



Prince Edward County Community Development Strategic Plan

February 2014





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1 Introduction

1.1 A Sustainable Rural Community

Prince Edward County's agricultural roots date back more 200 years, as evidenced in its landscapes and local economy. More recently, however, the county has seen the emergence of a more integrated rural economy that supports a broad range of small-scale, creative economy based businesses, with notable strengths in agri-business, tourism, commerce and industry, knowledge based industries, and arts and culture enterprises. Although much of the business and entrepreneurial activity takes place in the commercial cores of the County's largest settlement areas including Picton, Bloomfield, Wellington and Rossmore, local business growth is increasing in homes and on farms; a trend consistent with the experience of many small urban and rural communities across the province.

The County also attracts considerable tourism traffic during the summer months due to the presence of Sandbanks Provincial Park adding a level of vibrancy and activity unique in Eastern Ontario. However, it is the County's quality of place experience and proximity to Kingston, Ottawa, Montreal and the Greater Toronto and Hamilton Area that has provided the draw for new residents, investment and investors to the region. This has resulted in new business ventures including restaurants, artisans, unique retail experiences and a burgeoning culinary sector based on a popular local food



movement and a growing wine industry¹. However, with much of the small business economy still dependent on the influx of tourists and seasonal residents, the nature of these sectors means that many businesses struggle during the non-peak months.

Notwithstanding the strong evidence of a creative rural economy, the County is being impacted by a demographic shift towards an older population that has resulted from natural generational aging and the attractiveness of the region to early retirees. Coupled with the departure of youth for educational pursuits or employment opportunities, this has created an imbalance in region's demographic profile which will impact the County's ability to create and sustain economic growth over the long term. Combined with broader provincial trends such as the shift towards a service and knowledge based economy, the general decline of manufacturing and the increasing cost of entry in the agricultural sector, a 'rethink' and repositioning the County's economic development efforts is required.

In this context a community development strategic plan can act as an invisible hand guiding staff, citizens and businesses to work freely and yet collectively toward realizing the long term goals of a community. In the case of Prince Edward County, this means developing a community development strategic plan and implementation plan that guides the community's transformation to a sustainable rural economy - an economy that harnesses the talents of local citizens, attracts new residents, businesses and investors to a place with authentic quality of place experience, and where entrepreneurship and innovation of businesses and services are not only encouraged, but rewarded as well.

1.2 Objectives and Outcomes

Historically, rural communities across Ontario have faced significant challenges when it comes to encouraging and sustaining economic growth. This can be attributed in part, to their remoteness from large urban centres and thus the lack of industry supply chains and employment opportunities. Other factors such as the lack of infrastructure including broadband, networks to support business development and investment and the scale and skill of the resident workforce are also a consideration.

But, as anyone who is involved in economic development will know, driving sustainable economic development in rural communities is complex. Building a successful strategy requires understanding how different parts of the local economy can interact to generate new economic development opportunities, identifying the tools to effect this change and having the resources to make it happen. This includes first and foremost, building and leveraging local capacity – economic, social, technological and political capacity and resources including location, labour, capital, entrepreneurs and industrial composition².

¹ Prince Edward County is one of only three officially designated Viticultural Areas of Ontario. This designation was awarded by the Province of Ontario in 2007.

² Martin Prosperity Institute, Creativity, Tourism and Economic Development in a Rural Context, The case of Prince Edward County, May 2010



Prince Edward County through its Community Development Commission is determined to refocus and diversify its economic development initiatives to better position the community to meet emerging economic development opportunities, while at the same time tackling the larger issues that are impacting economic growth in the county. The preparation of a Community Development Strategic Plan is the first step towards:

- **Developing sustainable jobs well matched to local employment needs and opportunities;**
- **Supporting Prince Edward County's profile as an attractive economic climate with business opportunities;**
- **Building on local assets, resources, heritage and innovation; and**
- **Increasing the municipal tax base.**

The primary outcome of this strategic planning process has been to articulate a vision for what the county aspires to be as a community. The resulting Community Development Strategic Plan addresses the unique challenges and opportunities for Prince Edward County and responds directly to the tools and tactics required to achieve this vision and build and sustain a rural economy.

1.3 Approach and Methodology

It is Prince Edward County's intent to develop a five year community development strategic plan that will guide sustainable economic development programming and services.

Figure 1 illustrates the Strategic Planning Process for the Community Development Plan.

A critical component to the development of any community development strategic plan, regardless of the size of the community is a solid understanding of a community's performance against a range of local and regional socio-economic indicators. Combined with an analysis of current and emerging business investment trends and an inventory of community based assets, this information is used to inform a discussion of the County's quality of place experience and the degree to which this can be leveraged for future economic growth.

The results of were also used to inform stakeholder consultation efforts which included one on one interviews, focus group discussions and a community survey. A SWOT assessment (strengths, weaknesses, opportunities, threats) was then prepared that provides further indication of Prince Edward County's ability and capacity to support business investment and the County's value proposition for the attraction of business, investment and residents to the community.

Section 2 of this report provides a summary of the key findings derived from this process. The appendices to this report contain a more detailed understanding of the issues and forces that are shaping economic growth in Prince Edward County.



FIGURE 1: STRATEGIC PLANNING PROCESS



1.4 Financial and Budgetary Implications

The Prince Edward County Community Development Strategic Plan is intended as a high level plan focused on the growth and diversification of the local economy over the long term. It does not include specific financial cost estimates for individual projects or actions. Costing will be done through the development of an overarching Implementation Plan that articulates the resources required to move the plan forward.

It must be noted that while direct investments in economic development may create fiscal pressures for the County in the short term, it will be the foundation to the long term sustainability and resilience of the economy.

1.5 Notes on Data

In completing this report, Millier Dickinson Blais has made use of available 2006 and 2011 population Census and National Household Survey information for Prince Edward County and the Province of Ontario, as well as 2008 and 2012 business pattern data obtained from Statistics Canada.

Additional information as it relates to the County's competitive position relative to surrounding communities has been derived from the BMA 2012 Municipal Study.



2 Strategy Development Process

2.1 Situational Analysis

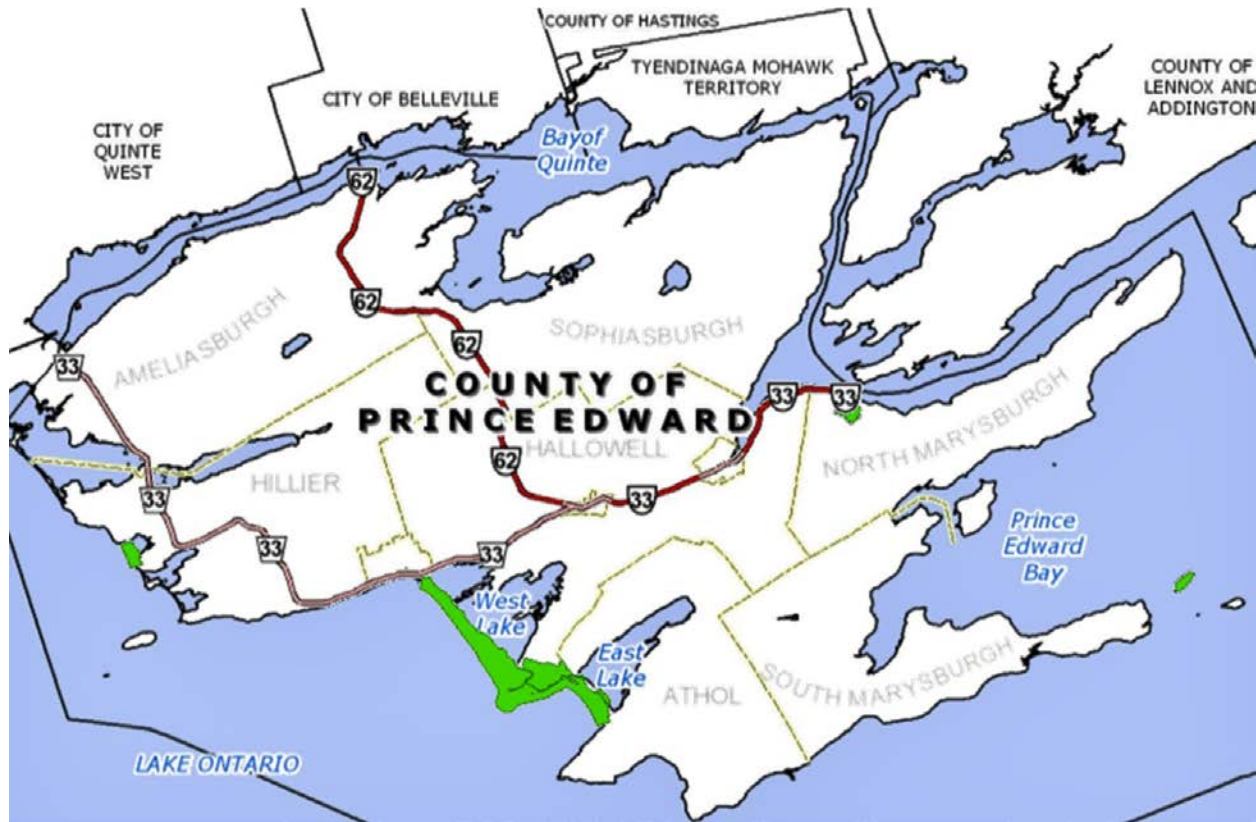
The Community Development Strategic Plan has been informed by a comprehensive analysis of the local and broader regional economy (figure 2). Consideration has been given to current and emerging business and industry sector trends and relevant background studies and reports that have a direct impact on the County's current and future economic development activities.

Highlights from this analysis include:

- Prince Edward County has a current population of 25,258 excluding seasonal residents. From 2001 to 2006, the County's population increased by 2.4%, but has subsequently declined by 0.9% between 2006 and 2011. The County anticipates a 10.9% increase in population (including seasonal residents) through 2032.
- The County's median age is 51.6 years of age compared to 44.6 years provincially and has been increasing since 2001, due in large part to the increase of retirees. Currently the largest age cohort in the County is between 60-64 years.
- Notwithstanding the general aging of the population people aged 20-64 comprise 57% of the population compared to 60% in Quinte West and 59% in Belleville.



FIGURE 2: COUNTY OF PRINCE EDWARD AND THE SURROUNDING REGION



Source: County of Prince Edward GIS Department

- Prince Edward County's estimated 2012 average household income of \$77,066 is higher than both Belleville (\$69,041) and Quinte West (\$69,041) which reflects the influx of wealth associated with the increase in retirees.
- As of 2011, the County had a smaller proportion of its population with a university certificate, diploma or degree (59%) when compared to the province (64.8%).
- There are a higher percentage of 25-44 age cohorts with no post-secondary degree education when compared to the County's older population suggesting that the older cohorts are better educated.
- In 2011, single detached homes made up 86.8% of the dwellings within the County. The weighted mean value of a single family home in the County is \$245,462, as compared to \$193,901 in Quinte West and \$194,879 in Belleville. The cost and availability of housing may be contributing to the County's ability to attract and retain younger workers.
- Since 2006, the County's total labour force has contracted by 680 workers or 7.8%, with the largest employment losses in manufacturing, educational services and agriculture.



- The highest proportions of workers in the County are currently employed in health care and social assistance, retail trade, manufacturing, construction, agriculture and accommodation and food services.
- Current Business Patterns data suggest there are 909 businesses (with employees) operating in the County, an increase of 31.3% since 2008. By comparison, home based/sole proprietor businesses only grew by 16.2% over the same period.
- Business (with employees) are concentrated in the following sectors:
 - Agriculture, Forestry, Fishing and Hunting (137 businesses)
 - Real Estate and Rental and Leasing (121 businesses)
 - Construction (102 businesses)
 - Professional, Scientific and Technical Services (101 businesses)
- The sectors that have seen the largest increase in the number of businesses include: agriculture, finance and insurance, and professional, scientific and technical service firms reflecting the changing nature of the local economy.
- In 2012, Prince Edward County had the lowest property taxes as a percentage of household income at 3.4% when compared to its neighbours.
- The County currently has the lowest development charges on non-residential commercial development when compared to Belleville, Quinte West or Kingston which should be a competitive advantage in the attraction of future investment.

A full summary of the economic base analysis can be found in **Appendix A**.

In addition to the situational analysis, a *preliminary* community asset mapping exercise³ was undertaken. This exercise identified more than 400 community based assets ranging historical, to natural, cultural and agricultural assets. The results demonstrate the unique resources, experiences and quality of place elements that differentiate the County from other regions of the province and that could be more effectively leveraged by the community development strategic plan. Based on this exercise, cultural enterprises, community cultural organizations, cultural facilities and spaces and events and festivals (cultural assets) comprise the most significant concentration of community assets in the County.

A complete summary of findings for the community asset mapping exercise can be found in **Appendix B**.

2.2 Stakeholder Consultation

In order to secure broad-based support for the Community Development Strategic Plan, a comprehensive consultation effort was essential. These included over 35 one-

³ Sources included: infoCanada, Online Directories, Taste the County, Prince Edward County Directories and Brochures, Prince Edward County Parks and Recreation Department, Register of Historic Places, Plaques Ontario, Local Business Websites.



on-one interviews and small-group discussions completed over the spring and summer of 2013. Participants included elected officials, senior business leaders, key community stakeholders, economic development partners, and senior management from the County. The input provided further insight into trends related to Prince Edward County's socio-economic makeup, the County's policy framework, and current community development activities.

In addition, an electronic survey was directed at residents, businesses and organizations within the County with more than 350 people participating in an assessment of the challenges and opportunities for economic growth and development. In all, more than 400 representatives from business, community organizations, and the broader community provided input through these consultation initiatives. The major themes that emerged from the consultation process included:

Appendix C and **D** provide details of the consultation program.

2.3 SWOT Assessment

Building on business and stakeholder input and the findings from the situational analysis and community mapping exercise, a Strengths, Weaknesses, Opportunities and Threats (SWOT) assessment was completed. The SWOT provides further evidence of the County's ability and capacity to support the attraction, retention and expansion of business investment, residential growth and community development.

The complete SWOT report can be found in **Appendix E**.

Strengths

- Unique Rural/Small Town Lifestyle and Quality of Place
- A Strong Network of Stakeholders and Organizations that are committed to the Community's Success
- Proximity to Major Urban Centres and Highway 401
- A Strong Base of Cultural and Agricultural Assets
- Concentration of Knowledge Based Businesses
- Significant Tourist Destination
- Low Property Tax and Building Permit Fees
- An Inventory of Municipally Owned Surplus Land and Buildings that could be used to Attract Business and Investment

Weaknesses

- Serviced Industrial Land is Inadequate to Attract Large Scale Investment
- Lack of Economic Diversification
- Aging Population and Shrinking Workforce
- Low Rates of Educational Attainment
- Housing Choice and Affordability
- Fiscal and Budgetary Pressures



- Lack of Clarity and Collaboration / Co-operation from County Administration
- Lack of Community Vision

Opportunities

- Support for and Attraction of Knowledge Based Businesses
- Strengthen and Leverage Cultural and Tourism Assets
- Increase Support for Small Businesses
- Capitalize on Cultural Assets and Resources
- Encourage and Promote Development in Local Commercial Areas
- Assess and Improve the Development/Permit Approvals Process
- Enhanced Marketing and Promotional Effort Geared to Attracting New Residents, Investors and Visitors
- Stronger Partnerships and Communication with Local Organizations, Business Community, and Public
- Enhance Municipal Website

Threats

- Lack of Control of Local Branding and Tourism Activities
- Limited Growth Potential if the 'Status Quo' Persists
- Near Term Fiscal and Budgetary Constraints
- Limited Financial Flexibility to Respond to Challenges
- Retail Based Businesses and Precarious Employment
- Changing Sense of Place

The findings from the situational analysis, stakeholder consultation process and SWOT are the basis for the goals and objectives contained in the Community Development Strategic Plan. The plan assumes that Prince Edward County will play a more positive role in developing the local economy and provide the fiscal stability to support a vibrant sustainable rural lifestyle.

2.4 Alignment with Other Plans

In preparing the Community Development Strategic Plan for Prince Edward County, consideration has been given to a range of municipally-led plans that will have a direct bearing on the implementation of the plan and the overall development of the County in the coming years.

2.4.1 County's Official Plan

Prince Edward County initiated an Official Plan Review in 2010. A core component of the County's work since that time has been in the preparation of 12 Issues Papers to inform the development of the new Official Plan. This effort has revealed three recurring themes for the Plan - low growth; scattered low density development outside



of the settlement areas; and an aging population, all of which have an impact on the growth of the local economy, the County's brand and identity, and the provision of community services. Underlying all of this is the recognition that agricultural and rural land uses are considered fundamental components of the County's character and its quality of place experience.

In identifying the potential planning policies and tools for addressing the issues identified during the initial phase of the Official Plan Review, consideration has been given to the results of the County's Community Development Strategic Plan process. In addition, the goals, objectives and actions contained in the Community Development Strategic Plan are well aligned with the direction that is emerging for the County's Official Plan. The framework is further supported by performance metrics that will monitor changes in the local economy and results achieved by the County over the next five years.

2.4.2 Corporate Strategic Plan

The current Corporate Strategic Plan for Prince Edward County was approved in 2007. While somewhat dated, the plan responds to a range of strategic issues that have a direct bearing on the Community Development Strategic Plan. This includes:

- **Creating employment that is stable, year round and well paying;**
- **Providing a professional and efficient interface with the community including the enhancement of our consultative and communication processes with the residents of the County;**
- **Ensuring opportunity for all income earners to live in Prince Edward County including aging and special needs population; and**
- **Protecting the County's culture, identity and quality of life.**

The recommendations contained within the Community Development Plan support the desired outcomes articulated in the Corporate Strategic Plan, and provide a strong framework for economic growth and the health and prosperity of the County.

2.4.3 Community Improvement Plan

A new Community Improvement Plan (CIP) came into effect on January 25, 2012. The Community Improvement Plan is an expression of the municipality's commitment to supporting economic development in all of our communities.

The intent of the plan is to;

- **Support creative entrepreneurs in the feasibility, development and start-up/expansion processes of their businesses;**
- **Establish land use and economic development policy that provides clear guidance for proposed development;**



- **Conserve and strengthen a wide variety of quality of place elements throughout the County;**
- **To strategically use financial incentives to attract and retain Creative Economy businesses, and help existing Creative Rural Economy businesses expand;**
- **Promote, strengthen and grow the synergies between Prince Edward County's Creative Rural Economy businesses;**
- **Maximize the ratio of long term private investment to public investment in Prince Edward County's Creative Rural Economy;**
- **Prioritize municipal investment in economic development programs and projects; and**
- **Assist the municipality with obtaining funding for key public projects.**

The new Community Improvement Plan aligns with the nature of the Prince Edward County economy and is uniquely tailored to the County's quality of place, its creative entrepreneurs and businesses. It also makes a strong statement about the County's desire to chart an innovative approach to both economic development and planning.



3 The Context for Economic Development

Giving consideration to the County's current community profile, stakeholder input and consultations, and the current policy environment, the following priorities have emerged as central considerations to inform the Prince Edward County Community Development Strategy.

These considerations bring together the aspirations of the community with the economic and political realities that will shape the County's path to sustainable economic growth and prosperity, over the next five years and beyond.

A Strong Sense of Place

One of the County's primary elements on which to drive future economic growth is its distinctive sense of place, which stems from its rural and small town amenities and associated lifestyle. The County offers historic villages and towns, beautiful beaches and waterfront areas, heritage homes and buildings, a robust network of arts and cultural activities, and the pastoral nature of its farming community. This combination together with the County's geography – an 'island' makes in unique in Ontario.



Over the last decade, these amenities and characteristics of the County have been successfully leveraged to attract new residents, investors and visitors to the County. Moreover, these features have been integral to the creation of new businesses including restaurants, artisans, unique retail experiences and agribusiness operations, such as wineries. Community consultation reinforced this sentiment with residents consistently citing the County's idyllic environment as a reason they remain in the community, and a major asset for driving future economic opportunities.

Looking ahead, the County's residents and business owners understand the importance of increasing the County's residential and business tax base through new development, but want to ensure that this effort is sensitive to the County's 'small town and rural feel'. In this context, it is important for the County to balance new development opportunities with the preservation of those community characteristics that have come to define the County's 'small town appeal'. Discounting the role and impact of the County's quality of place and community image in the attraction of residents and investment would be a mistake and could undermine the County's long term growth potential.

An Expanding Base of Cultural Assets

Based on a preliminary mapping effort, there are more than 200 cultural assets in the County, with the majority located in proximity to the 'millennium trail'. These assets are widely recognized as integral to the County's quality of place as they help to define and characterize the community.

Cultural assets can be an effective tool in the attraction of new residents, visitors and business investment when leveraged effectively. The emergence of Prince Edward County's creative food economy and the subsequent growth of this sector through effective marketing, is seen by many municipalities and regions across Canada as a success story in the area of rural economic development, tourism and investment attraction.

Part of this success is because the County's range of agricultural products is quite diverse. The emergence of artisan cheese along with the growth of local food stands, wineries, farm tours and gourmet chutney/jam/jelly makers have helped to strengthen and diversify the County's agricultural sector. However, more could be done to support and develop the County's agricultural supply chain and agribusiness opportunities.

While the County is seen as having achieved a level of success in leveraging its community assets, it needs to maintain momentum if it intends to continue to attract new business and investment. Consideration must be given to improving public access to the County's 800 km of waterfront and enabling limited waterfront development in the form of improvements to existing marinas, new marina development and more waterfront based activities and amenities. With Sandbanks Provincial Park functioning as the single largest attraction in the County, more must also be done to leverage these visitors that come to the park through improvements to signage and way finding and the provision of additional roofed accommodation. Existing arts, cultural and tourism operators must also be encouraged and supported in their efforts to improve



their online presence and in the adaption of technology that will enhance the customer service experience and draw greater attention to the County's investment and business opportunities.

A comprehensive cultural resource mapping exercise based on current provincial policy and mapping guidelines would further inform the County's marketing and promotional efforts and support future community development services and programs. Mapping these results could also assist with the planning and development associated with festivals and events, tourism product development opportunities, and future investment opportunities.

A Business Community Dominated by Small and Medium Sized Businesses (SMEs)

While the local economy shows evidence of diversification, it is overwhelmingly characterized by small companies and enterprises that employ less than 10 people – a trend playing out through much of Eastern Ontario. In 2012, excluding the businesses consisting of the self-employed – themselves small enterprises – there were over 470 businesses in the County that employ 1-4 people and a further 163 businesses that employ 5-9 people – almost 70% of all businesses. The County's relative lack of medium and large scale firms is notable because small, medium and large firms are generally believed to provide different economic functions within an economic region. Small firms are often the source of new products and ideas, while larger firms emerge where they are able to leverage economies of scale.

To support future growth and investment in the County, it is essential to understand and support the needs of established small and medium sized businesses across all sectors of the economy. This can be done through more comprehensive business retention and expansion programming combined with effective and targeted investment attraction activities. This is particularly relevant in light of existing research and trends across Canada which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there, and that a significant amount of job creation and innovation is being driven by small to medium sized businesses.

An Emerging Concentration of Knowledge Based Firms

With the recognition of the importance of small and medium size businesses to the local economy, the question becomes: on which types of businesses should the County focus its efforts and resources? The results of the businesses patterns assessment and community consultation have suggested the need to support the growth of professional service firms and knowledge based businesses.

The County is now home to over 100 professional, knowledge based service firms with over 80% of these located in Picton. While these types of businesses have minimal infrastructural requirements, they represent tremendous business growth potential with respect to local employment and local wealth creation. With the recent improvements to broadband infrastructure in the County, this represents an even more significant opportunity.



The Prince Edward County Innovation Centre and First Stone Venture Partners together with Prince Edward Lennox Addington Community Futures are actively engaged in supporting and attracting technology based business and entrepreneurs in the County. This is part of a larger trend that has seen a growing number of technology based companies and start-ups locate in rural communities because of the perceived quality of place experience and rural lifestyle.

An important consideration in the attraction and retention of these types of small and medium sized businesses is the need for small and/or adaptable office space or buildings, something considered to be in short supply in the County. These types of businesses are also more likely to rent than to own, making the availability of vacant space a key consideration in their choice of location. A further consideration will be the availability of business networking opportunities or business support activities.

A recent inventory of surplus municipal properties suggests that the County has over 30 lots (comprising both land and buildings) that may provide opportunities for business and investment. As appropriate, priority should be given to marketing and developing these properties for commercial and general industrial uses that would assist with the attraction of professional service and knowledge based businesses including options for shared use.

Consideration could also be given to identifying under-utilized or underperforming properties that could be repurposed to support small business operations/multi-tenanted operations as well as business incubators.

A Greater Focus on Downtown Revitalization

A vibrant downtown should be the centerpiece of any community's residential, cultural, commercial and recreational growth agenda. Downtown residential development supports local retail activity and contributes to a 'sense of place' in a community. Healthy downtowns also function as vibrant tourism destinations, stimulate outside investment and contribute to a broader base of community economic prosperity.

The need for focused attention on enhancing the quality of place, vibrancy and aesthetic appeal of the various commercial areas or 'downtowns' across the County was a common theme in the community consultation process. There was general consensus that the County needs to do more to foster and promote development in commercial areas that combines commercial (including upper storey office), residential, and other land uses (e.g. The Edward). Particular attention must also be given to advancing development opportunities associated with several large scale vacant buildings and properties in these commercial areas as they detract from the overall vibrancy of these downtowns (e.g. Royal Hotel, Picton).

Promoting development in the County's commercial areas (e.g. Picton, Wellington, Bloomfield, Rossmore) through tools and incentives that support increased density, storefront improvements and public/community art installations can ensure that these 'downtowns' provide a space that is vibrant, walkable, and creates a 'buzz' that encourages street-level interaction year round. This can also have the effect of attracting more people to live in these communities. The recent approval of the



County's Community Improvement Plan anticipates this level of support for the urban centres, hamlets and villages in the County. Picton Downtown in particular would benefit from an enhanced streetscape, improved walkability and better connections with its Harbour and waterfront.

An Aging Population

Across Canada municipal policy-makers are struggling to understand the full implications of an aging population. Currently, there are two divergent outlooks on this trend – those that “subscribe to an ‘age-friendly’ approach and those that take an ‘apocalyptic demography’ view of their older populations”.⁴ Apocalyptic demography refers to the notion that the older population will overwhelm the health and social care systems, as well as entire communities and their local resources. However, within many smaller communities, an age friendly view is emerging that maintains that aside from stimulating growth in their housing market, the in-migration of retirees and seniors offers other opportunities for economic development. For example, economic development officials are now encouraging local entrepreneurs to open new businesses that will cater to the older populations’ taste in clothing, personal care items, restaurants, and entertainment. There are also opportunities for attracting skilled health care professionals in privatized fields, such as massage therapists, ophthalmologists, denturists, and orthopedic clinics. Senior-newcomers from larger urban centres are also widely perceived as being educated and skilled in professions such as business, and management. These older adults can contribute to community development by applying their skills at local voluntary organizations, steering committees, and in other civic roles.

In the context of Prince Edward County, community consultation and statistical evidence has shown that an increasing number of early retirees are moving to the County in their early 50's because they can afford to do so. They are well educated and tend to have held senior management positions in business, industry and government. Accordingly, they carry with them a range of skills, which is adding to the community, rather than detracting from it. This is evidenced by the contribution these same residents are making to community organizations, volunteer networks and local business. Given the impact that this trend is having across the province, the County should be doing more to embrace and leverage this cohort in terms of the services and amenities and housing option needed to attract and retain this population.

A Lack of Serviced Employment Lands

The County's current inventory of serviced employment land is inadequate to attract small and larger scale business and industrial operations and is not competitive with properties in surrounding municipalities in terms of quality, market choice and price. Future development potential is limited by the lack of designated land and servicing capacity in the areas of the County close to Highway 401. Existing municipally owned employment lands in Picton are limited to small single lots unlikely to appeal to

⁴ Natalie Waldbrook et al. 2013. Challenging the myth of apocalyptic aging at the local level of governance in Ontario. *The Canadian Geographer*.



industrial operations and are considered most costly than options available in other communities.

Community consultation underscored the lack of clarity around the types of land that is available for development. More specifically, the development community is largely unaware of what land was available and serviced; what land could be serviced; and what the plans are for the provision of employment land over the longer term?

On the other hand, the Loch Sloy Business Park located on County Road 22 is seen as an attractive alternative for small business operations and entrepreneurs as evidenced by the waiting list for space and the regular enquiries for land and buildings that have included light manufacturing, distilleries, plastics producers and education training providers. However, new development at this business park is constrained by zoning provisions because the future use of the park is deemed “unknown”. A master plan is needed to guide the development of the site so that the smaller land parcels can be evaluated and potentially re-zoned to accommodate future business.

A Shrinking Workforce

Limited employment opportunities combine with the lack of community amenities have contributed to a decline in the County’s working age population. Expected employment growth from 2006 to 2011 did not materialize as projected, although this may be attributed in part to the economic downturn that occurred in 2008/2009. However, if this trend is not reversed it will have significant implications for the local economy.

The availability and affordability of housing in the County may also be a contributing factor to a declining workforce. At present, the County’s housing inventory is dominated by single family homes, many of them classified as character or heritage homes. With limited new development and the popularity of the County in recent years for retirees, average housing costs have increased and are high relative to surrounding communities such as Belleville and Quinte West.

If it is the County’s intent to attract younger families and young professionals to the County, then more must be done to provide for a broader range of housing options at various price points in proximity to community services and amenities. It is worth noting that research suggests that the younger age cohorts (18-35), more commonly referred to as GenY and a target market for the County, are more likely to consider rental accommodation instead of single family homes as they carry more personal debt than previous generations.

A Lack of Support for Community Development Efforts

Collaboration and co-operation between the County and community organizations was consistently characterized in community consultations as a poor, but open relationship. It was noted that while the County and community organizations frequently interact with one another; there is considerable frustration as it relates to the relatively few outcomes or actions to emerge from these efforts. Aside from the occasional support for local food markets or festivals and events, community members felt that the County



has not provided sufficient resources, assistance or leadership to advance community development efforts.

In addition, there was a general lack of awareness of economic development programs and initiatives and a perceived historical lack of support for the business community on the part of city administration and council. Select stakeholders saw a disconnect between the economic development services delivered in the County and actual needs of the business community. Those businesses that participated in the consultation phase of the community development strategic plan suggest there is a need to increase support for the collection and dissemination of relevant business and economic knowledge, business retention and expansion programming and the development and support of small business.

Historically, the council and administration at the County has been perceived as unresponsive to the needs of the community and lacking in a vision for the long term growth and sustainability of the local economy despite the need for investment. With that said, the current council is considered the first in a number of years that appears to be approaching these issues more strategically with the creation of the Community Development Commission, however, the County administration needs to follow suit. In particular, the County needs to address the perception that the development approvals process moves too slowly and is inconsistent in its decision making. This will be crucial in achieving the Commission's directed outcome of an attractive economic climate with business opportunities.

A Weakened Community Brand

While one of the County's most important assets, the messaging associated with the County's image and brand is not controlled by the County. Furthermore, community stakeholders perceive that there is a general lack of coordination within the County when it relates to local branding and tourism promotion activities, which has led to confusion in the local business community. The County's brand is too important to the community's continued prosperity to be left to an external individual or organization without some level of input and oversight from the County.

Consequently, there is a need for a more focused promotion and marketing campaign geared to attracting new residents and investment rather than just visitors. The Prince Edward County and 'Taste the County' have both produced a number of impressive print and web-based promotional materials for visiting the County; however the County lacks appropriate marketing material to advocate living and investing in the County.

While many communities prepare community profiles, there is a growing number that are preparing community *investment* profiles. Given the County's need and desire to attract more residents and investment to the area, consideration should be given to creating a community 'prospectus' that illustrates the strength and opportunity of the local economy, highlights local accomplishments and investment, as well as the commitment being made by the administration to create and sustain a sustainable rural economy (e.g. Community Improvement Plan, Community Development Plan and Official Plan Review).



A Shifting Technological Landscape

Broadband Internet has become widely available in the County and is increasingly common in rural communities across southern Ontario. Studies have shown that rural businesses and consumers have become almost as likely as their urban counterparts to use the Internet though broadband—or high-speed—is less prevalent. With the recent introduction of widespread broadband Internet to Prince Edward County, local businesses are now afforded a range of opportunities that could enhance or support their business. For example, in other rural communities with broadband Internet, businesses have been adopting more e-commerce and Internet practices, improving efficiency and expanding market reach. Some rural retailers use the Internet to satisfy supplier requirements, while farmers are increasingly purchasing inputs and conducting sales online.

Retail occupations currently account for a significant portion of the County's local employment however, the area is also well positioned to compete for low and high end service jobs. This includes medical services, design and website services and personal support services. But simply competing for does not guarantee success. While the County is now equipped with broadband internet, community consultation has highlighted the reluctance of many businesses to adjust their business practices to leverage the Internet. For example, businesses in the County are seen to be late adopters of new technologies, particularly internet based technologies, which may limit their productivity, competitiveness and long term viability. These range from offering e-retailing options, new credit transactions, compatible products for electronics (e-books, blu-ray discs), app developments, etc.

While it is understood, that the County's quality of place is tied to a traditional lifestyle and "simple way of doing things", it is critical that the County's businesses keep pace with new technologies and incorporate the same into their businesses practices.

A Diminished Financial State

Communities across rural Eastern Ontario (including Prince Edward County) are carrying most of the responsibility for the region's roads and bridges. Collectively, these communities are responsible for 73% of its roads and 60% of its structures. Included in the total is nearly 4,000 lane kilometres of provincial roads (and associated bridges) downloaded to local governments in the late 1990s. This pressure has led to chronic underfunding of maintenance of infrastructure of all types and an inability to preserve the value of assets appropriately.

Over the last two decades, Prince Edward County's reliance on residential tax assessment, increases in local government debt, declining working capital, and inability to build reserves for either working capital or to fund infrastructure have resulted in a diminished financial state. While the County's position has improved in the last two years, the situation remains a threat to long term economic prosperity.

In an effort to attract non-residential development the County has taken steps to improve its competitive position relative to the surrounding communities of Belleville, Quinte West and Kingston in the form of reductions to development charges and



permitting fees. While this is seen as a positive step by the local business community, it is not clear whether the County plans to continue in this effort.



4 A Community Development Strategic Plan

Clear and attainable economic development goals and objectives coupled with programs, activities and partnerships that can effectively achieve the desired outcomes are essential to the implementation of an economic development strategic plan.

A Community Development Strategic Plan for Prince Edward County is focused on achieving the following results for residents and businesses in the County.

- **The attraction and retention of sustainable jobs that are well matched to local employment needs and opportunities;**
- **supporting Prince Edward's County's profile as an attractive economic climate with business opportunities;**
- **building on local assets, resources, heritage and innovation; and**
- **increasing the municipal tax base.**

To do this the County understands the need for a more managed approach to economic development programming and services and a heightened level of cooperation and coordination with the County's stakeholder community and economic development partners.



4.1 Vision

Vision statements present an image of future success, based on what is attainable in reality – it should be built on the strengths, opportunities and capacity of a community. The County's Official Plan has presented such a vision for Prince Edward County.

A Special Place

"The County we envisage will continue to have the social and cultural values that have evolved through time; a community spirit, a sense of belonging, a tradition of self-reliance, social responsibility, sharing, neighbourliness and an appreciation of heritage and culture. This special community and lifestyle will have been preserved through new economic opportunities."

Prince Edward County Official Plan 2013

4.2 Goals, Objectives and Actions

Prince Edward County's Community Development Plan is underpinned by four high level goals, intended to anchor all strategic initiatives or ensuing actions on the part of the County's Economic Development Office. These goals also support the vision for the County as stated in County's Official Plan and Corporate Strategic Plan

The goals, objectives and related actions should be viewed as a starting point based on community input and research at a point in time. It is not meant to serve as an exhaustive list of all activities that could or will engage the County's economic development staff. New actions will emerge throughout the lifespan of this Strategy and partnership organizations will emerge or change. County staff and the Community Development Commission should allow for continuous assessment of how these new actions contribute to the overall success of the strategy.

- **GOALS** – the vision and desired outcomes that emerged from the strategic planning process and a view of the aspirations of the County's citizens and stakeholders
- **OBJECTIVES** – how these goals are to be achieved and what must be accomplished in the next five years
- **ACTIONS** – direct the County and its stakeholders to those essential issues or opportunities that must be addressed over the next five years – short term, medium term and long term.



4.3 Strategic Plan Framework

Goal 1 – An Iconic Rural Brand

Objective: to build greater awareness of the County’s lifestyle and visitor experience to attract new residents, visitors and investment opportunities

Actions

1. Initiate and implement a County-led marketing and branding program that effectively communicates the features, characteristics and major assets of Prince Edward County that will appeal to residents, investors and visitors, as a way to support and sustain the culture and identity of Prince Edward County.
 - 1.1. Complete community branding program that includes creative and voice development, application tools, multi-phase implementation plan.
 - 1.2. Develop and initiate a marketing program for business, visitor and resident attraction.
 - 1.2.1. Develop strategy to market Prince Edward County to new markets (Overseas). Strategy should identify high growth, investment potential targets. Strategic partnerships with regional organizations, government ministries, and the private sector to be leveraged.
 - 1.2.2. Give consideration to innovative e-tools (including web-based applications), tactics, media and resources required to demonstrate the County as an ideal place live, operate a business and invest.
 - 1.3. Communicate and promote the community development goals of the County to the community and solicit ongoing input and feedback from stakeholders, visitors, residents and business.
 - 1.4. Develop a Memorandum of Understanding with private sector led marketing and promotional activities to ensure the integrity of the ‘The County’ brand.
 - 1.4.1. Explore opportunities to engage with external organizations and the private sector on joint business, visitor and resident attraction marketing activities. Could include developing appropriate marketing materials for distribution and strategic participation at trade shows, exhibitions, etc.
2. Website development to include section that is dedicated to economic development and gives greater prominence to Prince Edward County’s community and business profile and value proposition for investors and future residents. Include information on the local economy, major community development initiatives, business success stories, real estate listings.



- 2.1. Develop a linking strategy with other relevant local and regional agencies and organizations.
 - 2.2. Encourage the development of a comprehensive business directory that is searchable, self-managed and provides support to the business community at large.
 3. Consolidate Destination Marketing, services and promotion within Prince Edward County's Community Development Department to more effectively leverage local resources and assets and ensure an integrated and successful tourism product and experience for visitors and residents of the County.
 - 3.1. Destination Marketing activity could include promotion and marketing PEC as a destination, government relations, provincial grants and programs, visitor services, marketing and media outreach, social media, corporate partnerships and sponsorships, visitors guide, 401 signage, and consumer shows and events.
 - 3.2. Develop a festivals and events strategy for the County that considers the current events business model and potential of separating from the core DM functions.
 - 3.2.1. Engage local event properties to foster collaboration and encourage them to focus on building an integrated brand and marketing effort and exploring the potential for extending the tourism's shoulder season.
 - 3.2.2. Examine opportunity to support a new signature festival that projects the image and character of the County and potentially builds on its shoulder season. (E.g. Indie Rock Festival, Winter Festival, etc.)
 4. Prepare a more detailed investment and community profile – a 'prospectus' that illustrates the diversity and strength of the existing business community, opportunities for business investment including a broader range of housing and the ability of the County to support sustainable growth and development.
 - 4.1. Develop, layout and produce a Community Profile that highlights the collaborative environment, sense of place, economy and demographics in Prince Edward County.
 - 4.2. Develop sector specific business investment prospectus and community profile for agriculture, tourism, service and high tech based enterprises.



Goal 2 – A Supportive Environment for Business and Investment

Objective: to enhance the County's competitive advantage for attracting and retaining business and investment in our traditional and emerging sectors

Actions

5. Develop a Business Retention and Expansion program that targets the top 50 companies in the County. These should include companies that are on a significant growth trajectory, are major employers and contributors to the local economy, provide high value products or services, or likely export a high percentage of their products. These businesses should be visited on an annual or biannual basis.
6. Promote the existing resources available to support small business and start-ups as it relates to the delivery of training, business counselling, market research, preparing a business plan, marketing, event planning, and legal and financial assistance to small business operators and entrepreneurs in Prince Edward County.
 - 6.1. Support the Small Business Centre, Chamber of Commerce and Prince Edward Lennox Addington CFDC to promote and deliver small business seminars geared to e-marketing and sales, health and safety, succession planning, customer service, website development, business networking, and workforce planning and marketing.
 - 6.2. Work with Prince Edward Lennox Addington CFDC to create an e-toolkit for managing a business' online presence including internet planning, website development, e-marketing, social media etc.
 - 6.3. Collaborate with external partners to develop an online master directory of business services and support available to local business and entrepreneurs. This should include a master list of external funding programs available to business.
7. Continue to support the Prince Edward County Small Business Centre to provide guidance and support to start-up and existing small businesses recognizing the uniqueness of the County's business community.
 - 7.1. Work with business and community stakeholders to identify a list of mentors and 'ambassadors' willing to provide business assistance and coaching to business starts and entrepreneurs. Encourage the Small Business Centre or PELA CFDC to investigate this type of programming.
8. Prepare a master plan for the development of the Loch Sloy Business Park that establishes future land use options and economic development opportunities for the park and options for a public/private partnership or incentives for the timely provision of water and sewers to the site.



9. Determine the feasibility and cost to advance the development and servicing of employment lands in the Rossmore community. This will depend on the outcome of the Official Plan and Rossmore secondary plan.
10. Maintain an inventory of available serviced and un-serviced commercial and industrial land, as well as commercial and industrial buildings in the County and make the information available on the County's website. The following information should be included at a minimum:
 - o parcel size,
 - o privately or municipally owned,
 - o contact information
 - o zoning and servicing information
11. Review the County's development approvals process for new residential, commercial and industrial development. Provide consideration to the Development Team approach modeled by other high functioning development communities. As part of this effort the County should communicate its intent to the development community.
 - 11.1. Facilitate regular meetings between the planning department, Community development staff and the County's development/investment community, as a way to ensure an understanding of issues and challenges facing developers/investors in the County, and discuss opportunities to improve the overall investment climate.
12. Establish an annual economic development/entrepreneurship forum where industry leaders, business organizations, individual businesses, and Prince Edward County staff, as well as political leaders can informally discuss issues concerning the sustainability and well-being of the local economy.
13. Promote and leverage the recent investment in broadband infrastructure as a means to attract knowledge based/technology based businesses and encourage both home occupations and new investment in the County.
 - 13.1. Develop a list of broadband availability either in satellite or fibre optic form, including providers for inclusion in the marketing materials.
 - 13.2. Pursue pilot project opportunities with Eastern Ontario Regional Network (EORN) and Prince Edward Lennox Addington CFDC to attract technology based businesses to the County leveraging the current infrastructure investment and building on EORN Phase II implementation effort. Fiber Optic exists in the Industrial Park and is going into the McFarland Home lands.
14. Develop an Agriculture/Agribusiness sector strategy that provides clear direction on matters related to the economic sustainability of the agricultural economy in the County.



- 14.1. Identification and prioritization of opportunities (e.g. research and development, local food, value-added agriculture, supply chain) and challenges (e.g. policy, climate, costs) relevant to Prince Edward County's agricultural community.
 - 14.2. The development of workshops that highlight methods that producers and Agri-food suppliers can utilize to enhance their business capabilities.
 - 14.3. Consider partnership on grant opportunities, assistance with value added agriculture operations, building on forward momentum from the 2012 Agriculture BR and E already completed.
15. Target the attraction of more roofed hotel accommodation to the County in an effort to derive more economic impact from the County's tourism sector and extend the sector's shoulder season.
- 15.1. Develop an accommodation attraction package that includes profile and potential incentives to be circulated to top accommodations developers to gauge interest.
 - 15.2. Conduct a hotel feasibility study that can be used in the attraction of investment if the accommodations development community requires.
16. Develop a Tourism Strategy for the County that addresses the long term viability and sustainability of this sector of the economy. Focus should include land, asset and water based tourism opportunities. Could be started in-house by reviewing the current but out of date Premier Ranked Tourism project.

Goal 3 – A Vibrant and Beautiful Community

Objective: to preserve and enhance our County's community and cultural assets, resources and knowledge to create thriving villages in which to live and visit

Actions

17. Improve signage and way finding in the County to enhance the experience of visitors to the County and provide enhanced gateway signage at the entry points to the County
- 17.1. Gateway Complex concept plan to be developed, potential partnership both public and private to be investigated, business model to be created, funding identified and project to be executed.
 - 17.2. Develop and implement a way finding signage program.
18. Implement the County's Community Improvement Plan (CIP) to make use of grants and tax incentives that will jump start business development and investment and assist with place-making efforts in the County's commercial areas including upper



storey office and residential development. Develop a strategy to market the incentive programs.

- 18.1.** Determine the money needed and recommend a roll-out of the plan and allocate in 2015 budget.
- 19.** Give consideration to the use of CIP policies to advance agribusiness opportunities in the County's agricultural areas including the adaptive reuse of heritage buildings and advocate for OP policies that do the same.
- 20.** Undertake a comprehensive cultural resources mapping exercise guided by the new definitions of cultural resources.
 - 20.1.** Leverage the work completed for the Community Development Strategic Plan with further community input to create of a searchable database and comprehensive online asset map of cultural resources in the County.
- 21.** Prepare a Heritage Master Plan that provides the foundation for identifying, preserving and managing the County's cultural heritage resources.
 - 21.1.** Include a high order inventory and assessment of cultural heritage resources within the municipality along with a thematic history of resource development, identification of "character areas" and preliminary recommendations for cultural heritage resource interpretive themes and key messages.
 - 21.2.** Develop a strategy to leverage the County's cultural heritage resources for economic and community benefit including consideration of allocating CIP funds, establishment of a heritage forum and facilitating education/training opportunities.
 - 21.3.** Advocate for policies that support and promote the adaptive reuse of heritage buildings and structures.
- 22.** Support and attract private sector marina investment in suitable locations across the County and encourage the enhancement of public docking and launching and residential development where appropriate.
 - 22.1.** Develop concept plan for Picton Harbour for approval. Pursue land acquisition / access if necessary. Determine needed amenities.
 - 22.2.** Develop internally a plan for the development of the public marinas and methods to support private marina development.
 - 22.3.** Develop internally a plan for the development of public boat launches determining priority, works required and methods for on-going upkeep.
 - 22.4.** Consider water access opportunities for public recreation, tourism development and quality of place enhancement.



23. Work with developers and local community organizations to develop an expanded network of walking and cycling trails that ultimately link the County's commercial areas with the rural landscapes in the community.
 - 23.1. Advocate for cycling friendly policies in the Official Plan and encourage public works to consider cycling friendly infrastructure in their planning.
24. Work with community partners to complete an assessment of needs as it relates to social services such as education, financial counselling, housing, medical needs, recreation and transportation specifically for the 55+ seniors population.
 - 24.1. Develop recommendations for both immediate and long term strategies as they relate to the facilitation of programs, services and facilities for seniors in the County.
 - 24.2. Pursue public/private partnerships opportunities to increase access to and availability of public transit options within Prince Edward County.

Goal 4 – Partnerships that Advance our Economic Sustainability

Objective: to take a leadership role in supporting strategic and collaborative community development between Prince Edward County and our economic development partners

Actions

25. Participate in the tourism and industry development efforts being undertaken by the Regional Tourism Organization, Ontario East Economic Development Corporation, Bay of Quinte Tourism Council (and affiliates).
 - 25.1. Leverage marketing and product development opportunities and partnerships to increase awareness of the development environment the County.
26. Pursue opportunities to revitalize Cultural Roundtable team (CRT) as a way to support the County's arts, culture and tourism economy. The CRT was formed to support the implementation of the County Cultural Plan completed in 2007. Regional cultural tourism strategies figured prominently in the Cultural Plan, and will be a priority for the CRT as it moves forward with its work. Alternatively engage with Hastings Cultural Round Table.
27. Engage local schools, business leaders, youth support agencies and Prince Edward Lennox Addington CFDC to develop and promote a youth entrepreneurship program as a way to foster the growth of an entrepreneurial culture in the County.



28. Identify partnership opportunities with local and regional post-secondary institutions (Loyalist College, Queens University, Fleming College, St. Lawrence College, Haliburton School for the Arts) to capitalize on opportunities aimed at developing distance learning or promoting more local post-secondary programs, research capacity and student placement opportunities to ensure an adequately trained, local workforce is available for the jobs being created in targeted growth sectors.
29. Support the East Central Ontario Training Board and the Quinte Local Immigration Partnership in their efforts to create a welcoming environment for newcomers and to address local workforce development issues including immigrant attraction strategies.
30. Expand and support the business development efforts of Prince Edward Lennox Addington CFDC in the County. Pursue opportunities to regularly engage PELA-CFDC around their programming and services to area businesses particularly where they support the development technology based entrepreneurs.

4.4 Implementation Plan

The findings from the supporting background research and analysis presented in appendices of this report have informed the development of the goals, objectives and actions contained in the community development plan. The plan is intended to build on the historical success of 'the County' brand in the attraction of business and investment, but also recognizes the limits of this effort and the need for greater momentum and leadership if the County is to achieve lasting and sustainable economic growth.

It must be said however, that economic development by its nature is a dynamic landscape, impacted by a wide range of internal and external stakeholders with opinions and ideas on how sustainable economic development is to be achieved. This becomes apparent when consideration is given to the scope and variety of projects that can be described as "economic development".

One of the key considerations in the effective implementation of the proposed community development strategic plan will be an understanding and communication of how the strategy is to be resourced. This includes the financial resources required to move forward and clarity of roles and responsibilities between the community development staff, other municipal staff or departments and local and regional stakeholders. This is relevant from the perspective of potential residents and businesses, investors and visitors to the County and their desire for a one stop approach to gathering information and assistance and understanding where future partnership might emerge.

With the completion of the Community Development Strategic Plan the County's Community Development Office has begun the business planning and budgetary



process that reflects the 2014 priorities and the resources required to move forward with the strategy implementation.



Appendices



Appendix A: Economic Base Analysis

Economic Base Analysis

A1: Demographic Characteristics

A1.1 Population and Population Growth

In 2011, Prince Edward County had a total population of 25,258. From 2001 to 2006, the County's population increased by 2.4%, but between 2006 and 2011 the County's population contracted by 0.9%. This decline is in contrast to the provincial average, which increased by 5.7% over the same period. The majority of the provincial population growth, however, is concentrated in larger urban centres, which attract a disproportionate number of new immigrants. In fact, regardless of immigrant category (i.e. permanent resident, temporary foreign worker or foreign study), these people are strongly attracted to the Greater Toronto Area to settle. In recent years, the surrounding regions (i.e. Peel and York and to a lesser extent Halton and Durham) have been increasing their share of immigrants. In light of these trends, rural and smaller communities across the rest of Ontario are facing population challenges that mirror those found in Prince Edward County. In Belleville and Quinte West, for example, between 2006 and 2011, population growth was only slightly ahead of Prince Edward County, with 1.3% and 0.9% growth rates respectively. Kingston, on the other hand, as a larger urban centre grew by 5.3% in the same period.

Moving forward, Prince Edward County's population is expected to increase to 34,755 in 2032, 39,850 in 2052 and 43,560 in 2062. Over this forecast period, population and housing growth in the County will shift from the rural area to urban areas. This growth will be predominantly felt in Wellington and Picton as these communities are expected to account for 51% and 23% of projected housing growth, respectively.⁵

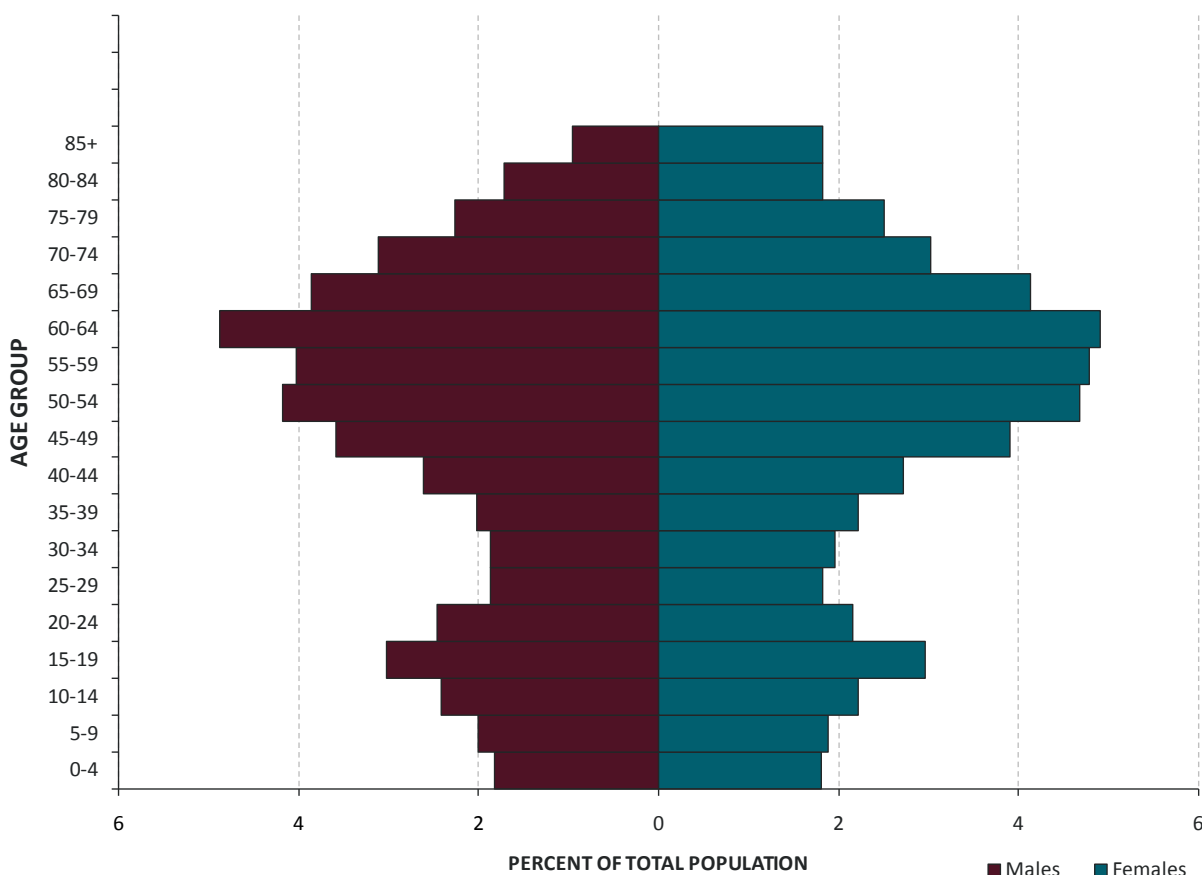
A1.2 Population by Age Structure

As of 2011, the demographic structure of both Ontario and Prince Edward County exhibited clear signs of aging. Prince Edward County is home to a proportionally older population than found in the province. In 2011 the County's median age was 51.6 years of age while the provincial median age was 40.4. Between 2001 and 2011, the median age of the County's population has steadily climbed from 44.3 to 47.7 to 51.6 for each census period. The population pyramid above shows the largest cohort of the County's population is between 60 and 64 years of age. As this cohort continues to age, the growth in seniors will place continued pressures on the County, in terms of service delivery and access in allowing seniors to 'age in place'.

⁵ Watson and Associates. Economics Limited. 2013. Prince Edward County Long Term Population Housing and Employment Forecast and Capital Needs Assessment.



FIGURE A1: POPULATION PYRAMID FOR PRINCE EDWARD COUNTY, 2011



Source: Statistics Canada. 2011. National Household Survey. Community Profiles. Adapted by Millier Dickinson Blais Inc.

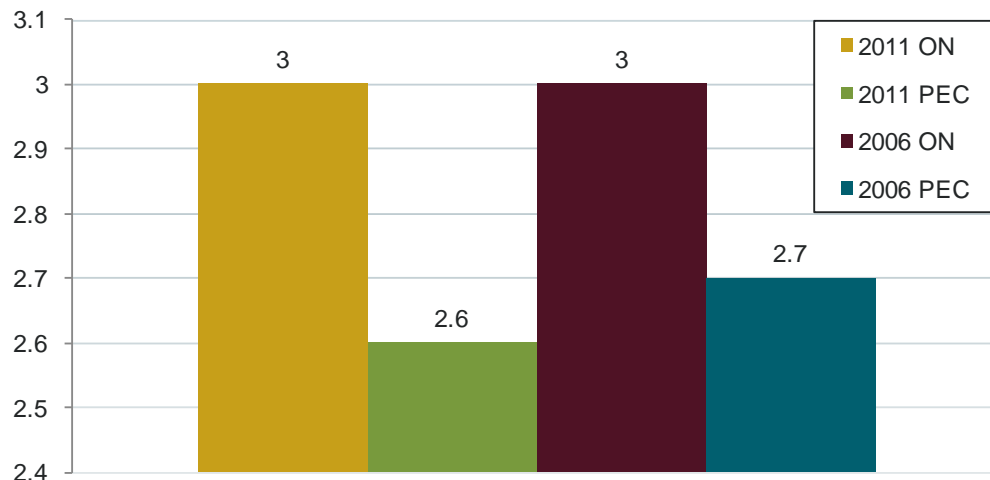
Despite this seemingly pessimistic outlook for the County's demographic structure, neighbouring municipalities of Belleville, Quinte West and Kingston are in fact in a similar demographic position. Within Prince Edward County, people aged 20 to 64, which are prime working years, comprise 57% of the population, which is in line with the 60% in Quinte West, 59% in Belleville and 62% in Kingston. Moreover, as the County's 55 and over cohort continues to grow, it is expected that rates of home based employment will increase as semi-retired residents seek lifestyles, which allow them to work from home on a full-time or part-time basis. It is expected that these individuals will increasingly take advantage of improvements in telecommunication technology, increased opportunities related to telecommuting and potential work schedule flexibility, most notably in knowledge-based employment sectors.⁶

⁶ Watson and Associates. Economics Limited. 2013. Prince Edward County Long Term Population Housing and Employment Forecast and Capital Needs Assessment.



A1.3 Household Size

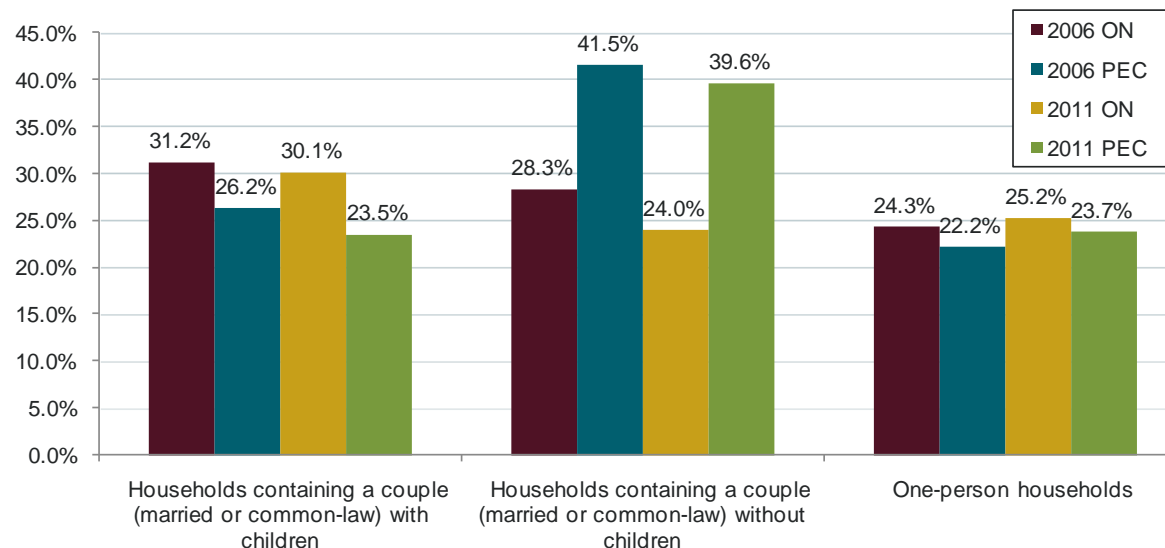
FIGURE A2: AVERAGE NUMBER OF PERSONS IN CENSUS FAMILY IN PRINCE EDWARD COUNTY AND ONTARIO, 2006-2011



Source: Statistics Canada. 2013. Ontario (Code 35) (table). National Household Survey (NHS) Profile. 2011 Census. Statistics Canada Catalogue no. 99-004-XWE. Ottawa; Statistics Canada. 2007. Prince Edward, Ontario (Code3513) (table). 2006 Community Profiles. 2006 Census.

With respect to household size, as measured by average number of persons in census family, Prince Edward County has smaller families than found across the rest of the province. As of 2011, Ontario's average number of persons per census family was 3.0, while the County's was 2.6. Between 2006 and 2011, the average number of persons in each census family has remained unchanged for the province while it has slightly declined in the County.

FIGURE A3: HOUSEHOLD TYPE IN PRINCE EDWARD COUNTY AND ONTARIO, 2006-2011



Source: Statistics Canada. 2013. Ontario (Code 35) (table). National Household Survey (NHS) Profile. 2011 Census. Statistics Canada Catalogue no. 99-004-XWE; Statistics Canada. 2007. Prince Edward, Ontario (Code3513) (table). 2006 Community Profiles. 2006 Census. Statistics Canada Catalogue no. 92-591-XWE.



With respect to household type, Prince Edward County has a disproportionate number of households containing a couple without children with 39.6% as of 2011. This is approximately 15% above the provincial average of 24%. This may be explained by the comparatively older population that is found within the County and the tendency for youth to leave the County for education or for employment opportunities. Despite this trend, the County has proportionally fewer single person households than the province.

A1.4 Household Income and Dwelling Value

An additional determinant of a community's socio-economic composition is the average income of its population. Figure A4 provides information on average household income along with the average dwelling value for Prince Edward County and its neighbouring municipalities. Prince Edward County's estimated 2012 average household income of \$77,066 is considerably higher than Belleville (\$69,041) and Quinte West (\$69,041). Kingston, however, has a slightly higher average household income than found in the County at \$78,170. This pattern holds true for the average value of dwellings in these municipalities. Prince Edward County's average cost of dwellings is in line with Kingston at just over \$245,000, whereas Belleville and Quinte West have lower average dwelling values of \$194,879 and \$193,901 respectively.

FIGURE A4: AVERAGE HOUSEHOLD INCOME AND DWELLING VALUE

Municipality	Weighted Mean Value of Dwelling	2012 Est. Avg. Household Income
Prince Edward County	\$245,462	\$77,066
Belleville	\$194,879	\$69,041
Quinte West	\$193,901	\$69,041
Kingston	\$245,253	\$78,170

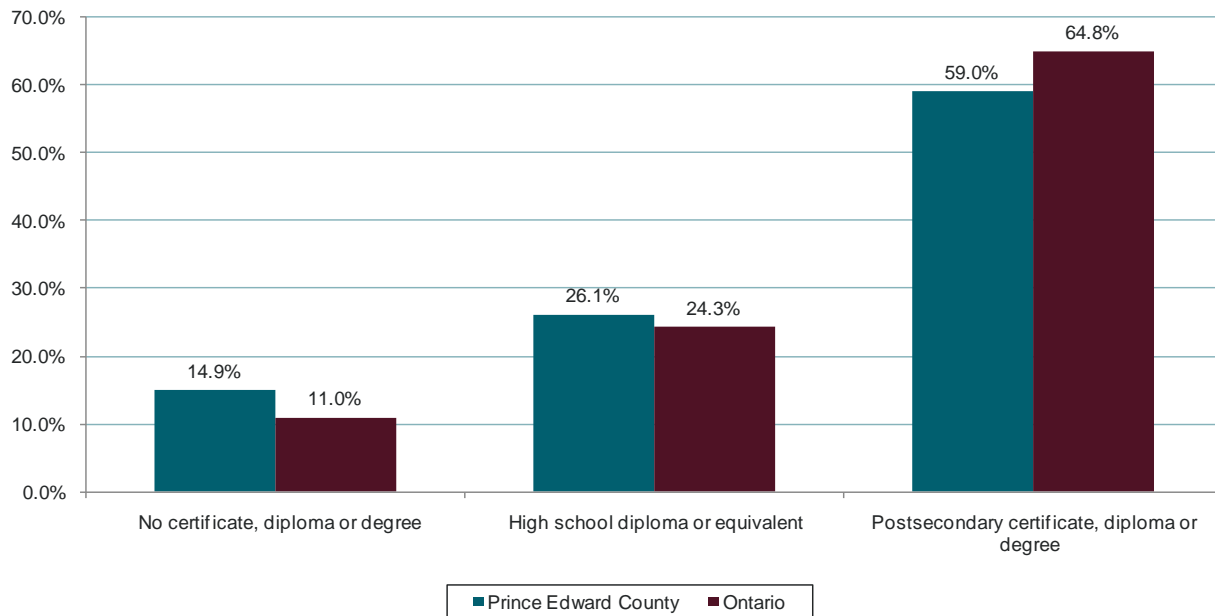
Source: BMA Management Consulting Inc. 2012. Municipal Study.

A1.5 Educational profile

Educational attainment is one of the most important socio-economic indicators to consider when evaluating a community's economic growth potential, as it speaks directly to its ability to staff new and existing businesses. As of 2011, the County had a smaller proportion of its population with a university certificate; diploma or degree (59%) when compared to the province (64.8%). Accordingly, the County had a greater proportion of its population with no certificate, diploma or degree compared to the provincial average.

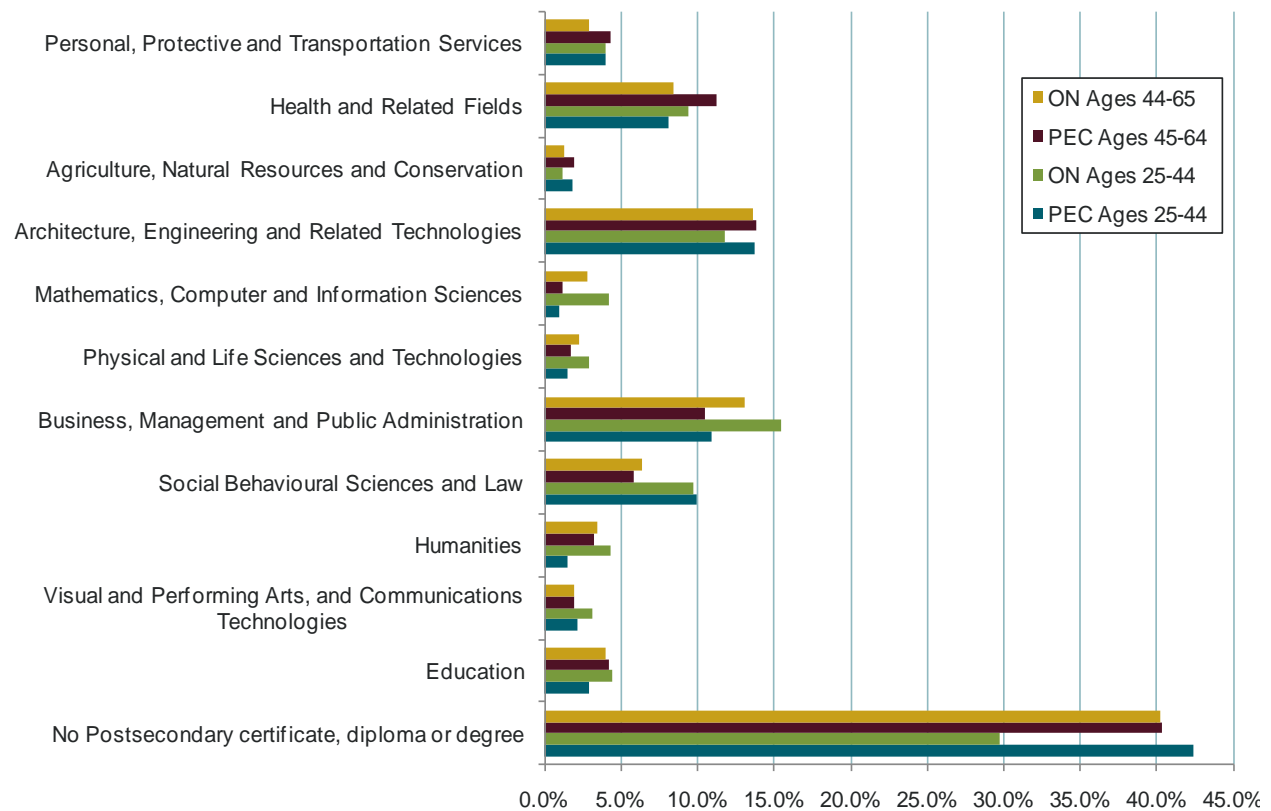


FIGURE A5: POPULATION BY EDUCATIONAL ATTAINMENT, AGED 25 TO 64, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047.

FIGURE A6: EDUCATION BY MAJOR FIELD OF STUDY AND AGE COHORT, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047.



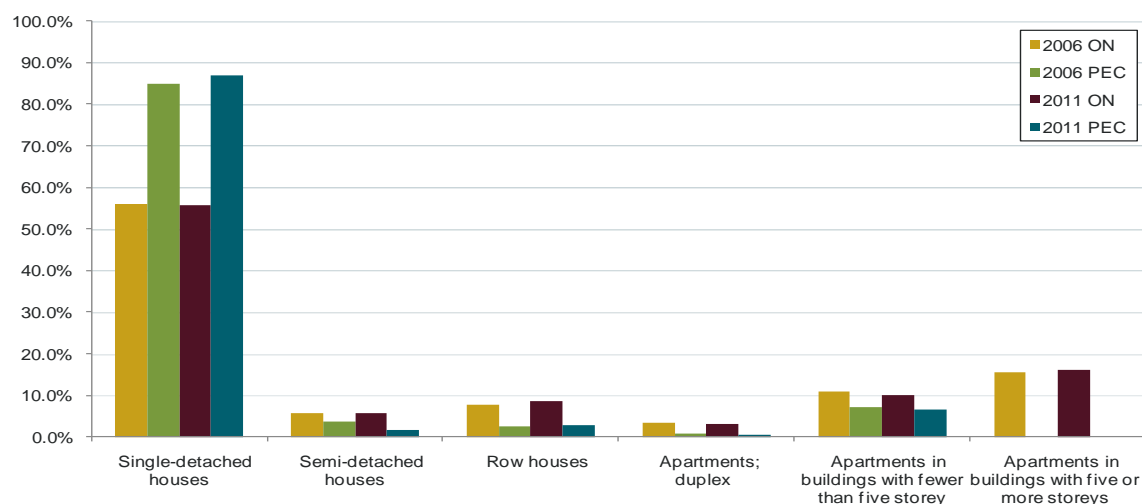
As the result of Prince Edward County's tendency to attract relatively affluent and educated retirees, one might expect the County to have a disproportionate level of education found within its population aged 45 to 64, when compared to the province. However, Figure A6 demonstrates that for this cohort the County is on par with the provincial average in terms of those without post-secondary education. Although, the fact that the County's population aged 25 to 44 lags the province in terms of post-secondary education, may still support this conclusion; given that the County's older population is more educated than its younger population.

In terms of fields of study, there are few notable differences between age cohorts within and between Ontario and Prince Edward County. Generally speaking, Ontario has proportionally more majors in business, management and public administration. On the other hand, Prince Edward County's older population, aged 44-65, has proportionally more majors in health and related fields than the province.

A.1.6 Dwelling Characteristics

With respect to dwelling type, Figure A7 shows that Prince Edward County, given its lower population densities, has considerably higher rates of single detached homes than compared to the province. In 2011, single detached homes made up 86.8% of the dwellings within the County, but accounted for just 55.6% in Ontario. The provincial average of single detached homes is skewed by Ontario's large urban centres which account for the bulk of the province's apartments and high rise developments. Accordingly, Prince Edward County's share of single detached homes may be considered typical of the majority of Ontario's smaller communities. Nevertheless, the lower population densities supported by these types of housing patterns reduces the feasibility of public transportation networks while increasing the per unit cost of municipal services.

FIGURE A7: DWELLING TYPES IN PRINCE EDWARD COUNTY AND ONTARIO, 2006-2011



Source: Statistics Canada. 2013. Ontario (Code 35) (table). National Household Survey (NHS) Profile. 2011 Census. Statistics Canada Catalogue no. 99-004-XWE. Ottawa; Statistics Canada. 2007. Prince Edward, Ontario (Code3513) (table). 2006 Community Profiles. 2006 Census. Statistics Canada Catalogue no. 92-591-XWE.



A2: Occupational Profile

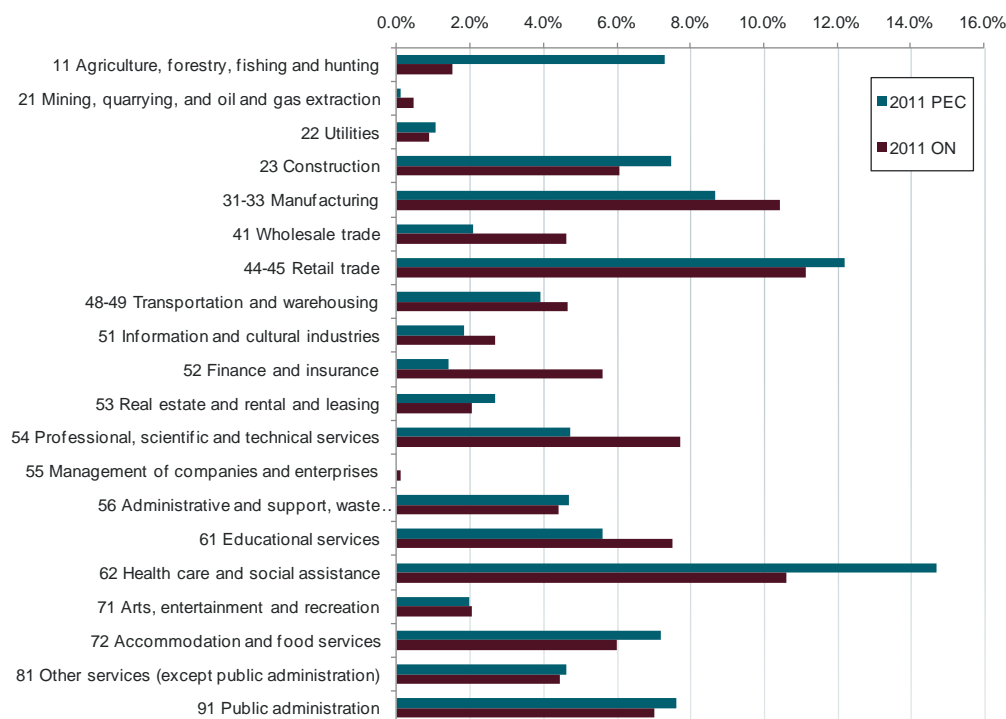
A2.1 Trends in Local Occupations and Employment

As of 2011, Prince Edward County's total labour force was 11,890, of which 10,885 were employed. Since 2006, the County's total labour force has contracted by 680 or by 7.8%. In 2011, the County's unemployment rate was 8.4%, which was just above the provincial rate of 8.3%.

Labour Force by Sector Category

With respect to labour force by sector, Prince Edward County's labour force is in many ways reflective of Ontario. For example, Prince Edward County has a proportionate share of its labour force involved with utilities, transportation and warehousing, administrative support, art entertainment and recreation, and other services which includes businesses like automotive repair and personal services. On the other hand, as an agricultural based community, Prince Edward County has a disproportionate share of its labour force in agriculture (7.3%), construction (7.5%), and health care and social assistance (14.7%). Prince Edward County also lags the province in manufacturing (8.7%), finance and insurance (1.4%), and professional and scientific services (4.7%).

FIGURE A8: CLASS OF WORKER BY SECTOR PRINCE EDWARD COUNTY AND ONTARIO BY PERCENTAGE, 2011

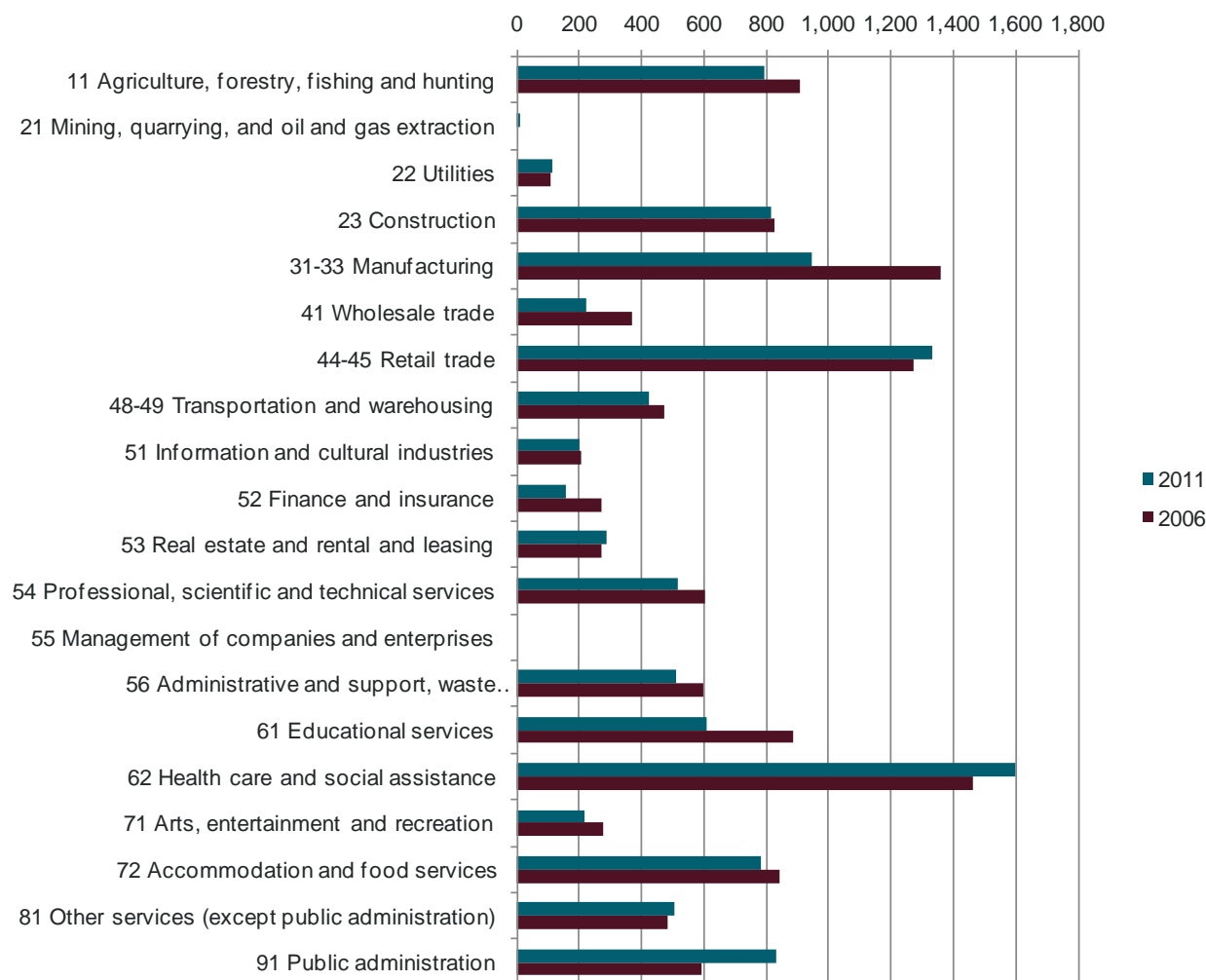


Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011052.



As shown in Figure A9 below, Prince Edward County's labour force composition, as categorized by industry, has shifted in a number of areas from 2006 to 2011. The manufacturing sector has lost the greatest number of workers from 2006, followed by educational services. Over the same period, the agricultural sector has also shed workers. In terms of sector employment growth, health care and public administration have added the most labour since 2006.

FIGURE A9: CLASS OF WORKER BY INDUSTRY, PRINCE EDWARD COUNTY BY EMPLOYED WORK FORCE AGE 15 AND OVER, 2011, 2006

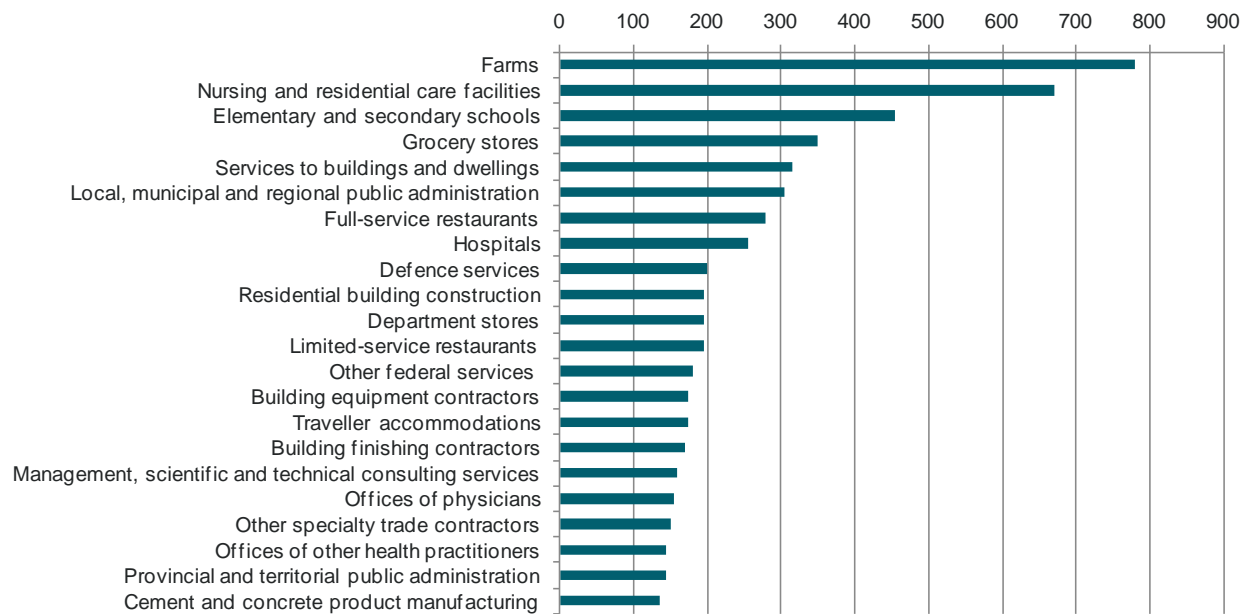


Source: Statistics Canada. 2007. Prince Edward, Ontario (Code3513) (table); Statistics Canada. National Household Survey. 2011. Prince Edward, Ontario.

Figure A10, shows the top 20 specific industrial sub-sectors in terms of total employment. As of 2011, farms and nursing and residential care facilities represented the top two subsectors in terms of employment. It is noteworthy that the majority of the subsectors shown in Figure A10 are concerned with non-export activities. In other words, these industries are primarily centred on servicing the needs of local residents or visitors.



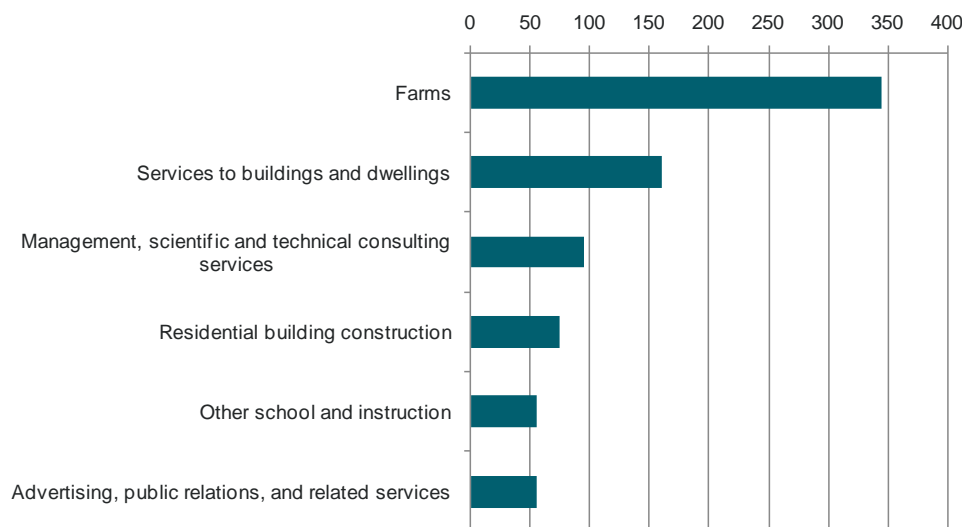
FIGURE A10: TOP 20 CLASS OF WORKER BY INDUSTRY IN PRINCE EDWARD COUNTY, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011052.

Figure A11, shows the top 6 industrial sub-sectors that employ the most people in the County. By far, farms represent the largest self-employer within the County. Of particular interest to this study, are those individuals that are self-employed in management, scientific and technical consulting services along with advertizing, public relations and related services. These areas may represent potential growth opportunities for the County as they require limited infrastructure, but may provide considerable returns to the community.

FIGURE A11: TOP 6 SELF EMPLOYED WORKER BY INDUSTRY IN PRINCE EDWARD COUNTY, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011052.



Moving forward, employment in primary industries (i.e. agriculture and other resource-based employment) is expected to comprise a relatively large proportion of the County's employment base (approximately 9% in 2012). This sector is expected to experience continued employment growth, representing 10% of total employment growth, over the next 60 years. This sector will continue to center on agriculture and agriculture-support activities focused largely on specialty crops, including viticulture (i.e. wineries/vineyards) and organic farming.⁷

Continuing to look ahead, by far the largest area of employment growth for Prince Edward County is expected to occur in retail and accommodation/food services. These sectors are projected to account for an increase of 1,770 jobs between 2012 and 2066, comprising 47% of total employment growth. While this is an important consideration for a community with a strong tourism focus, it also represents significant challenges for growing and sustaining a local economy. Retail positions are often at the lower income scale, part-time and offer little career advancement resulting in considerable staff turnover. They are also the first to be impacted in an economic downturn as evidenced in the recent census information.

On the other hand, manufacturing related employment is expected to account for 15% of growth driven by small and medium sized enterprises focused largely in manufacturing (food processing, green technologies).⁸ Institutional based employment, as it relates to health services will also account for 15% of employment growth.⁹

Labour Force by Occupational Classification

Understanding a community's labour force by its occupational category is far more instructive than by industrial category. In Figure A12, as of 2011, the largest occupational category, as measured by employed workers over the age of 15, was sales and service occupations. This is followed by occupations in trades, transport and equipment operators and related occupations. This category captures many of the occupations that are involved with agriculture. From 2006 to 2011, Prince Edward County's employed labour force in management occupations have grown by nearly 35% while the majority of the remaining occupational categories have declined. Of those categories with the largest decline, occupations related to occupations unique to primary industry business, finance and administration are the most significant, in terms of both proportional decline and absolute numbers.

⁷ Watson and Associates. Economics Limited. 2013. Prince Edward County Long Term Population Housing and Employment Forecast and Capital Needs Assessment.

⁸ Watson and Associates. Economics Limited. 2013. Prince Edward County Long Term Population Housing and Employment Forecast and Capital Needs Assessment.

⁹ Watson and Associates. Economics Limited. 2013. Prince Edward County Long Term Population Housing and Employment Forecast and Capital Needs Assessment.



FIGURE A12: PRINCE EDWARD COUNTY EMPLOYED LABOUR FORCE BY OCCUPATIONAL CLASSIFICATION, 2011, 2006

Occupational Category by Major unit	2011	2011 % of total	2006	2006 % of total	% change from 2006 to 2011
0 Management Occupations	1,480	13.6%	1,100	9.3%	34.5%
1 Business, Finance and Administration Occupations	1,240	11.4%	1,535	13.0%	-19.2%
2 Natural and Applied Sciences and Related Occupations	465	4.3%	500	4.2%	-7.0%
3 Health Occupations	850	7.8%	860	7.3%	-1.2%
4 Occupations in Social Science, Education, Government Service and Religion	1,275	11.7%	1,115	9.4%	14.3%
5 Occupations in Art, Culture, Recreation and Sport	385	3.5%	470	4.0%	-18.1%
6 Sales and Service Occupations	2,380	21.9%	2,645	22.4%	-10.0%
7 Trades, Transport and Equipment Operators and Related Occupations	1,880	17.3%	1,810	15.3%	3.9%
8 Occupations Unique to Primary Industry	350	3.2%	1,045	8.8%	-66.5%
9 Occupations Unique to Processing, Manufacturing and Utilities	585	5.4%	735	6.2%	-20.4%
Total	10,890	100.0%	11,810	100.0%	-7.8%

Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047; Statistics Canada. 2007. Census of the population.

Figure A13 provides a snapshot of Prince Edward County's largest occupational categories, in absolute terms. This snapshot reflects the County's strong agricultural and tourism sectors with the top occupations relating to farms and retail salespeople.

FIGURE A13: PRINCE EDWARD COUNTY'S TOP 15 OCCUPATIONS, 2011

Occupational Category by minor unit	2011
Retail salespersons	380
Managers in agriculture	375
Light duty cleaners	285
Retail and wholesale trade managers	260
Registered nurses and registered psychiatric nurses	260
Cashiers	260
Nurse aides, orderlies and patient service associates	205
Food counter attendants, kitchen helpers and related support occupations	185
General farm workers	185
Transport truck drivers	165
Carpenters	160
Administrative assistants	140
Landscaping and grounds maintenance labourers	140
Restaurant and food service managers	130
Secondary school teachers	125

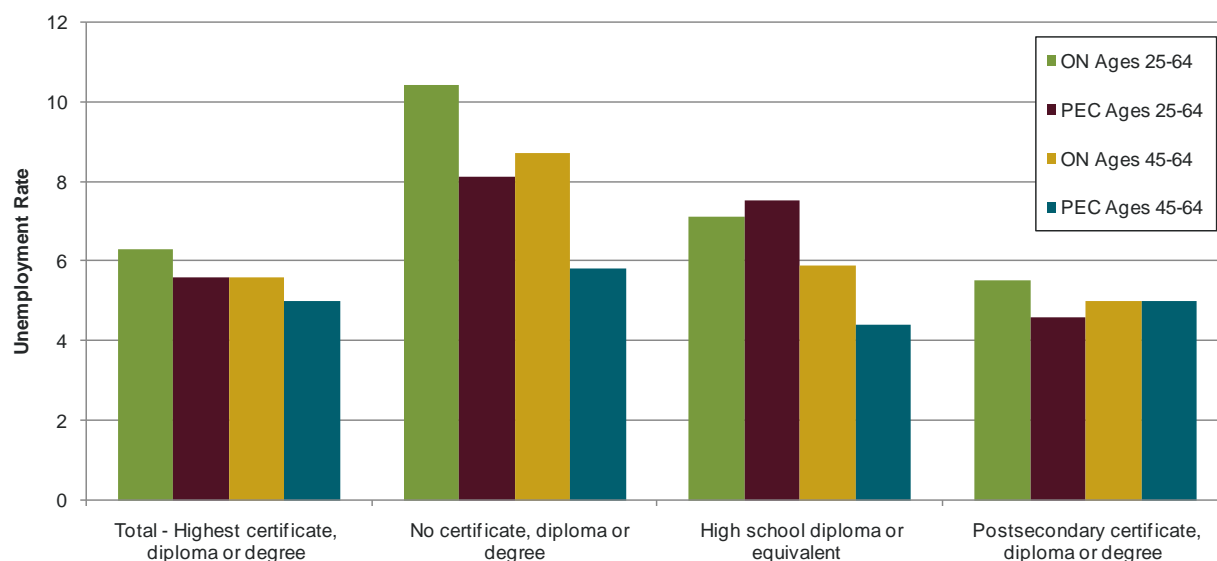
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047



Unemployment Rate by Educational Level

The unemployment rate of a community's population can be affected by a number of factors. One of the most central factors influencing an individual's ability to obtain and sustain employment is educational attainment. In other words, those individuals with more education will typically have lower rates of unemployment than those individuals with less education. With this in mind, Figure A14 provides unemployment rates by educational level and by age cohort for Prince Edward County and Ontario. Interestingly, the lowest unemployment rate by any level of education or age cohort is found in Prince Edward County with those individuals aged 45-65 and with a high school diploma or equivalent. This may be attributed to the County's farmers who would typically fall within this category. Aside from this cohort, Prince Edward County's labour force has generally lower rates of unemployment than Ontario.

FIGURE A14: UNEMPLOYMENT RATE BY EDUCATIONAL ATTAINMENT FOR PRINCE EDWARD COUNTY AND ONTARIO, 2011

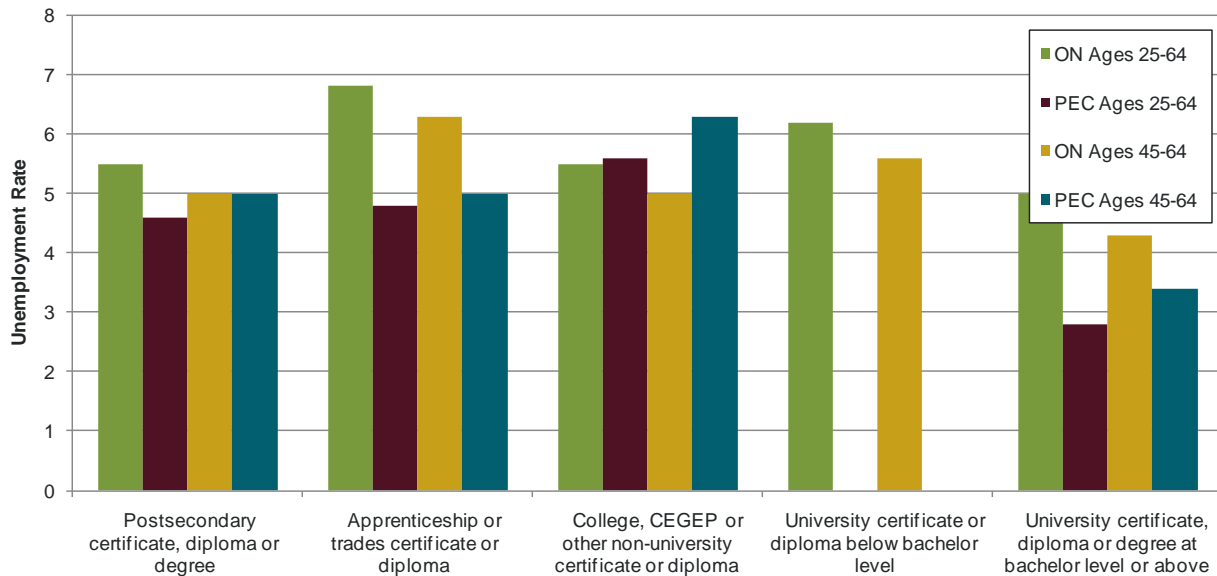


Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047.

Figure A15 provides further insight into the levels of unemployment by age cohort and educational attainment. In this figure, educational attainment is broken down by several categories including, apprenticeship or trades certificate, college, university certificate or university degree at least a bachelor level. Across each category, with the exception of college educated, Prince Edward County has lower levels of unemployment than found in Ontario. The university certificate category shows Prince Edward County to have zero unemployment, for either age cohort. This may be attributed to few residents indicating that they had this level of education, hence the missing value. This should not be interpreted to mean that Prince Edward County's residents with this type of education have full rates of employment.



FIGURE A15: UNEMPLOYMENT RATE BY POSTSECONDARY EDUCATION FOR PRINCE EDWARD COUNTY AND ONTARIO, 2011



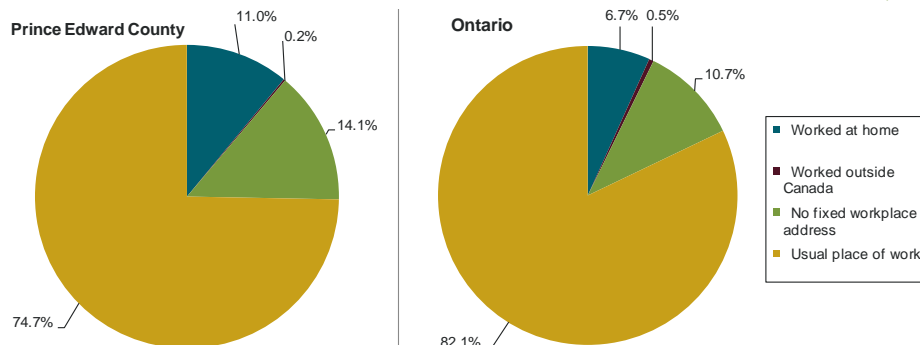
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011047.

A2.2 Labour Flow Characteristics

Place of Work Status

Figure A16 illustrates the proportion of workers within Prince Edward County and Ontario, in 2011, by their place of work. The place of work of Prince Edward County's labour force is generally reflective of Ontario, while there are some notable differences. The County has a much larger proportion of its labour force that works at home when compared to Ontario. This may be a result of the County's high rates of self-employed farmers along with home based businesses involved in advertising and professional and scientific services. Furthermore, the County has a larger proportion of its labour force that has no fixed place of work. This may be attributed to the County's large share of construction workers and trades contractors.

FIGURE A16: PLACE OF WORK STATUS IN PRINCE EDWARD COUNTY AND ONTARIO, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011049.

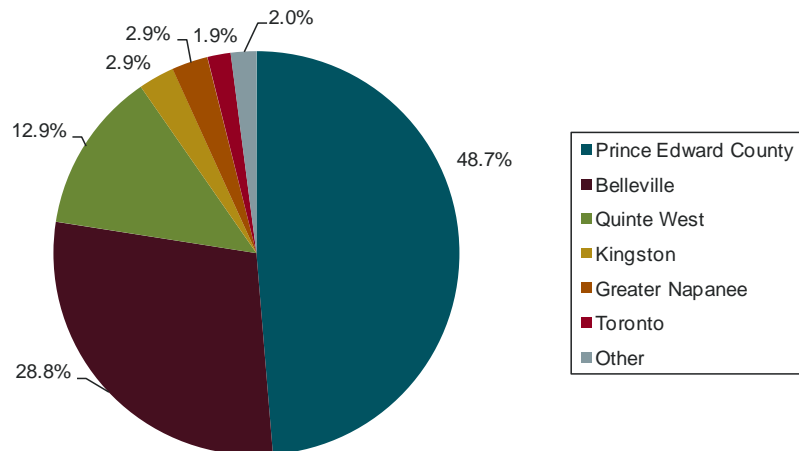


Commuting Patterns

The following two figures provide insight into the commuting patterns of those workers that live in Prince Edward County and for those workers that live outside of Prince Edward County but work within the County. Figure A17 shows the top ten locations where County residents commute for work. Just under half of residents commute to somewhere within the County for work; whereas nearly 30% of commuters travel to Belleville, while a further 13% of commuters travel to Quinte West.

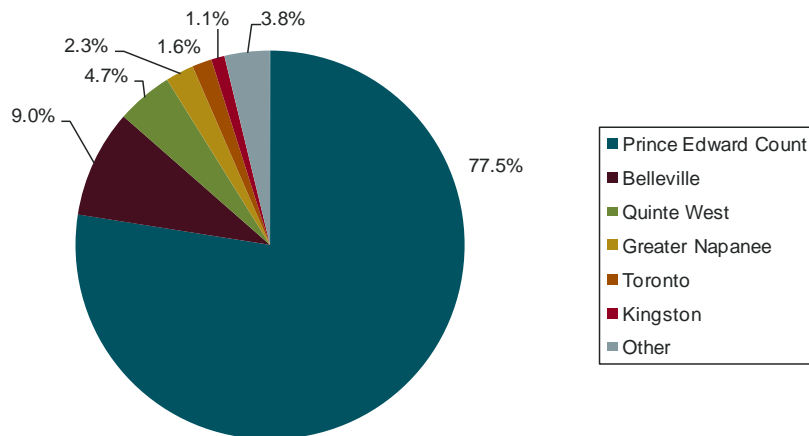
Figure A18 shows where the County's commuting labour force is coming from. Just over 75% of the County's labour force emanates from within the County, which means that approximately 25% of the County's labour force is drawn from other municipalities. Belleville contributes 9% of the labour force while Quinte West contributes nearly 5%. It is notable that, 2% of the County's labour force is drawn from Toronto.

FIGURE A17: TOP 10 LOCATIONS RESIDENTS OF PRINCE EDWARD COUNTRY COMMUTE TO FOR THEIR USUAL PLACE OF WORK, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.

FIGURE A18: TOP 10 LOCATIONS WORKERS OF PRINCE EDWARD COUNTRY COMMUTE FROM FOR THEIR USUAL PLACE OF WORK, 2011



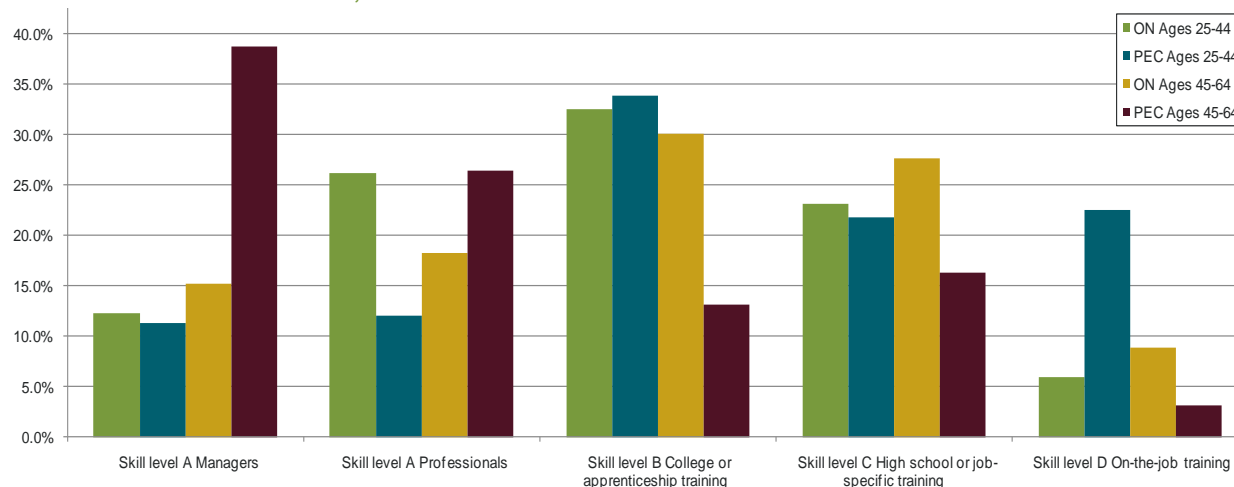
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.



New Comer Occupational Characteristics

To understand the types of occupational categories and corresponding skills levels or new-comers, Figure A19 shows these characteristics of new comers to the County and Ontario over for the last five years. In Prince Edward County, for migrants between the ages 45-64, 38.8% were managers while the provincial average over the same period was only 15.2%. This speaks to the types of new-comers that have been drawn to the County in the last five years. This statistic substantiates the anecdotal accounts of affluent, older, new-comers relocating to Prince Edward County. By comparison, for the same skill level, but for the younger age cohort, 25-44, new-comers over the last five years are in line with the provincial average of just over 10%. In the same vein, over the last five years, migrants to Prince Edward County, between the ages 45 and 64 were comprised of 26.4% professionals while the provincial average was only 18.2%.

FIGURE A19: MIGRANTS OVER THE LAST 5 YEARS BY OCCUPATION SKILL LEVEL FOR PRINCE EDWARD COUNTY AND ONTARIO, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011054.

A3: Business Patterns Assessment

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

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

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate" and "Subtotal" categories. The establishments in the "Indeterminate"



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

A3.1 Key Business Characteristics

A detailed review of the business patterns data for the period between 2008 and 2012 for Prince Edward County provides an understanding of the growth or decline of businesses over the four-year period and the key characteristics that define the County's business community. When combined with the broader industry analysis, the business patterns information will assist in understanding the key industry opportunities for Prince Edward County.

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

In terms of concentration, the following sectors (identified in Figure A20) exhibit the highest proportion of business establishments in Prince Edward County as of June 2012:

- Agriculture, Forestry, Fishing and Hunting (224 businesses, 13% of total)
- Construction (215 businesses, 12.55% of total)
- Retail Trade (174 businesses, 10.16% of total)
- Professional, Scientific and Technical Services (169 businesses, 9.87% of total)

Notably, when the indeterminate category (self-employed) is removed, the four sectors with the highest business establishment proportions remain consistent with only retail trade falling off the list, replaced by real estate and rental and leasing businesses:

- Agriculture, Forestry, Fishing and Hunting (137 businesses, 15% of total)
- Real Estate and Rental and Leasing (121 businesses, 13.3% of total)
- Construction (102 businesses, 11.22% of total)
- Professional, Scientific and Technical Services (101 businesses, 11.11% of total)



FIGURE A20: PRINCE EDWARD COUNTY BUSINESSES BY LOCATION AND SIZE, JUNE 2012, 2008

Industry (NAICS)	June 2012								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
11 Agriculture, Forestry, Fishing and Hunting	224	87	137	62	7	13	4	0	1
21 Mining, Quarrying, and Oil and Gas Extraction	5	5	0	1	2	2	0	0	0
22 Utilities	1	1	0	0	0	1	0	0	0
23 Construction	215	113	102	78	24	10	1	0	0
31-33 Manufacturing	71	37	34	14	6	10	6	0	1
41 Wholesale Trade	62	35	27	21	9	2	3	0	0
44-45 Retail Trade	174	92	82	46	27	11	2	5	1
48-49 Transportation and Warehousing	71	20	51	10	6	2	2	0	0
51 Information and Cultural Industries	29	11	18	6	3	1	1	0	0
52 Finance and Insurance	68	26	42	7	5	4	9	1	0
53 Real Estate and Rental and Leasing	151	30	121	22	4	2	2	0	0
54 Professional, Scientific and Technical Services	169	68	101	56	8	4	0	0	0
55 Management of Companies and Enterprises	25	5	20	4	1	0	0	0	0
56 Administrative and Support, Waste Management and Remediation Services	63	26	37	15	7	3	1	0	0
61 Educational Services	12	4	8	0	3	1	0	0	0
62 Health Care and Social Assistance	104	85	19	44	12	17	5	4	3
71 Arts, Entertainment and Recreation	40	15	25	8	3	1	3	0	0
72 Accommodation and Food Services	102	64	38	19	19	9	14	3	0
81 Other Services (except Public Administration)	126	79	47	58	17	2	1	1	0
91 Public Administration	1	1	0	0	0	0	0	0	1
Total Economy	1713	804	909	471	163	95	54	14	7

Source: Canadian Business Patterns June 2012, June 2008

Overall, business establishments in Prince Edward County are overwhelmingly characterized by small companies and enterprises that employ less than 10 people. In 2012, excluding the businesses consisting of the self-employed – which themselves are small enterprises – there were 471 businesses, or 51.8% of the subtotal, that employ 1-4 people. An additional 163 businesses, or 17.9% of the subtotal, employ 5-9 people. The five industries with the highest number of establishments employing fewer than 10 people were:

- Construction (102 businesses)
- Other Services (except Public Administration) (75 businesses)
- Agriculture, Forestry, Fishing and Hunting (69 businesses)
- Professional, Scientific and Technical Services (64 businesses)
- Health Care and Social Assistance (56 businesses)

It is also important to note the scarcity of medium and large firms in the County's economy. This is of interest because small, medium and large firms are generally believed to provide different economic functions within an economic region. Small firms are generally seen as the major source of new products and ideas, while large firms typically develop as products become more homogenous and firms begin to exploit economies of scale. The lack of mid-size and large business in Prince Edward



County is concerning as these firms are typically more export oriented and generate higher operating surpluses.

It is also valuable to examine the growth in businesses by industry, so as to better understand areas of emerging opportunity and importance within Prince Edward County's economy. The following figure provides an indication of the growth in business establishments by two digit NAICS codes from 2008 to 2012. The sectors that have experienced the highest rate of growth (exclusive of the self-employed, and those industries with 25 or fewer establishments) include:

- Agriculture, Forestry, Fishing and Hunting (132%)
- Finance and Insurance (90%)
- Professional, Scientific and Technical Services (44%)
- Administrative and Support, Waste Management and Remediation Services (42%)

FIGURE A21: NUMBER OF BUSINESS ESTABLISHMENTS BY SECTOR, PRINCE EDWARD COUNTY 2008 AND 2012

Industry (NAICS)	June 2008			June 2012			2008-2012	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% change total	% change Subtotal
11 Agriculture, Forestry, Fishing and Hunting	173	114	59	224	87	137	29.5%	132.2%
21 Mining, Quarrying, and Oil and Gas Extraction	8	4	4	5	5	0	-37.5%	-100.0%
22 Utilities	0	0	0	1	1	0	NA	NA
23 Construction	184	83	101	215	113	102	16.8%	1.0%
31-33 Manufacturing	52	25	27	71	37	34	36.5%	25.9%
41 Wholesale Trade	63	26	37	62	35	27	-1.6%	-27.0%
44-45 Retail Trade	170	68	102	174	92	82	2.4%	-19.6%
48-49 Transportation and Warehousing	65	50	15	71	20	51	9.2%	240.0%
51 Information and Cultural Industries	25	15	10	29	11	18	16.0%	80.0%
52 Finance and Insurance	52	30	22	68	26	42	30.8%	90.9%
53 Real Estate and Rental and Leasing	108	86	22	151	30	121	39.8%	450.0%
54 Professional, Scientific and Technical Services	178	108	70	169	68	101	-5.1%	44.3%
55 Management of Companies and Enterprises	22	20	2	25	5	20	13.6%	900.0%
56 Administrative and Support, Waste Management and Remediation Services	47	21	26	63	26	37	34.0%	42.3%
61 Educational Services	12	6	6	12	4	8	0.0%	33.3%
62 Health Care and Social Assistance	68	10	58	104	85	19	52.9%	-67.2%
71 Arts, Entertainment and Recreation	35	21	14	40	15	25	14.3%	78.6%
72 Accommodation and Food Services	86	36	50	102	64	38	18.6%	-24.0%
81 Other Services (except Public Administration)	111	45	66	126	79	47	13.5%	-28.8%
91 Public Administration	1	0	1	1	1	0	0.0%	-100.0%
Total Economy	1460	768	692	1713	804	909	17.3%	31.4%

Source: Canadian Business Patterns June 2012, June 2008

Overall between 2008 and 2012, the County added over 250 firms. This alone is noteworthy as many communities across Ontario lost businesses in the period as a result of the global recession that began in 2008. Seemingly insulated by macroeconomic trends affecting Ontario, Prince Edward County actually added manufacturing related firms, which was one of the sectors most adversely affected by the recession.

Figure A22 provides a snapshot of the largest business categories at the most detailed level of analysis. From this figure, it is evident that farming related activities, including, dairy cattle and milk production and animal combination farming account for a



considerable number of businesses within the County. Residential construction businesses are the second leading business category with 70 total firms. Of the businesses with a large number of locations and employees, residential construction and offices of physicians are the leaders with over 20 firms employing 1-4 individuals. Wineries and full service restaurants are also among the County's largest employers with several businesses employing 20-49 individuals.

FIGURE A22: TOP LOCAL BUSINESSES BY TOTAL NUMBER AND EMPLOYMENT CATEGORY

Description	Total	Indeterminate	1-4 Employees	5-9 Employees	10-19 Employees	20-49 Employees
Dairy Cattle and Milk Production	71	46	22	2	1	0
Animal Combination Farming	30	22	5	1	2	0
Residential Building Construction	70	34	21	8	6	1
Plumbing, Heating and Air-Conditioning Contractors	23	5	13	3	2	0
Finish Carpentry Contractors	23	14	6	3	0	0
Wineries	14	3	2	1	6	2
General Freight Trucking, Long Distance, Truck-Load	19	16	1	2	0	0
Miscellaneous Intermediation	32	27	3	1	0	0
Lessors of Residential Buildings and Dwellings (except Social Housing Projects)	43	36	4	2	1	0
Real Estate Agents	27	25	2	0	0	0
Offices of Real Estate Brokers	18	12	5	0	0	1
Computer Systems Design and Related Services	18	13	4	0	1	0
Administrative Management and General Management Consulting Services	24	14	9	1	0	0
Holding Companies	23	20	3	0	0	0
Landscaping Services	20	9	3	5	2	1
Offices of Physicians	42	6	30	5	0	1
RV (Recreational Vehicle) Parks and Campgrounds	19	8	6	3	1	1
Full-Service Restaurants	30	5	5	10	6	4
General Automotive Repair	17	9	8	0	0	0
Religious Organizations	25	1	21	1	1	1
Civic and Social Organizations	16	5	4	7	0	0

Source: Canadian Business Patterns June 2012

Aside from these larger employers, this section has shown the wealth of small businesses located within the County. Therefore, to support future growth and investment in the County, it is essential to understand and support the needs of the small businesses. This is particularly relevant in light of existing research and trends which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there, and a significant amount of job creation and innovation is increasingly being driven by small to medium sized businesses.

A4 Prince Edward County's Competitive Positioning

This section of the base analysis includes information drawn from a 2012 study prepared by BMA Management Consulting that benchmarks key municipal indicators. For the purposes of this report, Prince Edward County is compared with its neighboring municipalities of Belleville, Quinte West, and Kingston. Based on these results, Prince Edward County is a comparatively inexpensive place with respect to property taxes, development charges and permit fees. While this may be considered a positive with respect to business and residential attraction, the sustained application of these low



rates and charges may be unsustainable as several municipal indicators highlight Prince Edward County's precarious financial position.

A4.1 Financial Position Per Capita

A municipality's financial position is defined as the total fund balances including equity in business government enterprises less the amount to be recovered in future years associated with long term liabilities. A comparison of each municipality's overall financial position (assets less liabilities) in 2011 is shown in the figure below. There is a significant range in municipal financial position between Prince Edward County and its neighboring municipalities of Belleville, Quinte West, and Kingston. As of 2011, Prince Edward County had the worst financial position per capita when compared to its neighbours. Belleville, on the other hand, as of 2011 was the only municipality to post a positive financial position.

FIGURE A23: FINANCIAL POSITION PER CAPITA BY GEOGRAPHIC LOCATION, 2011

Municipality	2011 Financial Position Per Capita
Prince Edward County	-\$1,477.00
Belleville	\$529.00
Quinte West	-\$89.00
Kingston	-\$916.00

Source: BMA Management Consulting Inc. 2012. Municipal Study.

A4.2 Property Tax as Percentage of Income

This section provides a comparison of the allocation of gross income to fund municipal services on a typical household in each municipality. The approach used to calculate taxes as a percentage of income was to compare the average income in a municipality from the 2012 Financial Post Canadian Demographics against the tax burden on a typical home in the municipality using average dwelling values and applying the 2012 residential tax rates for each municipality. The results of this comparison are shown in Figure A24. As of 2012 Prince Edward County had the lowest property taxes as a percentage of household income at 3.4%. Quinte West's property taxes were only slightly higher at 3.6% while Kingston was over 1.2% higher than Prince Edward County at 4.6%.

FIGURE A24: PROPERTY TAXES AS A PERCENTAGE OF INCOME 2012

Municipality	2012 Est. Avg. Household Income	2012 Average Residential Taxes	2012 Property Taxes as a % of Household Income
Prince Edward County	\$77,066	\$2,624	3.40%
Belleville	\$69,041	\$3,008	4.40%
Quinte West	\$69,041	\$2,515	3.60%
Kingston	\$78,170	\$3,628	4.60%

Source: BMA Management Consulting Inc. 2012. Municipal Study.



A4.3 Municipal and Property Tax Burden

This section presents the total municipal tax burden as a percentage of income available on an average household. The relative tax burden in Prince Edward County for residential properties is particularly noteworthy given the County's proportion of residential tax assessment relative to industrial or commercial. As of 2012, Prince Edward County's average residential taxes were comparatively low at \$2,624, just above those in Quinte West. The total municipal tax burden of Prince Edward County was \$3,988 in 2012, which was on par with Belleville, above Quinte West and below Kingston. As a percentage of household income, Prince Edward County's tax burden was 5.2% in 2012. This was above Quinte West's 4.5%, but below the burden in Belleville and Kingston.

FIGURE A25: TOTAL MUNICIPAL BURDEN AS A PERCENTAGE OF INCOME

Municipality	2012 Average Residential Taxes	2012 Total Municipal Tax Burden	2012 Total Municipal Burden as a % of Household Income
Prince Edward County	\$2,624	\$3,988	5.20%
Belleville	\$3,008	\$3,907	5.70%
Quinte West	\$2,515	\$3,137	4.50%
Kingston	\$3,628	\$4,505	5.80%

Source: BMA Management Consulting Inc. 2012. Municipal Study.

A4.4 Development Charges

The figure below provides a comparison of development charges for the communities of Prince Edward County, Belleville, Quinte West, and Kingston. These rates reflect properties in the urban areas. The results of this comparison show that development charges are varied by municipality and by property type. Of these municipalities, there is no clear trend or leading municipality with respect to the lowest development charges. Quinte West, for example, has comparatively low development changes for residential development, but higher rates from commercial and industrial properties. Prince Edward County's rates are consistently average for residential, commercial, and industrial development. Kingston has by far the lowest development charges for commercial and industrial development at 0.88 per square foot.

FIGURE A26 2012 TOTAL DEVELOPMENT CHARGES

Municipality	Single Detached Dwellings per unit	Multiples Dwelling 3+ per unit	Multiples Dwelling 1&2 per unit	Apartment units >=2 per unit	Apartment units < 2 per unit	Non Res. Commercial per sq. ft.	Non Res. Industrial per sq. ft.
Prince Edward County	7,533	5,578	5,578	3,863	3,139	2.55	2.55
Belleville	8,890	6,178	6,178	6,300	3,617	4.89	none
Quinte West	5,995	3,781	3,781	3,819	2,195	3.32	3.32
Kingston	5,915	4,856	4,856	2,748	4,032	0.88	0.88

Source: BMA Management Consulting Inc. 2012. Municipal Study.



A4.5 Building Permit Fees

Municipalities are empowered by the Province to set their own building permit fees on applications for the issuance of building permits. With respect to residential m2 building permits, Prince Edward County has the lowest permit fees of the communities presented in Figure A27 below. To put this in real terms, for a property valued at \$162,000 a building permit would cost \$1,353 in the County, while it would cost \$1,503 in Quinte West, \$1,620 in Belleville and \$1,944 in Kingston. A similar ratio of building permit fees is observed for retail for these municipalities.

FIGURE A27: 2012 BUILDING PERMIT FEES

Municipality	Residential m2	Retail / m2 (finished)	Industrial / m2 (finished)
Prince Edward County	\$100 + \$7.50 /m2	\$100 + \$8 /m2	\$100 + \$2 /m2
Belleville	\$10/\$1,000	\$10/\$1,000	\$10/\$1,000
Quinte West	\$9.00 /m2	\$9.00	\$4.50
Kingston	\$9.15 /m2	\$10.25/\$1,000	\$10.25/\$1,000

Source: BMA Management Consulting Inc. 2012. Municipal Study.

A4.6 Tax ratios

The relative tax burden in each class of property is determined by the type of tax policies implemented in each municipality. Tax ratios define each property class's rate of taxation in relation to the rate of the residential property class. The tax ratio for the residential class is set by the province at 1.00. The different relative burdens are reflected in the tax ratios. These relative burdens are used to calculate the municipal tax rate of each property class in relation to the residential class. Across Ontario, multi-residential properties pay 2.74 times more municipal property taxes than their residential counterparts. As shown in Figure A28 Prince Edward County has the lowest tax ratios for each category. On average multi-residential properties pay 1.44 times more than their residential counterparts, while commercial users pay 1.11 times more and industrial users pay just 1.3895 times more. While this is an attractive feature for resident businesses, these tax ratios deserve closer attention as they may compromise the County's long term financial position.

FIGURE A28: COMPARISON OF 2012 TAX RATIOS

Municipality	Multi Resid.	Comm. Residual	Ind. Residual	Ind Large
Prince Edward County	1.4402	1.1125	1.3895	NA
Belleville	2.5102	1.9191	2.4000	NA
Quinte West	2.1300	1.5385	2.4460	2.6147
Kingston	2.4195	1.9800	2.6300	NA

Source: BMA Management Consulting Inc. 2012. Municipal Study.

A4.7 Property Tax Rates

Property taxes are primary site selection criteria for prospective businesses and homeowners. As shown in Figure A29, Prince Edward County has lower property taxes for each user category when compared to its neighbouring municipalities of Belleville,



Quinte West, and Kingston. It is noteworthy that the disparity of these property tax rates between Prince Edward County and these municipalities is considerable. The County's residential property tax rate is closest to the regional average, but still 0.23% lower than Quinte West (the next lowest). On the other hand, the County's other property tax rate categories including multi-residential, commercial office and shopping, and large industrial, in some cases are less than half the rate in other municipalities. As noted in the previous section, while these rates are an attractive feature for resident and prospective businesses and homeowners, these tax rates deserve closer attention as they may compromise the County's long term financial position.

FIGURE A29: PROPERTY TAX RATES BY USER TYPE, 2012

Municipality	Resid.	Multi Resid.	Comm. Residual	Comm. Office	Comm. Shopping	Ind. Residual	Ind. Large
Prince Edward County	1.07%	1.44%	1.74%	1.74%	1.74%	2.77%	2.77%
Belleville	1.54%	3.54%	4.03%	4.03%	4.03%	4.76%	4.76%
Quinte West	1.30%	2.51%	3.14%	3.14%	3.14%	4.22%	4.40%
Kingston	1.48%	3.23%	3.95%	3.95%	3.95%	4.86%	4.86%

Source: BMA Management Consulting Inc. 2012. Municipal Study.

A4.8 Industrial Park – Cost per Acre

Figure A30, below, shows the price per acre within the businesses parks found within Prince Edward County, Belleville, Quinte West and Kingston. As of 2012, Prince Edward County has a public – private industrial park with a total of 18 acres of land. Its price per acre ranges between \$70,000 and \$60,000. Geographically, Belleville is the County's closest municipality. Belleville has 150 acres of industrial land available from \$20,000 to \$40,000 per acre. Similarly, Quinte West has 125 acres of land available for \$35,000 per acre. The results of this comparison indicate that Prince Edward County's available industrial lands may be poorly positioned to attract investment.

FIGURE A30: INDUSTRIAL PARK COST COMPARISON, 2012

Municipality	Industrial Park	Size (Acres)	Price Per Acre		Ownership
			High	Low	
Prince Edward County	Phase 2	18	\$70,000	\$60,000	Public/Private
Belleville	North-East	150	\$40,000	\$20,000	Public/Private
Belleville	North-West	25	NA	NA	Private
Quinte West	Located in Trenton Ward	125	\$35,000	\$35,000	Public
Kingston	Cataraqui Industrial Estates	6	\$90,000	\$90,000	Public
Kingston	Clyde and Alcan Industrial Parks	6	\$65,000	\$65,000	Public
Kingston	St. Lawrence Park	25	\$275,000	\$275,000	Public

Source: BMA Management Consulting Inc. 2012. Municipal Study.



Appendix B: Community Asset Mapping

Community Asset Mapping

The Community Asset Mapping exercise undertaken for the Prince Edward County Community Development Strategic Plan should be seen as the beginning, not the end of community asset mapping efforts. The exercise is a fundamental beginning to establishing a solid baseline of community assets that describe current conditions and provide a benchmark against which to assess future growth and change. The exercise undertaken here provides a snapshot of important assets that grow the local economy and enhance the quality of life.

Four distinct areas were selected for the purposes of the community asset mapping exercise. The exercise looked at:

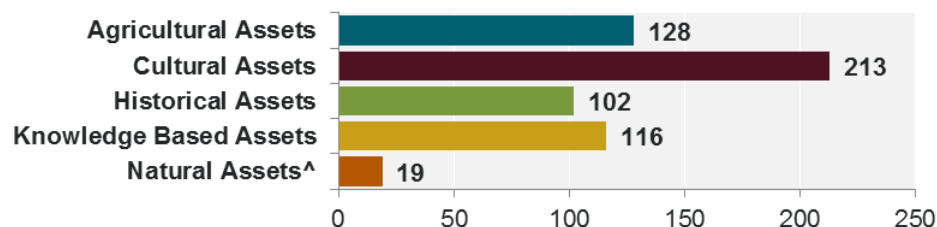
- **Historical Assets** – Assets that promote a sense of place and identity
- **Natural Assets** – Assets that showcase environmental leadership and quality
- **Cultural Assets** – Assets that deliver cultural amenities and products
- **Agricultural Assets** – Assets that support the agricultural production and promotion within the community

A fifth distinct area was later introduced into the exercise to examine the community's **knowledge based assets** – assets that deliver professional knowledge based services. This area centered on the idea that Prince Edward County was home to several knowledge based industries.

B1: Community Asset Mapping Results

The results of this preliminary asset mapping exercise are the first step to identifying the County's strength in its community assets and help track change over time to inform economic development strategies. By identifying and better profiling a community's unique resources and experiences, the County can better support its community development. The following chart illustrates the number of assets in each of the five distinct areas described above.

FIGURE B1: TOTAL NUMBER OF PRINCE EDWARD COUNTY'S COMMUNITY ASSETS



* Viticulture operations are also classified under Cultural Assets as defined by the Canadian Framework for Culture Statistics. ^Natural Assets do not include small community parks or parkettes.



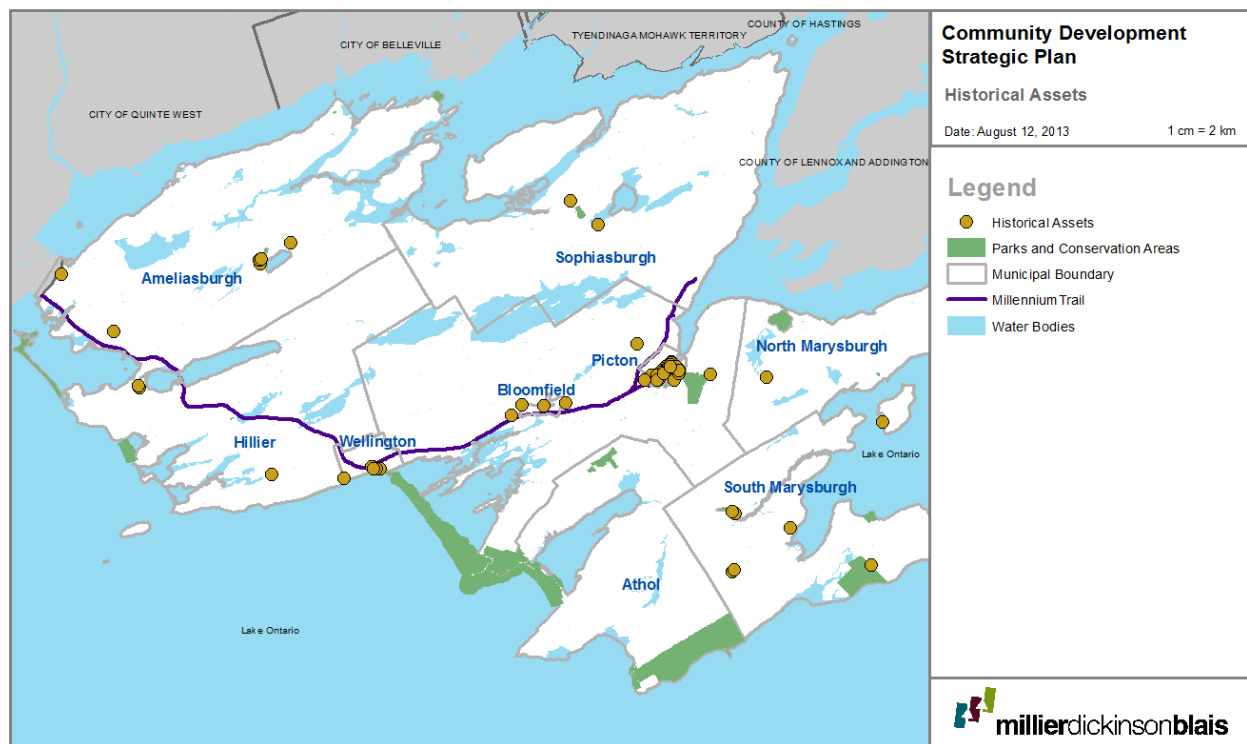
A range of factors will shape and determine how community resources are created/accesses: such as; unique histories and patterns of development; geography, population size and demographic characteristics; and economic conditions and fiscal realities. Moreover, a community's vision of community development will evolve over time that also influences how assets are retained or improved. The community asset mapping exercise has showcased a strong based of community assets that currently exist within the County. Understanding these assets will be essential to informing the Community Development Strategic Plan's directions.

Historical Assets

Prince Edward County's heritage assets embrace the County's rich array of history and rural character. The community mapping exercise identified several significant heritage buildings and properties as well as more modern and new history through the forms of commemorative and unique public art / historical plaque installations that add to the County's character. Over 100 significant historical assets were identified with the majority of them taking place near historical settlements (see Figure B2).

While the focus of the community asset mapping exercise has been on the tangible historical assets (such as the community town halls and churches), the importance of intangible resources (recorded history and traditions of the community) and community stories must not be overlooked. The preservation of these resources is essential to the continued efforts put into place by historical institutions such as museums that remind the County who and what it is.

FIGURE B2: PRINCE EDWARD COUNTY'S HISTORICAL ASSETS

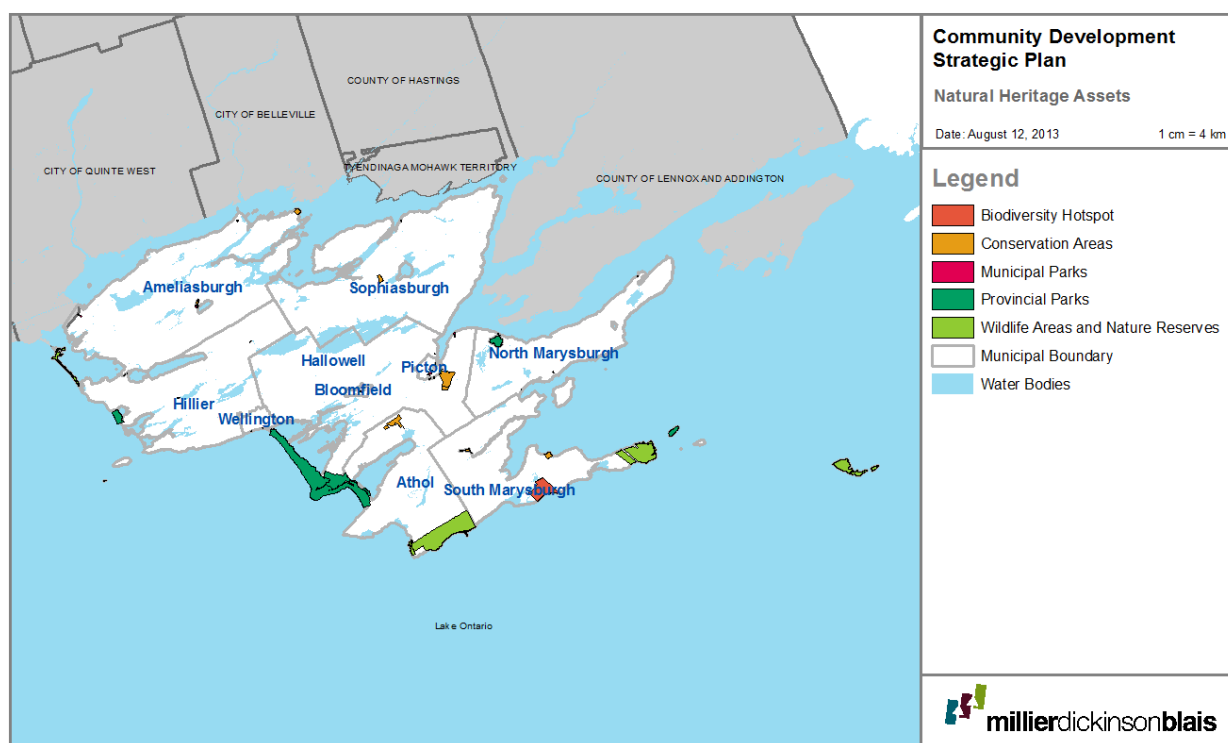




Natural Assets

Prince Edward County's natural assets are also part of the rich rural character which assists in attracting new residents, new businesses, and new investment. The County currently is home to an extensive and diverse natural heritage system consisting of attractive landscapes, multi-use pathway trails, provincial parks and beaches, wildlife and natural reserve areas and a biodiversity hotspot (Figure B3). The County's natural assets are a remarkable and defining character in the Prince Edward County's character, protecting and promoting these assets will continue to garner interest and increase and sustain tourism traffic.

FIGURE B3: PRINCE EDWARD COUNTY'S NATURAL ASSETS



Cultural Assets

The community asset mapping exercise identified a total of 213 cultural assets – which range from cultural enterprises, community cultural organizations (smaller, often community-based groups with less formal organizational structures and infrastructure, but that are essential to the cultural vitality in the city), cultural facilities and spaces, and festival and events.

The community asset mapping exercise identified 115 **cultural enterprises** (Figure B4). Cultural enterprises are defined as culture-based businesses and established not-for-profit cultural organizations. For the purpose of this exercise the following categories were collected: Antique Dealers, Artisan Cheese Companies, Artisan Coffee and Deserts Shops. Artist Studios, Auctioneers, Book Shops, Commercial

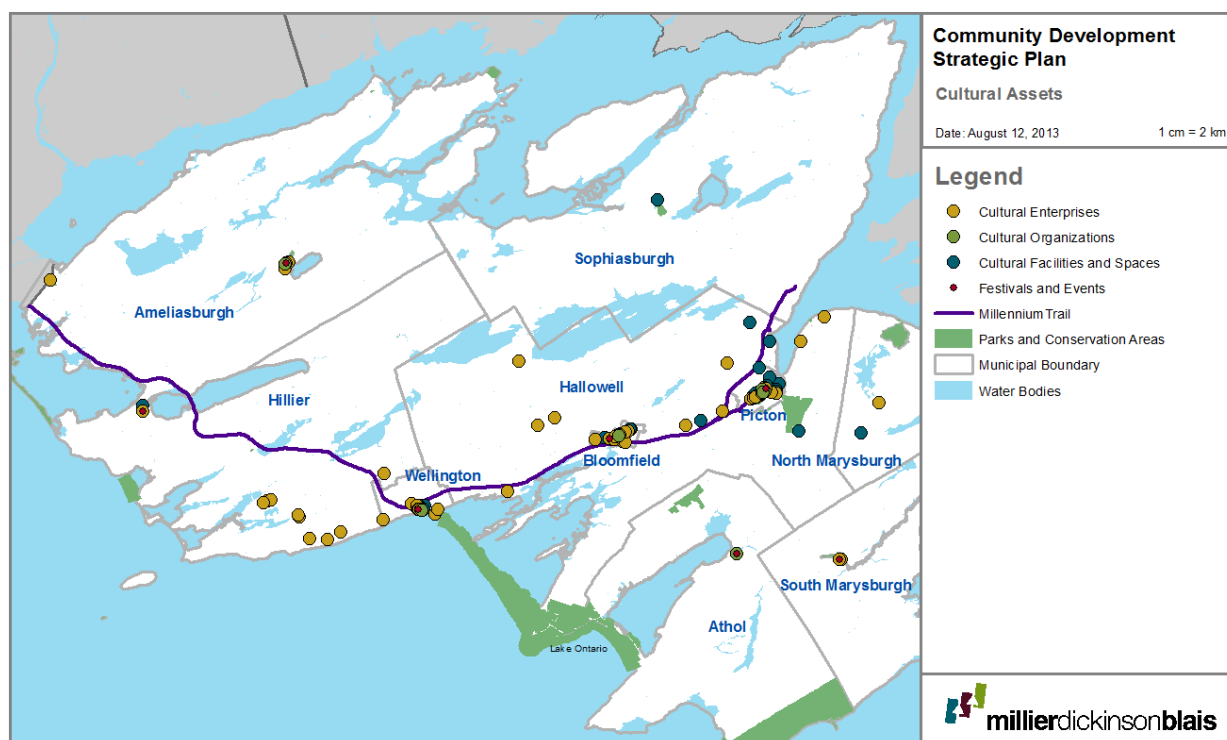


Galleries, Design Services (Graphic, Interior, or Web), Libraries, Museums, Music and Dance Instruction, Performing Arts, Photographers, Publishers, Radio and Broadcasters, Wineries, and Breweries.

In 2000, the Provincial Government granted permission for Waupoos Estates Winery to open the first winery in Prince Edward County after the Provincial Government allowed for wineries to exist outside of Designated Viticulture Areas. By 2007, Prince Edward County was officially designated as a Designated Viticulture Area¹⁰. News of the new designation and pioneers' early success and the resulting quality of wine spread quickly. By 2011 the County was producing over 100,000 cases of wine per year and witnessing growth in visitation and spending¹¹. Today along with the artisan cheese and coffee shops, wineries have contributed to the success of the County's agricultural economy.

There are two types of for-profit cultural enterprises, *cultural businesses* (retail businesses that sell cultural products and services directly to residents and visitors such as commercial galleries and book stores) and *cultural industries* (businesses that create, produce and distribute cultural goods and services through channels not involving 'on the street' encounters with consumers such as film studios and design firms – several of these businesses can and do operate from traditional office spaces).

FIGURE B4: PRINCE EDWARD COUNTY'S CULTURAL ASSETS



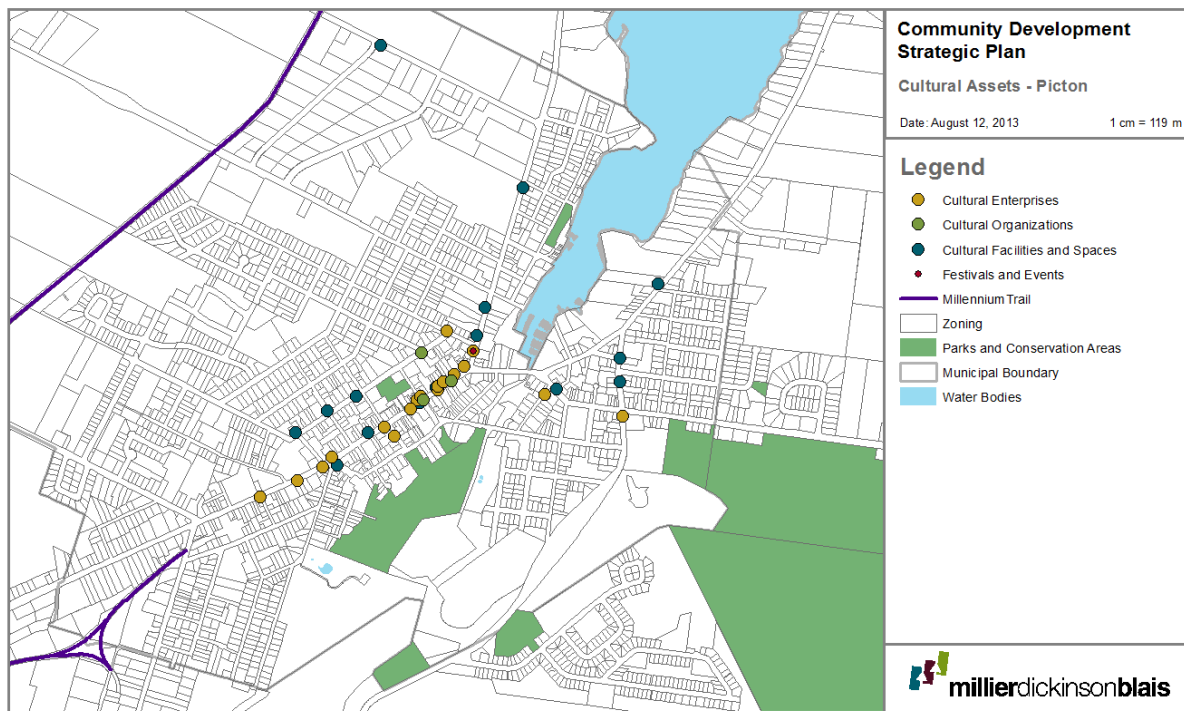
10 The Prince Edward County Winegrowers Association
11 ibid



Mapping results indicate that the County is home to more than 35 cultural industries – ranging from graphic designers to artist studios to Publishers. With more than 85% of them located along the main streets in the communities of Picton, Bloomfield, and Wellington (Figure B5), which carry a range of retail/office space options. The County's cultural businesses account for over 30 store-front cultural exchanges. Similar to cultural industries, these businesses are predominantly located along the main streets of Picton, Bloomfield, and Wellington. These results verify that the main streets of Picton, Bloomfield, and Wellington are significant corridors for cultural retail and professional services.

FIGURE B5: PRINCE EDWARD COUNTY'S CULTURAL ASSETS – PICTON / BLOOMFIELD / WELLINGTON

FIGURE B5: PICTON



Prince Edward County's **community cultural organizations** are the most challenging to locate due to their grassroots nature. The community mapping exercise identified over 10 organizations. These organizations included organizations with broad cultural mandates related to preserving and promoting the cultural traditions of the County or organizations dedicated to enhancing the County's local food and artisan publicity outside of the County. Examples include the Prince Edward County Arts Council and Taste the County). A number of community organizations serving discipline-specific resources such as visual arts, dance, and performing arts, were also identified.

The County has a wide variety of **spaces and facilities** where cultural activities take place. Some represent more formally recognized cultural facilities such as Museums, Libraries, and Theatres. Others include some of the County's churches and schools that open their doors to provide spaces and facilities for smaller cultural groups and



activities including community bands and choirs, and arts instruction classes. Over 50 cultural facilities and spaces were identified.

FIGURE B5: BLOOMFIELD

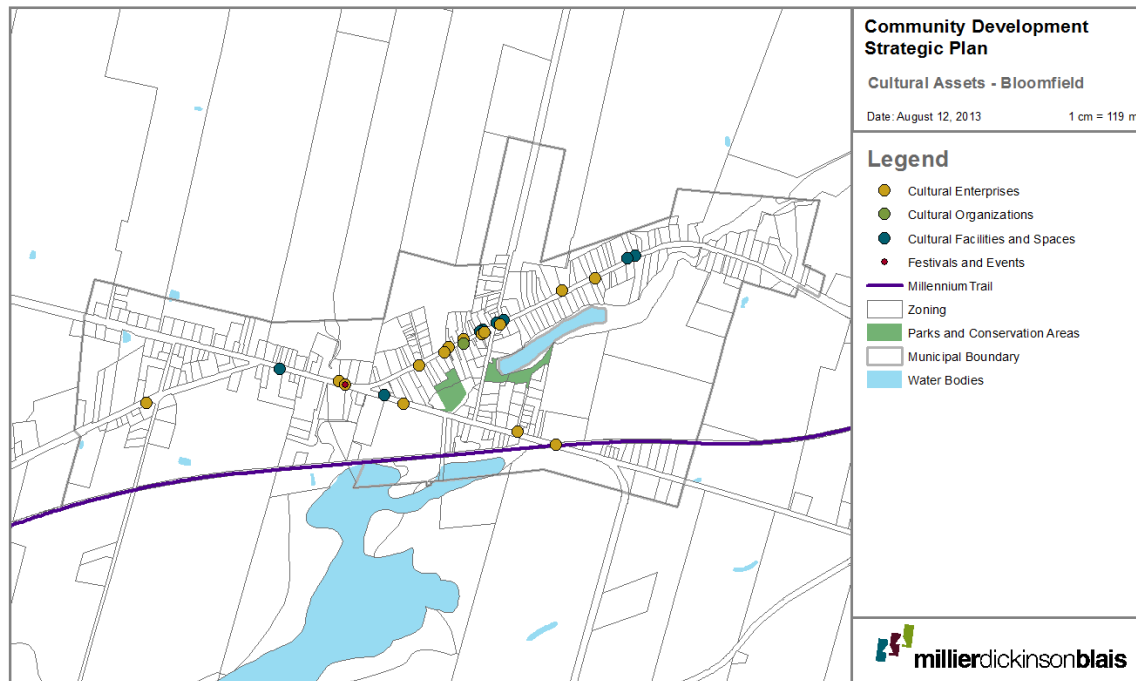
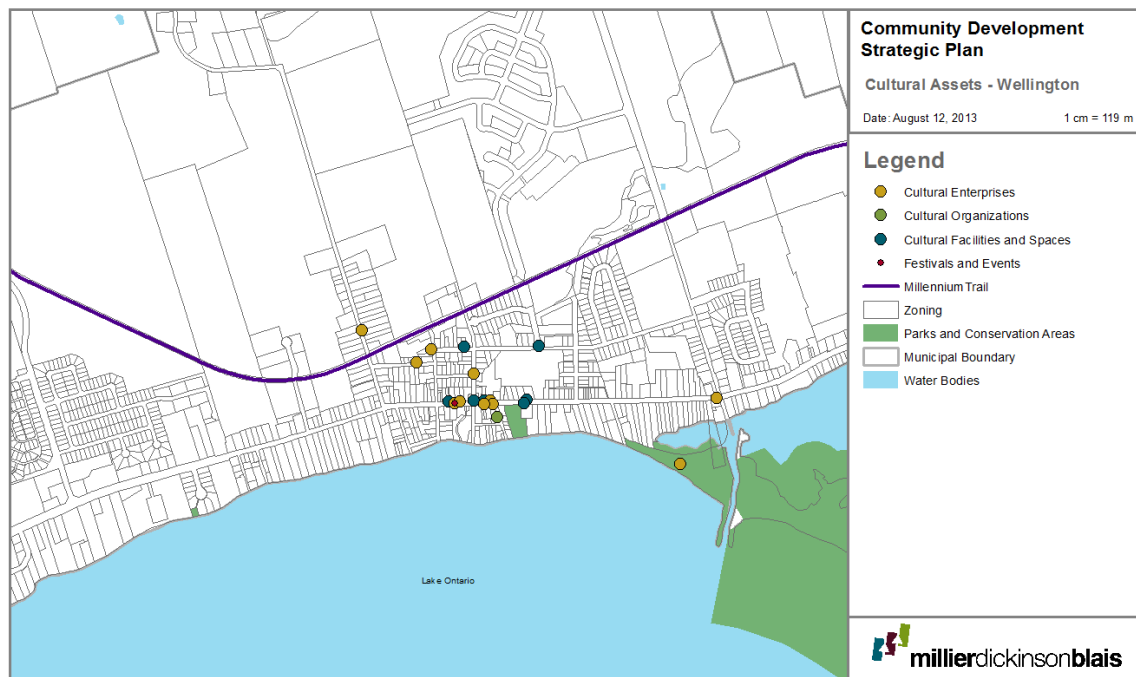


FIGURE B5: WELLINGTON





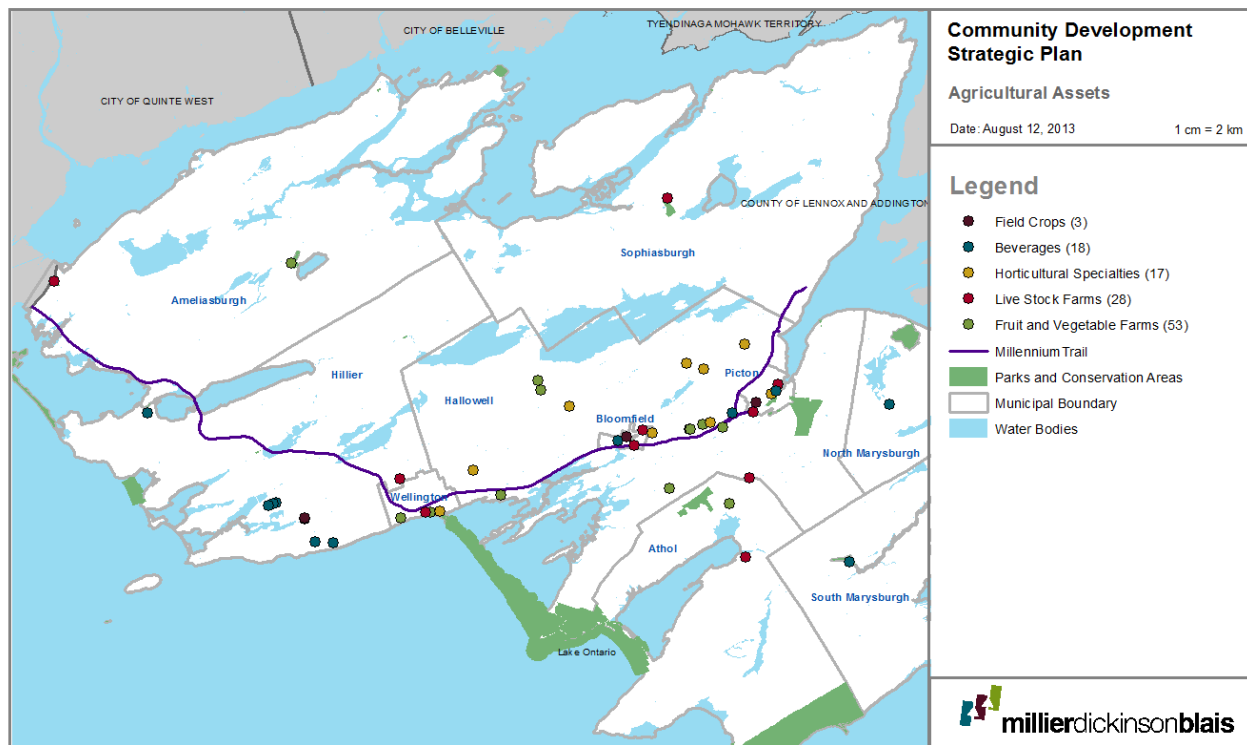
Prince Edward County has a diverse range of **festivals and events** which for purposes of mapping are defined as regular recurring events. These range from County-wide events such as Art in the County, to the smaller community-based events such as the Picton fair which has experienced remarkable growth and success over several years. Festival and events are large generators economic prosperity for the County; they also serve as important vehicles for community engagement and civic pride. Over 35 recurring festivals and events were identified. Major festival locations included Picton, Bloomfield and Wellington's main streets.

Agricultural Assets

Agriculture and agribusiness including food processing have been an important component of Eastern Ontario's economy since the region was settled. Of the 23 municipalities in Eastern Ontario that have identified key sector targets, 11 (including Prince Edward County) have identified agriculture and agribusiness as a key economic driver in their community.

Work has been done to develop value-added opportunities in agriculture across Eastern Ontario particularly in agritourism. Eastern Ontario's rural communities have been developing innovative ways to capitalize on this traditional sector. Innovations in this sector are quite divergent with one capitalizing on the '*art of the rural*' through small value-added operations, culinary tourism, and place-based branding.

FIGURE B6: PRINCE EDWARD COUNTY'S AGRICULTURAL ASSETS





‘Art of Rural’

A number of communities across Eastern Ontario are taking advantage of the creative food economy as a method of economic development, population attraction and tourism, and Prince Edward County leads the way. The resurgence of artisan cheese in the County along with the growth of local food stands, wineries, farm tours and gourmet chutney/jam/jelly makers have brought value-added agricultural experiences and products to the area. The County is home to over 100 agricultural assets spread throughout the area (Figure B6).

Knowledge Based Assets

The County is home to over 100 professional knowledge based service industries. Knowledge based service industries that were included in the community asset mapping exercise include: Accountants, Architects, Computer Services, Professional Consultants, Financial Services, Government Offices and Departments, Lawyers, and Medical Services. The mapping exercise identified 45 medical service establishments, 27 government offices and departments (including Fire and Police), 10 accounting firms, 9 architects and engineering firms, 9 financial service institutions, 7 consultants that range from energy and environmental specialties, 6 computer service shops, and 3 attorneys. Examples of these include, Prince Edward Family Health and CIBC.

In terms of spatial concentrations, knowledge based assets are clustered in one distinct areas, Picton (Figure B7). Picton is the central business district for Prince Edward County. Several of the County’s prominent medical services and facilities are located in Picton such as the Prince Edward County Memorial Hospital and the H.J.McFarland Lands that are a part of the County’s Age In Place concept. Several Medical Practitioners have also set up offices within Picton – alongside the main street – their practices range from dentistry to chiropractic and other medical professions. Government offices and departments are also predominantly located within Picton. Ontario Fisheries, Ontario DMV, Ontario Courts of Justice, and the Ontario Provincial Police Department are a few of several government offices and departments. Financial institutions such as CIBC, Bank of Montreal, Scotia Bank, and TD Canada Trust all have branches within Picton. It is clear from the mapping results that Picton plays a very important role in the attraction of knowledge based industries into Prince Edward County.

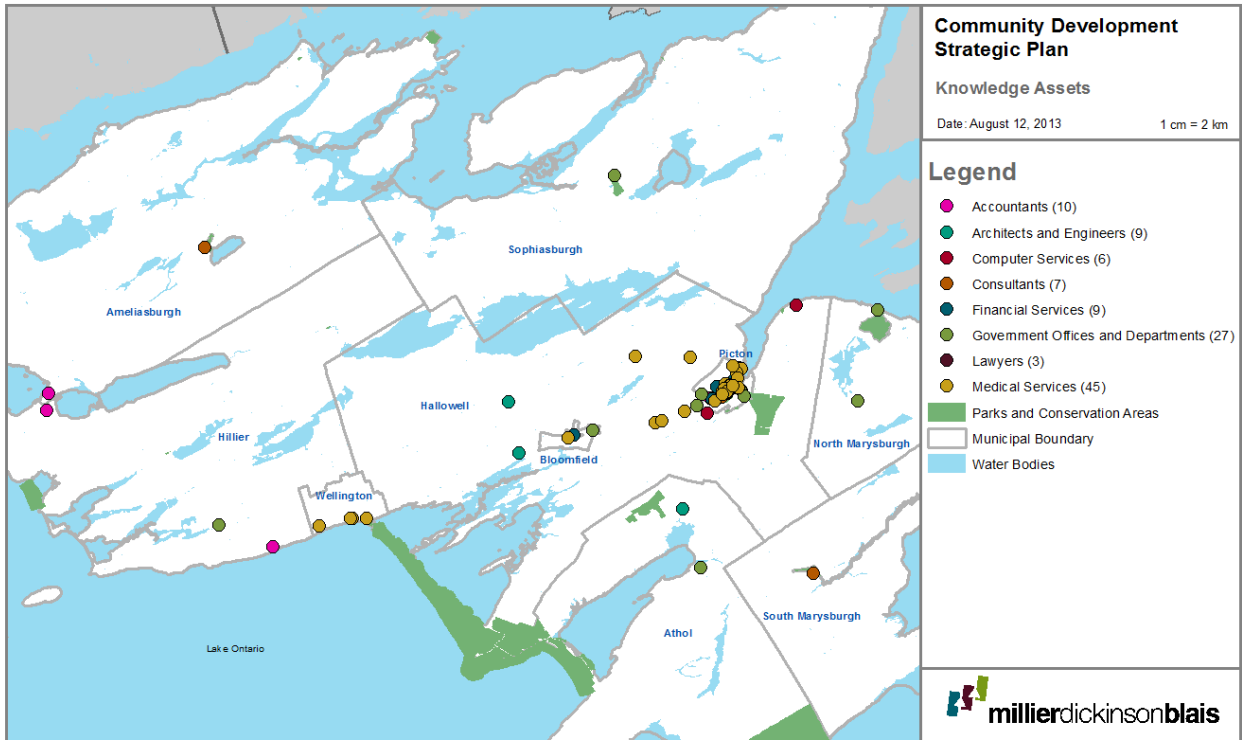
The innovative reputations of local assets can create a ‘buzz’ about Prince Edward County, and in turn, attract more people and jobs to the County. These five distinct areas incorporate Prince Edward County into many facets of their operations and share the common goal for the County to grow and prosper. The economy is constantly changing, and so assets must remain innovative in order to succeed. Assets can remain innovative if they begin to collaborate strategically and act regionally to improve their competitive advantage.

The work completed here provides a solid foundation upon which to broaden and deepen mapping efforts over time to map these competitive advantages. The current



mapping data provides a picture of the current state of resources in the County, and a benchmark from which to measure growth and change in the asset base over time.

FIGURE B7: PRINCE EDWARD COUNTY'S KNOWLEDGE BASED ASSETS



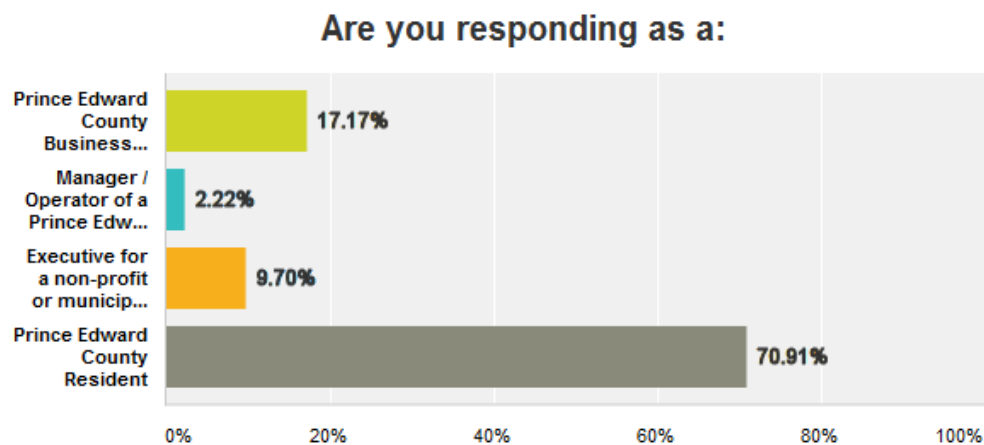


Appendix C: Community Survey Results

Community Survey Results

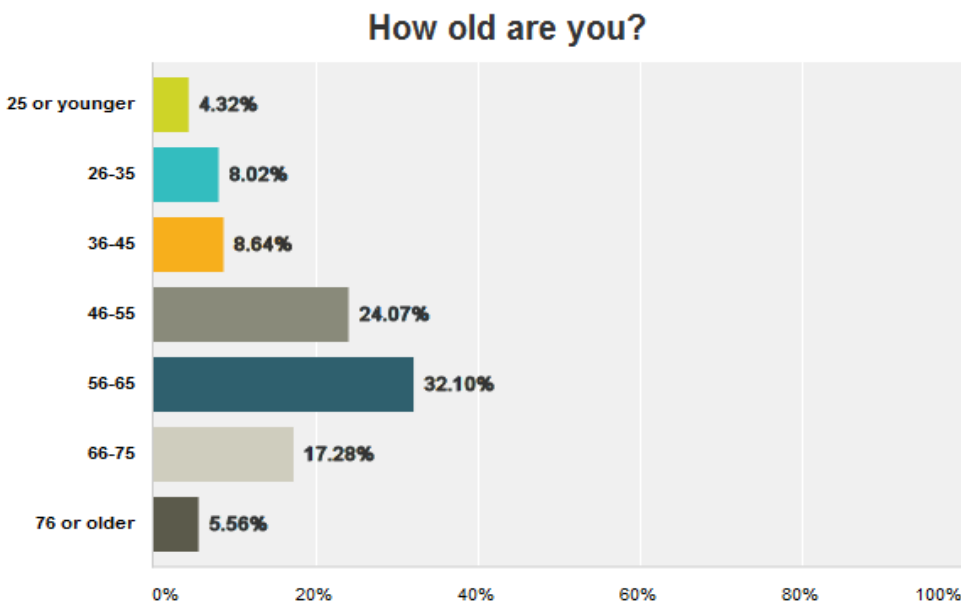
C1: Survey Results - Residents

Question 1



- Majority of survey respondents were PEC Residents at 71%
- Business owners made up 17% of respondents

Question 2





- Majority of respondents were between 46-75 at 73%
- Response rate from 26-45 age group was around 17%
- Response rates from those younger than 25 was around 4%

Question 3: How do you generally feel about Prince Edward County as a place to live?

People Like Living Here

- Like the mix of town and country
- Good place to live for retirees and families
- Good local amenities such as shops, wineries, farms and food
- Natural assets
- Sense of community
- Satisfied with entertainment opportunities

Economic/Social Stratification

- Social distance between residents richer and poorer residents
- Entertainment opportunities are only for richer residents
- Inequity between rural and urban residents
- Over run with tourists
- Housing too costly for young workers and families, causing some to move out of community
- Newer resident want to change the County, want more growth
- Agricultural land is being developed for new homes to attract new residents
- Losing sense of community

Business Environment

- Poor place to do business
- Poor employment opportunities
- Rely too much on tourist sector, employment is seasonal
- Lack of jobs in other sectors
- Lack of employment for youth and young adults

Entertainment

- Lack of entertainment for youth and kids and pensioners'

Municipal Services

- Traffic problems due to lack of roads
- Infrastructure can't handle the tourists during the in season
- Property taxes too high for service



Question 4: What 3 distinctive assets or advantages does Prince Edward County have on which to build a strong economy?

Natural Assets

- Natural beauty, sand banks/beaches
- Camping
- Outdoor recreation

Tourism

- Strong tourist season
- Potential for more growth
- Good small retail shops, strong main street
- There are no big boxes
- Good restaurants
- Food tourism

Agriculture

- Presence of vineyards/wineries
- Strong agriculture industry
- Good farm land, area has good soil for farming
- Good presence of small scale agriculture
- Local food movement, people like they can buy local food

Community

- Open minded community
- Diverse population
- Sense of community, friendly people, small town feel
- Strong volunteer community
- Good quality of life/cheap cost of living

Location

- Close to water
- Close to highway 401
- Good locations between Ontario and Quebec
- Close to major cities

Cultural Sector

- Good arts and culture community presence
- Sense heritage/history
- Historical buildings
- Artist and artisans
- Arts centre, theatre



Local People

- Talented and educated locals
- Creative individuals
- People with business experience/strong entrepreneurship
- Senior population

Question 5: What are the 3 most important community development issues you would like Prince Edward County to address in the next 5 years?

Agriculture

- Preserve/protect agricultural land
- Protect small farms and wineries
- Area losing agriculture land, need to preserve
- Wineries/vineyards are causing problems, what exactly they do not say

Development/Growth

- Too much residential housing, losing small town feel, keep rural feel, it is becoming too suburban
- Want to increase tax base without losing rural appeal of County
- End policies that inhibit growth, too much red tape prohibiting growth
- Encourage increased residential development
- Need better growth strategy for town/village areas, some sites in centre of town are vacant
- Manage growth to preserve agricultural and natural heritage
- Preserve strong town/village core

Business

- Support for small businesses in County
- Want strong main street retail, want main street to be revitalized
- Too many empty stores on main street, want to see them occupied by businesses
- Keep big boxes out of downtown
- Foster new business development for local employment
- Make it easier to open up business
- Need to promote creative rural economy
- Develop industrial park to provide jobs
- Attract more high skill jobs and diversify economy

Employment

- Develop non-seasonal jobs, want full time all year round employment
- Want business that offer real job prospects
- Need jobs to keep up with population growth
- Need jobs for young people, to retain younger generation



Hospital

- Maintain hospital services for young and old

Infrastructure

- Traffic congestion
- Want buses
- Maintain and upgrade roads, roads are in bad condition
- Sidewalks are not well maintained
- Want bike paths on roads
- Want recreation facilities

Wind Turbine

- No turbine
- Will jeopardize tourism and quality of place

Housing

- Low income and affordable housing so people can reside in the County
- Lower housings costs, rentals too expensive
- Make it easy to build affordable housing
- Need housing for seniors, can be assisted living or for seniors with active lifestyles

Tourism

- Grow tourist trade
- Build on destination brand
- Market area as agricultural destination
- Strategy for year round tourism, winter's not many tourist

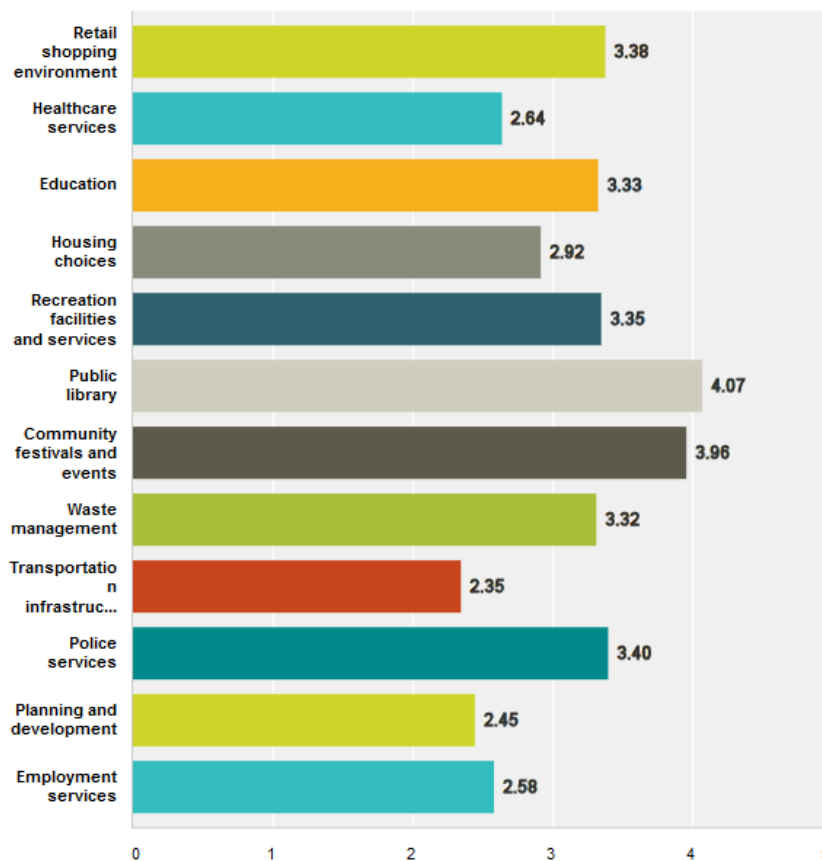
Municipal services

- Too many people on council
- Keep taxes low
- Want better services for taxes they pay, better garbage pickup
- Need reliable high speed internet connection
- Want activities for youth



Question 6

Using a scale of 1-5 where 1 is 'not at all satisfied' and 5 is 'very satisfied', please rate the quality of the products and services in Prince Edward County

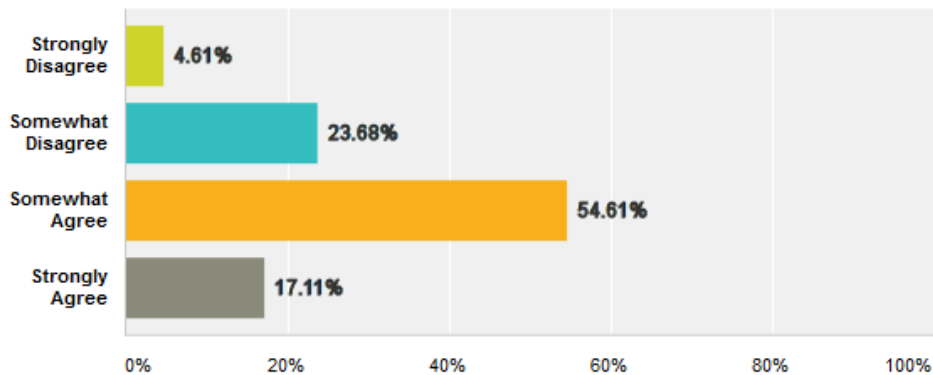


- Public library and Community festivals and events got the highest scores of around 4
- Transportation and infrastructure and Planning and development got the lowest scores of 2.35 and 2.45 respectively
- 30% of respondents stated that they were very satisfied with Community festivals and events
- 27% of respondents stated that they were not at all satisfied with Transportation infrastructure



Question 7

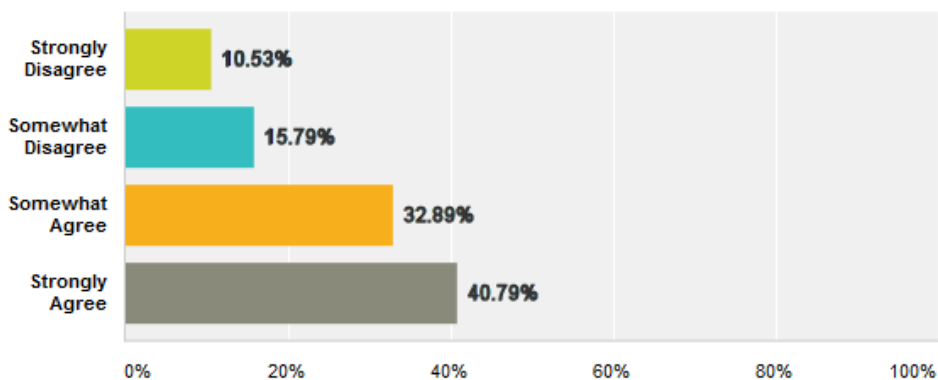
Please indicate to what level you agree or disagree with the following statement:
Prince Edward County is a good location for a business to locate.



- The majority of respondents somewhat agree or strongly agree at around 72%

Question 8

Please indicate to what level you agree or disagree with the following statement:
Prince Edward County needs to actively pursue more commercial / industrial growth.

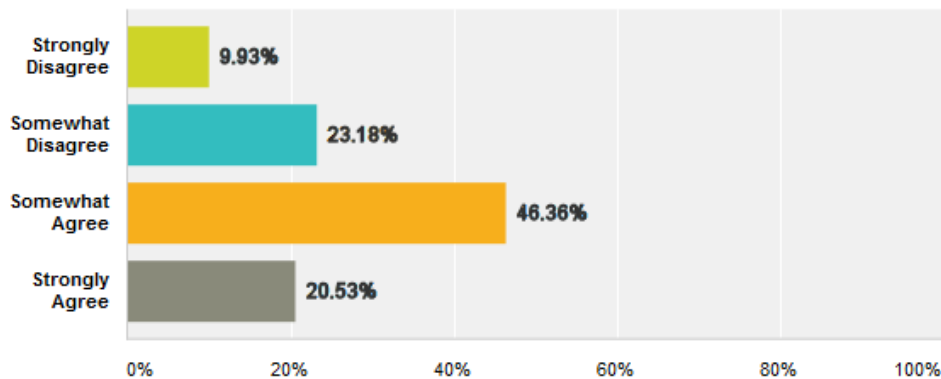


- The majority of respondents somewhat agree or strongly agree that PEC needs to pursue more commercial/industrial growth at 74%



Question 9

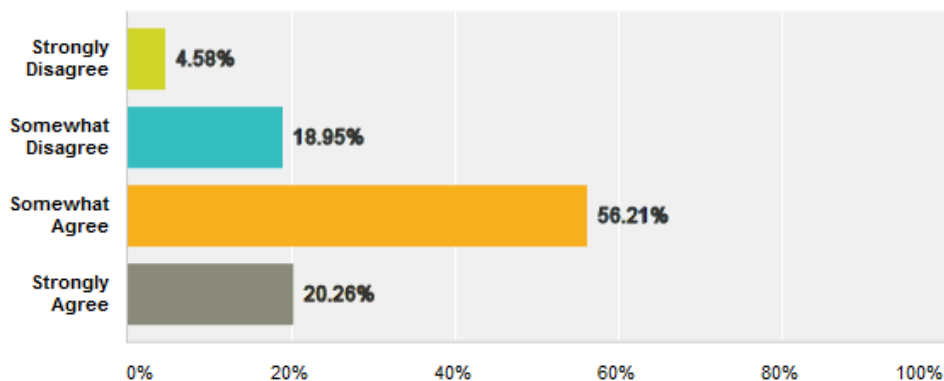
**Please indicate to what level you agree or disagree with the following statement:
Prince Edward County needs to actively pursue residential growth**



- The majority of respondents somewhat agree or strongly agree that PEC needs to pursue more residential growth at 67%

Question 10

Please indicate to what level you agree or disagree with the following statement: My community is welcoming of newcomers.

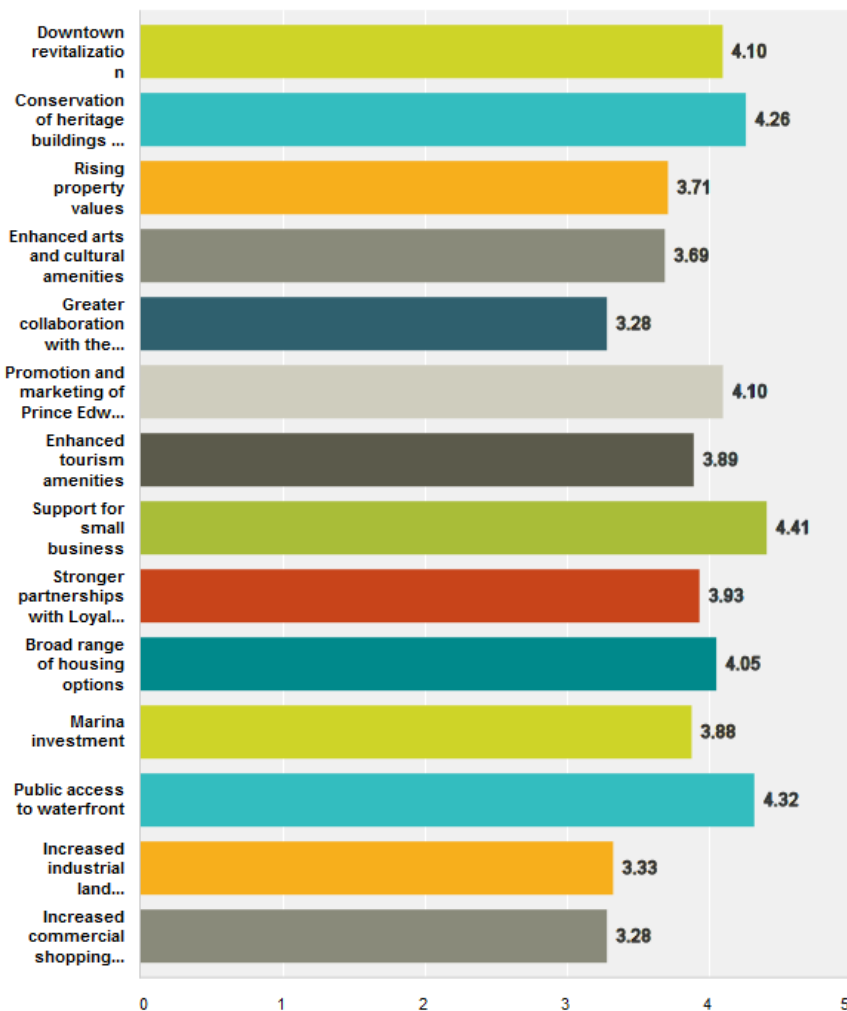


- The majority of respondents somewhat agree or strongly agree that PEC is welcoming at 76%



Question 11

On a scale of 1 to 5 with 1 being 'not important at all' and 5 being 'very important' please rank the following factors to the future growth of Prince Edward County.

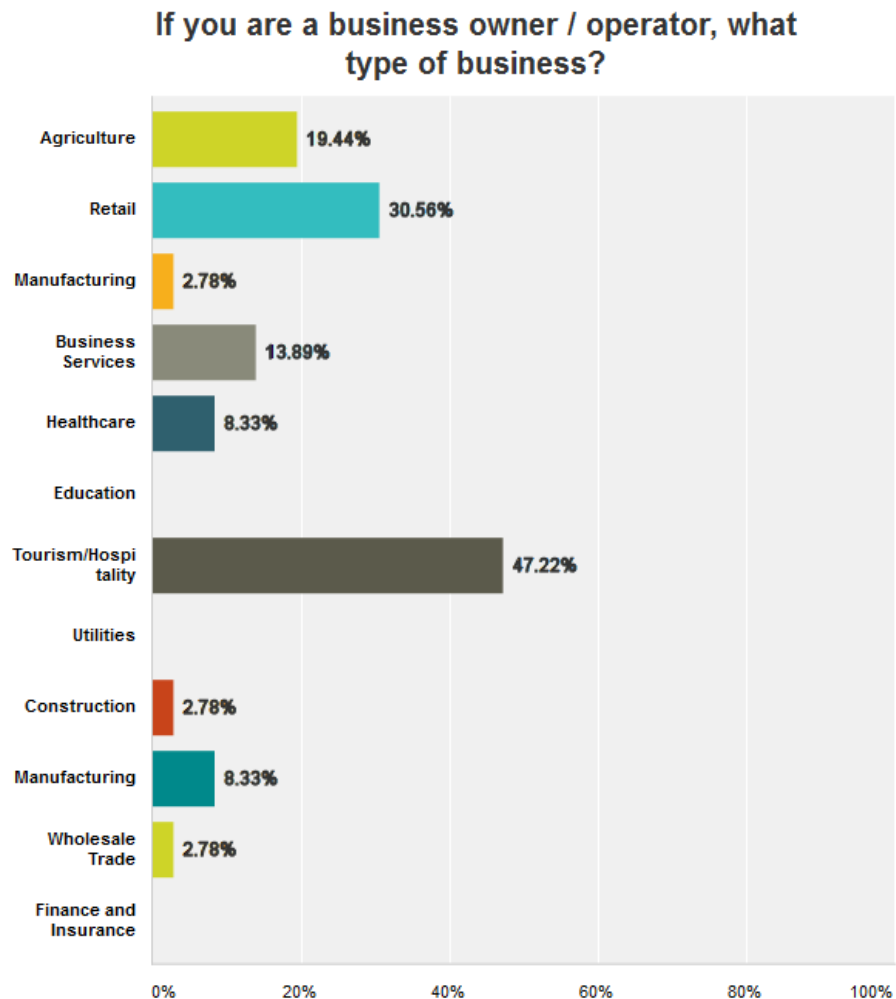


- The following categories got the highest scores: Downtown revitalization at 4.1, Conservation of heritage buildings at 4.26, Promotion and marketing of PEC at 4.1, Support for small business at 4.41 and Public access to waterfront at 4.32
- The following categories got the lowest scores: Greater Collaboration with surrounding counties at 3.28, Increased Industrial land development opportunities at 3.33 and Increased commercial shopping opportunities at 3.28
- 51% and 50% of respondents stated that Support for small businesses and Public access to the waterfront were very important respectively
- Less than 8% of the responses had a response of not important at all for all categories



C2: Survey Results - Businesses

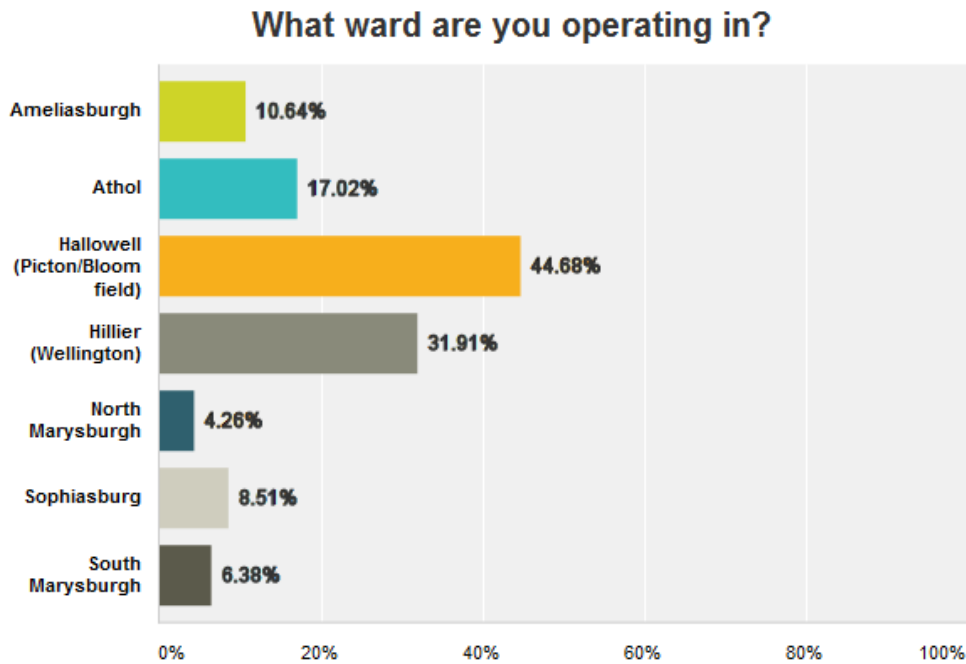
Question 12



- 78% of businesses are those that benefit from tourism activities; with tourism/hospitality at 47% and Retail at 31%.
- Agriculture at 19% may also benefit from tourism if they operate as wineries
- Manufacturing, Construction and Wholesale trade were the least represented which were all around 3%

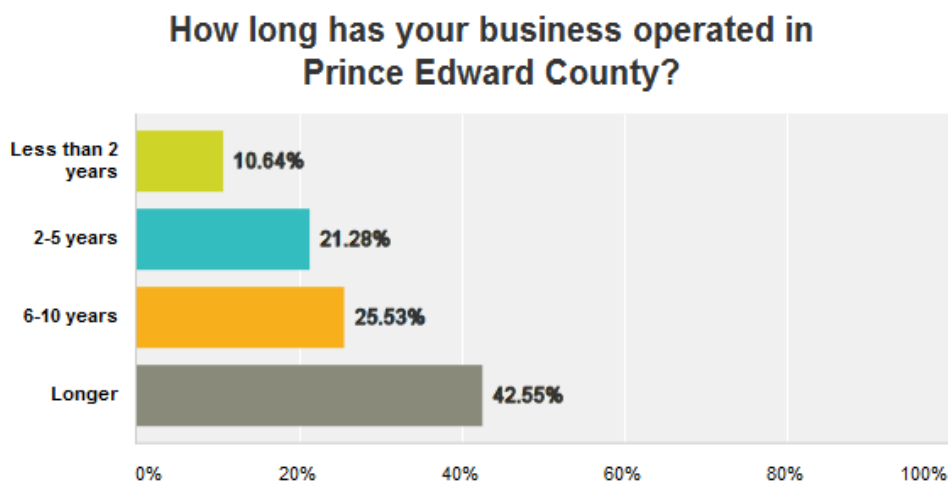


Question 13



- The majority of the respondents were from Hallowell or Hillier at 45% and 32% respectively

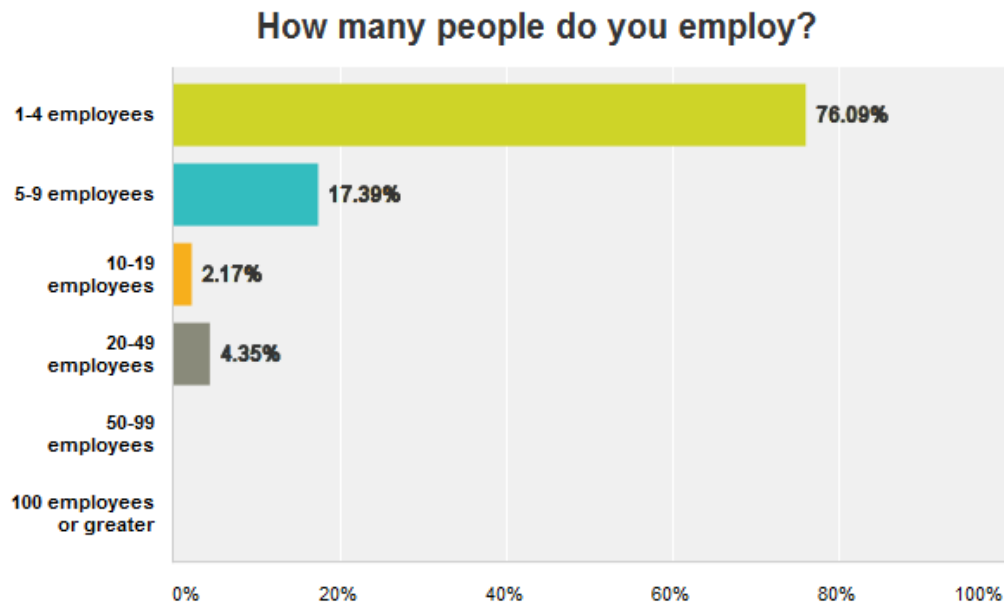
Question 14



- 43% of businesses have been in operation for longer than 10 years
- It should be noted that only 5 businesses have been in operation for less than 2 years



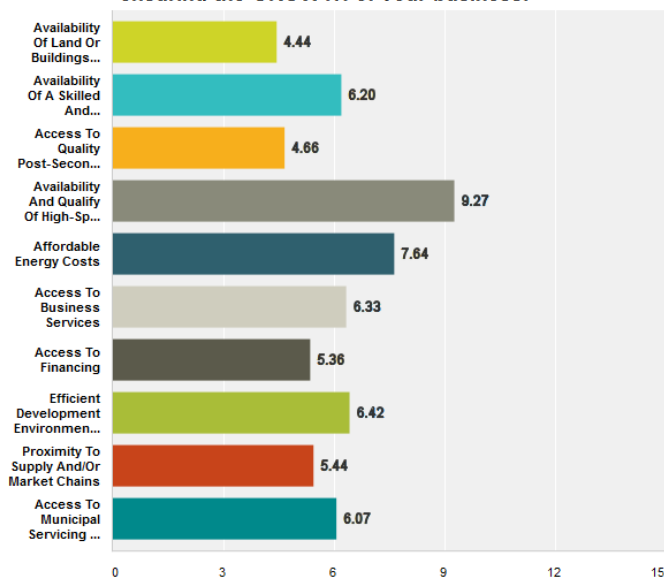
Question 15



- The 96% businesses in PEC have less than 20 employees
- Only 2 businesses responded that they have 20-49 employees
- Corresponds with the findings that most businesses in area are in tourism, retail or agriculture

Question 16

Using a scale for 0 to 10 where 0 is “not at all important” and 10 is “very important”, please rate the following criteria to indicate the level of importance each one has, in ensuring the **GROWTH** of your business.

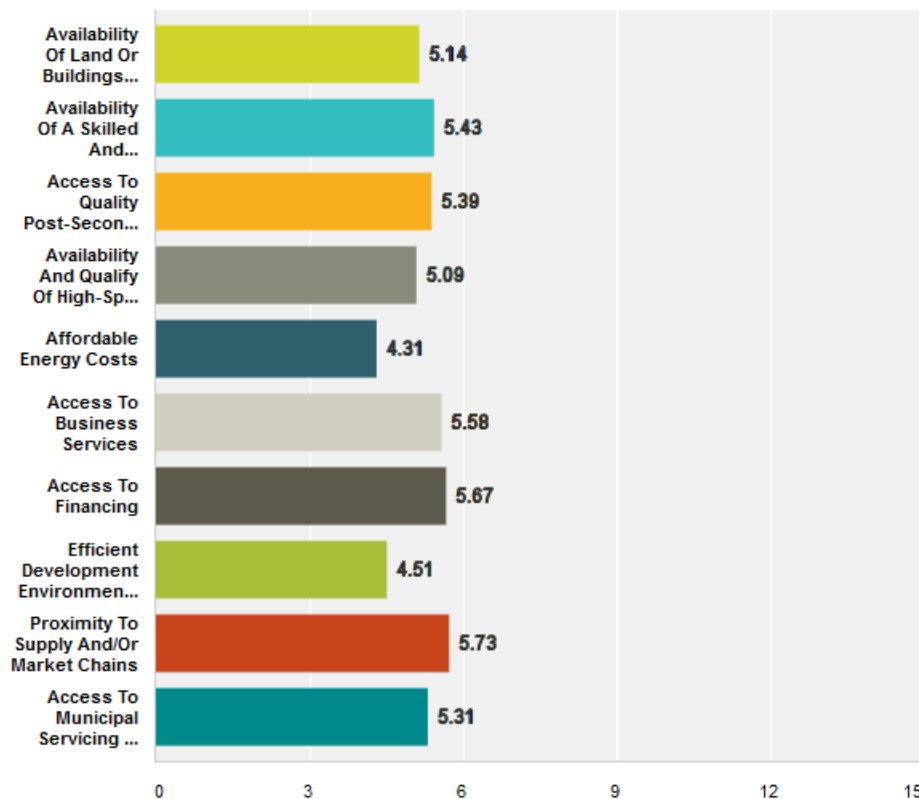




- Most of the categories scores between 5-7
- Availability and quality of high speed telecommunications and affordable energy costs scored the highest at 9.37 and 7.64 respectively
- For availability and quality of high speed telecommunications 71% of respondents stated that it was very important
- Availability of land or Buildings and availability of skilled/semi-skilled workforce scored the lowest at 4.44 and 4.66 respectively

Question 17

Using a scale for 0 to 10 where 0 is “not at all satisfied” and 10 is “very satisfied”, please rate the following to indicate the level of your satisfaction with Prince Edward County as a place to OPERATE a business.



- None of the categories score greater than 6, results evenly distributed around 4-5
- 2 categories got a score less than 5, which were Affordable energy costs at 4.31 and Efficient development environment at 4.51



Question 18: What 3 distinctive assets or advantages does Prince Edward County have on which to build a strong economy?

Natural Assets

- Natural assets attractive to tourists
- Great beaches and beautiful countryside
- Provincial Park
- Top fishing area in bay of Quinte

Agriculture

- Great wineries
- Strong agricultural sector
- Ideal climate and land for agriculture

Tourism

- Good influx of tourist, businesses can be created to take advantage of their presence
- Strong tourism sector
- Wide range of businesses to attract tourism, such as wineries, restaurant
- Strong seasonal tourism

Location

- Proximity to major cities and large population, can take advantage of close location to major markets
- Access to water

Local Businesses

- Wide mix of local businesses, strong presence of small businesses
- Strong creative entrepreneurs
- Presence of artists and craftsmen with studio

Local Community

- Locals are welcoming
- Strong sense of community
- Small town charm, have historic downtown
- Educated residential population



Question 19: What are the 3 most important community development issues you would like Prince Edward County to address in the next 5 years?

Development/Growth

- Want preserve/enhance historic architecture on main street
- Encourage large residential developments in Towns
- Revitalize downtowns of Towns
- Protect greens spaces and rural setting
- Want more properties available for new businesses
- Want lower development fees

Municipal Services

- Reliable high speed internet
- Better communication between all township in County
- High costs for municipal services
- Better cell phone communications
- Reduce government overlap
- Reduce size of council
- Want community services for youth

Tourism

- Want co-ordinated approach to promoting tourism
- Better branding of the County
- Better promotion of County, not many people in Ontario know about County
- Create welcoming environment for year round tourism
- Want people to visit other sites than Main street in Picton
- Better facilities to encourage tourism
- Also market artists' studios instead of just "Wine and Dine"

Infrastructure

- Upgrade and maintain roads
- Better transportation connections to all communities
- More public washrooms
- Better traffic flow needed
- Want more bike lanes and rack

Agriculture

- Protect and preserve farm land and its practices by restricting development
- Support local farming



Business

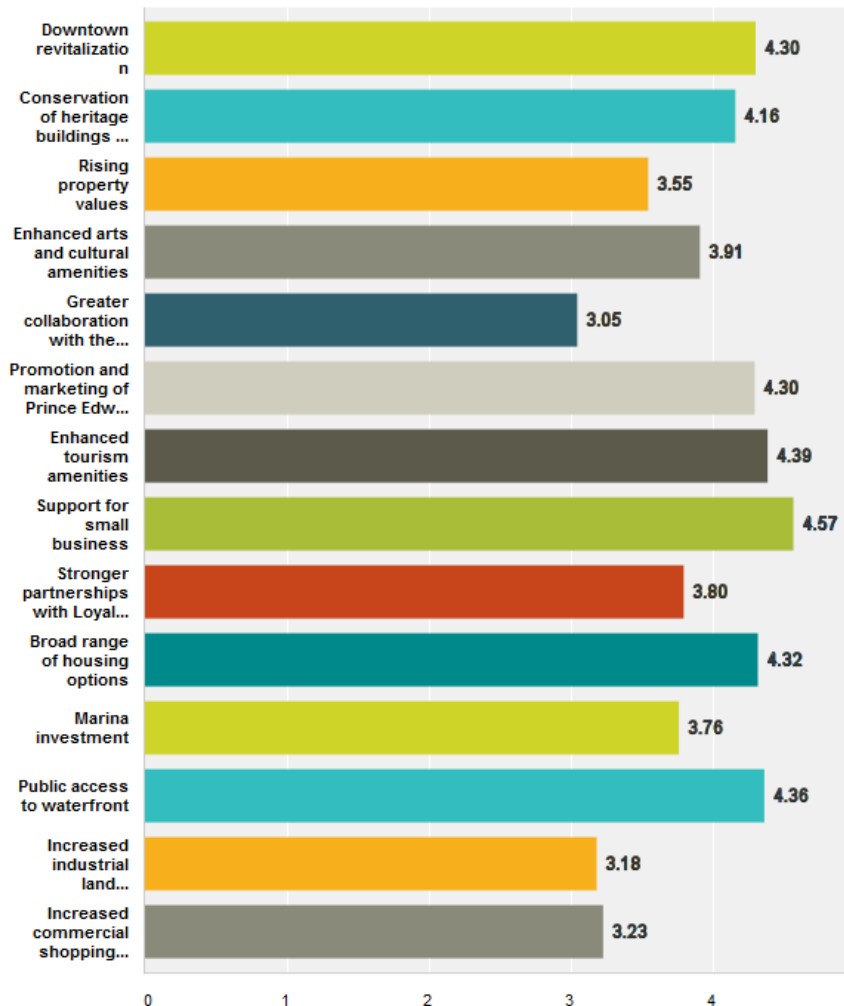
- Want to preserve local businesses
- Some want big box others do not want them
- Better promotion of small businesses

Employment

- Want year round employment
- Want jobs for young people so they do not leave County

Question 20

On a scale of 1 to 5 with 1 being 'not important at all' and 5 being 'very important' please rank the following factors to the future growth of Prince Edward County.



- None of the categories got a score of less than 3



- Highest scoring were Support for small business at 4.57, Public access to waterfront at 4.36 and Enhanced tourism amenities at 4.36
- Lowest scoring were Greater collaboration with surrounding municipalities at 3.05, Increased industrial land development opportunities at 3.18 and Increased commercial shopping opportunities at 3.23
- All categories that scored 4 and greater has a very important response rate greater than 56%

Question 21: What is the primary reason for locating your business in Prince Edward County?

Natural Assets

- Tranquil and beautiful place to live
- Enjoy rural setting
- Sandbanks

Quality of Life

- Able to live and work in area
- Safe area with low crime
- Satisfied with entertainment options
- Enjoy Country living and slower pace of life
- Access to locally grown food
- Access to good wine and art
- Enjoy strong sense of community
- Close to family, and they grew up there
- Cheaper cost of living

Tourism

- Business depends on tourism
- Want to live in a tourist destination

Agriculture

- Availability of affordable agriculture land
- Presence of quality soil and good climate for farming

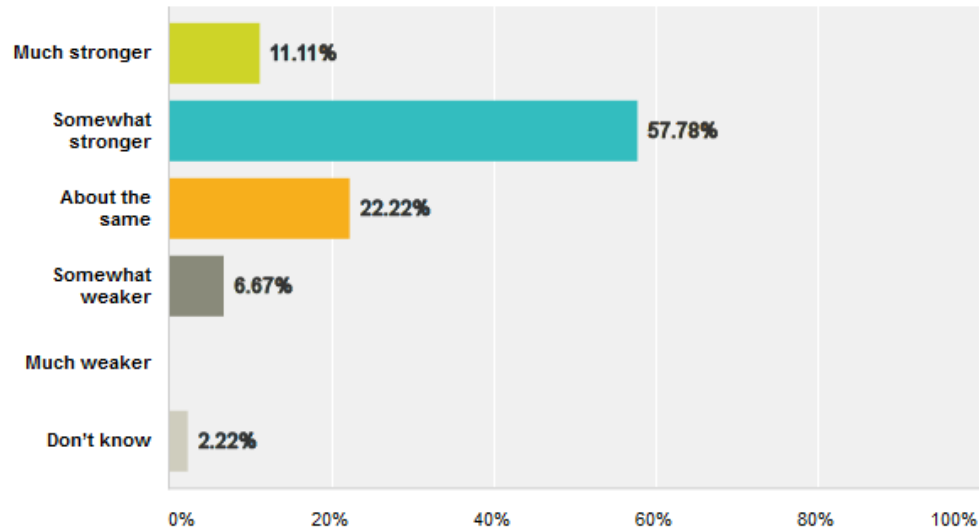
Housing

- Cheaper housing compared to major cities



Question 22

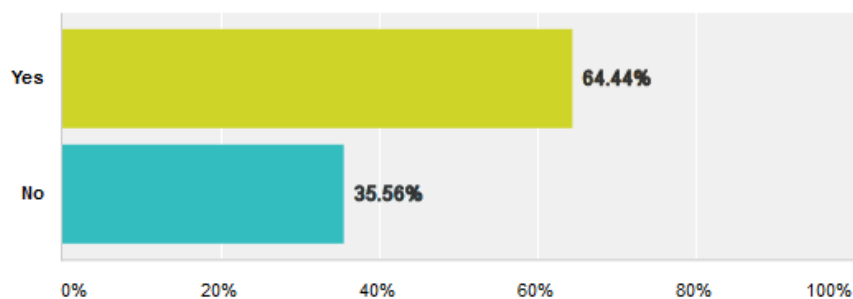
How do you expect your company to perform in the next 2 years compared to the last 2 years?



- 69% of responses were much stronger or somewhat stronger
- 7% of responses were somewhat weaker or much weaker
- Only 5 responses were much stronger
- Only 3 responses were somewhat weaker

Question 23

Do you have plans to upgrade/expand your Prince Edward County operation?

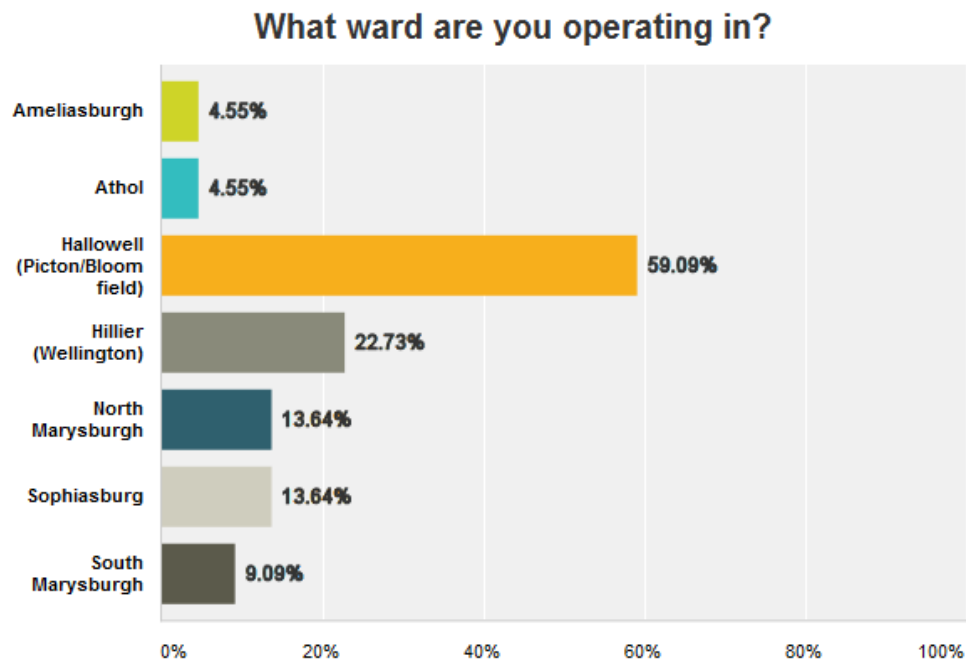


- Majority of responses were Yes



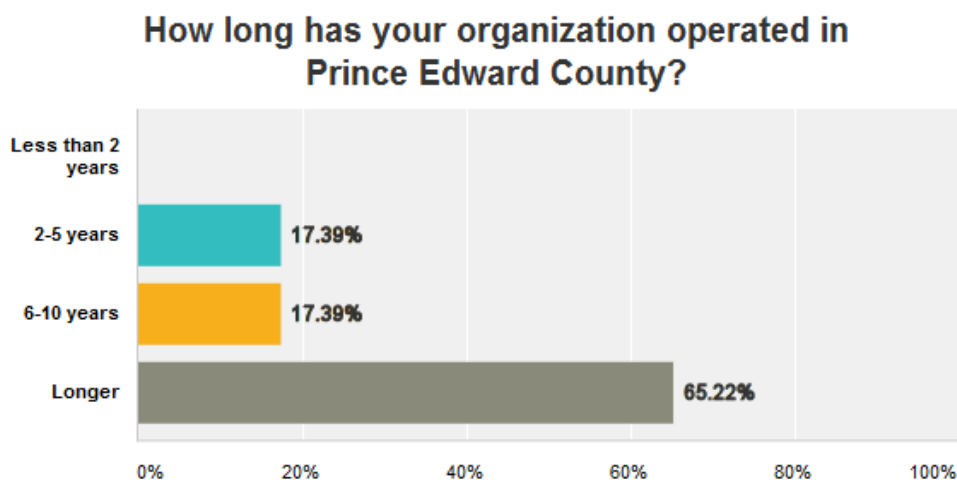
C3: Survey Results - Organizations

Question 24



- The majority of organizations are operating in Hallowell at 59% and Hillier at 23%
- Ameliasburgh and Athol had 1 response each while South Marysburgh had 2 responses

Question 25

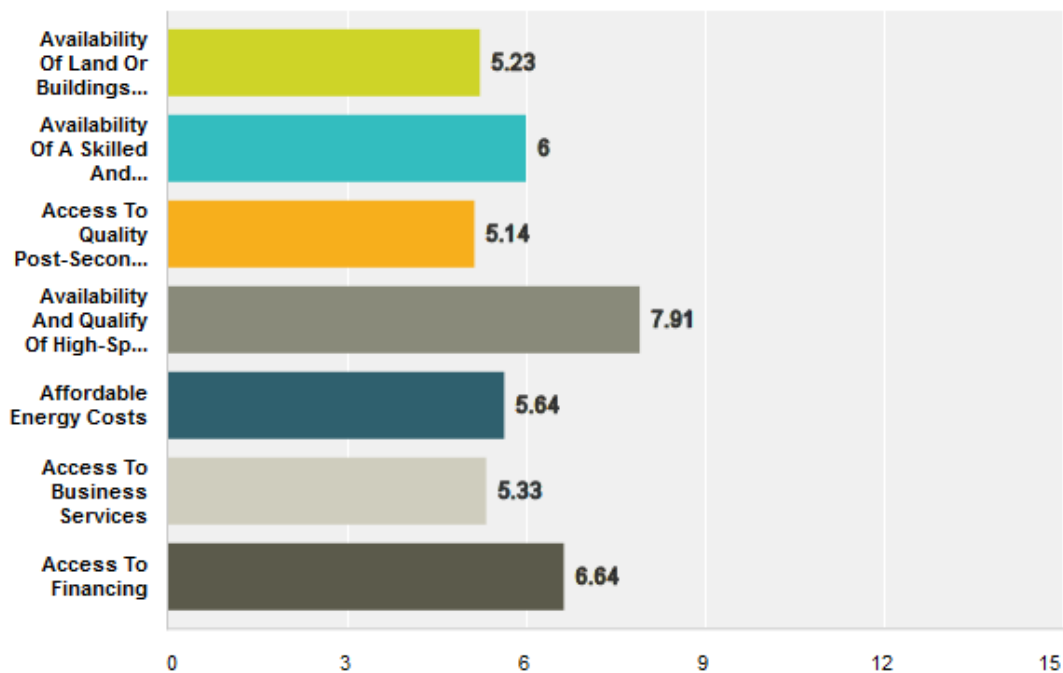


- 66% of organizations have been operating longer than 10 years
- 8 organizations have been operating less than 10 years



Question 26

Using a scale for 0 to 10 where 0 is “not at all important” and 10 is “very important”, please rate the following criteria to indicate the level of importance each one has, in ensuring the **GROWTH** of your organization.

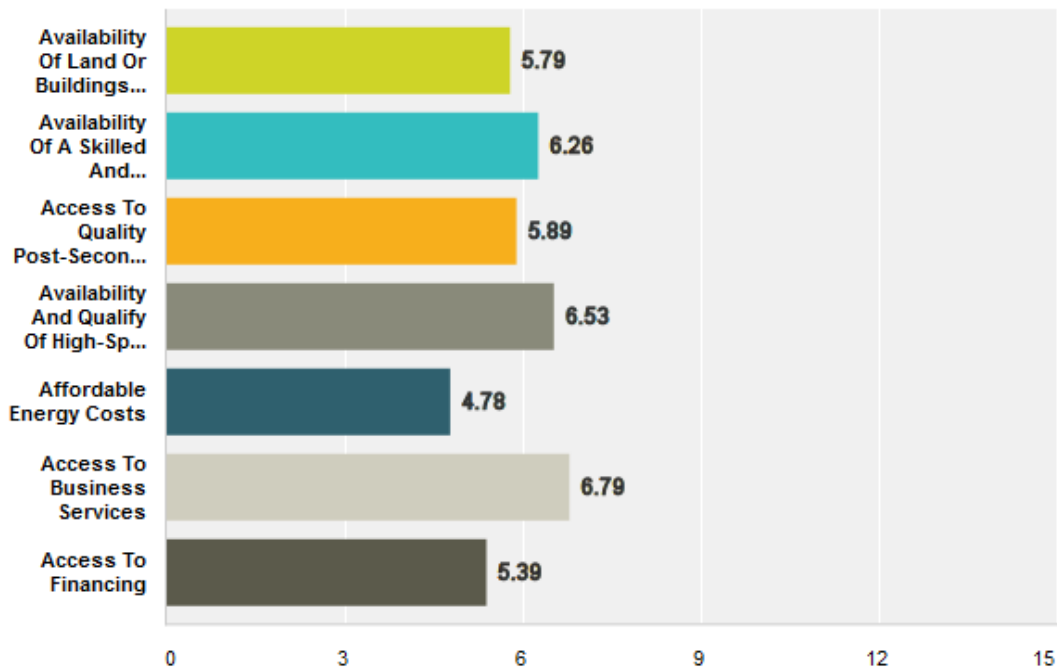


- Most categories scored between 5-6
- Highest scoring categories were Availability and quality of high speed telecommunications at 7.91 and Access to financing at 6.64
- 41% and 36% of responses stated that Availability and quality of high speed telecommunications and Access to financing were very important respectively
- 27% of responses stated that Availability of land or building were Not at all important



Question 27

Using a scale for 0 to 10 where 0 is “not at all satisfied” and 10 is “very satisfied”, please rate the following to indicate the level of your satisfaction with Prince Edward County as a place to **OPERATE** an organization.



- All but one category scored between 5-7
- The categories that scored higher than 6 were Availability of land or building, Availability of a skilled/semi-skilled workforce and Availability and quality of high speed telecommunications
- Affordable energy costs only category scored less than 5

Question 28: What 3 distinctive assets or advantages does Prince Edward County have on which to build a strong economy?

Natural Assets

- Beaches
- Sandbanks
- Rural setting



Community

- Quiet area
- Rich history
- Strong volunteer community
- Good sense of community

Location

- Close to major cities

Tourism

- Strong tourist sector

Businesses

- Availability of art and artisanal products
- Presence of small businesses
- Good culinary presence

Local people

- Strong sense of entrepreneurship
- Well educated people
- Presence of retirement community
- Talented people in variety of sectors

Agriculture

- Availability of wine/wineries

Question 29: What are the 3 most important community development issues you would like Prince Edward County to address in the next 5 years?

Tourism

- Better promote County history to tourist
- Create Visitor Centre
- Want better understanding of impact of tourism
- Stronger and consistent branding of tourism sector

Development/Growth

- Revitalize towns without losing historic buildings
- Encourage development, especially senior housing
- Preserve small town character



Municipal Service

- Want smaller council
- Want better telecommunication services
- Want better transit service

Housing

- Affordable housing for young families and seniors

Business

- Support to grow existing businesses
- Increase local business marketing/awareness

Infrastructure

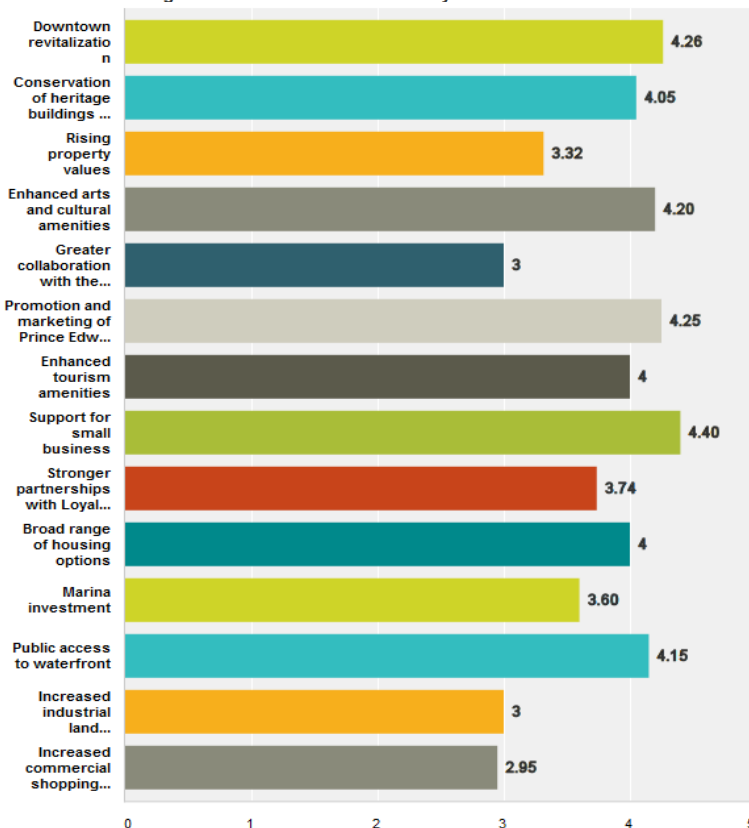
- Want better County wide transportation options

Wind Turbine

- Stop wind farm development

Question 30

On a scale of 1 to 5 with 1 being 'not important at all' and 5 being 'very important' please rank the following factors to the future growth of Prince Edward County.





- The highest scoring categories were Downtown revitalization at 4.26, Promotion and marketing of PEC at 4.25 and Support for small business at 4.4
- The lowest scoring categories were Greater collaboration with surrounding municipalities at 3, Increased industrial land development opportunities at 3 and increased commercial shopping opportunities at 2.95

C4: Additional comments

Development/Growth

- Want to preserve sense of history and authenticity, preserve heritage properties
- Limit buildings that have suburban style
- Want development but not at cost of locals who may no longer be able to live there, or losing its small town charm and sense of community
 - Some want to limit residential growth, becoming too much of a suburb
 - Others fine with area becoming bedroom community
- County should market itself as retirement community to attract senior residents
- Worries about County becomes tourist playground or retirement community
- County is becoming no longer affordable for average family due to higher cost of living including housing costs
- Support for communities outside the big towns

Tourism

- Develop eco-tourism
- Shouldn't just focus on high spending tourists, also offer low cost options
- Don't want to see tourism sector becoming too corporate, want to preserve small businesses
- Want diversity of businesses that cater to tourists, i.e. don't just develop wineries
- Better advertisement/marketing of annual/seasonal festivals/events
- Too many tourists, they use municipal infrastructure but don't pay for it through taxes

Municipal Service

- Stop political bickering at council, need stronger municipal leadership, reduce council size
- Want more efficient services from municipality
- Difference in opinion on property taxes some say its low and are willing to pay more for better municipal services, others say it is too high
- Not enough programs for youth
- Want more active transportation



Turbine

- Turbine will destroy natural beauty thus area will become less attractive to tourists

Natural Assets

- Natural beauty, shoreline and beaches are assets, want to see them preserved
- Preserve wildlife

Business

- Big business presence will destroy charm of County, some people want big box stores, others don't
- Develop arts and cultural sectors
- Weak BIA that cannot help local businesses
- Lack of promotion of businesses not on Main street
- Commercial rents are too high to open new businesses
- Lack of access to waterfront
- Want to develop businesses that provides jobs all year round
- Don't focus on attracting industrial sector

Agriculture

- Agriculture sector is part of identity/history
- Need to recognize the importance of the agricultural sector
- Availability/access of wineries and local food will allow the County to become more attractive destination
- Preserve farmland and support local farmers

Local population

- Need to attract and retain young people and families
- Need jobs for youth



Appendix D: Focus Group Summary

Focus Group Summary

D1: Executive Summary

The following are meeting proceedings from focus groups in Prince Edward County held on July 15-18, 2013. The purpose of the sessions was to solicit input and advice from the broader community on a community development strategy. The group explored the following questions:

31. What unique strengths and assets does Prince Edward County have that will attract and sustain investment in the future?
32. What opportunities are there to stimulate business development, investment, and interest in the County in next 3-5 years?
33. How do we make this happen in Prince Edward County?
 - 33.1. Suggest 1-2 specific actions (e.g. projects, tools, partnerships) for each opportunity.
34. What is getting in the way of stimulating economic development in the County?

Editor's Notes:

1. The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
2. The symbol // indicates that two similar ideas have been merged together.
3. This document contains the meeting proceedings and is not intended as a "Final Report"

D2: Tourism, Arts & Culture

D2.1 Assets and Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

XXX = WHICH OF THESE DISTINGUISH PEC FROM OTHERS?

1. XXX Sandbanks and north beach parks, water-based recreation,
Merged Comments:
 - 1.1. Sandbanks
 - 1.2. Sandbanks Provincial Park
 - 1.3. Sandbanks and north beach provincial parks



2. XXX Reputation outside PEC: lots of external mktg -> positive awareness "exit 566"
3. XXX Wineries ...designated as Ontario wine region
4. Nature environment - features like waterfalls, hidden lakes, long point reserve, Fresh Air, Nature, Many no cost attractions
Merged Comments:
 - 4.1. Natural environment
 - 4.2. Fresh Air, Nature, Many no cost attractions
5. 800 km of waterfront - 800 km of waterfront - not all public :(lots of water/shoreline on Lake Ontario
6. Great lifestyle, ...Freedom: definitely don't have urban constraints.. Easy to be me
7. Rural, gentrified setting ... Nice blend of old & new
8. High unemployment rate which can be translated into available workforce
9. Community feeling: strong sense of community, high rates of participation in community
10. Proximity to 401, Toronto, Ottawa, Montreal
11. Rail service
12. Few stop signs, even less stop lights
13. Free Parking
14. Agricultural growth
15. Biking, health, fitness and wellness potential
16. Fairly good high speed access (and improving)
17. Sunshine Music and Memories
18. Family reunions (lots of big farmhouses to rent)
19. Weather - always sunny compared to GTA !!!
20. HISTORY

D2.2 Opportunities

TOURISM, ARTS & CULTURE: WHAT OPPORTUNITIES ARE THERE TO STIMULATE BUSINESS DEVELOPMENT, INVESTMENT, & INTEREST IN THE COUNTY IN NEXT 3-5 YEARS? IF WE COULD ONLY FOCUS ON FIVE OF THESE... HIGH IMPACT & WITHIN OUR ABILITY TO INFLUENCE

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 14

Total number of voters (N): 4

Votes	Idea
4	1. Different drives/routes/trails (Bay of Quinte, HPE, L&A route, route 33) such as in nova scotia
3	2. Growth in sectors catering to seniors (e.g. needs of our older demographic)
3	3. Opportunities for collaboration on economic and community development that will be cutting edge e.g. we need to get various agenda/players talking and moving in same direction 3.1. Develop more cooperatives, working together for the common goal (e.g. sharing resources & services) 3.2. Have all major centres work on a Weekend Project



Votes	Idea
2	4. Development of our local markets (e.g. how can we cater to people here 365 days/year)
2	5. Hostel type accommodation like Europe? Less than B&B prices, No Frill Lodging
2	6. Upgrade our tourism products and marketing to meet contemporary standards 6.1. Central booking engine, enhanced business expertise in tourism sector, strengthened industry partnerships, working with other regional destinations in marketing
2	7. Recognition of 'volunteer' contribution to success of arts & culture, and resulting contribution to economy (-> vol burnout)
1	8. Less overlapping of events, more piggybacking on what's in place already. No Need to reinvent the wheel.
1	9. single / few sources of information for tourism, arts and culture e.g. consolidated website...
1	10. "Exploit" the "talent" we have here, i.e. Musicians, Arts, Theatre, Culture
1	11. Build a truck/thru traffic bypass for Picton
0	12. We need to allow Grey Water use etc
0	13. Access for fifth wheel equipment, motorhomes (parking, park access, Quinte Island etc.)

D.2.3 Action Plans

HOW DO WE MAKE THIS HAPPEN IN PRINCE EDWARD COUNTY?

SUGGEST 1-2 SPECIFIC ACTIONS (E.G. PROJECTS, TOOLS, PARTNERSHIPS) FOR EACH OPPORTUNITY.

PRIORITY: Different drives/routes/trails (bay of quinte, HPE, L&A route, route 33) such as in nova scotia

Brainstormed ideas:

1. Route 33

PRIORITY: Growth in sectors catering to seniors (e.g. needs of our older demographic)

Brainstormed ideas:

1. services that allow seniors to age in place, continue to live in PEC.

PRIORITY: Opportunities for collaboration on economic and community development that will be cutting edge e.g. we need to get various agenda/players talking and moving in same direction

Brainstormed ideas:

1. Have all major centres work on a Weekend Project
2. Develop more cooperatives, working together for the common goal (e.g. sharing resources & services)



PRIORITY: Development of our local markets (e.g. how can we cater to people here 365 days/year)

Brainstormed ideas:

1. Create incentives / marketing opps for locals to participate in tourism, e.g. resident passes to museums, Festival Players family programming. to make more accessible to residents
2. No frills accommodation

PRIORITY: Hostel type accommodation like Europe? Less than B&B prices, No Frill Lodging

Brainstormed ideas:

1. make use of under-utilized buildings for lodging - incentives? Heritage protection?
 2. Need more affordable places to stay -> Talk to Tammy Love at Handworks
- smaller lots, homes, semis, stacked condos

PRIORITY: Upgrade our tourism products and marketing to meet contemporary standards -> enhanced business expertise in tourism sector, strengthened industry partnerships,

Brainstormed ideas:

1. central booking engine,
2. working with other regional destinations in marketing
3. make tourism (development, marketing,) part of County structure or by a central organization
4. you start at the top (CAO, council size)
5. Streamline council to 8, with a max 2 year term,
6. Talk to me more about booking engine and other tourism development. No charge. (Gord)

D2.4 Barriers and Obstacles

WHAT IS GETTING IN THE WAY OF STIMULATING ECONOMIC DEVELOPMENT IN THE COUNTY?

NOTE: THESE ARE NOT RANKED

1. Good strategic plan that focuses our efforts and includes following:

Merged Comments:

- outcomes can't all be dependent on Council
- Paint a picture of what success looks like
- Empower and ensure the capacity of Commission
- Ensure actionable follow through



- Need some real performance measures
- 2. \$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$\$
- 3. Council attitude
- 4. City hall has reputation of being hard to work with (planning/development)
- 5. Old conventional status quo thinking no longer works ...need more "we instead of me"
- 6. Provincial policy statements

D3: Agriculture

There was insufficient attendance for this session

D4: General Public (Monday 6pm)

D4.1 Assets and Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

XXX = WHICH OF THESE DISTINGUISH PEC FROM OTHERS?

1. Xxx sandbanks
2. Xxx geography & beauty: landscape, topography, fields, physical features, beaches, prov parks, conservation areas etc.
3. Xx internationally famous cycling area... Terrifically mapped cycling routes. Lots of cycling routes on the internet. Internationally famous for "easy" routes on flat, quiet roads.

Merged Comments:

Many mapped cycling routes. Internationally famous cycling area

4. Xxx quality local produce, fresh, affordable ... Small accessible farms and roadside stands and some excellent larger farms
5. Xxx we're an island...lots of water/shoreline ...very well defined space (island...) The boundaries help keep it defined as a unique location..
6. Xxx lots of roads with nice country scenery

Merged Comments:

... Many beautiful roads that have few cars, beautiful vistas with opportunities for access to safe and not very wild areas of natural beauty = "Southampton's"

7. Xxx arterial accessibility... Mesh of tiny roads
8. Location: within the 10million person triangle of Toronto, Ottawa, and Montreal.
9. Wapoos island, nickelson island ,main duck and false duck islands
10. Designated Ontario wine region
11. We have a distillery (vodka, gin, bitters etc.)
12. Good foundation of community - sense of welcome spirit among neighbors "people care"



13. very, very friendly local folks that are always willing to help ... people
14. Lots of people have moved here with deep experience & expertise
15. Lots of "old style" venues like the regent, the drive-in, the beach, and the museums. Unvarnished or gentrified experiences which allow folks to interact with each other rather than screens and phones.
16. Branding/reputation. Folks "think" we have all these great things as well -> build on the branding "the County "
17. Many shipwrecks along the south shore
18. Unique "cool" shopping and restaurants
19. Affordable housing compared to Toronto encourages people to sell there and buy here... But compared to north of Belleville, housing is more expensive
20. Accommodation choices...camping b&b motels/hotels

D4.2 Opportunities

WHAT OPPORTUNITIES ARE THERE TO STIMULATE BUSINESS DEVELOPMENT, INVESTMENT, AND INTEREST IN THE COUNTY IN NEXT 3-5 YEARS?

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 20

Total number of voters (N): 6

Votes	Idea
5	1. Save our hospital
4	2. Internet connection - high speed affordable available everywhere
4	3. Pave the road shoulders to make roads safer and more fun
4	4. Permits/approvals/Change building codes -> e.g. Facilitate easier development/business 4.1. Provide funding/support/ to local people wanting to start businesses rather than road blocks... (municipal)
3	5. Provide better parking in the towns .don't charge for parking in Picton
3	6. Older demographic -> cater to needs of seniors... E.g. Housing
2	7. E-friendly visitor strategy... Develop an APP for the phones with all the County can offer 7.1. create awesome and exciting mapping systems on the smart technology so that folks have "routes" that they can explore geared to their interests i.e. Museums, bikes, motorcycles, foodies, house picture takers etc. Etc. 7.2. central booking engine for visitors
2	8. Provide tax incentives for local businesses
2	9. Better transit... Get rid of some of the cars ...create an easy travel route between Belleville train station and prince Edward County so that folks can get here that don't necessarily have cars. 9.1. work with sandbanks and the County roads department to create non car "pathways" between the park and picton and Bloomfield and wellington so that folks can travel within the County and not be on the road. Give ways for locals to travel within the area without needing their car.
2	10. Washrooms that stay open after 5pm!!!!!!!



Votes	Idea
2	11. Develop more activities / events to occur during the shoulder season (e.g. Maple in the County in March...) 11.1. create theme weekends where the whole County is dedicated to hosting that sector of folks i.e. "classic car week" or "bike week" or "historical reenactment week" and create partnerships with restaurants and accommodations that will allow folks to "get a deal" if they're participating
1	12. Create a locally invested small business bank that is private and "micro" based that loans out small amount from County folks TO County folks.
1	13. Help existing small business grow by providing better infrastructure in the industrial area of Picton
1	14. Cohesive branding
1	15. Waterfront trail branding: Ontario is spending money on developing the waterfront trail in the next ten years. Work with council to get matching funds to increase walkability and cyclability.
0	16. Historical significance -> United empire loyalist events, reenactments ,...Sir john a MacDonald lived in wellington
0	17. Sewers in Bloomfield
0	18. Read the Beldon atlas of 1878, PEC history. Note population then was 19,000 souls
0	19. Coupon book for the County that would feature all of the businesses -- coupon book could be sold for a minimum amount or handed out by the chamber/businesses

D4.3 Action Plans

HOW DO WE MAKE THIS HAPPEN IN PRINCE EDWARD COUNTY?

SUGGEST 1-2 SPECIFIC ACTIONS (E.G. PROJECTS, TOOLS, PARTNERSHIPS) FOR EACH OPPORTUNITY.

PRIORITY: Save our hospital

Brainstormed ideas:

1. Resign from Quinte Health Care (see Napanee)
2. Donor fatigue -> NO FUNDRAISERS! (we are over saturated with "asks")

PRIORITY: internet connection - high speed affordable available everywhere

Brainstormed ideas:

1. subsidize local providers to create more accessible high speed internet. don

PRIORITY: pave the road shoulders to make roads safer and more fun

Brainstormed ideas:

1. can't increase the road paving budget ... but change the way the road is repaved. instead of paving 10kms of road without shoulder, pave 8 with a shoulder. over years we'll get it all done.
2. adopt a road



PRIORITY: Permits/approvals/Change building codes/tax incentives for local businesses -> e.g. facilitate easier development/business

Brainstormed ideas:

1. Provide funding/support/ to local people wanting to start businesses rather than road blocks... (municipal)
2. planning and building bylaws? get rid of the "unwilling participant" attitude at city hall

PRIORITY: provide better parking in the towns ..don't charge for parking in Picton

Brainstormed ideas:

1. analysis of properties that could be purchased, near/close to shopping areas and turned into parking

PRIORITY: Older demographic -> cater to needs of seniors... e.g. housing

Brainstormed ideas:

1. subsidize funding of local transit options for non-driving folks.

PRIORITY: E-friendly visitor strategy... Develop an APP for the phones with all the County can offer

Brainstormed ideas:

1. Central booking engine for visitors (chamber?)
2. Create awesome and exciting mapping systems on the smart technology so that folks have "routes" that they can explore geared to their interests i.e. Museums, bikes, motorcycles, foodies, house picture takers etc. etc.
3. Partner with colleges and universities to help develop e-strategies.

D4.4 Barriers and Obstacles

WHAT IS GETTING IN THE WAY OF STIMULATING ECONOMIC DEVELOPMENT IN THE COUNTY?

1. Entrenched ideas by everyone (lack of flexibility)
2. Our biggest problem is council ... Most on council don't want to see change ...divide between opinion, education and reality... Each different council person has their "ideas" and is not interested in "difference" but only in validating their own ideas and encouraging his/her agenda.
3. Lack of funding
4. Staff actually runs the County not council
5. We will not need a 5 year plan if wind turbines are allowed on this island
6. Protection of primary agricultural lands.... Concerned that development won't happen in the right places (noting that agricultural is vital to the County)
7. Lack of a good direction and leadership towards a long term vision/goal. A lack of true understanding of the long-term goals of the County. Decisions would be easier at the County level if there was a comprehensive long term consensus that "environment" has a priority over "industry" (if that were the decision). But each different set of councilmembers could be working towards a vision of the County that is holistic, rather than divisive.



D5: General Public (Thursday 1pm)

There was insufficient attendance for this session

D6: General Public (Thursday 7pm)

- Bob Stock chair of recreation committee Legion
- Monica Alyea mom of a famous musician former councillor
- Wolf Braun married a County girl... lived on and off for 40 years
- Ian Batt 6 yrs in County
- John Houghton County marathon kids of steel food bank ice hockey etc. etc.
- Suzanne O'Connor home based business museum committee WWI
- Tina Konecny pres of wellington business association volunteer graphic design

D6.1 Assets and Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

XXX = WHICH OF THESE DISTINGUISH PEC FROM OTHERS?

1. XXX talented creative intelligent people -> lots of incubator activity ... a lot of good marketing expertise
2. XXX A strong sense of community ...willingness to volunteer and help one another

Merged Comments:

...people who have a passion for an idea to improve and grow their thoughts to improve and attract people to their ideas

3. XXX grapes grow here and other related products
4. XXX location ...great place ...fresh air, gorgeous scenery

Merged Comments:

-> proximity to huge urban centres ... smack down in middle of 50% of Canadian population ...

5. XXX lots of waterfront, shoreline .. sandbanks
6. XXX you can be a big fish in a little pond
7. XXX we are (almost) an island
8. XX Many talented artisans
9. XXX character - County is unique from anywhere else

Merged Comments:

... magical... old houses... friendly spirit... everyone knows one another



10. XXX An aging population that want to stay here but need services and supports and residential opportunities to make that possible

11. ruralness

12. A 'mysterious' air about, a lot of 'positive' energy about it ...People who are moving here who want to be "engaged" as citizens to support those who are getting too old to do it with the same energy

14. the name "the County" itself is very positive. A lot of positive attitude to new ideas....

15. inexpensive land, and lots? of it ... but -> creates affordability issues

16. heritage

17. potential - huge opportunity to grow, flourish, ... we can create something incredible here

18. No traffic, no crime

19. lifestyle ... a better way of life, who wouldn't want to live here? ...different pace

20. People who know past history - content and process - and we need to know what we want to keep/protect

21. Strong "rural" communities that need to be protected.... rural communities that want young families and need land development policies that work for "rural"

Parking Lot

- Health assets - > (note for opportunities Q2)

- Vision -> want to flesh out the desired future state...

D6.2 Opportunities

WHAT OPPORTUNITIES ARE THERE TO STIMULATE BUSINESS DEVELOPMENT, INVESTMENT, AND INTEREST IN THE COUNTY IN NEXT 3-5 YEARS? IF WE COULD ONLY FOCUS ON SEVEN (HIGH IMPACT AND WITHIN OUR INFLUENCE/CONTROL)

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 26

Total number of voters (N): 7

Votes	Idea
6	<p>1. Integrated/Group/collaborative marketing.. A royal winter fair booth for the County also Ottawa event....more marketing outreach help for food and material entrepreneurs</p> <p>1.1. make a commercial to showcase the County</p> <p>1.2. We need more media coverage. We need some creative marketing ideas.</p> <p>1.3. better use of social media</p> <p>1.4. more integration/exposure to all not just 1 group (note: taste, marathon, bike,</p>



Votes	Idea
	WWI etc.)
5	2. Gas station in wellington
4	3. A viable hospital (1st relocation question is always about this)
4	4. Permits/approvals/codes that make it easier for sustainable responsible development
3	5. More marine services (launches, docks, food, public washrooms etc.)
3	6. Road maintenance
2	7. Services for aging folks who want to stay here and/or whose families want them to stay here 7.1. Health & wellness in the 'alternative health sector' with focus on 'growing old' yet 'staying young'
2	8. Supports for small rural communities/businesses that help keep "the character" of the County
2	9. Bike paths
2	10. Strong focus on all 4 seasons ... More focus on events for County folk during the 'off season'
2	11. If our schools are half empty, let's rent out the space to art colleges, there are a lot of teachers here.
2	12. More ideas of Dan Taylors to be implemented. It was expensive but motivating, encouraged networking and effective (note: cultural roundtable... Creative minds group).
2	13. Better transportation.....a regular rural bus route ala south of Scotland RESP: Ian by Monday
2	14. Make better use of the old air base at McCauley Mtn
2	15. Cross promoting with other areas, they come here and we go there so we get to know each other's offerings ... Get vendors from other regions to come here and then our folks go there....
1	16. Hi-Speed Internet available to all in the County (to attract small business)
1	17. A pool of young talented people who want to stay here or return here to live and raise their young families
1	18. Healing House, Natural healing using herbs and nutrition instead of pharmaceutical drugs
1	19. Geography/topography that supports "eco/adventure" tourism w/ special needs populations including aging & other disabilities
1	20. Wine related opportunities... County Wine bar, where you can go for a glass or tasting and buy County wines... Marche au Vin en Wellington
1	21. Back to our roots, Generate socially conscious business, i.e. canning
1	22. Relocate non retail businesses west of wharf street off main street, see point above 22.1. redevelopment of meat plant property, i.e. business center
0	23. People moving here who know people who might consider moving businesses here Leverage connections of those who are here...
0	24. Helping underprivileged and disadvantaged youth to be encouraged and reach their potential (note: high ratio of FASD)



Note: prior to voting, the group brainstormed ideas and then merged the similar items.

Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. Not as they were ranked by the group). Items that did not have any ideas merged are not included.

25. Services for aging folks who want to stay here and/or whose families want them to stay here

Merged comments:

Growth in sectors catering to seniors (e.g. Catering to needs of our older demographic)

Health services for older people

26. Integrated/Group/collaborative marketing.. A royal winter fair booth for the County also Ottawa event....more marketing outreach help for food and material entrepreneurs

Merged comments:

Internal economic growth by combining all business and groups into a single strength or identity -- more exposure to all not just 1 group This can also work at the external level

D6.3 Action Plans

HOW DO WE MAKE THIS HAPPEN IN PRINCE EDWARD COUNTY?

SUGGEST 1-2 SPECIFIC ACTIONS (E.G. PROJECTS, TOOLS, PARTNERSHIPS) FOR EACH OPPORTUNITY.

PRIORITY: Integrated/Group/collaborative marketing.. a royal winter fair booth for the County also Ottawa event....more marketing outreach help for food and material entrepreneurs

Brainstormed ideas:

1. Make a commercial to showcase the County
2. All business groups should join together with their printed directories.
3. More integration/exposure to all not just 1 group (note: taste, marathon, bike, wwi etc.)
4. Better use of social media
5. Creative marketing events that attract media attention i.e.: breaking a world record, something that will make news around Canada or even on YouTube
6. Net working within all groups
7. Talk to rwfair and get some space costing, cost out booth cost and display design/production...speak to active County entrepreneurs and book the space
8. Once your group has done rwf they will know how to organize other events etc.
9. This falls under the chamber of commerce for the most part. It's not economic development.



10. Generate marketing plan for entire County, objectives, strategies, tone, manner, execution, budget, timing, bring together resources to a common message, common goal.

Priority: County has to be aggressive in promoting petrol in wellington... Gas station in wellington

Brainstormed ideas:

1. Facilitate land acquisition and zoning towards attracting a petrol distributor to the area. Expands reach of visitors to all the areas of the County, including south shore, and retains retail reach for local merchants to make a decent profit without inflating prices.
2. Contact the gas companies to see if they would be interested. Go to franchise shows
3. Actively canvas petroleum distributors for the opportunity, including associated services to augment the facility.
4. Have a meeting at town hall, a gathering of folks to brainstorm ideas from all sorts of people as to how we can overcome the roadblocks in this issue. Who knows what ideas might come up. When everyone's involved, it might be the motivator to finally get this to happen and make it a profitable venture for the new owner.

Priority: a viable hospital (1st relocation question is always about this)

Brainstormed ideas:

1. Our elected officials at the municipal level need to be engaged on our hospital. De-amalgamate the hospital from qhc.
2. Find a solution that would work here, bring in other kinds of healing.
3. Have tourist give input into why and importance of knowing that we have a 1st class hospital
4. We need to clarify/highlight the cost of not keeping the hospital

Priority: permits/approvals/codes that make it easier for sustainable responsible development

Brainstormed ideas:

1. Council needs to get organized, we still don't know who does what at shire hall.
2. Re-organize the planning dept.
3. Municipal staff research enabling permitting. Etc. Processes used in other parts of the "world", not just next door municipalities, that could be considered for use in pec. Set goals for target areas - e.g. Rural housing for young families, services for aging populations, etc
4. There needs to be a clear, concise understanding of the purpose and principles of economic development at all levels.... Elected officials, bureaucrats and the residents of the County. Without agreement on purpose and principles not much will change.

Priority: more marine services (launches, docks, food, public washrooms etc.)

Brainstormed ideas:



1. Talk with other marinas and see if someone would want to open something similar here
2. Staff of pec simply have a change of hours to open/close the public washrooms earlier/later at picton or get a type of w/c that's accessible 24 hours. This will increase the positive attitude of the marina (not piss folks off) because there's no washrooms for the public nearby.\

Priority: road maintenance

Brainstormed ideas:

1. Set a budget and get matching funds from other levels of govt.
2. Engage the province about the sharing of maintenance of roads to the beach, or, close the beach and see how long it takes to bring a consensus??
3. Develop roads plan that "maintains" current road surfaces. Maintenance of gravel roads in the long term can be more expensive....

Priority: services for aging folks who want to stay here and/or whose families want them to stay here

Brainstormed ideas:

1. Health & wellness in the 'alternative health sector' with focus on 'growing old' yet
2. 'Staying young'
3. The older people believe in doctors, they need education on how to use natural healing.
4. With all the land we can grow healing herbs, hemp and gmo free food that would keep people here healthier and not need the hospital so much
5. We have a unique geography with zero public transportation
6. Meditation for beginners, make it accessible, non-intimidating and approachable for this age group/culture/dynamics. Accessible would be easy meditation with a 'light' education. Accessible would be affordable at town hall in wellington for example and the town halls in each region. Approach newspapers about doing a psa (public service announcement - no charge from papers) on the course so they know about it.
7. Develop age in place locations that give folks access to water or at least water views rather than trying to offer places as close to your "next destination" i.e. McFarland home. Not every apt/room having a water view but at least a communal viewing room. Much better use for the wellington lcbo new site!
8. Create a transportation system that mirrors other small rural communities by looking to examples elsewhere in the "world", not just neighbouring municipalities. We need to think globally and research globally to act better locally!

D6.4 Barriers and Obstacles

WHAT IS GETTING IN THE WAY OF STIMULATING ECONOMIC DEVELOPMENT IN THE COUNTY?

1. Lack of transparency, parochialism
2. Finding investors - where are they hiding?
3. There is no agreement amongst our elected officials and bureaucrats on the purpose and principles of economic development.
4. Power too centralized at shire hall...cannot even rent out hillier hall without coordination from s.h.



5. Lack of synergy in this council. Independent ideas delivered but there seems to be minimal attempt to "build" on each other's ideas for best solutions/outcomes. A lot of consulting and paper creation and taxpayer costs. ..
6. People want to move here, they just need to find jobs here
7. End game vision, where would we like to be in 5/10 15 years, perhaps 25. Establish the end game, develop the plan to get there. Set objectives, settle on strategies, and develop the plan to get there!
8. People need to be more aware of the County, many still don't know about us.
9. We have been in this same position for the past 15+ years, there are those folks who don't care if it changes, and those who think it needs to change. Who is correct?
10. Wishful thinking on the part of our elected officials that we can still attract smoke-stack industries to the County. :-(
11. The separatism of the County, the different groups not working together due to a feeling of competitiveness (perhaps due to an unstimulated economy), a feeling of 'us' and 'them' between the different areas (i.e. picton and wellington), a lack of participation at events from people from other parts of the County (i.e. picton folks not wishing to partake in wellington events and vice versa), and groups not working together to combine their efforts. I feel like when Dan Taylor was pursuing his ideas, this problem was rally being solved.
12. We need to work together. Many are trying to do the same thing.
13. The mayor needs to be far more accountable...the hospital needs his direct and o-going effort
14. 15. All County council needs to get out to other areas of the County to events and not just the mayor to see what groups to with no help from council to improve County vision
15. Tendency to dwell on ongoing or historic "issues" without going for the other brass rings/opportunities. Dan Taylor ticked people off because he "pushed us forward and pushed back" when he needed to.
16. Blow the bridges!!
17. Elephants in the room: cost of not keeping the hospital... Wind turbines



Appendix E: SWOT Analysis

SWOT Analysis

E.1 Approach

The starting point for Prince Edward County's Community Development Strategic Plan was a comprehensive analysis of the local and broader regional and provincial economy. This resulted in the preparation of a base analysis report that discussed the County's economic performance in a regional context.

The base analysis was followed by a consultation process that included community and sector based focus groups, a series of one-on-one consultations with key stakeholders (including elected officials), and an online community and business survey.

Building on the previous work and the consultation summaries, this SWOT (Strengths, Weaknesses, Opportunities and Threats) Report provides further indication of Prince Edward County's ability and capacity to support business investment and community prosperity.

Defining the SWOT

For the purposes of this report a SWOT is characterized in the following terms:

	Helpful To achieving the objective	Harmful To achieving the objective
Internal Origin (attributes of the organization)	S Strengths	W Weaknesses
External Origin (attributes of the environment)	O Opportunities	T Threats



- **Strengths (Positive, Internal):** Positive attributes or assets currently present in Prince Edward County, particular in comparison to region and province;
- **Weaknesses (Negative, Internal):** Local issues or characteristics that limit the current or future growth opportunities for the County;
- **Opportunities (Positive, Internal and External):** Areas where the County can remedy its weaknesses (e.g. learning from others, provincial assistance, strategic initiatives, aggressive marketing or promotion, targeted investment, etc.); and
- **Threats (Negative, Internal and External):** trends that threaten Prince Edward County's future and attractiveness to new residents and investment, from local weaknesses, global changes or shifts in consumer demand.

The SWOT analysis that follows provides insight into the challenges and opportunities for Prince Edward County in its efforts to sustain economic growth in light of the demographic and fiscal pressures being experienced by the County and province as a whole.

E.2 Strengths

Unique Rural/Small Town Lifestyle and Quality of Place

The County provides a high quality of place experience as evidenced by its historic villages and towns, beautiful beaches and waterfront areas, inventory of historic homes and buildings, network of arts and cultural activities and pastoral nature of its farming community.

The quality of place experience has successfully drawn investors and investment, as well as an increasing number of visitors to the County in recent years. It has supported the creation of new businesses including restaurants, artisans, unique retail experiences and agribusiness operations, such as wineries.

The 'County' appeals to early retirees, young professionals and families looking for a unique rural, and community based lifestyle. Residents feel very strongly that the County's idyllic environment is a major asset in driving future economic opportunities.

A Strong Network of Stakeholders and Organizations that are committed to the Community's Success

The residents within the County demonstrate a high level of volunteerism and commitment to community building. Several community organizations have been formed to deliver products and activities to residents and visitors alike. The local destination marketing organization, Taste the County, has demonstrated considerable success resulting from this high level volunteerism and commitment to developing a tourism brand for the County. This brand has assisted with attracting new investment, residents and visitors to the area.



The Prince Edward / Lennox & Addington Community Futures Development Corporation (PELA-CFDC-CFDC) has invested in the success of the County through a variety of community development initiatives and is a partner in the Prince Edward County Innovation Centre. PELA-CFDC-CFDC has supported local businesses in retaining and expanding their operations in the County.

The Prince Edward County Chamber of Tourism and Commerce (PECCTC) provides good local conduits between the County administration and area businesses. The PECCTC is a beacon for community and business support around initiatives and directions related to improving investment and attraction into their local communities. They ensure that local businesses have a voice and serve to champion specific initiatives.

Proximity to Major Urban Centres (Toronto, Ottawa and Montreal) and Highway 401

The County's proximity and accessibility to Toronto, Ottawa and Montreal has been a major asset in attracting investors, and business investment to the County. Area residents have access to the amenities and services of the larger urban centres, while still being able to have a unique rural lifestyle.

The popularity of the County with visitors and tourists from Toronto, Ottawa, Montreal and the United States, supports the retention and growth of local businesses. Local businesses have ease of access to these larger markets for their products and services.

A Strong Base of Cultural and Agricultural Assets

Based on a preliminary assessment, over 200 cultural assets have been identified in the County, with the majority located in proximity to the 'millennium trail'. These assets are widely recognized as integral to the County's quality of place as they help to define and characterize the community.

Cultural assets can attract visitors and business investment as well as new residents when leveraged effectively. Prince Edward County is seen as a leader in leveraging the creative food economy as a method of economic development, tourism and investment attraction—particularly in Eastern Ontario.

The County's range of agricultural products is also quite diverse. The resurgence of artisan cheese in the County along with the growth of local food stands, wineries, farm tours and gourmet chutney/jam/jelly makers have brought value-added agricultural experiences and products to the area. The County is home to over 100 agricultural assets and over the past decade these assets have been leveraged to increase the local agricultural sector.

Concentration of Knowledge Based Businesses

The County is now home to over 100 professional, knowledge based service firms with over 80% of these located in Picton. These types of businesses have minimal



infrastructural requirements, but represent tremendous business growth potential with respect to local employment growth and local wealth creation.

The Prince Edward County Innovation Centre and First Stone Venture Partners are actively engaged in supporting and developing technology based business and entrepreneurs in the County. Located in Picton, these incubators are the result of an increasing trend for rural communities to attract knowledge based businesses through their quality of life amenities (an aforementioned strength of the County).

Knowledge based industries do not typically require large acreage sites as required by manufacturing businesses and are, therefore, often located in smaller office spaces. An incubator can service and assist young knowledge based industries in starting up their operations while also providing office space at their facility. If supported, these industries can mature and grow into new offices within the County.

Significant Tourist Destination

Prince Edward County is a significant tourist destination. Due to its local attractions (wineries and restaurants) and amenities, and proximity to major urban markets, the County is well positioned to expand and develop its tourism and recreational opportunities into a four season tourism destination. This will drive employment growth in related sectors, including food and accommodations.

The County offers several experiences such as extensive natural experiences consisting of attractive landscapes, multiuse pathway trails, provincial parks (Sandbanks) and beaches, wildlife and natural reserve areas and a biodiversity hotspot, and culinary and cultural experiences such as the Taste and Arts Trails, and Museum and walking tours.

The Local Food Movement and the popularity of the 100 Mile Diet continues to attract visitors and investment to the area around the County's agricultural products.

To continue improving the tourist destination key stakeholders and business leaders have stressed the importance of establishing more affordable and available accommodations facilities. Many visitors to the County spend their overnights in the Quinte West region.

Low Property Tax and Building Permit Fees

Prince Edward County, when compared to its neighbouring municipalities of Belleville, Quinte West, and Kingston is an inexpensive place with respect to property taxes, development charges and permit fees. As of 2012, Prince Edward County had the lowest property taxes as a percentage of household income (3.4%). In the same year, the County had the lowest residential m2 building permits fees.

With respect to tax ratios, Price Edward County had the lowest ratios when compared to its neighbours. Across Ontario, multi-residential properties pay 2.74 times more municipal property taxes than their residential counterparts. In Prince Edward County on average multi-residential properties pay 1.44 times more than their residential



counterparts, while commercial users pay 1.11 times more and industrial users pay just 1.3895 times more.

While these relatively low property taxes and building permit fees may be considered a positive with respect to business and residential attraction, the sustained application of these low rates and charges may be unsustainable as several municipal indicators (outlined in the Weaknesses Section below) highlight Prince Edward County's precarious financial position.

An Inventory of Municipally Owned Surplus Land and Buildings that could be used to Attract Business and Investment

Based on an inventory of surplus municipal properties, the County has over 30 lots comprising both land and buildings – predominantly characterized as open space properties. These properties provide the County with an opportunity to locate businesses and investment choices in ideal locations to maximize their contributions to the County and community.

Under municipal control, priority can be given to commercial and general industrial uses over residential developers to increase employment activity in the area. Under-utilized and underperforming assets can also be repurposed to support small business operations/multi-tenanted operations and shared space (development of more business incubators). The surplus land also affords the County the opportunity to engage local realtors and businesses for future investment opportunities, creating partnerships and local business/residential growth.

E.3 Weaknesses

Serviced Industrial Land is Inadequate to Attract Large Scale Investment

The County's economy is characterized by small and home based business operations. These business operators are more likely to demand rental space options, office style development, and flexible use space options, which is seen to be in short supply across the County.

The County lacks a suitable inventory of serviced employment land that would attract larger scale industrial operations and the current inventory of available land is not competitive with available land in surrounding municipalities in terms of quality, market choice and price. Development potential is also limited by the County's location to major transportation corridors when compared to the market choice available in adjacent communities (Bay of Quinte, Trenton, and Belleville).

Community consultation underscored the lack of clarity around the types of land that is available for development. More specifically, stakeholders inquired about: 1) what land is available and serviced; and 2) what land could be serviced and what the plans are for the provision of employment land over the longer term?



There was also uncertainty about the status of the Loch Sloy Business Park. This business park is attractive to small business operations and entrepreneurs as evidenced by the waiting list for space. However, the zoning of these lands is described as “complicated” by County officials. At present, new development at this business park is constrained by zoning provisions because the future use of the park is deemed “unknown”. A master plan is needed to guide the development of the site so that its many smaller land parcels can be evaluated and potentially re-zoned to accommodate future business.

Lack of Economic Diversification

Retail occupations dominate local employment opportunities in the County, which often equates to minimum wage positions, part-time or seasonal employment. The dominance of retail employment puts the local economy at some risk in an economic downturn and impacts buying power for larger consumer items, like cars and houses.

The County has not been aggressive in attracting higher value employment that is well suited to the area in particular technology based businesses and Information Communication Technology/Media operations. The recent introduction of broadband infrastructure may facilitate the growth of these types of operations in the County.

Stakeholders also described that businesses in the County are seen to be late adopters of new technologies, particularly internet based technologies, which may limit their productivity, competitiveness and long term viability. These range from offering e-retailing options, new credit transactions, compatible products for electronics (e-books, Blu-ray discs), app developments, etc.

Aging Population and Shrinking Workforce

The County is the second oldest census district in Ontario. By 2036, Prince Edward County is expected to replace Haliburton as the provincial census district with the highest percent of seniors (42%) and lowest percent of children (9.4%).

Limited employment opportunities and limited community facilities and services in some areas of the County have resulted in the loss of working age population. Expected employment growth from 2006 to 2011 did not materialize as projected, but rather declined. This may be attributed in part to the economic downturn that occurred in 2008/2009. However, if this trend is not reversed it will have significant implications for the local economy.

From 2001 to 2006, the County’s population increased by 2.4%, but between 2006 and 2011 the County’s population contracted by 0.9%. This decline is in contrast to the provincial average, which increased by 5.7% over the same period. The growth in the number of seniors will result in increased demands for services and amenities geared to this portion of the population and put pressure on the County to provide for, or attract such businesses and investment. Ignoring these demands may result in the out-migration of seniors from the County and a further loss of population.

On the other hand, as the County’s 55 and over cohort continues to grow, it is expected that rates of home based employment will increase as semi-retired residents



seek lifestyles, which allow them to work from home on a full-time or part-time basis. It is expected that these individuals will increasingly take advantage of improvements in telecommunication technology, increased opportunities related to telecommuting and potential work schedule flexibility, most notably in knowledge-based employment sectors.

Low Rates of Educational Attainment

Results of the last census suggest that the County had a smaller proportion of its population with a post-secondary education - university certificate; diploma or degree when compared to the province. Given the rural nature of the community, this is not unexpected; however, the older age cohorts appear better educated than the younger age cohorts, which present a problem in the attraction and retention of businesses and business investment.

Housing Choice and Affordability

The County's housing inventory is dominated by single family homes, many of them classified as character or heritage homes. The limited new development and the attractiveness and popularity of the County in recent years have combined to increase the cost of housing in the County relative to surrounding communities.

If it is the County's intent to attract younger families and young professionals to the County then more must be done to provide an adequate choice of housing options at various price points in proximity to community services and amenities. It is worth noting that the younger age cohorts (18-35), most commonly referred to as Gen Y are also more likely to consider rental accommodation instead of single family homes.

Fiscal and Budgetary Pressures

Prince Edward County like many rural communities faces major fiscal challenges with upfront investment and the ongoing maintenance of its municipal infrastructure. A municipality's financial position is defined as the total fund balances including equity in business government enterprises less the amount to be recovered in future years associated with long term liabilities. When compared to its neighbours of Quinte West, Belleville and Kingston, Prince Edward County had the worst financial position per capita. The County's financial position reinforces the need to reevaluate community spending imperatives, local taxation rates, development charges and other revenue generation tools.

Lack of Clarity and Collaboration / Co-operation from County Administration

The lack of clarity surrounding planning approvals processes and decision making was a common theme heard throughout the community engagement process. Many developers have acknowledged the County to be a difficult place in which to move developments forward. Planning applications and their approval process were cited as slow and tedious when compared to the County's neighbours. This reduces the



likelihood of many potential developers operating in the County. The County needs to review its development approval process to improve this perception.

The lack of collaboration and co-operation between the County and community organizations was also heard as a poor but open relationship. It was noted that the County and community organizations do in fact frequently interact with one another; however, the frustration relates to the relatively few outcomes or actions to emerge from these meetings. Outside of the occasional support for local food markets or festivals and events, community members felt that the County has not expanded its resources to assist community organizations in attracting new investment opportunities.

Lack of Community Vision

In spite of the considerable efforts by the County to engage with local businesses and residents to guide the Official Plan Review process, and this Community Development Strategic Plan, the community survey and stakeholder interviews revealed a perceived disconnect between Council's vision and that of community members. In this sense, there are competing visions for the future direction of Prince Edward County. This lack of a consistent vision speaks to the communications challenges faced by the County as the County's leadership has not effectively communicated its vision to the public. In a similar vein, the County is without a coordinated approach to local branding and tourism promotion activities. This has also fuelled the public's lack of understanding for the County's vision.

E.4 Opportunities

Attraction of Knowledge based Businesses

In recent years, there has been a growing number of technology based firms and technology based start-ups in the area. The success of the Prince Edward County Innovation Centre and the emergence of First Stone Venture Partners provide a unique opportunity to bolster the growth of knowledge based business in the County. While PELA-CFDC-CFDC and the Innovation Centre are prepared to support these businesses, the challenge to this initiative will centre on attracting the requisite workforce to sustain these businesses. Prince Edward County's lack of affordable housing options for young professionals is a limiting factor to attracting and retaining these workers.

Establishing and leveraging partnerships with neighbouring post-secondary educational institutions, such as Loyalist College, will be critical to ensuring a steady stream of young professionals are available to support this burgeoning sector. Tapping into apprenticeship, co-op, and internship programs would serve local businesses well.



Support for Technology Based Businesses

The economy is shifting away from traditional stand-alone store front retail operations to service based and e-retailing opportunities. Picton's downtown is quickly becoming a knowledge based corridor offering a diversity of services such as medical services, design and website services, and personal support services (legal).

There is an opportunity to utilize the County's improved broadband infrastructure to cultivate more technology based businesses. Educating local store front businesses owners about the merits of utilizing new technologies in their current business models can assist in evolving their operations to include e-identities.

The County can look to their community partners and leverage some of their initiatives such as PELA-CFDC-CFDC's five years of funding from Eastern Ontario Development Plan to facilitate this transition. Together they can work to mobilize the local human capital associated with the Information Communication Technology/Media sectors and foster social innovation entrepreneurs to live and work in the County.

Strengthen and Leverage Cultural and Tourism Assets

The County's cultural and tourism assets need to be further enhanced to attract new visitors, residents and business investment to the area. This includes improving public access to the County's 800 km of waterfront, enhancing waterfront connections (improved or new marinas), waterfront activities and events, the effective marketing and promotion of Sandbanks Provincial Park, and improving local signage of tours (Taste/Arts Trails, etc.).

Existing arts, cultural and tourism operators need to be supported in their efforts to integrate new technologies, to improve their online presence and customer service experience. This might include opportunities in web app developments.

Affordable roofed accommodation is also needed in the County to expand visitor attraction opportunities and is essential in the development of a four season tourism economy.

More effective communication and collaboration between community organizations and the County would also support the more effective leveraging of the County's cultural assets to support tourism development.

Increase Support for Small Businesses

Much of the growth of the national economy of late has been attributed to small and medium sized enterprises which exhibit innovative and entrepreneurial qualities. Approximately 70% of employer businesses in the County have 10 or fewer employees. The County needs to build on this larger trend and support the growth of small to medium sized enterprises through more comprehensive business retention and expansion activities and marketing and investment attraction activities.

To support future growth and investment in the County, it is essential to understand and support the needs of the small businesses.



Capitalize on Cultural Assets and Resources

A comprehensive cultural resource mapping exercise based on current provincial policy and mapping guidelines would further inform the County's marketing and promotional efforts and support future community economic development services and programs.

Mapping results could assist with the planning and development associated with festivals and events, tourism product development opportunities, and investment opportunities.

Encourage and Promote Development in Local Commercial Areas

The need for focused attention on enhancing the quality of place, vibrancy and aesthetic appeal of commercial areas across the County was a common theme in community consultation process. The County should encourage and promote development in commercial areas that combines commercial (including upper storey office), residential, and other land uses (e.g. The Edward).

Promoting development in the local commercial areas through tools and incentives to support increased density, storefront improvements and public art installations can assist commercial areas' ability to provide a space that is vibrant, walkable, and creates a 'buzz' that encourages street-level interaction year round.

A strong presence of cultural resources and programs such as music performances and festivals are another set of powerful tools for animating commercial areas. Significant input was also provided related to the potential use of either empty or underutilized buildings or storefronts for possible use as exhibition spaces for artists and artisans to attract attention to the area.

Assess and Improve the Development/Permit Approvals Process

The development / permit approvals process within the County was an earlier weakness identified through the consultation process. The County has the opportunity to establish a developer feedback process that will assist in assess and improving its current approval process. In this way the County can understand the challenges that developers are currently facing and learn where they can improve to not only satisfy current developers in the County but also attract developers from regional competitors.

Establishing a true "one window" approach to development can quickly increase the development activity in the County and encourage markets to respond to the increased supply/activity. A transparent approvals approach would allow for the County to control the type of development they see necessary to their current economic performance.

Enhanced Marketing and Promotional Effort Geared to Attracting New Residents, Investors and Visitors.

Strong consensus emerged from the consultation effort around the need to increase awareness of the many resources and experiences available to residents and visitors to Prince Edward County. While stronger internal promotion is important, it is critical that promotional efforts be circulated far beyond the County's borders. This can



manifest as increased and wider circulation of consolidated marketing materials. Sandbanks Provincial Park is a major destination for many French-speaking Quebec visitors.

A number of ideas emerged related to stronger and enhanced promotion and marketing geared to attracting new residents, investors and visitors. The County, PECCTC and Taste the County has produced a number of impressive print-based promotional materials for 'visiting' the County, however they have not prepared appropriate material to advocate 'living' in the County or starting a business in the County.

There is an opportunity to develop a detailed community investment profile (currently underway), in collaboration with PELA-CFDC-CFDC that builds on the County's recent efforts and illustrates the strength of the County's business community by key sectors, together with the quality of life experience in the County and the type of investment being targeted by the County. A community investment profile should also demonstrate the strengths of the local economy and the ability to support further investment and workforce within each sector. Preparing material on the web and in print, while also distributing this information at investment shows, is the first step to letting investors know that the County is willing and ready to accept them.

Stronger Partnerships and Communication with Local Organizations, Business Community, and Public

The County has the opportunity to strengthen intra-community business partnerships by providing physical and informational resources to the PELA-CFDC-CFDC, PECCTC, Taste the County, the Small Business Centre, local business associations and other community organizations in their efforts to gather company information, support and to develop marketing and promotional programming on behalf of area businesses.

The County can work with PELA-CFDC-CFDC and local businesses to develop and promote programs to attract small business and entrepreneurs. The County can work with the local Chamber of Tourism and Commerce, local BIAs and Sandbanks Provincial Park, to promote and attract businesses and visitors to the County's downtowns. Lastly, the County is currently working with Taste the County to develop a memorandum of understanding between the County and Taste to ensure both parties are marketing the same message to increase the viability of tourism development in the County.

Enhance Municipal Website

The County should continue to rebrand its municipal website. Several stakeholders suggested that the municipal website is not the first site that many visitors or those seeking information about County procedures come across. There is a needed effort for the County to improve its municipal website to provide a more user-friendly experience that acknowledges this is the location for all relevant County based information.



The County will need to collaborate with Infolink, whose website is currently the leading tourism website for any information regarding the County's tourism experiences and integrate their sites experience to include new marketing tools to support local business growth and development in the Tourism sector.

Incorporation of the County's newly formed Community Development functions in the new website is also encouraged.

E.5 Threats

Lack of Control of Local Branding and Tourism Activities

There is a lack of a coordinated approach to local branding and tourism promotion activities often resulting in a dilution of 'the County' brand. The value of a community brand and the messaging associated with it is an important asset for the County and should be more effectively managed by the County as part of its investment and resident attraction efforts.

Limited Growth Potential if the 'Status Quo' Persists

The County is subject to low growth projections for population, limited growth potential for the property tax base and limited growth potential from revenue sources other than the local tax base are all outcomes if the status quo remains in the Eastern Ontario region. This is partially due to the inability for full-assessment development access to at least 75% of the region's land mass, an issue that the County can assist other counties to improve.

Near Term Fiscal and Budgetary Constraints

Communities across rural Eastern Ontario (including Prince Edward County) are carrying most of the responsibility for the region's roads and bridges. Collectively, these communities are responsible for 73% of its roads and 60% of its structures. Included in the total is nearly 4,000 lane kilometres of provincial roads (and associated bridges) downloaded to local governments in the late 1990s. This pressure has led to chronic underfunding of maintenance of infrastructure of all types and the ability to preserve the value of assets appropriately.

Limited Financial Flexibility to Respond To Challenges

Prince Edward County's heavy reliance on residential tax assessment, dramatic increase in local government debt, declining work capital, deteriorating net financial position, and inability to build reserves for either working capital or to fund infrastructure have all led to limited financial flexibility with which to manage and encourage growth. In the past two years, however this position has improved with capital transfers increasing, although this remains a threat to long term economic prosperity. A large challenge has been for local governments in Eastern Ontario to



build capital reserves at a rate which would ensure that the required funds are there to underwrite future costs of infrastructure investment in the region as a whole.

Retail Based Businesses and Precarious Employment

The largest area of employment growth for the County is expected to occur in retail and accommodation/food services. These sectors are projected to account for an increase of 1,770 jobs between 2012 and 2066, comprising 47% of total employment growth. While this is an important consideration for a community with a strong tourism focus, it also represents significant challenges for growing and sustaining a local economy. Retail positions are often at the lower income scale, part-time and offer little career advancement resulting in considerable staff turnover. They are also the first to be impacted in an economic downturn as evidenced in the recent census information.

Changing Sense of Place

One of the County's primary community assets is its distinct sense of place. Residents and business owners understand the importance of increasing the County's residential and business tax base through new development, but they also underscored the need to preserve the County's "small town and rural feel". In this context, it is important for the County to balance new development with the preservation of those community characteristics that have come to define the County's "small town appeal". Discounting the strength of the County's sense of place and community image to support development for the sake of development and growth would be a mistake and represents a threat to the County's future prosperity.