented to NYRC as well as potential threats. The analysis is based on factors observed, reported by steering committee members, reviewed in policy documents, through gap analyses, best practices by other communities, and inputs from focus groups. The purpose of the SWOT is to provide NYRC with the tools it needs to better understand what marketable strengths it has to attract business and more specifically, high value employment opportunities, while minimizing its weaknesses and threats that may prevent it from obtaining new employment opportunities or losing the ones it currently has available.

5.1 Strengths

The strengths listed below were selected because they are characteristics of the towns that if taken advantage could lead directly to new employment opportunities, or indirectly through new economic developments that would bring new businesses or support and expand current ones.

- NYRC's strengths are plentiful, and not yet fully utilized to generate the expected growth in economic prosperity and employment opportunity. The largest asset to the Northern York region is its value to organizations that are interested in a ready to go workforce that requires little training, little expense, and great value. The current localization of the workforce can be broken down into several marketable groups. Specifically, the largest group of high value employable staff that live in the northern York region are in the health industry. The workforce survey revealed that more than 15% of those that had been queried were health industry workers. Also, the average commuter from NYRC who was queried had a high school to college diploma. The large healthcare workforce in NYRC and their level of education makes the area very marketable to non high technology industries.

- A proportion of the workforce indicated they held management or senior management level positions at the organizations that they worked. Individuals at these levels of employment can have influence in their organizations decision making process, such as investment of resources and opportunities into communities like those of NYRC.

- Another strength of NYRC is the general population growth that is expected by York Region. This growth will mean further construction in the area, increases in infrastructure, and a larger workforce that will be providing a solid tax base for the town. The population in itself will increase the value of the area and land, which will be enticing to property developers and business developers. The developments will lead to new employment opportunities for trades, as well as the specific industries that may migrate or start in NYRC to take advantage of the population growth.

- One aspect of NYRC which will encourage growth is the general cost of living and housing. As the southern communities of York Region reach their limits for buildable land, the value of housing will continue to increase. Thus, families looking for value will look further north, and NYRC provides some of the best value. A comparison of property prices between Markham and Richmond Hill versus East Gwillimbury and Georgina found equivalent properties to be two to five times in price. This will increase the value of NYRC to businesses to migrate employment opportunities to the area as the influx of families will mean an increase in the available skilled workforce to organizations.

- Price comparisons of food, products and services are fairly consistent between East Gwillimbury, Georgina, Newmarket, Markham, and Georgina. However, East Gwillimbury and Georgina have an advantage in lower fuel costs. Additionally, for families there are many benefits for living in East Gwillimbury or Georgina. One example can be found in families with very young children requiring childcare, day care and home care. The cost of such services in East Gwillimbury and Georgina is at least half the cost of similar services in Newmarket, Markham and Toronto. Furthermore, many of the recreational activities offered through the municipalities cost half as much as those similar programs in Newmarket, Markham or Toronto. Thus, NYRC's strength is that it provides a lot of value to families. For businesses that have a social commitment to their employees, such as offering daycare services or local recreational giveaways, but are conscious of the additional overhead will find these savings invaluable.

- NYRC also provides families with a more relaxed lifestyle. One where individuals can enjoy a countryside lifestyle with all the big city amenities. As one individual in Georgina put it "...is a nice place to live, and raise a family." There was great concurrence by participants in both the Georgina and East Gwillimbury focus groups. In fact, "nice place to live" in the focus group questionnaire was ranked very high by participants. The "nice place to live" mentality is relevant for businesses as well, which want to provide a culture that can make their workforce more efficient and are willing to relocate their business and staffing to that location.

- The NYRC is the most southerly contact point to Lake Simcoe, one of the largest seasonal tourist attractions in Ontario. Many day trippers travel to Lake Simcoe to visit and spend a day at the beach or on the lake in both summer and winter. Georgina is even considered as the ice fishing capital, where individuals from around North America attend their annual ice fishing championships on Lake Simcoe. Combined with the natural trails and parks available in NYRC, makes outdoor recreation a strength of the NYRC. Additionally, the Recreation Outdoor Campus, which is a mega outdoor project that is being completed, will further enhance the area's strength for outdoor recreation. Combined with the extensive bicycle and hiking paths and suddenly there is a lot that NYRC offers to visitors who are interested in outdoor activities.

- In regards to nature and green space, Georgina and East Gwillimbury have a large amount of protected greenbelt. Thus, large proportions of the communities will remain zoned as rural or agricultural. The province government's Buy Ontario initiative makes having agricultural property in the municipality valuable in the long term, especially when considering there are more profitable opportunities for farmers, such as organic farming. In addition, direct access to local producers reduces cost of products to consumers, restaurants, and grocery stores. There are many possibilities for high valued employment opportunities (such as local wholesale businesses) that will be needed to connect these agricultural products to those who will use them.

- The Buy Ontario initiatives require access to larger markets for organizations in NYRC to be successful. Luckily, the NYRC has close proximity to Canada's largest markets. Specifically, the southern boundary of East Gwillimbury borders Newmarket, a city with a middle to high household family income. Furthermore, from Highway 404's Green Lane on-ramp to the Steeles Avenue off-ramp (boundary of Toronto) is an average time travel of 25 minutes. This close proximity to Canada's largest city and business market is a major strength of the region. It should be noted that many populous towns and cities are also situated in between NYRC and Toronto, like Markham, Richmond Hill, and Aurora, which means the time to travel to them is even shorter. Businesses that market their services to these larger markers are concerned with access to these larger target markets, and NYRC's close proximity does make it considerably appealing to such businesses and their staff.

- One strength for the region that does not receive much attention is its location and access to the major arterial highways that feed not only southern Ontario, but northern Ontario, and the rest of Canada. Specifically, NYRC has direct access to highway 404 (Hwy 404) which feeds the downtown core of Toronto, and connects to the Queen Elizabeth Way (QEW) that feeds directly to the Canada/ USA border. The Hwy 404, which currently is being extended to Georgina and is slated for completion by December of 2012, will terminate at the southern end of Georgina's urban centre and only a few minutes from the proposed Keswick Business Park. The Hwy 404 bisects East Gwillimbury and passes nearby undeveloped commercial/ industrial land. For organizations requiring access to highway infrastructure, the access of the highway near an undeveloped business park is a major strength of the towns. The other major highway that feeds Toronto from north to south is highway 400 (Hwy 400). This highway travels northward to cities like Barrie. The most western boundary of East Gwillimbury is only 15 minute from Hwy 400. On the eastern side of NYRC, from Georgina's boundary it is only a 5 minute drive to Highway 12, a Trans-Canada Highway that provides access to the rest of the province and country. For industries with products or services that are distributed nationally, the NYRC is a great location.

- In addition to roadways, there are some public transit options available to the population. Currently, York Region Transit/ VIVA offers transit routes through Georgina and East Gwillimbury. GO transit has GO bus services that route through NYRC. There is also a GO train station within East Gwillimbury which provides direct access to downtown Toronto's Union Station, and all the major towns and cities along the way to Toronto.

- In terms of business needs, South Lake Community Futures Development Corporation (CFDC), a not-for-profit community based organization providing a variety of small business and community economic development services is located within Keswick, the urban centre of Georgina. The South Lake CFDC operates under a contract with the Federal Economic Development Agency of Southern Ontario (FedDev Ontario), and provides a variety of services to communities and businesses. This includes business loans, counselling, education, resources, and assistance to businesses and communities. South Lake CFDC provides a great starting point for new businesses and established businesses when it comes to getting useful information and resources. For example, South Lake CFDC can provide funding opportunities to organizations that want to hire and train new employees or to update their IT infrastructure.

5.2 Weaknesses

The weaknesses listed below were selected because they were considered less desirable attributes of the towns that could hurt the creation of new employment opportunities by impacting new economic developments.

- As rural communities that are to expect large population growth, East Gwillimbury and Georgina are going to have some apparent and not so apparent weaknesses which may hinder economic growth. One weakness that is apparent is the lack of industrial/ commercial buildings. This was highlighted by business owners in both Georgina and East Gwillimbury, when the discussion of business prospecting was introduced. At the time of this study, there were very limited options for a medium to large business that would like to enter into NYRC. The lands allocated for business park development are privately owned, and no work had started at the sites at the time of writing this report, especially in Georgina. Any large scale organization trying to place roots in NYRC will have to wait until all studies and assessments are done, permits are obtained, infrastructure is in place, and actual site development begins. Note: some of the studies are currently in progress or have been completed by the towns.

- Although the infrastructure that is necessary for the business parks is slowly being addressed, there are still areas were infrastructure has not been allocated. Private developers will not be encouraged to build any commercial/ industrial buildings without access to available municipal infrastructure. This further strains attracting businesses as developers will not likely accept a tenant if they cannot promise a potential site that their clients can lease or purchase. At the focus groups, concern was raised by participants who owned businesses about the potential of inadequate hard infrastructure, such as water and sewage that could not only impact the new developments, but could also impact current businesses.

- A comparison of York Region's vision of the future and its official plan versus the municipal NYRC plans reveals a large gap which displays a major weakness of NYRC when competing with respective southern York Region municipalities. Specifically, NYRC currently has inadequate soft infrastructure that is necessary for businesses. One of the major visions of York Region is to be the region of choice for the technology industry sector. While this is true for the more southern communities in York Region, there is a current inadequacy of soft infrastructure for East Gwillimbury and Georgina. The telecommunications gap analysis study by the Town of East Gwillimbury and funded by South Lake CFDC was completed in June 2010 to begin addressing this issue in the town. Services such as high-speed broadband internet service, competitive services such as Bell and Rogers, fibre optic pipelines, and a variety of other technology based needs are not widely available. Granted that soft infrastructure is slowly improving, there is still a long way to go. Many of the businesses that were queried that are currently near or outside the urban centres of NYRC are generally serviced by South Simcoe Community Broadband (SSCB) or through Internet Lake Simcoe (ILS). Tested speeds from reputable internet speed testing sites, like broadbandreports.com, show that the speeds offered during office hours by SSCB or ILS is not considered broadband. The same is true for Bellnet's services, whose speeds fluctuate with the hours of the day. Services like Rogers and Bell are proliferating in the area, but only within certain urbanized zones, such as new housing developments. Most companies nowadays are just as interested in soft infrastructure as hard infrastructure, and markets which cannot provide them are put in a disadvantage. One main reason is that many new companies use their internet for a variety of things, ranging from hosting their own websites and email servers to using cost effective voice over IP (VoIP) telephone services offered by companies like Cisco. These services require high-speed broadband and if a community cannot offer them, then a prospective business will look elsewhere. In doing so, they also take the employment opportunities with them.

- Another weakness is transportation alternatives currently offered to residents. From reviews of the Region’s official rural transit plans, the provincial transit plans, and the municipal transit network, there is a major limitation of transit for NYRC, specifically public transit. When considering the growth expected in the area. Current routes of VIVA (regional York Region transit) and GO Transit only service a very small population of the two municipalities. The current transit routes service only a few key locations within Georgina and East Gwillimbury, and only along major roads. There is an inadequacy of transit routes in residential areas, to public areas, and major retail/ commercial/ industrial locations. Furthermore, there is limited intra-municipal transit between the various communities, such as between Mount Albert and Holland Landing in East Gwillimbury. This in turn impacts congestion and traffic as many rely on a vehicle to travel to locations within the towns and to other locations outside them. Although this is a regional and provincial issue, the municipalities advocating for stronger transit services is limited, often requiring town citizen input on annual transit route changes.

- The use of knowledge is imperative in private sector decision making and the same is true for public administration. The limited information about ones current business performance, operations, logistics, demographics, and economics can have a detrimental impact on effective judgements. When requested for a portfolio of information that normally is presented to prospective businesses, sparse information was provided by the towns. At present, the municipalities do not maintain current information about transportation comparisons to other municipalities, detailed population profiles even from 2006 that would include education and labour force, top employers, wages, or tax rates in their prospective business profile. These pieces of information are considered relevant aspects of a community profile and are need by a business to decide which town offers the best value. Some of the above mentioned information is located on the town’s websites, but they do not seem organized in a meaningful way, and require an individual to do some digging.

- More and more organizations are looking at not just investing in a location, but in a community. Thus, having a sense of community is important when marketing a town. The feedback that was gathered in the focus groups shows two towns whose populations still see themselves as individual communities. Some do not recognize Georgina or East Gwillimbury, but rather just their own small community. This fractured view by the citizens will impact any large business development projects.

- One demographic in the towns that are not fully utilized by the towns is agriculture. Information about agriculture from the towns is little, with not much detail. At the time, East Gwillimbury had started collecting information about farmers, but it was not complete. As an industry, agriculture in NYRC is substantial, and the level of information related to it is not equivalent to what is expected. When one considers that the province is set on promoting healthy living and eating, and Buy Ontario initiatives, the towns should have more details about their agricultural inventory and how to leverage the local farming community to promote itself and its agricultural capacity to surrounding towns and cities.

- In terms of business support services and help, there is a perception of insufficient support for the current businesses in the towns. In NYRC, support services can be accessed through the South Lake CFDC, Georgina Economic Development fund, events held by York Small Business Enterprise Centre (YSBEC) and the six Northern York Region (N6) municipalities conference, and limited support services offered by the economic development departments of the municipalities. Although the above services and supports are available, in comparison to other municipalities reviewed, they are not seen as sufficient for growing municipalities like East Gwillimbury and Georgina. In addition, if an organization is interested in NYRC, there is no single unified source within the area where one can obtain municipal, regional, provincial, and federal information about services and products that are offered to them. This is important for start-up businesses or entrepreneurs who do not have the tools or the resources to find all the various pieces of information, support services available to them on their own. Currently, South Lake CFDC is able to provide some of this information, but they may not be able to provide all of the resources that one could find at the York Small Business Enterprise Centre in Newmarket such as the York Regions Export program, or potential research & development funds and grants. At minimum, more N6 and YSBEC events and workshops in East Gwillimbury and Georgina in comparison to what is currently being offered would be beneficial for the municipalities.

- The towns do not have a dedicated section of their websites for small businesses, or entrepreneurs. Nearly 98% of organizations in Canada are small businesses, and better information is needed for them. There is also a lack of centralized information about self employment, and the resources that are needed for it.

- One of the common themes that arose in the focus groups was “red tape,” especially when dealing with planning and permits. This was true for Georgina and East Gwillimbury. This will slow down new business development when property developers are being hindered at building on employable lands.

- A consistent trend in the focus groups from younger adults was the necessity to emigrate “...to places that can give me the education and jobs I need, because there is none of that here...” The York Region Official Plan highlights the need to support young adults in their education and entrepreneurial endeavours. Though some services are already in place, such as trades training through GTTI, higher or post secondary education is lacking. Also difficult to find were services and information geared specifically to young entrepreneurs or individuals who want to start a business or have started a business but do not have the skill sets to manage them. Support for young adults could lead to new businesses that could provide great employment opportunities.

- York Region has also identified “newcomers” as different ethnic groups or individuals who have recently migrated into the area from outside of the York Region. The current cultural or diversity plans in place by the towns to highlight or manage the concerns of such diverse groups migrating into NYRC need to be reviewed as the towns prepare to embrace greater diversity. The need for better cultural and ethnically diverse programs will become obvious. This migration can already be seen in the southern housing development in East Gwillimbury that border Newmarket. An example of potential programs are the “newcomers” seminars offered by the City of Toronto through the Toronto Public Library that teach individuals and families about services and tools offered by the city, and how to integrate into the local economy and community. They also provide workshops and classes on language, and beginner skills training such as typing and using word processing programs.

- A review of Georgina and East Gwillimbury's development charges (DC; BMA Municipality Study – 2010) for non-residential commercial and non-residential industrial land development to be above the GTA average. While for the GTA, the non-residential commercial DC average was $20.63 per square foot (sq. ft.) and the non-residential industrial DC was $11.94 per sq. ft., East Gwillimbury charges were $5.73 per sq. ft. more for commercial, and 3.12 per sq. ft. more for industrial. Georgina's rates were lower, but it still was $4.34 per sq. ft. more for commercial and $1.73 per sq. ft. more for industrial. Comparatively, East Gwillimbury was charging more per square foot than Aurora and Newmarket for commercial and industrial development, and Georgina was charging more than Milton, and nearly the same as Vaughan. It is understood that East Gwillimbury and Georgina may have higher costs because there is more infrastructure development than more southern municipalities. However, these higher charges could discourage the decision making of organizations to select East Gwillimbury or Georgina when they compare the cost for development of a site with a large footprint in different municipalities.

- While trying to determine the current economic and business development in NYRC, it was apparent that there are no proper performance measurements in place to tell municipal staff, citizens, and businesses of the success of the town in business development and retention. Though there is work on creating a comprehensive listing of current property availabilities by Georgina and an available vacant employment land inventory by East Gwillimbury, there is no information about current occupancy rates, no listing of agriculture, no measure of marketing success, or measure of programs and services. Not being able to measure the performance of economic development will make it difficult to demonstrate to large corporations why they should locate within NYRC, and to convince municipal councils as to why investment into business and economic development is necessary.

- Due to limited infrastructure and rapid growth, the NYRC is challenged by having to build its infrastructure as the towns expand. The building of new roads, sewers, water, electricity and other resources can be taxing, and without a non-residential tax base, residents are forced to pick up the bulk of the cost. This will be reflected in higher property taxes, water and sewage rates, and utility charges.

5.3 Opportunities

The opportunities listed below are trends or patterns that are in favour of the NYRC, and provide it with an advantage in comparison to other municipalities. An aspect of the opportunities is to build on the strengths or relieving the weaknesses listed in the above sections. These are ideas that would provide NYRC with the best potential for increasing economic development with the end goal being the creation of new employment opportunities.

- The best opportunity available to Georgina and East Gwillimbury, as stated by a focus group participant was that the municipalities are a "...blank slate..." This is considered an opportunity because it allows the towns to discover their strengths and use them to brand their images. Rebranding is an expensive prospect, so not having to do that in the current economic environment means cost savings that can be directed towards future marketing campaigns. The brand is an important step towards generating economic development. For example, the City of Waterloo has branded itself as the innovation and technology centre of Ontario, and many high technology businesses either start their or move there, this in turn means the high value employment opportunities those business provide also go to Waterloo.

- The current study builds on the Statistics Canada Census community profile that highlights the current workforce, their skills, and abilities. The NYRC now have the opportunity to take advantage of this information and attract businesses that would have a need to employ an available workforce. The industry sectors that have a defined high value workforce presence in NYRC are health care/ social assistance, professional/ scientific/ technical services, and public administration. This is particularly relevant in the context of the Local Labour Market Update, which found that health care in York Region has seen the fastest growth in recent years in comparison to other industry sectors (Local Labour Market Update, 2011). A focus on this specific area could provide potential for employers to migrate to the area. Georgina and East Gwillimbury have the opportunity to coordinate efforts and attract businesses in these sectors knowing that they have the readily available workforce. This information, in conjunction with a detailed community profile, will be very useful in trade shows, presentations, electronic media, and other forms of marketing for the NYRC. Bringing businesses that are in the same industry sector as the available workforce will mean immediate available high value employment opportunities for individuals that reside in NYRC.

- The future increase in the population of NYRC, Newmarket, and surrounding areas will put a great strain on the South Lake Regional Health Centre. There is a growing potential for a smaller health care centre or hospital to service East Gwillimbury and Georgina as the population increases and serviceable rates increase beyond regional and provincial standards. This provides NYRC the opportunity to carry out a long term feasibility and planning study to present to South Lake Regional Health Centre and the Ministry of Health for potential opportunities. NYRC already has the available workforce, and this would provide the high value employment opportunities for those skilled individuals.

- Part of the attraction to East Gwillimbury and Georgina is the abundance of land available for non-residential development. This provides a large employer the opportunity to develop a complex or building that suit their needs. Similar examples include Philips Electronics Ltd. Canadian Corporate headquarters in Vaughan and Honda Canada Distribution Centre in Markham. The proper marketing and incentives could see potential interest from large high value employers looking for space which is not available further south in the Region or GTA. These large employers bring with them a substantial number of high value employment opportunities.

- Marketing and promoting the NYRC can be an expensive venture, especially when attempting to influence large international organizations. The “no walls” mentality of the NYRC bodes well as it will give it the opportunity to work with other municipalities, and other levels of government to generate leads and opportunities. Case in point, the Town of Innisfil's Economic Development Department was very open to information sharing, and a potential partnership with Georgina and East Gwillimbury. As the network of cooperation increases, so do the available resources and assets that can be used to market NYRC to potential interested organizations and the employment opportunities they could provide to the area.

- The opportunity for cooperation should not be limited to the public sector. The potential for NYRC increases with improving cooperation with private sector organizations that can provide opportunities that otherwise may not be available to the NYRC. For example, the Milton Education Village includes an incubation centre to help foster private sector research and development. This has helped attract new businesses into the business park, and has helped expedite the development of their post secondary education campus and potential future health care centre.

- The lack of a post secondary institution or a satellite campus for a post secondary institution provides a great opportunity for the NYRC to justify one in its area. There has been some interest in East Gwillimbury for the Queensville site, which has been set aside by the municipality. However, its location and transportation infrastructure could impact the site's viability. East Gwillimbury needs to convert potential leads into a memorandum of understanding (MOU) that can be provided to the Ministry of Training, Colleges and Universities (MTCU). Recent experience with dual campus facilities, such as the shared campus between York University and Seneca College which has led to a major expansion of the Keele campus that is already at capacity, could benefit NYRC. An MOU that includes a partnership between a college and university would dramatically increase the success of the Queensville site or another viable site's approval.

- The Queensville site also provides East Gwillimbury with a valid argument for why further investment into public transportation infrastructure is needed in the area. A public university at the site would not only provide the region with a northern post secondary presence that would target students south of Georgian College in Barrie, but it would also help alleviate the issue of young adults who emigrate to find post secondary education elsewhere. Many businesses gravitate towards post secondary institutions because of the fresh and ready workforce that has the most current knowledge and techniques.

- The Town of Georgina and the Ladies of the Lake have been trying to generate further visibility and promotion for a water innovation and research center (WIRC). To date, a successful fundraising and promotion event called Splash has taken place during the summer of 2011, and further events and activities are planned for the future. It is critical that the town provides full support if their vision for such a centre is to be realized. Their success will likely depend on their ability to find partners to build the WIRC. There is a great deal of additional work that needs to be done on the project, such as defining the parameters of WIRC, and beginning a marketing campaign for it. The potential benefit of WIRC being built is that it will provide Georgina with many high value employment opportunities.

- The unique nature of WIRC could lead to a potential partnership with a post secondary institution that may be interested in water research. However, there is the possibility to fast track development of WIRC by looking at it as an incubator model similar to that used in St. Catharines. Rather than an open research centre, it is split so that part of the complex would be for publicly funded research & development and education, while the other part of the complex would be an incubator for new or established businesses to use to develop new technologies, techniques, and ideas that they would have otherwise been unable to do on their own. In other words, the town would provide a space and tools for research and development, while the organizations would provide the ideas. The incubator could be built rather quickly, which would increase the potential interest from post secondary institutions. There are multiple sources of public and private funding available for such innovation projects, such as Royal Bank of Canada’s Blue Water Project and the National Research Council’s Infrastructure fund.

- A proportion of businesses in York Region are small businesses and new start-ups that focus on delivering a niche product or service. There is great potential for the NYRC to invest its time and resources in helping start-ups knowing that the short term gains will be minimal, but the long term impacts could be significant if and when some of these businesses become successful. This is especially true when the focus is on young entrepreneurs. They not only bring fresh and new ideas, but they attract venture capitalists, angel investors, and larger organizations that are willing to invest in the individuals, companies, and their communities to help them succeed.

- NYRC has a lot of green rural and agricultural spaces that can be potential locations for many of the green initiatives that have been suggested by the province and outlined in recent green workforce reports like the Workforce Planning Board of York Region & Bradford West's Greening the Economy – Transitioning to New Careers Report (2011). An example of such land use has been the proposal of lands along Old Homestead Rd. in Georgina to be used for solar farms. These solar farms would create new employment opportunities related to their design, development, implementation, and maintenance.

- The NYRC has the opportunity to utilize the spill over effect from Newmarket's growth which is still expanding but has begun to reach its boundary limits. This can already be seen in new developments along the southern boundary of East Gwillimbury. The growth in Newmarket has generated a lot of retail development in East Gwillimbury near the boundary between the two communities. The municipalities should take advantage and market to businesses that want to be near Newmarket but cannot find either the space or value. These businesses locating in East Gwillimbury and Georgina will also bring new employment opportunities to the towns.

5.4 Threats

The threats to NYRC were obstacles or competition from external sources that would negatively impact the current employment within the area, and hurt future economic & employment development.

- Currently, the largest threat to the NYRC's high value labour market is the employment opportunities in larger municipalities, such as Toronto, Markham, Newmarket, and Richmond Hill. Currently, there are few employment opportunities in NYRC that can compete with the availabilities in those markets.

- The larger municipalities can leverage greater incentives to attract businesses to their communities. For example, the City of St. Catharines does not charge any city DC - only regional charges are applied.

- Building on the previous point, there is also a lack of suitable industrial and commercial buildings with adequate hard and soft infrastructure. As companies become more high tech, their needs for high-speed broadband access, and high capacity water, sewage and utilities also increases. There is the threat that the towns may not be able to cope with these needs of larger employers, like those in the manufacturing industry.

- If the South Lake Regional Health Centre decides to increase its capacity at its current location, or to locate a new facility near to its primary location, it could dramatically affect NYRC's chances of a health centre or hospital.

- Green technology markets being targeted by other municipalities that are willing to provide various levels of assistance and access to resources that would help the business start generating products or services within their town or city.

- The competition between municipalities for the same industry sectors benefits businesses as they seek better incentives. In all cases, it is important for the NYRC municipalities to closely review the incentives they can provide an organization. It may be that in the short term the incentive may benefit the town, but may impede or undervalue the return they get in the long term.

- The issue of "red tape" is one that has been mentioned previously, but it is a major threat to business development and employment opportunities. If an organization is not able to receive the permits, permissions, or assistance in a timely manner, they may consider not investing in NYRC. The potential for this threat increases if the organization is in an industry that is close knit, like the food processing industry, where word of mouth could influence other organizations' perceptions of the municipality in terms of how the municipality treats its businesses. This could give the municipality a bad reputation within that industry.

- Limited comprehensive soft infrastructure like telecommunications and high-speed broadband will dramatically hinder the NRYC's ability to attract certain industry sectors, or any businesses that rely on high-speed broadband or a telecommunications infrastructure. This is a threat as other communities south of East Gwillimbury have a fairly comprehensive infrastructure policy in place that includes high-speed broadband and other amenities necessary for businesses.

6 Best Practices

This review of current community best practices has focused mainly on communities from within the Province of Ontario. Community selection was based on towns or cities identified by the project steering committee, or by the lead consultant based on criteria set by the steering committee. The general focus was mainly on communities that are healthy, have had positively growing economies and populations over the last several years, and have instituted policies over the past several years that have brought about that positive change.

6.1 Common Policies and Strategies

This review of best practices has identified both trends in policies that were consistent across a majority of the towns and cities, and actions that were specific to a town or city. It is important to review the general policies and activities that were consistent across the majority because it provides a common thread that has been proven to be successful. At the same time looking at successful independent initiatives can help to inspire 'outside the box' thinking to promote solutions unique to individual municipalities.

6.1.1 The ‘Lifestyle’ Approach

The most significant common thread demonstrated by the policies and strategies reviewed has been to promote not so much a niche or product, but rather a type of lifestyle. Each of the towns reviewed had selected a specific niche or resource and focused their efforts in highlighting how it integrates into a general high-quality lifestyle. This is then used as a cornerstone for marketing their community. It is important to note that this is a fundamental principal in community-based economic development. In this type of model, the commodity that is marketed is the people and the way of living. For example, the City of Stratford markets itself as the community for sophisticated individuals with a taste for the arts and entertainment. This message is not only prominent in their marketing material, but is also carried over into how the community presents itself. This has allowed the City of Stratford to help its already established tourism businesses have a focus as to the type of clientele they should target their services towards. Although the niche market is town or city specific, the overall practice of marketing towards more sophisticated individuals who are looking to enjoy the benefits of living within close proximity to Toronto, enjoy urban necessities, but live in a more rural setting was common across all the towns and cities reviewed. All of the towns and cities within Southern Ontario that were reviewed for this report had this concept of target marketing as part of their strategic and official plans. Marketing towards high value visitors demonstrates that the towns or cities are well developed, and a place that someone who is more affluent would enjoy. Thus, their overall goal is to appeal to high value visitors.

6.1.2 Identify Your Niche

On top of focusing their vision towards the middle and upper class, many of the communities have aggressively invested into developing marketing campaigns around events and resources that naturally occur within their communities. For example, the City of Waterloo took advantage of their universities, which have excellent reputations in technology, innovation, and mathematics, and leveraged that as their strongest selling point. Thus, the City of Waterloo is marketed as an “incubator” for innovation in technologies. The City of Stratford has strong and vibrant Arts events, so its focus has been on marketing its artistic innovations, such as their Arts Museum. Aurora has used its knowledge in skilled and precision automotive manufacturing to market towards high precision manufacturing ventures. Leveraging what they already have within their own towns or cities has helped them not only focus on the specific industries to target, but also to develop a theme to stick with when designing websites, and when developing tourism and business retention and expansion strategies. To increase visibility to their target markets, they then hold special events to further attract high value visitors and prospective business people to show off and actively promote their community’s assets.

6.1.3 Developing Marketing Capital

The abilities of these successful towns to market their communities can be seen in the quality of their promotional material for tourism and economic development. A review of the towns’ and cities’ breakdown of marketing budgets showed that they were spending a fair portion of their operating budget towards marketing and tourism. For example, in 2005, the Town of Port Hope with a population of 17,500 people and an operating city budget of $11 million had a tourism budget of $300,000 dollars. In the same period, the City of Brantford (population: 90,000) and Brantford county (population: 40,000) had a city budget of $260 million, and set a tourism operating budget of $1.2 million. The significant feature here is that only $1 million is contributed by the city, and the rest is co-op revenue. The City of Stratford matches the funds generated by the private sector. One methodology taken advantage of by the City of Stratford and many of the other municipalities has been the use of destination marketing fees (DMF's) that are used by the municipalities to increase the available funds for tourism. The DMF is either a percentage or flat fee that is surcharged to the cost of accommodations that are available within the town or city.

One of the first priorities within the towns and cities reviewed was to use their resources to attract and increase their accommodation capacities. They also tried to ensure their city core had some form of conference centre, ether independent or in conjunction with the accommodations. They have then used these commodities to lure event organizers to bring conventions and events to their towns and cities. By applying DMF to accommodations, the municipalities were able to generate needed revenue which was then directly used to increase promotional efforts.

It should be noted that as of June 2010, the DMF charges in Ontario have be eliminated with the establishment of the Regional Tourism Zones (RTZ). The RTZs in Ontario came about from the Discovering Ontario report that recommended a regional approach to tourism. Although DMFs have been phased out as of July 2010, the Ministry of Tourism, Culture, and Sport is implementing the Regional Tourism Levy (RTL). The RTL is meant to standardize and replace the DMFs across the province.

6.1.4 Centralized Marketing Strategies

To manage funds, and to provide a general framework for marketing and promotion specific to tourism, each municipality that was reviewed had a separate committee responsible for tourism, promotion and marketing. This committee is maintained under the municipality's economic development department. The purpose of this over-arching committee is to be the high level group that acts as a framework and ensures all marketing and promotion of the town/city are consistent and unified. The tourism committees generally consist of city staff and individuals from organizations involved in tourism. A trend for marketing and promoting their town/city's is to provide potential visitors the initial impression of a high quality municipality by creating very high quality electronic (i.e. Websites and e-brochures) and print material. For example, when the City of Stratford and Town of Milton both developed their marketing material, they devoted nearly $60,000 each towards websites alone. They both provide excellent examples of how to take advantage of digital media to promote a municipality. The online material is considered vital as many visitors, entrepreneurs, and businesses now use digital tools to conduct their due diligence that normally would be done via phone calls and site visits. Though the tourism websites are managed by the economic development department, they are setup independent of the town's website (e.g., Miltons 'This Way Up' website) which provokes an idea of a website independent from the town trying to promote itself. The websites are full of information and they all include the following: community and demographic profiles (including advantages of demographic for business), land availability (mainly non-residential), service availability for businesses and residential, a comprehensive cost breakdown for residential and non-residential sectors making sure to highlight the positives, and a presentation of the specific benefits of the town and the lifestyle one enjoys while living there. In addition, the websites promote the current businesses in the town, print success stories, testimonials, and any news and events that are relevant to businesses and visitors. They also provide a business directory of current organizations that are within the municipality.

6.1.5 Tourism Promotion

For many of the distance communities, such as the Town of Milton, cities of Stratford, Brantford, St. Catherines, and Niagara on the Lake, there is a heavy emphasis on promoting the communities as a tourist destination to supplement their existing tourism industry. Tourism generates a large income source for these municipalities. Also, tourism provides a great immediate source of employment as many supplementary and ancillary businesses are need to support the tourism industry. Each municipality has an over arching tourism program that is overseen by their economic development department who is responsible for making sure a singular message is presented. Their purpose is to provide a larger platform for the tourism industry to promote itself. In the case of the City of Stratford, prior to their 2005 review of their official plan, there were multiple levels of promotion going on, which included individual theatres, hotels, the town itself, and the region. The general message about the City of Stratford being delivered by each group was disjointed and there was no common theme. Additionally, there were overlaps in marketing which led to wasted resources in duplicated messages being sent out by the different groups.

The Tourism Stratford committee was established to concentrate the message, and make sure the same theme was present in all marketing of events. Furthermore, they ensured that private sector resources and funds were not wasted by repeating the same messages and promotions over and over again. This is also a great venue to bring together all levels of government with the private sector to better coordinate marketing of the town and better utilize the resources available. This coordination allows for better brand development and a louder platform to carry out promotion of the town, region, and the businesses that thrive there. A key point that was highlighted by the various communities' tourism associations was their focus on the seasons which they were already doing well, and slowly expanding their focus to include activities or events that included other seasons. For example, the Stratford Festival and its many events occur during the summer season, so much of the tourism promotion focuses around that season and the events that occur then. Once their tourism for the summer season began doing well, they then began to expand their promotion to spring and fall events as well. They hope to be able to maintain consistent tourism year round, but fully understand that tourism is seasonal and they should take full advantage of the seasons that are most profitable and make the best of it. To that effect, their promotional material for their summer events is well above par in terms of quality and content. It is very clear that significant resources have been used to create them, and based on the performance of their tourism industry; it seems to be money well spent.

6.1.6 Cooperation and Alliances

The practice that seems to have been of the largest benefit for the towns and cities is the view of a "no walls" mentality. In essence, the thought behind this is that a town/city's community does not stop at the municipality's boundaries, but rather it encompasses surrounding towns/cities, regions, the province, and the nation. They have learnt to take advantage of alliances with the private sector so that promotions and marketing are not just the burden of the municipality. They leverage their established businesses, and the individuals in those businesses with the expertise to attract more business. They partner with neighbouring towns/cities to work together and attract larger businesses and to better utilize their dollars. They manage the "red tape" and offer organizations direct support and assistance in accessing other levels of government and the services they offer. Specifically, they have used the offerings of other government levels, such as tax breaks, grants, and subsidies as an incentive towards attracting businesses. Additionally, integrating other government levels into their marketing and promotion has helped these towns to get those levels of government further involved and invested into the town/city. In fact, the Province of

Ontario has provided support and venues for promoting and marketing in cases where the towns/cities are willing to partner with their surrounding neighbours, work together, and promote a larger geography of Ontario.

6.1.7 Building Entrepreneurship

Another common thread has been investment into entrepreneurship and small businesses. In fact, the City of Waterloo has made entrepreneurship the central focus of their strategic plan and official plan. This has resulted in the rise of many successful small organizations that have grown into giants of their industries, such as Research In Motion. These communities have extensive support for small businesses, and for entrepreneurs, specifically young entrepreneurs. There is a focus on breeding young adults with an entrepreneur mentality because young adults are a large source of individuals that emigrate outside of the town for employment opportunities because they are highly mobile. These communities have learnt to harness the resources of the various levels of government, private sector, and their community futures organization to provide small businesses and entrepreneurs a platform to become successful within the town rather than having them leave for somewhere else where they may receive better support. These services include a mentorship program that relies on industry volunteers, financial services, and resource links to other information sources and services (e.g., cities of Richmond Hill, Vaughan, Mississauga, Waterloo, Stratford, and the Town of Milton have dedicated young entrepreneurs programs). In the case of the City of Stratford and the Town of Milton, this played a key role in attaining higher education opportunities for their towns because innovation, entrepreneurship, and education go hand in hand. In the case of many of the communities reviewed for this study that currently have a higher education institution; they have strategically targeted the educational institutions that are interested in investing in the niche market that the municipality is promoting. So, in the case of the City of Stratford, they have a University of Waterloo satellite campus that focuses on arts and media research and development.

6.1.8 Supporting Local Agriculture

So far, many of the best practices have focused on the more urban components of the towns and cities, but it is important to note that many of these municipalities also have an active agricultural industry as well. They included in their official plans ideas as to how to proceed with agriculture and how to best help local farmers improve upon the assets they already maintain. Primarily, they have worked at improving communication with their local farmers, created an index of agriculture, and have created associations or groups which try to provide a forum where local government and farmers have a platform to share information & ideas. This platform is where the local municipality can directly engage the farming community and provide direct assistance that normally would not be available to the farmer. For example, helping farmers determine what government grants are available to them and how to access them. Furthermore, local municipality partnerships have allowed towns to better cooperate with other municipalities within their region to promote the agricultural stock available by their region. By knowing the index of agriculture, which is the inventory of agricultural products produced, the town or city is better able to promote or market their municipality to organizations and businesses that may rely on those products.

The town can also act as an intermediary to help the farmers promote and sell their products. For example, all the towns and cities that were reviewed had a farmers market located in a visible part of their urban centre to allow farmers a way of selling their products locally. This has been very successful in many places, including Markham which holds a farmers market in a parking lot located on Main Street. The towns have also helped the local producers by acting as an intermediary between them and prospective buyers, such as restaurants, hotels, and other businesses that rely on agriculture. Thus, the municipality has helped the local farmers by providing them an opportunity to deal directly with prospective businesses interested in purchasing locally produced goods rather than through a distributor.

Having a firm grasp of the local agricultural community also allows municipalities to work on initiatives designed to meet current needs within that community. For example, in the county of Frontenac, community leaders are taking the initiative to help improve income from agricultural lands. Specifically, they have recently completed studies to determine whether developing an abattoir within the region will be a worthwhile venture. The idea being that producing and processing poultry within the county helps farmers get their product to the end consumer faster. They do not have to send their chicken long distances to be processed, which means less vitamins and artificial chemicals are needed to keep them hearty. In conjunction with the provinces push for more locally produced and locally consumed initiatives, they can market their processed products directly to their neighbours which are Toronto, Kingston, and Ottawa. Thus, not only is the county taking an active role for their area, but it is working towards building a better partnership with its local farming community.

6.1.9 Improving Communications & Unity

In reviewing the various best practices, two items in particular stood out as especially relevant for both East Gwillimbury and Georgina – improving both internal and external communication & promoting town unity. The municipalities reviewed did an excellent job at not only aggressively promoting themselves to visitors and external organizations, but they also had excellent venues for disseminating information to their own citizens. Although, both East Gwillimbury and Georgina have issues with IT infrastructure, other smaller towns have experienced the same difficulties, but have decided that the most effective method of communication is through electronic formats. For example, the City of Waterloo posts survey questions regarding community issues on their website and allow residents to vote. This provides citizens to provide direct input into relevant community issues and feel involved. These municipalities understand that although not everyone is able to have internet access at home, they can still access it through many facilities available within their community, such as libraries, community centers, and public education institutions. Although, they still present information in their local papers and on local radio, their focus has been to increase their communication with their citizens through electronic formats.

The second item that stands out is unity. There is a major emphasis by these municipalities to represent all the different communities, townships, and villages under a singular title. For example, the Town of Milton encompasses the Campellville area, but in all promotional material, on their websites, and while in conversation, it is all known as the Town of Milton. In the Town's of Georgina, and East Gwillimbury, there is still resistance to being considered part of the Town, but moving forward, this will cause confusion and frustration. In the case of the Town of Milton, their official plan (1997) outlines that Milton proper is to be considered downtown Milton, while the surrounding area is to be considered suburban or rural regions of the town. This reduces confusion, and makes it easier for potential visitors to navigate the region. Similar steps need to be taken in Georgina and East Gwillimbury to reduce confusion and increase the visibility of the towns as a whole.

6.2 Independent Initiatives

In addition to the general trends identified as a part of the current best practices review, there were some actions carried out by individual municipalities which met our criteria for best practice. An overview of successful independent initiatives used by individual towns is provided below.

6.2.1 Potential Cooperation Tools

One type of action taken by some communities was in business incentives that were approved for being presented to potential organizations. We observed a variety of creative methods used to lure new business. The City of Stratford removed development fees on commercial properties that were constructed using local construction organizations. The City of Waterloo uses grants, funds, and bursaries through funds donated by current private sector partners to entice entrepreneurs to select the City of Waterloo as their place for business, and to actively be involved in research and development. Research In Motion funds a competition to determine the most innovative idea each year. This is very similar to the activities of the New Brunswick Innovation Foundation, a provincial program, which holds an annual competition in New Brunswick to determine who has the most innovative idea or product. In fact, it is a very prominent competition in the region that gets the involvement of the CBC and the Dragon's Den, where the top 5 ideas are presented to the Dragon's Den panel, and are critiqued by the Dragon's Den panel. It is recorded and televised on the CBC, and residents then vote on the most innovative idea. This concept has gained a lot of momentum in recent years as it has led to many upstarts finding great success and reinvesting into their communities. The competition has also attracted a lot of large businesses to the region because it demonstrates to them the area's commitment to innovation and development.

6.2.2 Personalized Visitor Guide Programs

An interesting program used by the City of Stratford is the personalized visitor guide program – visitors are connected with 'locals' who show them the best of their town. This is a program used in other places, such as Dublin, Ireland. For example, if you are interested in pubs, and would like to experience that part of Stratford, you can sign up for the program, and when you arrive to the City of Stratford, you meet your guide who will take you on a personalized tour of the pubs. Tours with locals can also provide the 'inside scoop' on hidden walking trails, the best fishing spots, or the funkiest art galleries. The emphasis is on showing visitors areas of the town/city that they normally would not have known about if they had tried to visit the area by themselves. This is an innovative way of not only exposing visitors to the different areas of the community, but also showing the community's vibrancy, and lifestyle which can help to leave visitors wanting to come back for more. The visitor guide program is a volunteer based program where community members volunteer their time to help become a guide for visitors. Commentary on many travel and tourism sites about the program has been very positive.

6.3 Site Visits

As part of the project, four towns and cities in southern Ontario were selected and visited by steering committee members to ask detailed questions about some of their projects and how they went about starting them. This provided not only the Steering Committee delegates more detailed information about the municipalities about their successes, but also insight and knowledge for economic development officers of East Gwillimbury and Georgina on the logistics of starting such projects. The visits are presented in the order that delegates visited the sites.

6.3.1 City of Stratford

Delegates met with Randy Mattice, Economic Development Officer for the City of Stratford

- Economic Development Department (EDD) in separate building from City Hall
    - Combined with Regional CFDC

- EDD budget currently is $650,000, of which $180,000 goes to running the centre

- Branding of Economy was first and most important step

- The City has invested in diversification, with a focus on its core asset
    - Branding city as a place for Creative Economy and Digital Economy
        - This has led to RBC Secure Data Centre

        - High-speed broadband availability has been key to the success of this branding
    - Leveraged creative economy to obtain a University of Waterloo satellite campus that focus on digital media and global enterprise
        - Mayor met with University of Waterloo president and began the process
    - They have also been able to develop a Chef School
        - Partnered through MTCU

- Stratford believes in no walls philosophy and is part of Southern Ontario Marketing Alliance (SOMA), and a few other tourism and marketing alliances
    - These alliances provide a large resource pool to attract international opportunities and foreign investment

- City of Stratford's marketing focuses on Quality of Life promotion

- Stratford Festival Generates $150 million
    - Readjusted tourism campaigns to target new regions
    - Attempt to market Stratford experience described above

- Manufacturing is the largest industry sector, with a gross payroll of $450 million
    - One quarter of employment is in manufacturing
    - Largest sector to be hit

- City does not have industrial development charges

- New Business Park
    - Actively pushed forward by city, not developers
    - City took lead on development
    - All sites include soft infrastructure, such as fibre optic cables

- Current working on Innovation Centre to provide support for start-ups and entrepreneurs with new ideas, development and research
    - Mentoring seminars through BDC

6.3.2 Town of Milton

Delegates met with Robert Humphreys, Economic Development Officer for the Town of Milton

- Current EDD working budget is $600,000

- The town has seen rapid growth

- Largest Project has been the Milton Education Village (MEV)
    - It is a multipurpose area: part affordable housing, part Wilfrid Laurier University (WLU) campus, and part business park for research and development
    - WLU has signed a memorandum of understanding with the town
    - The current location for the MEV was previously owned by Mattamy Homes, while the original site for the MEV was very small and not ideal, it was perfect for residential development
        - Town signed a land transfer agreement with Mattamy Homes, and they switched spots

- Business park also is an incubator for research and development
    - Includes common area for use by businesses
    - Provide seminars on innovation for entrepreneurs.

- Industrial development charges receive a 50% tax exemption

- Believe in no walls philosophy
    - Part of larger alliances like Greater Toronto Marketing Alliance that provide potential leads an opportunities to follow up

6.3.3 Town of Innisfil

Delegates met with Rachel Sullivan, Economic Development Officer for the Town of Innisfil

- Towns position as far as economic development progress is very similar to East Gwillimbury

- Town has rebranded itself, and has worked on involving its citizens
    - Tag line is built into all documentation
    - Unified communication

- Last year began offering Business Trade Show
    - Individuals interested in starting a business could approach businesses already established in the town for help or inquires
    - Successful event and will do it again

- Town is working on an Education node
    - Would include post secondary institution and a health care centre

- EDO showed a lot of interest in collaborating with Georgina and East Gwillimbury on future ventures and projects, such as small business workshops and fairs

6.3.4 City of St. Catharines

Delegates met with David Oakes, Director of the Economic Development & Tourism Department for the City of St. Catharines, and Marco Marino, Economic Development Officer for the City of St. Catharines

- Believe in no walls philosophy
    - Collaboration with various public and private organizations
    - Working with Brock University and Niagara College for post-secondary education
        - Have gone one step further and utilized post secondary students for doing research used by town

- Carried out a cluster study to determine key sectors for its business case for current economic development strategy
    - Increased validity of their strategy and business plan

- St. Catharines has branded itself as “re-inventing” and has used that as a tool to attract business and employment opportunities.
    - Have used this branding exercise to help gain support of citizens, stakeholders, and interested businesses and organizations

- By focusing on “re-branding,” they have been able to target various sectors and markets by determining how their re-branding fits with their needs

- Small Business Enterprise Centre is located prominently to encourage retirees and young individuals interested in starting their own business
  - The centre provides the tools and information that an individual would need to start a business

- Employ a variety of facade and street front improvement programs and community improvement programs
  - Provide many potential funding and grant alternatives to help smaller business take advantage of such programs

- The city does not have any non-residential development charges
  - Only collects regional development charges which it then passes on to the region

7 Recommendations

Based on the findings of above, a series of tangible recommendations have been developed as it relates to the NYRC's economic development, and more specifically, each town's economic development. Overall, it is the goal of this study that the Town of East Gwillimbury and the Town of Georgina try to collaborate as much as possible as it only works in their favour in attracting new economic development and employment opportunities.

7.1 Northern York Region Communities

7.1.1 Programs, Services and Policies

- Each town needs to review and inventory its current programs and services related to diversity and "new comers." The term newcomer refers to anyone who has recently migrated to East Gwillimbury or Georgina. These can be individuals who have migrated from within York Region, within Ontario, within Canada, or internationally. Programs and services to newcomers should be made permanently visible at libraries, public spaces, and town websites (similar to "York Link" on the York Regions website).

- Each town should review current development charges and service fees to ensure they are competitive in comparison to other municipalities in the area
    - A review of the 2007 and 2010 BMA municipality study found development charges in East Gwillimbury and Georgina to be higher than some southerly York Region towns which could inhibit growth

- Review current infrastructure policies and plans and establish minimum infrastructure requirements that include soft infrastructure such as high-speed broadband for non-residential areas.

- Towns should review current tax increment financing (TIF) or tax increment equivalent grants (TIEF) for existing and future businesses as a way to spur development and intensification of employment areas

- Each town needs to create a small business/ entrepreneurs program to encourage new start-up business and entrepreneurship development within the town.

    - Currently South Lake CFDC provides some support services in NYRC
    - A focus needs to be given to young entrepreneurs (30 years of age and under)
    - Leverage current businesses in the town to provide mentoring services
    - If there is a potential to bringing a small business program into the community, a detailed case study is required
        - Should also consider extending regular service hours of Small Business Enterprise Centre services to NYRC, or establish a physical presence in NYRC
        - Approach South Lake CFDC to determine if there is a potential for supporting the small business program, or in the case of SBEC presence in NYRC, if there is the potential to sharing a location and its operating costs

- Review current permit and planning processes and address any issues that could potentially impact business development through "red tape" issues

7.1.2 Health Care

- Develop a feasibility study for the proposition of health centre or hospital. Need to establish a longer term need for such an institution
    - The feasibility study of the health centre/ hospital should take into consideration population growth
    - Consult with Southlake Regional Health Centre to identify potential needs that could be addressed by a secondary site
    - Evaluate the potential of a private/ public cooperation where part of the complex would be a public health service provider, and the other part would be private clinics and services

7.1.3 Post-Secondary Education

- Give consideration to a potential shared campus program between Georgina and East Gwillimbury for post-secondary institution. Part of the campus would reside at the Water Innovation Centre, and the other portion at Queensville site

- Consider evaluating GTTI and its role in post-secondary
    - There is a potential to use GTTI as a jumping off point to raise interest from other potential partners
    - Develop a case study for using GTTI as a seed investment in long term post-secondary education in NYRC

7.1.4 Cooperation and Alliance

- Establish an NYRC committee to further develop potential opportunities that may not be available to each town separately
    - The health centre is one example, as is a post secondary institution
    - The region is missing a hotel/ motel with accommodations for large group of delegates and conference facilities
        - Attracting tourism where individuals stay overnight or longer requires available accommodations
        - Current size of each town may not be sufficient, but together there is a case for one
        - Take into consideration the Recreational Outdoor Centre in Georgina, when deciding of a site location

- Review larger network of cooperative alliances to leverage marketable skills and opportunities
    - The N6 is an example of this network
    - Contact Town of Innisfil and review potential cooperation on projects with them
    - Contact York Region and review potential cooperation on projects with them

7.1.5 Communication

- Each town should review current information dissemination practices and determine better methods of getting information to and from citizens, businesses, and markets external to the town

7.1.6 Agriculture

- Comprehensive agricultural inventory needs to be created and tracked
  - Should be a partnership between Georgina and East Gwillimbury to reduce burden of resources
  - Create agriculture committee to address needs and concerns of farmers
  - Should consider contacting Ontario Farmers Association for help with contacting members in NYRC

7.1.7 Performance Measures

- Evaluate current, or develop new performance measures to determine success of projects, initiatives, and marketing of the NYRC
  - For example, there are minimal town tools to determine non-residential occupancy rates
  - Create a timeline chart where projects are listed by expected milestone dates, and logging actual activity and whether those milestones were reached on time.
    - For example, a site development should be tracked to determine if milestones for the development are reached on time, or are delayed and where the delays occurred. This will allow the town to address any delays that were due to the town's activity.

- Create the Northern York Region Community Commitment to Action Consortium
  - An objective of the consortium will be to help with implementation of recommendations listed in this report
  - The committee should consist of 25 entities

- Members on the committee should include:
  - Current study's steering committee
  - Representative members of the stakeholders (the towns, South Lake CFDC, Workforce Planning Board of York Region & Bradford West Gwillimbury, Georgina Trades Training Inc., and York Region)
  - Citizens from the towns of East Gwillimbury and Georgina
  - Representative members from private/ public organizations and public/ private associations.
    - E.g., chambers of commerce, private businesses, and stakeholders from other levels of government

7.2 East Gwillimbury

7.2.1 Programs, Services, and Policies

- Review current branding of town and determine if it needs to be revised to address industry sectors of interest or that would best fit with East Gwillimbury's vision

- Identify sector or economy that best fits East Gwillimbury's brand

- Due to the slow pace of development at the business parks, town should explore the financial feasibility to secure and develop a Town owned business park as a way to ensure timely development of employment land, or become more proactive in forcing development

- Develop community improvement plan (CIP) that would allow infrastructure upgrades, and street front rejuvenation and revitalization projects within the municipality

7.2.2 Post Secondary Education

- Review the current location of the Queensville University site, and consider whether alternative sites with better transportation infrastructure and services would improve odds of attracting a secondary institution. Overview potential sites based on requirements for attracting a post secondary institution.

- Begin exploring with potential institutions that are exploring satellite campuses
    - Consider the potential for a private university that could later look for certification as a public entity
    - Consider review of current town profile to demonstrate a case for a market need of a post-secondary institution in the town
    - Identify current industry sectors and markets of interest that match East Gwillimbury branding and explore potential partnerships that would highlight these strengths
    - Consider splitting the site into a multipurpose development, where part of it can be an incubator to support innovation, research and development
        - Thus a case can be made for private sector alliances that could jumpstart a post-secondary institution potential

7.2.3 Communication

- Develop and implement a strategy to help address the independent community mentality that is still embedded in the citizens (get people to think about East Gwillimbury, not Mt. Albert, Sharon, Holland Landing, or so on)
    - Needs to be a long term strategy as it will take a long time to change perceptions
    - Will need to address perception of service inequality between different communities

7.3 Georgina

7.3.1 Programs, Services, and Policies

- Review sustainability of separate Business Retention and Expansion (BR&E) for the three major communities
    - Review feasibility of amalgamating them into one or two
        - Central BR&E (Keswick) and Non-Central (Sutton and Jackson Point)

7.3.2 Water Innovation and Research Centre

- Town needs to take be more proactive in the Water Innovation and Research Centre
    - The current definition of the WIRC and its marketing is still very broad and not well defined, which hinders marketing potential
        - Develop detailed business model which will provide stake holders and interested parties with a clear idea of what the overall project will look like when completed
        - Focus groups were not sure what the concept or purpose of the WIRC currently is because of vague explanations, but they understood that the project was currently still in the concept stage
        - Consult with post-secondary institutions that may be interested the WIRC, and work on developing a memorandum of understanding
        - Avoid using other community examples like Science Centre North, as that pigeon holes the concept, derive a made in Georgina explanation and then share it
    - It is difficult to predict skills set inventory for the WIRC when it is not clear what the overall project will become

- Review potential case for an incubator program on the site that could help foster research and development from businesses that are related to water
    - This process could fast track development timelines

- Look into potential funding sources
    - Royal Bank of Canada's Blue Waters Project
    - National Research Council's Infrastructure and Superstructure funds
        - Will require establishing alliances with private partners to access some of the funds
    - Private investment
    - Consider hospital model of Not for Profit Foundation that supports For-Profit institution

7.3.3 Communication

- Review industries that would best match what Georgina's skilled workforce offers and target those sectors
  - Based on the current report, health care provides the strongest potential industry sector, but requires a feasibility study to build a case for attracting industry to area

- Develop and implement unification strategy to help address the independent community mentality that is still embedded in the citizens
  - Needs to be a long term strategy as it will take a long time to change perceptions

7.3.4 Cooperation and Alliance

- Develop case study of GTTI as the site for incubator
  - They already have the available space, up to date equipment and facilities that could be useful for small business and entrepreneurial research & development
  - Could potentially substitute as a small business enterprise centre for the northern Georgina area.
    - Needs further study

Conclusion

In summary, the many strengths and opportunities within the municipalities of East Gwillimbury and Georgina make them attractive places for business and employment development. The workforce survey and focus groups show that there are many skilled individuals who currently live in NYRC but travel to other municipalities for work. The goal is to change that by creating more high value employment opportunities within the municipalities for these individuals, and create new ones for those moving to the area.

The recommendations for NYRC and the municipalities are meant to be tangible tasks that will help attract new economic development, and in turn, employment opportunities. They were derived from reviewing the best practices of other municipalities, the SWOT analysis of NYRC, and focus group discussions held in the towns of East Gwillimbury and Georgina. Although, there are many recommendations made in this report, it would benefit the NYRC to begin with the implementation of the Northern York Region Community Commitment to Action Consortium. Since, an objective of the consortium is to help with implementation of the recommendations, its establishment will be useful for the municipalities as they move forward.

As the NYRC engages the recommendations, it is hoped that the performance measures will show the opportunities available to the municipalities. Specifically, in terms of growth and sustainability in new business and employment opportunities.

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Appendix I – NAICS Definitions

NAICS definitions were obtained from the U.S Census Bureau 2002 NAICS Definitions file available through their website.

Sector 11--Agriculture, Forestry, Fishing and Hunting

The Sector as a Whole

The Agriculture, Forestry, Fishing and Hunting sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, and harvesting fish and other animals from a farm, ranch, or their natural habitats.

The establishments in this sector are often described as farms, ranches, dairies, greenhouses, nurseries, orchards, or hatcheries. A farm may consist of a single tract of land or a number of separate tracts which may be held under different tenures. For example, one tract may be owned by the farm operator and another rented. It may be operated by the operator alone or with the assistance of members of the household or hired employees, or it may be operated by a partnership, corporation, or other type of organization. When a landowner has one or more tenants, renters, croppers, or managers, the land operated by each is considered a farm.

The sector distinguishes two basic activities: agricultural production and agricultural support activities. Agricultural production includes establishments performing the complete farm or ranch operation, such as farm owner-operators, tenant farm operators, and sharecroppers. Agricultural support activities include establishments that perform one or more activities associated with farm operation, such as soil preparation, planting, harvesting, and management, on a contract or fee basis.

Excluded from the Agriculture, Forestry, Hunting and Fishing sector are establishments primarily engaged in agricultural research and establishments primarily engaged in administering programs for regulating and conserving land, mineral, wildlife, and forest use. These establishments are classified in Industry 54171, Research and Development in the Physical, Engineering, and Life Sciences; and Industry 92412, Administration of Conservation Programs, respectively.

21 Mining

The Sector as a Whole

The Mining sector comprises establishments that extract naturally occurring mineral solids, such as coal and ores; liquid minerals, such as crude petroleum; and gases, such as natural gas. The term mining is used in the broad sense to include quarrying, well operations, beneficiating (e.g., crushing, screening, washing, and flotation), and other preparation customarily performed at the mine site, or as a part of mining activity.

The Mining sector distinguishes two basic activities: mine operation and mining support activities. Mine operation includes establishments operating mines, quarries, or oil and gas wells on their own account or for others on a contract or fee basis. Mining support activities include establishments that perform exploration (except geophysical surveying) and/or other mining services on a contract or fee basis (except mine site preparation and construction of oil/gas pipelines).

Establishments in the Mining sector are grouped and classified according to the natural resource mined or to be mined. Industries include establishments that develop the mine site, extract the natural resources, and/or those that beneficiate (i.e., prepare) the mineral mined. Beneficiation is the process whereby the extracted material is reduced to particles that can be separated into mineral and waste, the former suitable for further processing or direct use. The operations that take place in beneficiation are primarily mechanical, such as grinding, washing, magnetic separation, and centrifugal separation. In contrast, manufacturing operations primarily use chemical and electrochemical processes, such as electrolysis and distillation. However, some treatments, such as heat treatments, take place in both the beneficiation and the manufacturing (i.e., smelting/refining) stages. The range of preparation activities varies by mineral and the purity of any given ore deposit. While some minerals, such as petroleum and natural gas, require little or no preparation, others are washed and screened, while yet others, such as gold and silver, can be transformed into bullion before leaving the mine site.

Mining, beneficiating, and manufacturing activities often occur in a single location. Separate receipts will be collected for these activities whenever possible. When receipts cannot be broken out between mining and manufacturing, establishments that mine or quarry non-metallic minerals, beneficiate the non-metallic minerals into more finished manufactured products are classified based on the primary activity of the establishment. A mine that manufactures a small amount of finished products will be classified in Sector 21, Mining. An establishment that mines whose primary output is a more finished manufactured product will be classified in Sector 31-33, Manufacturing.

23 Construction

The Sector as a Whole

The construction sector comprises establishments primarily engaged in the construction of buildings or engineering projects (e.g., highways and utility systems). Establishments primarily engaged in the preparation of sites for new construction and establishments primarily engaged in subdividing land for sale as building sites also are included in this sector.

Construction work done may include new work, additions, alterations, or maintenance and repairs. Activities of these establishments generally are managed at a fixed place of business, but they usually perform construction activities at multiple project sites. Production responsibilities for establishments in this sector are usually specified in (1) contracts with the owners of construction projects (prime contracts) or (2) contracts with other construction establishments (subcontracts).

Establishments primarily engaged in contracts that include responsibility for all aspects of individual construction projects are commonly known as general contractors, but also may be known as design-builders, construction managers, turnkey contractors, or (in cases where two or more establishments jointly secure a general contract) joint-venture contractors. Construction managers that provide oversight and scheduling only (i.e., agency) as well as construction managers that are responsible for the entire project (i.e., at risk) are included as general contractor type establishments. Establishments of the "general contractor type" frequently arrange construction of separate parts of their projects through subcontracts with other construction establishments.

Establishments primarily engaged in activities to produce a specific component (e.g., masonry, painting, and electrical work) of a construction project are commonly known as specialty trade contractors. Activities of specialty trade contractors are usually subcontracted from other construction establishments but, especially in remodelling and repair construction, the work may be done directly for the owner of the property.

Establishments primarily engaged in activities to construct buildings to be sold on sites that they own are known as operative builders, but also may be known as speculative builders or merchant builders. Operative builders produce buildings in a manner similar to general contractors, but their production processes also include site acquisition and securing of financial backing. Operative builders are most often associated with the construction of residential buildings. Like general contractors, they may subcontract all or part of the actual construction work on their buildings.

There are substantial differences in the types of equipment, work force skills, and other inputs required by establishments in this sector. To highlight these differences and variations in the underlying production functions, this sector is divided into three subsectors.

Subsector 236, Construction of Buildings, comprises establishments of the general contractor type and operative builders involved in the construction of buildings. Subsector 237, Heavy and Civil Engineering Construction, comprises establishments involved in the construction of engineering projects. Subsector 238, Specialty Trade Contractors, comprises establishments engaged in specialty trade activities generally needed in the construction of all types of buildings.

Force account construction is construction work performed by an enterprise primarily engaged in some business other than construction for its own account and use, using employees of the enterprise. This activity is not included in the construction sector unless the construction work performed is the primary activity of a separate establishment of the enterprise. The installation and the ongoing repair and maintenance of telecommunications and utility networks are excluded from construction when the establishments performing the work are not independent contractors. Although a growing proportion of this work is subcontracted to independent contractors in the Construction Sector, the operating units of telecommunications and utility companies performing this work are included with the telecommunications or utility activities.

31-33 Manufacturing

The Sector as a Whole

The Manufacturing sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. The assembling of component parts of manufactured products is considered manufacturing, except in cases where the activity is appropriately classified in Sector 23, Construction.

Establishments in the Manufacturing sector are often described as plants, factories, or mills and characteristically use power-driven machines and materials-handling equipment. However, establishments that transform materials or substances into new products by hand or in the worker's home and those engaged in selling to the general public products made on the same premises from which they are sold, such as bakeries, candy stores, and custom tailors, may also be included in this sector.

Manufacturing establishments may process materials or may contract with other establishments to process their materials for them. Both types of establishments are included in manufacturing.

The materials, substances, or components transformed by manufacturing establishments are raw materials that are products of agriculture, forestry, fishing, mining, or quarrying as well as products of other manufacturing establishments. The materials used may be purchased directly from producers, obtained through customary trade channels, or secured without recourse to the market by transferring the product from one establishment to another, under the same ownership. The new product of a manufacturing establishment may be finished in the sense that it is ready for utilization or consumption, or it may be semi finished to become an input for an establishment engaged in further manufacturing. For example, the product of the alumina refinery is the input used in the primary production of aluminum; primary aluminum is the input to an aluminum wire drawing plant; and aluminum wire is the input for a fabricated wire product manufacturing establishment.

The subsectors in the Manufacturing sector generally reflect distinct production processes related to material inputs, production equipment, and employee skills. In the machinery area, where assembling is a key activity, parts and accessories for manufactured products are classified in the industry of the finished manufactured item when they are made for separate sale. For example, a replacement refrigerator door would be classified with refrigerators and an attachment for a piece of metal working machinery would be classified with metal working machinery. However, components, input from other manufacturing establishments, are classified based on the production function of the component manufacturer. For example, electronic components are classified in Subsector 334, Computer and Electronic Product Manufacturing and stampings are classified in Subsector 332, Fabricated Metal Product Manufacturing.

Manufacturing establishments often perform one or more activities that are classified outside the Manufacturing sector of NAICS. For instance, almost all manufacturing has some captive research and development or administrative operations, such as accounting, payroll, or management. These captive services are treated the same as captive manufacturing activities. When the services are provided by separate establishments, they are classified to the NAICS sector where such services are primary, not in manufacturing.

The boundaries of manufacturing and the other sectors of the classification system can be somewhat blurry. The establishments in the manufacturing sector are engaged in the transformation of materials into new products. Their output is a new product. However, the definition of what constitutes a new product can be somewhat subjective. As clarification, the following activities are considered manufacturing in NAICS: Milk bottling and pasteurizing; Water bottling and processing; Fresh fish packaging (oyster shucking, fish filleting); Apparel jobbing (assigning of materials to contract factories or shops for fabrication or other contract operations) as well as contracting on materials owned by others; Printing and related activities; Ready-mixed concrete production; Leather converting; Grinding of lenses to prescription; Wood preserving; Electroplating, plating, metal heat treating, and polishing for the trade; Lapidary work for the trade; Fabricating signs and advertising displays; Rebuilding or remanufacturing machinery (i.e., automotive parts) Ship repair and renovation; Machine shops; and Tire retreading. Conversely, there are activities that are sometimes considered manufacturing, but which for NAICS are classified in another sector (i.e., not classified as manufacturing). They include: 1.

Logging, classified in Sector 11, Agriculture, Forestry, Fishing and Hunting is considered a harvesting operation; 2. The beneficiating of ores and other minerals, classified in Sector 21, Mining, is considered part of the activity of mining; 3. The construction of structures and fabricating operations performed at the site of construction by contractors, is classified in Sector 23, Construction; 4. Establishments engaged in breaking of bulk and redistribution in smaller lots, including packaging, repackaging, or bottling products, such as liquors or chemicals; the customized assembly of computers; sorting of scrap; mixing paints to customer order; and cutting metals to customer order, classified in Sector 42, Wholesale Trade or Sector 44-45, Retail Trade, produce a modified version of the same product, not a new product; and 5.

Publishing and the combined activity of publishing and printing, classified in Sector 51, Information, perform the transformation of information into a product where as the value of the product to the consumer lies in the information content, not in the format in which it is distributed (i.e., the book or software diskette).

42 Wholesale Trade

The Sector as a Whole

The Wholesale Trade sector comprises establishments engaged in wholesaling merchandise, generally without transformation, and rendering services incidental to the sale of merchandise. The merchandise described in this sector includes the outputs of agriculture, mining, manufacturing, and certain information industries, such as publishing.

The wholesaling process is an intermediate step in the distribution of merchandise. Wholesalers are organized to sell or arrange the purchase or sale of (a) goods for resale (i.e., goods sold to other wholesalers or retailers), (b) capital or durable nonconsumer goods, and (c) raw and intermediate materials and supplies used in production.

Wholesalers sell merchandise to other businesses and normally operate from a warehouse or office. These warehouses and offices are characterized by having little or no display of merchandise. In addition, neither the design nor the location of the premises is intended to solicit walk-in traffic. Wholesalers do not normally use advertising directed to the general public. Customers are generally reached initially via telephone, in-person marketing, or by specialized advertising that may include Internet and other electronic means. Follow-up orders are either vendor-initiated or client-initiated, generally based on previous sales, and typically exhibit strong ties between sellers and buyers. In fact, transactions are often conducted between wholesalers and clients that have long-standing business relationships.

This sector comprises two main types of wholesalers: merchant wholesalers that sell goods on their own account and business to business electronic markets, agents, and brokers that arrange sales and purchases for others generally for a commission or fee.

(1) Establishments that sell goods on their own account are known as wholesale merchants, distributors, jobbers, drop shippers, and import/export merchants. Also included as wholesale merchants are sales offices and sales branches (but not retail stores) maintained by manufacturing, refining, or mining enterprises apart from their plants or mines for the purpose of marketing their products. Merchant wholesale establishments typically maintain their own warehouse, where they receive and handle goods for their customers. Goods are generally sold without transformation, but may include integral functions, such as sorting, packaging, labelling, and other marketing services.

(2) Establishments arranging for the purchase or sale of goods owned by others or purchasing goods, generally on a commission basis are known as business to business electronic markets, agents and brokers, commission merchants, import/export agents and brokers, auction companies, and manufacturers' representatives. These establishments operate from offices and generally do not own or handle the goods they sell.

Some wholesale establishments may be connected with a single manufacturer and promote and sell the particular manufacturers' products to a wide range of other wholesalers or retailers. Other wholesalers may be connected to a retail chain, or limited number of retail chains, and only provide a variety of products needed by that particular retail operation(s). These wholesalers may obtain the products from a wide range of manufacturers. Still other wholesalers may not take title to the goods, but act as agents and brokers for a commission.

Although, in general, wholesaling normally denotes sales in large volumes, durable nonconsumer goods may be sold in single units. Sales of capital or durable nonconsumer goods used in the production of goods and services, such as farm machinery, medium and heavy duty trucks, and industrial machinery, are always included in wholesale trade.

44-45 Retail Trade

The Sector as a Whole

The Retail Trade sector comprises establishments engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are, therefore, organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers: store and nonstore retailers.

1. Store retailers operate fixed point-of-sale locations, located and designed to attract a high volume of walk-in customers. In general, retail stores have extensive displays of merchandise and use mass-media advertising to attract customers. They typically sell merchandise to the general public for personal or household consumption, but some also serve business and institutional clients. These include establishments, such as office supply stores, computer and software stores, building materials dealers, plumbing supply stores, and electrical supply stores. Catalog showrooms, gasoline services stations, automotive dealers, and mobile home dealers are treated as store retailers.

In addition to retailing merchandise, some types of store retailers are also engaged in the provision of after-sales services, such as repair and installation. For example, new automobile dealers, electronic and appliance stores, and musical instrument and supply stores often provide repair services. As a general rule, establishments engaged in retailing merchandise and providing after-sales services are classified in this sector.

The first eleven subsectors of retail trade are store retailers. The establishments are grouped into industries and industry groups typically based on one or more of the following criteria:

(a) The merchandise line or lines carried by the store; for example, specialty stores are distinguished from general-line stores.

(b) The usual trade designation of the establishments. This criterion applies in cases where a store type is well recognized by the industry and the public, but difficult to define strictly in terms of commodity lines carried; for example, pharmacies, hardware stores, and department stores.

(c) Capital requirements in terms of display equipment; for example, food stores have equipment requirements not found in other retail industries.

(d) Human resource requirements in terms of expertise; for example, the staff of an automobile dealer requires knowledge in financing, registering, and licensing issues that are not necessary in other retail industries.

2. Nonstore retailers, like store retailers, are organized to serve the general public, but their retailing methods differ. The establishments of this subsector reach customers and market merchandise with methods, such as the broadcasting of "infomercials," the broadcasting and publishing of direct-response advertising, the publishing of paper and electronic catalogs, door-to-door solicitation, in-home demonstration, selling from portable stalls (street vendors, except food), and distribution through vending machines. Establishments engaged in the direct sale (nonstore) of products, such as home heating oil dealers and home delivery newspaper routes are included here.

The buying of goods for resale is a characteristic of retail trade establishments that particularly distinguishes them from establishments in the agriculture, manufacturing, and construction industries. For example, farms that sell their products at or from the point of production are not classified in retail, but rather in agriculture. Similarly, establishments that both manufacture and sell their products to the general public are not classified in retail, but rather in manufacturing. However, establishments that engage in processing activities incidental to retailing are classified in retail. This includes establishments, such as optical goods stores that do in-store grinding of lenses, and meat and seafood markets.

Wholesalers also engage in the buying of goods for resale, but they are not usually organized to serve the general public. They typically operate from a warehouse or office and neither the design nor the location of these premises is intended to solicit a high volume of walk-in traffic. Wholesalers supply institutional, industrial, wholesale, and retail clients; their operations are, therefore, generally organized to purchase, sell, and deliver merchandise in larger quantities. However, dealers of durable nonconsumer goods, such as farm machinery and heavy duty trucks, are included in wholesale trade even if they often sell these products in single units.

48-49 Transportation and Warehousing

The Sector as a Whole

The Transportation and Warehousing sector includes industries providing transportation of passengers and cargo, warehousing and storage for goods, scenic and sightseeing transportation, and support activities related to modes of transportation. Establishments in these industries use transportation equipment or transportation related facilities as a productive asset. The type of equipment depends on the mode of transportation. The modes of transportation are air, rail, water, road, and pipeline.

The Transportation and Warehousing sector distinguishes three basic types of activities: subsectors for each mode of transportation, a subsector for warehousing and storage, and a subsector for establishments providing support activities for transportation. In addition, there are subsectors for establishments that provide passenger transportation for scenic and sightseeing purposes, postal services, and courier services.

A separate subsector for support activities is established in the sector because, first, support activities for transportation are inherently multimodal, such as freight transportation arrangement, or have multimodal aspects. Secondly, there are production process similarities among the support activity industries.

One of the support activities identified in the support activity subsector is the routine repair and maintenance of transportation equipment (e.g., aircraft at an airport, railroad rolling stock at a railroad terminal, or ships at a harbour or port facility). Such establishments do not perform complete overhauling or rebuilding of transportation equipment (i.e., periodic restoration of transportation equipment to original design specifications) or transportation equipment conversion (i.e., major modification to systems). An establishment that primarily performs factory (or shipyard) overhauls, rebuilding, or conversions of aircraft, railroad rolling stock, or a ship is classified in Subsector 336, Transportation Equipment Manufacturing according to the type of equipment.

Many of the establishments in this sector often operate on networks, with physical facilities, labour forces, and equipment spread over an extensive geographic area.

Warehousing establishments in this sector are distinguished from merchant wholesaling in that the warehouse establishments do not sell the goods.

Excluded from this sector are establishments primarily engaged in providing travel agent services that support transportation and other establishments, such as hotels, businesses, and government agencies. These establishments are classified in Sector 56, Administrative and Support and Waste Management and Remediation Services.

Also, establishments primarily engaged in providing rental and leasing of transportation equipment without operator are classified in Subsector 532, Rental and Leasing Services.

51 Information

The Sector as a Whole

The Information sector comprises establishments engaged in the following processes: (a) producing and distributing information and cultural products, (b) providing the means to transmit or distribute these products as well as data or communications, and (c) processing data.

The main components of this sector are the publishing industries, including software publishing, and both traditional publishing and publishing exclusively on the Internet; the motion picture and sound recording industries; the broadcasting industries, including traditional broadcasting and those broadcasting exclusively over the Internet; the telecommunications industries; the industries known as Internet service providers and web search portals, data processing industries, and the information services industries.

The expressions "information age" and "global information economy" are used with considerable frequency today. The general idea of an "information economy" includes both the notion of industries primarily producing, processing, and distributing information, as well as the idea that every industry is using available information and information technology to reorganize and make themselves more productive.

For the purpose of developing NAICS, it is the transformation of information into a commodity that is produced and distributed by a number of growing industries that is at issue. The Information sector groups three types of establishments: (1) those engaged in producing and distributing information and cultural products; (2) those that provide the means to transmit or distribute these products as well as data or communications; and (3) those that process data. Cultural products are those that directly express attitudes, opinions, ideas, values, and artistic creativity; provide entertainment; or offer information and analysis concerning the past and present. Included in this definition are popular, mass-produced, products as well as cultural products that normally have a more limited audience, such as poetry books, literary magazines, or classical records.

The unique characteristics of information and cultural products, and of the processes involved in their production and distribution, distinguish the Information sector from the goods-producing and service-producing sectors. Some of these characteristics are:

1. Unlike traditional goods, an "information or cultural product," such as a newspaper on-line or television program, does not necessarily have tangible qualities, nor is it necessarily associated with a particular form. A movie can be shown at a movie theatre, on a television broadcast, through video-on-demand or rented at a local video store. A sound recording can be aired on radio, embedded in multimedia products, or sold at a record store.

2. Unlike traditional services, the delivery of these products does not require direct contact between the supplier and the consumer.

3. The value of these products to the consumer lies in their informational, educational, cultural, or entertainment content, not in the format in which they are distributed. Most of these products are protected from unlawful reproduction by copyright laws.

4. The intangible property aspect of information and cultural products makes the processes involved in their production and distribution very different from goods and services. Only those possessing the rights to these works are authorized to reproduce, alter, improve, and distribute them. Acquiring and using these rights often involves significant costs. In addition, technology is revolutionizing the distribution of these products. It is possible to distribute them in a physical form, via broadcast, or on-line.

5. Distributors of information and cultural products can easily add value to the products they distribute. For instance, broadcasters add advertising not contained in the original product. This capacity means that unlike traditional distributors, they derive revenue not from sale of the distributed product to the final consumer, but from those who pay for the privilege of adding information to the original product. Similarly, a directory and mailing list publisher can acquire the rights to thousands of previously published newspaper and periodical articles and add new value by providing search and software and organizing the information in a way that facilitates research and retrieval. These products often command a much higher price than the original information.

The distribution modes for information commodities may either eliminate the necessity for traditional manufacture, or reverse the conventional order of manufacture-distribute: A newspaper distributed on-line, for example, can be printed locally or by the final consumer. Similarly, it is anticipated that packaged software, which today is mainly bought through the traditional retail channels, will soon be available mainly on-line. The NAICS Information sector is designed to make such economic changes transparent as they occur, or to facilitate designing surveys that will monitor the new phenomena and provide data to analyze the changes.

Many of the industries in the NAICS Information sector are engaged in producing products protected by copyright law, or in distributing them (other than distribution by traditional wholesale and retail methods). Examples are traditional publishing industries, software and directory and mailing list publishing industries, and film and sound industries. Broadcasting and telecommunications industries and information providers and processors are also included in the Information sector, because their technologies are so closely linked to other industries in the Information sector.

52 Finance and Insurance

The Sector as a Whole

The Finance and Insurance sector comprises establishments primarily engaged in financial transactions (transactions involving the creation, liquidation, or change in ownership of financial assets) and/or in facilitating financial transactions. Three principal types of activities are identified:

1. Raising funds by taking deposits and/or issuing securities and, in the process, incurring liabilities. Establishments engaged in this activity use raised funds to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale, and risk. This activity is known as financial intermediation.

2. Pooling of risk by underwriting insurance and annuities. Establishments engaged in this activity collect fees, insurance premiums, or annuity considerations; build up reserves; invest those reserves; and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.

3. Providing specialized services facilitating or supporting financial intermediation, insurance, and employee benefit programs.

In addition, monetary authorities charged with monetary control are included in this sector.

The subsectors, industry groups, and industries within the NAICS Finance and Insurance sector are defined on the basis of their unique production processes. As with all industries, the production processes are distinguished by their use of specialized human resources and specialized physical capital. In addition, the way in which these establishments acquire and allocate financial capital, their source of funds, and the use of those funds provides a third basis for distinguishing characteristics of the production process. For instance, the production process in raising funds through deposit-taking is different from the process of raising funds in bond or money markets. The process of making loans to individuals also requires different production processes than does the creation of investment pools or the underwriting of securities.

Most of the Finance and Insurance subsectors contain one or more industry groups of (1) intermediaries with similar patterns of raising and using funds and (2) establishments engaged in activities that facilitate, or are otherwise related to, that type of financial or insurance intermediation. Industries within this sector are defined in terms of activities for which a production process can be specified, and many of these activities are not exclusive to a particular type of financial institution. To deal with the varied activities taking place within existing financial institutions, the approach is to split these institutions into components performing specialized services. This requires defining the units engaged in providing those services and developing procedures that allow for their delineation. These units are the equivalents for finance and insurance of the establishments defined for other industries.

The output of many financial services, as well as the inputs and the processes by which they are combined, cannot be observed at a single location and can only be defined at a higher level of the organizational structure of the enterprise. Additionally, a number of independent activities that represent separate and distinct production processes may take place at a single location belonging to a multilocation financial firm. Activities are more likely to be homogeneous with respect to production characteristics than are locations, at least in financial services. The classification defines activities broadly enough that it can be used both by those classifying by location and by those employing a more top-down approach to the delineation of the establishment.

Establishments engaged in activities that facilitate, or are otherwise related to, the various types of intermediation have been included in individual subsectors, rather than in a separate subsector dedicated to services alone because these services are performed by intermediaries, as well as by specialist establishments, the extent to which the activity of the intermediaries can be separately identified is not clear.

The Finance and Insurance sector has been defined to encompass establishments primarily engaged in financial transactions; that is, transactions involving the creation, liquidation, change in ownership of financial assets; or in facilitating financial transactions. Financial industries are extensive users of electronic means for facilitating the verification of financial balances, authorizing transactions, transferring funds to and from transactors' accounts, notifying banks (or credit card issuers) of the individual transactions, and providing daily summaries. Since these transaction processing activities are integral to the production of finance and insurance services, establishments that principally provide a financial transaction processing service are classified to this sector, rather than to the data processing industry in the Information sector.

Legal entities that hold portfolios of assets on behalf of others are significant and data on them are required for a variety of purposes. Thus for NAICS, these funds, trusts, and other financial vehicles are the fifth subsector of the Finance and Insurance sector. These entities earn interest, dividends, and other property income, but have little or no employment and no revenue from the sale of services. Separate establishments and employees devoted to the management of funds are classified in Industry Group 5239, Other Financial Investment Activities.

53 Real Estate and Rental and Leasing

The Sector as a Whole

The Real Estate and Rental and Leasing sector comprises establishments primarily engaged in renting, leasing, or otherwise allowing the use of tangible or intangible assets, and establishments providing related services. The major portion of this sector comprises establishments that rent, lease, or otherwise allow the use of their own assets by others. The assets may be tangible, as is the case of real estate and equipment, or intangible, as is the case with patents and trademarks.

This sector also includes establishments primarily engaged in managing real estate for others, selling, renting and/or buying real estate for others, and appraising real estate. These activities are closely related to this sector's main activity, and it was felt that from a production basis they would best be included here. In addition, a substantial proportion of property management is self-performed by lessors.

The main components of this sector are the real estate lessors industries; equipment lessors industries (including motor vehicles, computers, and consumer goods); and lessors of nonfinancial intangible assets (except copyrighted works).

Excluded from this sector are real estate investment trusts (REITS) and establishments primarily engaged in renting or leasing equipment with operators. REITS are classified in Subsector 525, Funds, Trusts, and Other Financial Vehicles, because they are considered investment vehicles. Establishments renting or leasing equipment with operators are classified in various subsectors of NAICS depending on the nature of the services provided (e.g., transportation, construction, agriculture). These activities are excluded from this sector because the client is paying for the expertise and knowledge of the equipment operator, in addition to the rental of the equipment. In many cases, such as the rental of heavy construction equipment, the operator is essential to operate the equipment.

54 Professional, Scientific, and Technical Services

The Sector as a Whole

The Professional, Scientific, and Technical Services sector comprises establishments that specialize in performing professional, scientific, and technical activities for others. These activities require a high degree of expertise and training. The establishments in this sector specialize according to expertise and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: legal advice and representation; accounting, bookkeeping, and payroll services; architectural, engineering, and specialized design services; computer services; consulting services; research services; advertising services; photographic services; translation and interpretation services; veterinary services; and other professional, scientific, and technical services.

This sector excludes establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics. These establishments are classified in Sector 56, Administrative and Support and Waste Management and Remediation Services.

55 Management of Companies and Enterprises

The Sector as a Whole

The Management of Companies and Enterprises sector comprises (1) establishments that hold the securities of (or other equity interests in) companies and enterprises for the purpose of owning a controlling interest or influencing management decisions or (2) establishments (except government establishments) that administer, oversee, and manage establishments of the company or enterprise and that normally undertake the strategic or organizational planning and decision-making role of the company or enterprise. Establishments that administer, oversee, and manage may hold the securities of the company or enterprise.

Establishments in this sector perform essential activities that are often undertaken, in-house, by establishments in many sectors of the economy. By consolidating the performance of these activities of the enterprise at one establishment, economies of scale are achieved.

Government establishments primarily engaged in administering, overseeing, and managing governmental programs are classified in Sector 92, Public Administration.

Establishments primarily engaged in providing a range of day-to-day office administrative services, such as financial planning, billing and recordkeeping, personnel, and physical distribution and logistics are classified in Industry 56111, Office Administrative Services.

56 Administrative and Support and Waste Management and Remediation Services

The Sector as a Whole

The Administrative and Support and Waste Management and Remediation Services sector comprises establishments performing routine support activities for the day-to-day operations of other organizations. These essential activities are often undertaken in-house by establishments in many sectors of the economy. The establishments in this sector specialize in one or more of these support activities and provide these services to clients in a variety of industries and, in some cases, to households. Activities performed include: office administration, hiring and placing of personnel, document preparation and similar clerical services, solicitation, collection, security and surveillance services, cleaning, and waste disposal services.

The administrative and management activities performed by establishments in this sector are typically on a contract or fee basis. These activities may also be performed by establishments that are part of the company or enterprise. However, establishments involved in administering, overseeing, and managing other establishments of the company or enterprise, are classified in Sector 55, Management of Companies and Enterprises. These establishments normally undertake the strategic and organizational planning and decision making role of the company or enterprise. Government establishments engaged in administering, overseeing, and managing governmental programs are classified in Sector 92, Public Administration.

61 Educational Services

The Sector as a Whole

The Educational Services sector comprises establishments that provide instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities, and training centers. These establishments may be privately owned and operated for profit or not for profit, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Educational services are usually delivered by teachers or instructors that explain, tell, demonstrate, supervise, and direct learning. Instruction is imparted in diverse settings, such as educational institutions, the workplace, or the home through correspondence, television, or other means. It can be adapted to the particular needs of the students, for example sign language can replace verbal language for teaching students with hearing impairments. All industries in the sector share this commonality of process, namely, labour inputs of instructors with the requisite subject matter expertise and teaching ability.

62 Health Care and Social Assistance

The Sector as a Whole
The Health Care and Social Assistance sector comprises establishments providing health care and social assistance for individuals. The sector includes both health care and social assistance because it is sometimes difficult to distinguish between the boundaries of these two activities. The industries in this sector are arranged on a continuum starting with those establishments providing medical care exclusively, continuing with those providing health care and social assistance, and finally finishing with those providing only social assistance. The services provided by establishments in this sector are delivered by trained professionals. All industries in the sector share this commonality of process, namely, labour inputs of health practitioners or social workers with the requisite expertise. Many of the industries in the sector are defined based on the educational degree held by the practitioners included in the industry.
Excluded from this sector are aerobic classes in Subsector 713, Amusement, Gambling and Recreation Industries and nonmedical diet and weight reducing centers in Subsector 812, Personal and Laundry Services. Although these can be viewed as health services, these services are not typically delivered by health practitioners.

71 Arts, Entertainment, and Recreation

The Sector as a Whole

The Arts, Entertainment, and Recreation sector includes a wide range of establishments that operate facilities or provide services to meet varied cultural, entertainment, and recreational interests of their patrons. This sector comprises (1) establishments that are involved in producing, promoting, or participating in live performances, events, or exhibits intended for public viewing; (2) establishments that preserve and exhibit objects and sites of historical, cultural, or educational interest; and (3) establishments that operate facilities or provide services that enable patrons to participate in recreational activities or pursue amusement, hobby, and leisure-time interests.

Some establishments that provide cultural, entertainment, or recreational facilities and services are classified in other sectors. Excluded from this sector are: (1) establishments that provide both accommodations and recreational facilities, such as hunting and fishing camps and resort and casino hotels are classified in Subsector 721, Accommodation; (2) restaurants and night clubs that provide live entertainment in addition to the sale of food and beverages are classified in Subsector 722, Food Services and Drinking Places; (3) motion picture theatres, libraries and archives, and publishers of newspapers, magazines, books, periodicals, and computer software are classified in Sector 51, Information; and (4) establishments using transportation equipment to provide recreational and entertainment services, such as those operating sightseeing buses, dinner cruises, or helicopter rides are classified in Subsector 487, Scenic and Sightseeing Transportation.

72 Accommodation and Food Services

The Sector as a Whole

The Accommodation and Food Services sector comprises establishments providing customers with lodging and/or preparing meals, snacks, and beverages for immediate consumption. The sector includes both accommodation and food services establishments because the two activities are often combined at the same establishment.

Excluded from this sector are civic and social organizations; amusement and recreation parks; theatres; and other recreation or entertainment facilities providing food and beverage services.

81 Other Services (except Public Administration)

The Sector as a Whole

The Other Services (except Public Administration) sector comprises establishments engaged in providing services not specifically provided for elsewhere in the classification system. Establishments in this sector are primarily engaged in activities, such as equipment and machinery repairing, promoting or administering religious activities, grant making, advocacy, and providing dry-cleaning and laundry services, personal care services, death care services, pet care services, photofinishing services, temporary parking services, and dating services.

Private households that engage in employing workers on or about the premises in activities primarily concerned with the operation of the household are included in this sector.

Excluded from this sector are establishments primarily engaged in retailing new equipment and also performing repairs and general maintenance on equipment. These establishments are classified in Sector 44-45, Retail Trade.

92 Public Administration

The Sector as a Whole

The Public Administration sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area. These agencies also set policy, create laws, adjudicate civil and criminal legal cases, provide for public safety and for national defence. In general, government establishments in the Public Administration sector oversee governmental programs and activities that are not performed by private establishments. Establishments in this sector typically are engaged in the organization and financing of the production of public goods and services, most of which are provided for free or at prices that are not economically significant.

Government establishments also engage in a wide range of productive activities covering not only public goods and services but also individual goods and services similar to those produced in sectors typically identified with private-sector establishments. In general, ownership is not a criterion for classification in NAICS. Therefore, government establishments engaged in the production of private-sector-like goods and services should be classified in the same industry as private-sector establishments engaged in similar activities.

As a practical matter, it is difficult to identify separate establishment detail for many government agencies. To the extent that separate establishment records are available, the administration of governmental programs is classified in Sector 92, Public Administration, while the operation of that same governmental program is classified elsewhere in NAICS based on the activities performed. For example, the governmental administrative authority for an airport is classified in Industry 92612, Regulation and Administration of Transportation Programs, while operating the airport is classified in

Industry 48811, Airport Operations. When separate records are not available to distinguish between the administration of a governmental program and the operation of it, the establishment is classified in Sector 92, Public Administration.

Examples of government-provided goods and services that are classified in sectors other than Public Administration include: schools, classified in Sector 61, Educational Services; hospitals, classified in Subsector 622, Hospitals; establishments operating transportation facilities, classified in Sector 48-49, Transportation and Warehousing; the operation of utilities, classified in Sector 22, Utilities; and the Government Printing Office, classified in Subsector 323, Printing and Related Support Activities.

Appendix I – Workforce Survey

The Training Centre
Workforce Survey

Your participation in this short survey will help us identify the skills that leave the community on a daily basis for work, and how the community can increase employment opportunities for those who have to travel outside of the community for work. By participating, you are helping your town and your community become a better place. If you have internet access, you can complete this workforce survey online by visiting www.gtti.ca.

What town/city do you live in? ______________________

What town/city do you work in? ______________________

What is your profession/job title? ______________________

What is your type of business? ______________________
(IT, Banking, Healthcare, etc)

How do you get there? ______________________
(car, bus, train, carpool, etc.)

You can return this completed survey to drop boxes located at the civic centre, and certain public spaces. For a list of drop box locations, visit www.gtti.ca

Appendix II – National Occupation Code Definitions

In a nutshell, the NOC is a tool that is used to classify occupations according to their Skill Level and Skill Type. A four-digit code, called the "NOC code", identifies the occupation. Each digit of this code reflects an important trait of the occupation it represents. Information about the NOC can be obtained from Human Resources and Skills Development Canada.

Let's begin by looking at each digit and the significance it has with respect to the NOC.

Skill Type

Skill Type is based on the type of work performed, but it also reflects the field of training or experience that is normally required for entry into the occupation. This includes the educational area of study required, as well as the industry of employment in cases where experience within an internal job ladder is required for entry. These categories are intended to indicate easily understood segments of the world of work.

The first digit of the NOC code normally designates the Skill Type (see chart below). For example, *Occupations Unique to Processing, Manufacturing and Utilities* start with the digit 9. *Management Occupations*, which are found across all Skill Types, start with 0. Remember that an occupation that is coded with a first digit of 1 through 9 refers to the Skill Type of that occupation. An occupation that has a 0 as the first digit indicates management.

The 10 Skill Types that represent the first digit of a NOC code.

NOC Skill Types	
Skill Type	Occupation
0	Management Occupations
1	Business, Finance and Administration Occupations
2	Natural and Applied Sciences and Related Occupations
3	Health Occupations
4	Occupations in Social Science, Education, Government Service and Religion
5	Occupations in Art, Culture, Recreation and Sport
6	Sales and Service Occupations
7	Trades, Transport and Equipment Operators and Related Occupations
8	Occupations Unique to Primary Industry
9	Occupations Unique to Processing, Manufacturing and Utilities

Let us look at each Skill Type in more detail.

0. Management Occupations
This Skill Type category contains legislators, senior management occupations and middle and other management occupations. These occupations span all Skill Type categories.

1. Business, Finance and Administration Occupations

This category contains occupations that are concerned with providing financial and business services, administrative and regulatory services and clerical supervision and support services. Some occupations in this Skill Type are unique to the financial and business service sectors; however, most are found in all industries.

2. Natural and Applied Sciences and Related Occupations
This category contains professional and technical occupations in the sciences, including physical and life sciences, engineering, architecture and information technology.

3. Health Occupations
This category includes occupations concerned with providing health care services directly to patients and occupations that provide support to professional and technical health care staff.

4. Occupations in Social Science, Education, Government Service and Religion
This Skill Type category includes occupations that are concerned with law, teaching, counselling, conducting social science research, developing government policy, and administering government and other programs.

5. Occupations in Art, Culture, Recreation and Sport
This Skill Type category includes professional and technical occupations related to art and culture, including the performing arts, film and video, broadcasting, journalism, writing, creative design, libraries and museums. It also includes occupations in recreation and sport.

6. Sales and Service Occupations
This Skill Type category contains sales occupations, personal and protective service occupations and occupations related to the hospitality and tourism industries.

7. Trades, Transport and Equipment Operators and Related Occupations

Skill Type category includes construction and mechanical trades, trades supervisors and contractors and operators of transportation and heavy equipment. These occupations are found in a wide range of industrial sectors, with many occurring in the construction and transportation industries.

This Skill Type includes most of the apprenticeable trades, including all of those related to the construction industry. Other occupations in this category usually require completion of college or other programs combined with on-the-job training. Progression to supervisory or self-employed contractor status is possible with experience. There is limited mobility or transferability of skills among occupations in this category due to specific apprenticeship, training and licensing requirements for most occupations.

8. Occupations Unique to Primary Industry
This category contains supervisory and equipment operation occupations in the natural resource-based sectors of mining, oil and gas production, forestry and logging, agriculture, horticulture and fishing. Most occupations in this category are industry specific and do not occur outside of the primary industries.

9. Occupations Unique to Processing, Manufacturing and Utilities
This category contains supervisory and production occupations in manufacturing, processing and utilities.

You now know how occupations are classified according to a work domain that is called "Skill Type". We will now learn how the NOC further categorizes occupations according to different levels of skill required within each Skill Type.

Skill Level

In the context of the NOC, Skill Level corresponds to the type and/or amount of training or education typically required to work in an occupation. The NOC consists of four Skill Levels identified A through D and each is assigned a numerical value ranging from 1 to 6. To illustrate this concept, have a look at the following chart to see the relationship between the alphabetical value of each Skill Level and its accompanying numerical value.

Skill Level is primarily based on the nature of education and training required to work in an occupation. This criterion also reflects the experience required for entry and the complexity of the responsibilities involved in the work, compared with other occupations. In most cases, progression to Skill Level A, from B, is not usually possible without completion of additional formal education, whereas progression from Skill Level D to Skill Level C is often achievable through on-the-job training and experience.

Each Skill Level is intended to reflect commonly accepted paths to employment in an occupation. Where there are several paths to employment, the Skill Level most commonly identified by employers is used, considering the context of the occupation and the trends in hiring requirements.

For *Trades, Transport and Equipment Operators and Related Occupations*, Skill Level B occupations may be coded with either a 2 or a 3. The reason for this is that there are more than 9 minor groups within the major group. When there are more than 9 minor groups within a major group, the Skill Level digit is increased by one, but corresponds to the same alphabetical character. The same applies for Skill Level C in *Occupations Unique to Processing, Manufacturing and Utilities*, where the second digit can be either 4 or 5. We will discuss Major and Minor Groups in more detail shortly. For now, just understand that the second digit of the NOC code represents the Skill Level of an occupation.

The 4 Skill Levels (both alphabetic characters and numerical values) used in the NOC.

NOC Skill Levels		
Skill Level (alpha)	Skill Level (digit)	Nature of Education/ Training
A **Occupations usually require university education.**	1	University degree at the bachelor's, master's or doctorate level.
B **Occupations usually require college or vocational education or apprenticeship training.**	2 or 3	Two to three years of post-secondary education at a community college, institute of technology or CEGEP *or* Two to five years of apprenticeship training *or* Three to four years of secondary school and more than two years of on-the-job training, specialized training courses or specific work experience. Occupations with supervisory responsibilities and occupations with significant health and safety responsibilities, such as firefighters, police officers and registered nursing assistants are all assigned the Skill Level B.
C **Occupations usually require secondary school and/or occupation-specific training.**	4 or 5	One to four years of secondary school education *or* Up to two years of on-the-job training, specialized training courses or specific work experience.
D **On-the-job training is usually provided for occupations.**	6	Short work demonstration or on-the-job training *or* No formal educational requirements.

Management Occupations

Management occupations are not assigned to a Skill Level category. Factors other than education and training (e.g., previous experience, ownership of real property and capital, ownership of intellectual property, inherent decision-making skills and organizational capabilities) are often more significant determinants for employment in management occupations.

Management occupations span the Skill Types of the entire classification structure and are found in all areas of the labour market. All NOC codes that begin with a zero represent management occupations. When the second digit is zero, this represents "senior" management occupations. To identify all other management occupations, the *second digit* (1 through 9) is the corresponding Skill Type.

To illustrate this concept let us look at the following:

- Management occupations in sales and services begin with 06. The 0 indicates that it is a management level occupation and the 6 indicates that the occupation falls under the Sales and Service Skill Type.
- Now consider an NOC code that has a zero as its *first* and *second* digit. Similar to the example above, we know that this occupation is a management occupation because it begins with zero. We also know that the second digit for management occupations may reflect the Skill Type. However, because there is no Skill Type 0, we can conclude that this is a senior management occupation.

Major Groups

A *major group* is simply the first two digits of an NOC code. It is a roll-up, or, an aggregation of minor groups (which we will look at shortly). There are 26 major groups in the NOC and these are classified as follows:

MAJOR GROUPS
MANAGEMENT OCCUPATIONS
00 Senior Management Occupations
BUSINESS, FINANCE AND ADMINISTRATION OCCUPATIONS
11 Professional Occupations in Business and Finance
NATURAL AND APPLIED SCIENCES AND RELATED OCCUPATIONS
21 Professional Occupations in Natural and Applied Sciences
HEALTH OCCUPATIONS
31 Professional Occupations in Health
34 Assisting Occupations in Support of Health Services
OCCUPATIONS IN SOCIAL SCIENCE, EDUCATION, GOVERNMENT SERVICE AND RELIGION
41 Professional Occupations in Social Science, Education, Government Services and Religion
42 Paraprofessional Occupations in Law, Social Services, Education and Religion
OCCUPATIONS IN ART, CULTURE, RECREATION AND SPORT
51 Professional Occupations in Art and Culture
52 Technical and Skilled Occupations in Art, Culture, Recreation and Sport
SALES AND SERVICE OCCUPATIONS
62 Skilled Sales and Service Occupations
66 Elemental Sales and Service Occupations
TRADES, TRANSPORT AND EQUIPMENT OPERATORS AND RELATED OCCUPATIONS
72-73 Trades and Skilled Transport and Equipment Operators
74 Intermediate Occupations in Transport, Equipment Operation, Installation and
OCCUPATIONS UNIQUE TO PRIMARY INDUSTRY
82 Skilled Occupations in Primary Industry
84 Intermediate Occupations in Primary Industry
86 Labourers in Primary Industry
OCCUPATIONS UNIQUE TO PROCESSING, MANUFACTURING AND UTILITIES
92 Processing, Manufacturing and Utilities Supervisors and Skilled Operators
94-95 Processing and Manufacturing Machine Operators and Assemblers
96 Labourers in Processing, Manufacturing and Utilities

As we have learned, the first digit represents the Skill Type for an occupation and the second digit of the code generally separates occupations according to Skill Level, or the type and duration of training required. Therefore, we can have several major groups within each Skill Type. In the example of *Sales and Service Occupations* , there are three major groups:

62 Skilled Sales and Service Occupation
64 Intermediate Sales and Service Occupations
66 Elemental Sales and Service Occupations

Minor Groups

At the three-digit level, the major groups are further divided into 140 *minor groups*. For example, major group 64, Intermediate Sales and Service occupations, includes eight minor groups:

641 Sales Representatives, Wholesale Trade
642 Retail Salespersons and Sales Clerks
643 Occupations in Travel and Accommodation
644 Tour and Recreational Guides and Casino Occupations
645 Occupations in Food and Beverage Service
646 Other Occupations in Protective Servic
647 Childcare and Home Support Workers
648 ther Occupations in Personal Service

By now you have probably realized that each digit of the NOC code helps to further specify an occupation. At the minor group level, you can pinpoint a domain in which an occupation is carried out. However, we need to go one step further to identify an actual occupational group.

Occupational Descriptions

Whether you are an economist analyzing labour market data for a specific occupation or an employment counselor helping someone determine what type of training to take, occupational descriptions help us understand an occupation using a standardized language.

Occupational descriptions are published for each of the 520 unit groups included in the NOC. Each description is referred to as a "NOC group". Each description includes the following elements:

Lead Statement

The lead statement provides a general description of the occupation and the boundaries of the unit group. It also indicates the kinds of industries, workplaces or establishments where the occupation is found.

Example Titles

Example titles are the occupational titles commonly found within the group. This list is not exhaustive. A more complete listing of alphabetical job titles can be found in the NOC Index of Titles.

Main Duties

The main duties section describes the most significant duties of the occupations in the group. It may include:

- a series of statements that can be applied to all occupations in the group;
- two or more sub-sets of occupations with statements that apply to each component; and/or
- a series of brief statements that are linked to specific occupations, that, while similar enough to be in the same group, can be described separately.

Statements in Italics, at the end of this section, identify a specialization that may exist within the occupation.

Employment Requirements

Employment requirements are prerequisites generally needed to enter the occupation. Several types of requirements are listed:

- type and level of education, starting with the lowest possible requirement for entry into the occupation;
- specific training required, including apprenticeship, on-the-job or internal training;
- experience in a related occupation, especially for supervisory or managerial occupations;
- licences, certificates or affiliations; and/or
- other requirements not dependent on formal education, such as athletic abilities, artistic talent or presentation of a portfolio.

While some occupations have very specific employment requirements, others have a wide range of acceptable requirements. The following terminology is used to indicate the level of the requirement:

- *"Is required"* indicates a definite requirement.
- "*Is usually required"* means that the qualification is generally expressed as required by a majority of employers, but not always mandatory.
- *"May be required"* describes requirements that some employers may impose, but are not universal.

Qualities related to personal suitability that may have an impact on employability are not described in this publication. These factors are subjective and determined by employers and assessed during the hiring process.

Appendix III – Workforce Survey Distribution – NOC

NOC Codes	NYRC		East Gwillimbury		Georgina	
Total	2124	100.0%	468	100.0%	1656	100.0%
00	82	3.9%	17	3.6%	65	3.9%
01	339	16.0%	99	21.2%	240	14.5%
02	1	0.0%	0	0.0%	1	0.1%
06	27	1.3%	8	1.7%	19	1.1%
07	30	1.4%	3	0.6%	27	1.6%
08	6	0.3%	4	0.9%	2	0.1%
09	20	0.9%	2	0.4%	18	1.1%
11	69	3.2%	26	5.6%	43	2.6%
14	107	5.0%	18	3.8%	89	5.4%
21	72	3.4%	23	4.9%	49	3.0%
22	33	1.6%	7	1.5%	26	1.6%
31	127	6.0%	30	6.4%	97	5.9%
32	21	1.0%	6	1.3%	15	0.9%
34	10	0.5%	0	0.0%	10	0.6%
41	178	8.4%	38	8.1%	140	8.5%
42	76	3.6%	5	1.1%	71	4.3%
51	34	1.6%	15	3.2%	19	1.1%
52	42	2.0%	13	2.8%	29	1.8%
62	97	4.6%	19	4.1%	78	4.7%
64	207	9.7%	26	5.6%	181	10.9%
66	77	3.6%	11	2.4%	66	4.0%
72	128	6.0%	28	6.0%	100	6.0%
73	70	3.3%	10	2.1%	60	3.6%
74	111	5.2%	28	6.0%	83	5.0%
76	31	1.5%	13	2.8%	18	1.1%
82	55	2.6%	12	2.6%	43	2.6%
94	1	0.0%	0	0.0%	1	0.1%
96	73	3.4%	7	1.5%	66	4.0%

Appendix IV – Workforce Survey Frequency Distribution – NOC by Commuter Patterns to Top Six Municipalities

NOC Codes	M		T		G		NM		EG		A	
Total	114	100.0%	702	100.0%	536	100.0%	315	100.0%	65	100.0%	57	100.0%
00	5	4.4%	20	2.8%	35	6.5%	12	3.8%	9	13.8%	2	3.5%
01	22	19.3%	134	19.1%	56	10.4%	50	15.9%	0	0.0%	14	24.6%
02	0	0.0%	1	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
06	3	2.6%	12	1.7%	9	1.7%	1	0.3%	0	0.0%	0	0.0%
07	2	1.8%	5	0.7%	15	2.8%	2	0.6%	0	0.0%	0	0.0%
08	1	0.9%	4	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
09	0	0.0%	3	0.4%	6	1.1%	5	1.6%	0	0.0%	0	0.0%
11	3	2.6%	39	5.6%	3	0.6%	9	2.9%	0	0.0%	1	1.8%
14	3	2.6%	19	2.7%	42	7.8%	18	5.7%	13	20.0%	3	5.3%
21	16	14.0%	28	4.0%	4	0.7%	6	1.9%	0	0.0%	0	0.0%
22	2	1.8%	15	2.1%	2	0.4%	3	1.0%	0	0.0%	0	0.0%
31	6	5.3%	49	7.0%	15	2.8%	38	12.1%	1	1.5%	2	3.5%
32	0	0.0%	7	1.0%	7	1.3%	7	2.2%	0	0.0%	0	0.0%
34	0	0.0%	3	0.4%	2	0.4%	5	1.6%	0	0.0%	0	0.0%
41	8	7.0%	68	9.7%	46	8.6%	11	3.5%	6	9.2%	7	12.3%
42	1	0.9%	9	1.3%	31	5.8%	22	7.0%	2	3.1%	0	0.0%
51	0	0.0%	26	3.7%	5	0.9%	0	0.0%	0	0.0%	0	0.0%
52	3	2.6%	8	1.1%	20	3.7%	9	2.9%	0	0.0%	0	0.0%
62	4	3.5%	30	4.3%	26	4.9%	21	6.7%	4	6.2%	2	3.5%
64	14	12.3%	40	5.7%	88	16.4%	29	9.2%	5	7.7%	8	14.0%
66	0	0.0%	14	2.0%	44	8.2%	5	1.6%	4	6.2%	1	1.8%
72	4	3.5%	56	8.0%	17	3.2%	12	3.8%	9	13.8%	4	7.0%
73	4	3.5%	21	3.0%	21	3.9%	10	3.2%	2	3.1%	2	3.5%
74	5	4.4%	33	4.7%	14	2.6%	22	7.0%	1	1.5%	10	17.5%
76	2	1.8%	15	2.1%	3	0.6%	3	1.0%	0	0.0%	0	0.0%
82	1	0.9%	16	2.3%	13	2.4%	4	1.3%	8	12.3%	1	1.8%
94	0	0.0%	1	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
96	5	4.4%	26	3.7%	12	2.2%	11	3.5%	1	1.5%	0	0.0%

Appendix V – Focus Group Questionnaire

The Training Centre

Questionnaire

Thank you for your participation in today's focus group. We would first like to get some background information, and standardized opinions that we can compare across the different groups of individuals living within out municipality. The questionnaire should not take more than 15 minutes. Please try to respond to each question truthfully. The responses you provide will help provide insight to GTTI and the town. Your responses to this questionnaire are confidential and will not be shared or distributed with anyone. Your data will be aggregated with everyone else and then analyzed as a group.

1. What is your age? ________________________
2. Where do you currently live? ________________________
3. How long have you lived in the [Municipality]? ________________________
4. What is your highest level of educational attainment (Grade 1-12, Diploma, Degree, Masters, PhD, MD...etc.)? ________________________
5. Your current job title? ________________________
6. Your current organizations name? ________________________
7. Your current organizations location? ________________________
8. Your current travel time to work? ________________________
9. Your current mode of transport to work? ________________________
10. How long have you been working there? ________________________

For the following questions please rate each question on a scale from 1 to 5, where 1 is strongly disagree, 3 is no opinion, and 5 is strongly agree.

	Low		Avg		High	Don't Know	N/A
11. Do you actively search for any opportunities within [Municipality] or close to it?	1	2	3	4	5	DK	N/A
12. If a job opportunity existed in [Municipality], how willing would you be to apply for it?	1	2	3	4	5	DK	N/A
13. Would you accept a lower paying wage within [Municipality], if it meant you did not have to travel?	1	2	3	4	5	DK	N/A
14. Would you be willing to go through a training program if it meant employment within [Municipality]?	1	2	3	4	5	DK	N/A

15. If a job opportunity existed in [Municipality], how different would the wage have to be from your current salary/ wage before you say no?
    ____

16. Have you ever tried to start your own business? ______________________________

If you answered yes for question 16, then please answer the following questions, otherwise skip to 19.

17. How long have you had a business? ______________________________

18. List any obstacles your business has faced in [Municipality]?
    ____
    ____
    ____
    ____

Please rate each of the following for the Municipalities weakness as a place to work/do business? For each of the questions, please rate each question on a scale from 1 to 5, where 1 is the lowest, 3 is average, and 5 is the highest.

		Low		Avg		High	Don't Know	N/A
19.	Taxes	1	2	3	4	5	DK	N/A
20.	Public Transportation	1	2	3	4	5	DK	N/A
21.	Access to (skilled) labour	1	2	3	4	5	DK	N/A
22.	Bureaucracy/ restrictive (land/building/traffic) bylaws	1	2	3	4	5	DK	N/A
23.	Property/ real estate/ housing costs	1	2	3	4	5	DK	N/A
24.	Traffic/ Traffic congestion	1	2	3	4	5	DK	N/A
25.	Lack of government support/ incentives for business	1	2	3	4	5	DK	N/A
26.	High rent	1	2	3	4	5	DK	N/A
27.	Hydro interruptions	1	2	3	4	5	DK	N/A
28.	Cost of doing business	1	2	3	4	5	DK	N/A
29.	Government/ poor municipal management	1	2	3	4	5	DK	N/A
30.	Hydro/ utility cost	1	2	3	4	5	DK	N/A
31.	Poor/ limited municipal services/ infrastructure	1	2	3	4	5	DK	N/A
32.	Limited local customer base	1	2	3	4	5	DK	N/A
33.	Other: ________________________	1	2	3	4	5	DK	N/A

Please rate each of the following for the Municipalities strengths as a place to work/do business? For each of the questions, please rate each question on a scale from 1 to 5, where 1 is the lowest, 3 is average, and 5 is the highest.

	Low		Avg		High	Don't Know	N/A
34. Transport routes/close to highways	1	2	3	4	5	DK	N/A
35. Convenient/central location	1	2	3	4	5	DK	N/A
36. Low taxes	1	2	3	4	5	DK	N/A
37. Close to customers	1	2	3	4	5	DK	N/A
38. Good/skilled workforce	1	2	3	4	5	DK	N/A
39. Access to suppliers/ service providers	1	2	3	4	5	DK	N/A
40. Manufacturing/ high tech industry hub	1	2	3	4	5	DK	N/A
41. Proximity to other businesses	1	2	3	4	5	DK	N/A
42. Access to infrastructure	1	2	3	4	5	DK	N/A
43. Close to home/easy commute	1	2	3	4	5	DK	N/A
44. Proximity/ good access to Toronto/ GTA	1	2	3	4	5	DK	N/A
45. Growth/ good growth potential	1	2	3	4	5	DK	N/A
46. Lower cost of doing business	1	2	3	4	5	DK	N/A
47. Financial incentives	1	2	3	4	5	DK	N/A
48. Availability of space/ real estate	1	2	3	4	5	DK	N/A
49. Proximity to rail/ air service	1	2	3	4	5	DK	N/A
50. Nice place to live	1	2	3	4	5	DK	N/A
51. Other: ________________________	1	2	3	4	5	DK	N/A

Appendix VI – Discussion Group Results

East Gwillimbury Discussion Question One Items and their Rankings

	Question 1 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Clean slate	4	1	0
2. Green space	2	0	2
3. Potential for many different industries	2	2	1
4. Nice place to live	2	2	2
5. Size of spaces	1	3	2
6. More value for money	2	2	0
7. Friendly & Welcoming	1	1	3
8. Educated community citizens	0	1	1
9. Lake	0	1	0
10. Recreational Space	0	1	1
11. Tourist Attraction	0	1	0
12. Balance of small town with city life	1	0	1
13. Larger space and sense of history	0	0	0
14. Rural Life	1	1	0
15. Sense of community	0	1	2
16. Get away from city	1	0	1
17. Many Festivals and activities	0	0	1
18. Ice Fishing	0	0	0

East Gwillimbury Discussion Question Two Items and their Rankings

	Question Two Frequencies		
	Rank 1	Rank 2	Rank 3
1. No Tim Hortons	1	1	1
2. Little office space for industry	3	2	2
3. Lacking infrastructure	3	3	2
4. Lacking levels of education facilities	0	2	2
5. Transportation	7	3	4
6. Volunteer fire services	0	0	1
7. Entertainment	1	1	0
8. Affordable	0	0	0
9. Education/Training	0	0	0
10. Bigger version of GTTI	0	1	0
11. Transportation	1	1	1
12. Public Transit (irregular hours)/ inconsistent	0	0	0
13. Drivers town	0	0	0
14. Poor access to go train	0	2	2
15. No work for young adults	0	0	0
16. Healthcare services	0	0	0
17. No walk-in clinics	0	0	0
18. Recreations	1	1	0
19. Gyms	0	0	0
20. Dog Parks	0	0	0
21. Tourism	0	0	0
22. Attractions are not presented well	0	0	0
23. More accessible	0	0	0
24. Lacking for lake	0	0	0
25. Parking	0	0	0
26. Hotels	0	0	0
27. Convention Centre	0	0	0
28. Small business park	0	0	0
29. No exhibition area/ centre	0	0	0
30. Little Government opportunities	0	0	0
31. Services for elderly	0	0	0

East Gwillimbury Discussion Question Three Items and their Rankings

	Question 3 Frequencies		
	Rank 1	Rank 2	Rank 3
1. 500+ firms	3	1	0
2. Small businesses/Home business	2	1	1
3. Professional Services	0	1	1
4. Satellite offices	1	2	0
5. Recycling Centre	1	0	0
6. Knowledge based institution	1	2	4
7. Government services institution	2	1	2
8. Tourism	0	1	0
9. Health care	2	2	2
10. Factories	1	0	1
11. Day Care – Flexible	0	0	0
12. Apprenticeship programs	0	1	0
13. Call Centres	1	1	0
14. Government	0	0	0
15. University	0	2	1
16. Large Firms	0	0	0
17. Medium Size Firms	2	1	2
18. No large corporate (e.g. GM)	0	0	1
19. Full-time employment	0	0	0

East Gwillimbury Discussion Question Four Items and their Rankings

	Question 4 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Wholesale and distribution	0	0	2
2. Recreation	0	1	2
3. Educational Centres	2	2	0
4. Research	0	3	0
5. Ecotourism	2	1	2
6. Museum	0	0	0
7. Grow your own products	1	0	0
8. Locally produced	2	2	0
9. Organic Farming	2	0	2
10. Maximizing external programs	0	1	0
11. Solar Farms	3	1	1
12. Wind Farms	0	0	0
13. Farmers Market	0	0	1
14. Specialty Factory – focusing on local agriculture	0	1	0

Georgina Discussion Question One Items and their Rankings

	Question 1 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Attractions	11	4	6
2. Cheap housing	6	7	3
3. Close to 48	2	0	0
4. Recreational Facilities	1	2	2
5. Rural Area/ Low Density Area	1	1	1
6. Great place for above average income families	0	0	1
7. Easy access to amenities	2	0	1
8. Friendly	0	0	1
9. Proximity to Toronto	4	8	8
10. Good Education system	0	2	0
11. Lack of local competition	3	4	1
12. Proximity to lake simcoe	0	0	0
13. Proximity to forest	0	0	0
14. Proximity to airport	0	0	0
15. Tourism	2	1	2
16. Small Town feeling with large town facilities	0	0	0
17. Revitalized	0	0	0
18. Feeling of spaciousness	0	0	0
19. Large Residential Base	0	0	2
20. Transportation	1	0	1
21. Young Families	0	2	2
22. Cheaper Taxes	0	1	0

Georgina Discussion Question Two Items and their Rankings

	Question 2 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Transportation	7	5	4
2. Health	14	4	4
3. Professionals	0	2	0
4. Education	2	3	1
5. Services for young adults/ kids	0	1	0
6. Lack of employment opportunities	0	7	0
7. Accommodations	0	4	5
8. Mall	0	0	0
9. Industrial	4	1	0
10. Skilled Trades (not enough)	1	0	3
11. High Tax Base	1	0	1
12. Subsidized/ Affordable House	1	1	2
13. No Tax Incentives	0	1	1
14. No rail lines	0	0	1
15. Restaurants & Fast Foods	0	1	3
16. Commercial Space (Now)	3	1	1
17. Recreational/Youth Services	0	4	2
18. Fragmented Identity	0	0	0
19. No Main centre	0	0	0
20. No development around lake	3	1	0
21. Tourism	0	0	4

Georgina Discussion Question Three Items and their Rankings

	Question 3 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Post-secondary education	3	0	3
2. Recreation Centre	2	3	3
3. Resort	0	0	1
4. Manufacturing / Assembly plant	12	6	5
5. Call Centre	0	2	1
6. Tourism	0	2	1
7. Head Offices for corporations	2	1	4
8. Environmentally friendly	0	0	0
9. Health Centre	4	4	1
10. Government Opportunities	9	5	2
11. Warehousing	0	2	1
12. Accommodation/Hotel/B&B	2	1	5
13. Restaurant/Cafes/Bistros	1	2	0
14. Attractions	1	3	2
15. Trades Training (Larger version of GTTI)	0	3	1
16. Professional	1	0	1
17. Farmers Market	0	1	1

Georgina Discussion Question Four Items and their Rankings

	Question 4 Frequencies		
	Rank 1	Rank 2	Rank 3
1. Training Facilities/ Education Centre	16	5	6
2. Pick your own farm	1	1	0
3. Onsite store	1	3	0
4. Community Gardens	5	2	3
6. Forestry/ Gardening Program	1	2	3
7. Christmas Tree Farm	0	0	0
8. Children's Day Camp	1	1	0
9. Solar Panel /Wind Power Generation	2	2	1
10. Organic Farmers	0	5	0
11. Processing Plant	2	2	6
12. Parks/Tourism	1	1	2
13. Water/Agriculture	0	1	1
14. Technological Advances in Farming	2	2	3
15. Cultural Experience	1	5	0
16. Better Advertising for Area	2	1	0
17. Wedding Industry	1	1	1
18. Basket Program	1	0	2
19. Better Communication	0	1	1
20. Servicing Shelters and Other services	0	0	1