



The CountyTM
PRINCE EDWARD COUNTY + ONTARIO

**Community Development Department
Business Retention & Expansion (BR+E) Initiative**

2018 - 2019 Report

-Arts, Entertainment and Recreation-



Contents

- Introduction 3
- BR+E Background 3
- About OMAFRA BR+E Executive Pulse 3
- Project Scope 4
- About the Sectors 4
- Key Findings Summary 5
- Survey Results: 7
 - Business Information: 7
 - Business Climate 7
- Potential for Growth 8
 - Arts & Entertainment..... 8
 - Service, Sports & Recreation..... 8
- Challenges to Growth & Expansion 10
 - Arts & Entertainment Sector..... 10
 - Service, Sports & Recreation Sector 10
- Workforce Challenges 11
 - Opportunities:*..... 12
- Recommendations: 12
- Concluding Remarks..... 14
- Thank you to Businesses 15
- Appendix: 16

Introduction

Business Retention and Expansion (BR+E) programs are an opportunity for an in-depth look at the health and vitality of a sector within the economy. Done on a sector-by-sector basis, with updates to each sector taking place every few years, the process involves conducting confidential interviews with business owners and operators to gather insights into their needs, challenges and growth potential.

On June 24, 2015, members of the Prince Edward County Community and Economic Development Commission (CEDC) participated in a facilitated priority setting session, within the context of the PEC Community Development Strategic Plan completed in late 2013 and implemented beginning in 2014. The intent of the session was to review key goals and actions to affirm that the current strategy, stakeholder expectations and resources were aligned with the broader economic and community development landscape in which The County competes.

One of the outcomes of this session was to prioritize the following action:

Goal #2 – A supportive Environment for Business and Investment:

Action Item #5: “Develop a Business Retention and Expansion (BR+E) 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.”

BR+E Background

In past years, the Community Development Department (CDD) has undertaken BR+E studies for the Agricultural, Manufacturing, Construction, Professional Services and Health Care sectors. For this current study of the Arts, Entertainment and Recreation sector, 70 businesses were interviewed over the course of four months. These in-person surveys provide baseline information about each business, workforce insight, future plans and challenges with doing business in the community. Previous BR+E projects have served as an important resource for informing Community Development priorities and work plans. They also provide a natural opportunity for outreach to the business community to identify any immediate needs that may be impeding business growth.

About OMAFRA BR+E Executive Pulse

The Ontario Ministry of Agriculture, Food & Rural Affairs (OMAFRA) provides no-charge tools and resources for communities conducting BR+E surveys. This includes a best practices manual, comprehensive business survey templates, and an online data management system known as Executive Pulse. By participating in, and using OMAFRA’s system, communities also gain the benefits of comparative data from other communities across rural Ontario. Provincial results are compiled from

each of the communities contributing data to the online data management system. To date, 73 other communities in rural Ontario have participated in the BR+E surveys. This provides an invaluable comparative resource for Prince Edward County as key findings are determined.

Project Scope

Starting in December 2018, the CDD conducted more than 70 interviews with organizations and individuals active in the Arts, Entertainment and Recreation sectors over four months. 44 of the interviewees represented for-profit businesses in this sector. The remaining 36 organizations were predominantly not-for-profits, sports leagues or associations that operate with a board of directors, volunteers and few if any employees.

The survey questions were based on OMAFRA's standard business retention survey with the addition of some specific industry related questions developed by staff. For this particular BR+E, community questions were developed that focused specifically on volunteerism and service and sports clubs.

About the Sectors

Included in this year's interviews were all of the municipal ward recreation committees and businesses and organizations that represented each of the following:

- Theatre
- Musical groups & Artists
- Festivals and events
- Artists and galleries (includes writing)
- Museums and historical sites
- Nature parks and beaches
- Golf courses
- Marinas
- Fitness and recreation

NAICS CODE / DESCRIPTION 71: Arts, Entertainment and Recreation

The North American Industry Classification System (NAICS) is a standard method of identifying the different sectors that comprise an economy. Like industries are grouped together and identified as a particular sector of the economy. For the Arts, Entertainment and Recreation Sector, the following types of businesses are included:

7111 Performing arts companies

7112 Spectator sports

7113 Promoters (presenters) of performing arts, sports and similar events

7114 Agents and managers for artists, athletes, entertainers and other public figures

7115 Independent artists, writers and performers

7121 Heritage institutions

7131 Amusement parks and arcades

7132 Gambling industries

7139 Other amusement and recreation industries



ARTS, ENTERTAINMENT & RECREATION

CHALLENGES

UNPREDICTABLE WAGES



Financial realities mean many art-related entrepreneurs are forced to take on part-time work, diversify their offerings or augment their income in other ways. Since many artists and musicians rely on tourists for their income, seasonality in that sector can greatly impact the consistency and stability of earnings.

CHANGING CONSUMER DEMOGRAPHICS



Millennial visitors to The County are reported to be reluctant to invest in art pieces, due to limited funds, inadequate wall space and/or lack of home ownership. At the same time, older art collectors are beginning to downsize and divest.

COMPETITION



Changing markets and greater global connectivity mean artists, musicians and others in the art and entertainment sectors face greater pressures to stay competitive, whether regionally, nationally or internationally.

CONNECTIVITY



A more global art and entertainment market requires artists, musicians and others to expand into the digital realm, using Internet-based platforms and e-commerce to reach international clientele. This can be challenging in a rural space.

VOLUNTEERISM



The spirit of volunteerism is key to the success of service organizations, non-profits and minor sports leagues, among others. But volunteer burnout is making it more difficult to find and retain committed individuals. An aging population also means more services are needed, with fewer people available to deliver them.

CHANGING CLIMATE



Sports leagues, events and festivals rely on predictable climate patterns in order to plan and deliver games, concerts, performances and more. As the climate changes, organizers are seeing more disruption. Flooding can have a huge impact on the summer tourist trade, while wild weather generally can make it difficult for sports and outdoor events.

SPACE FOR INDOOR SPORTS



School closures impact more than students. With the shuttering of public schools across The County, available gymnasium space has been reduced, creating competition for space between recreational sports groups.

Key Findings Summary

Many entrepreneurs in the Arts, Entertainment and Recreation Sector report that since much of the work pays essentially part-time wages, they are forced to diversify their products or augment their income with employment that takes them away from their core business.

Sales tend to be seasonal and rely heavily on tourists as clientele. Qualitative evidence provided by interviewees suggests changing demographics amongst tourists means Arts and Entertainment entrepreneurs must evolve their offerings and products for sale. For example, many entrepreneurs interviewed stated that younger tourists are more interested in small mementos commemorating their time in Prince Edward County, rather than large art pieces. Similarly, the move toward open concept living, with fewer walls to hang art, was cited as a reason for downward trends in traditional art purchases.

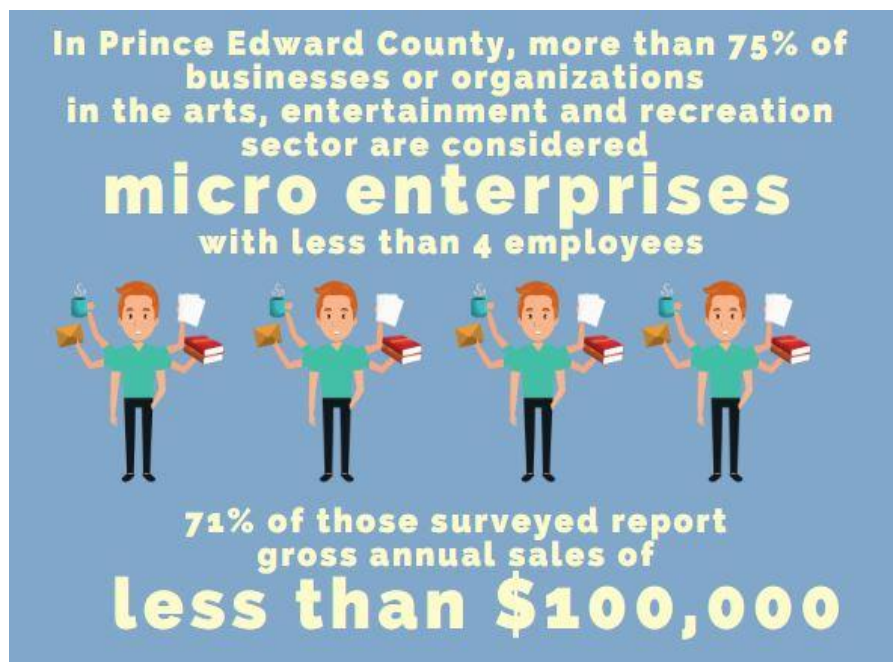
Seasonality in the Arts and Entertainment markets, as well as greater openness and competition in the global Art and Entertainment markets presents challenges. E-commerce has opened up the global Art market, introducing new opportunities to reach wider audiences but also new competition from artists in areas previously left

less-competitive by lack of access and high shipping rates.

In the Sports and Recreation sector, long-standing community organizations, such as local service clubs and minor sport associations, report that they are struggling to find the volunteers necessary to continue providing their usual services and supports. Interviewees suggest this is partly due to an aging population, but also because while parents want to be involved with their children's activities, they struggle to make volunteer commitments given competing demands on their time.

Several recreational clubs and event organizers also report that changing climate has impacted their sports leagues and festivals, making it more difficult to plan and deliver successful services, events or sporting events.

Finally, public school closures have resulted in less available gymnasium space at the same time there is growing demand for courts from sports such as basketball and pickleball. Recreational facilities need to reflect the demands of an active senior community.



Survey Results:

Business Information:

In Prince Edward County, more than 90% of Arts, Entertainment and Recreation businesses classify themselves as locally-owned and operated. More than 75% of the businesses or organizations employ between one and four people, meeting Industry Canada’s definition of “micro businesses,” employing less than four paid employees, or “small businesses” that have between five and 99 paid employees.

As a creative industry, the Arts sector in particular relies on one’s individual skill and talents to produce products and services for sale at market. Most often, the arts entrepreneur is independent, operating as a single staffed sole proprietorship. For the majority of these micro enterprises, the primary employee(s) are the business owner(s) and most often the place of work is home based, often involving live/work arrangements. Among the surveyed businesses, there were only a few with bricks and mortar locations separate from the address of their residence.

It should be also noted that 71% of the businesses reported less than \$100,000 in annual gross sales. For many of these businesses, there were second income opportunities from a wide variety of sources. Workshops, lessons, second businesses, vacation rentals, hospitality or first career or retirement savings were most commonly cited as necessary to support work in the Arts, Entertainment and Recreation sector.

The sector could best be described as local, with very limited employment, modest sales and operations that involve few employees beyond the owner. That said, in Prince Edward County, the Arts, Entertainment & Recreation Industry represents 266 jobs, which is 44% above the national average. This sector of our economy has grown more than 20% since 2009.

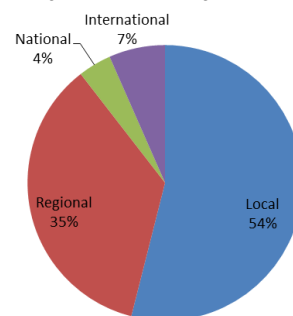
Local clubs and organizations that offer cultural, sporting and community-based activities fall most often into the not-for-profit category. Of the 36 local clubs and organizations interviewed, almost 44% of them have been in existence in Prince Edward County for more than 35 years. Their longevity and endurance speaks to the commitment and involvement of community members through volunteerism.

Business Climate

The Arts, Entertainment and Recreation Sectors are seeing significant maturation, primarily in response to The County’s growing tourism profile. Many local arts and entertainment businesses are now well established, several with more than 10 years in the local economy.

Residents of Prince Edward County were reported to be the primary market for this entire sector. A significant second market are regional/provincial visitors, with interviewees saying tourism plays a significant role in the volume of sales, onsite visitors and ultimately the success of their business.

Primary Market for your Business



Interviewees noted that international markets represent a higher share over national markets, which was partially explained by proximity to the larger, more affluent U.S. market. Art gallery owners/operators stated that a significant proportion of sales remain in Prince Edward County, fuelled largely by new homeowners, looking for local products for their second/vacation homes. With more affordable shipping and increased internet connectivity, writing workshops, editing of digital video footage, commissions via social media of large or small artwork and even shipping of fragile glass or ceramic products is possible.

Potential for Growth

Arts & Entertainment

Art and Recreation businesses with a positive growth outlook say they are experiencing increased annual visitation and an expanded tourism season as reasons for growth of this industry in this community. Some 70% of businesses surveyed believe that the Arts, Entertainment and Recreation Sector is growing and will continue to grow.

Opportunities in national and international markets, along with increased e-commerce, provide reasons to be optimistic about further growth.



Responding to tourist trends

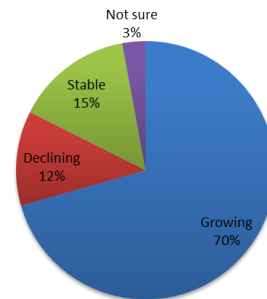
Survey respondents say millennial visitors want only small mementos of their trip, placing greater importance on experiences over items. Older visitors, meanwhile, are downsizing, leaving less room for art.

However, the changing demographic of the clientele is forcing Arts and Entertainment businesses to re-evaluate what and how they produce for the market. For example, wine tour operators report that they are modifying their services to include activities beyond food and beverage experiences, often including culinary or creative workshops marketed to small and medium-sized groups that enhance the visitor's experience and provide some authentic takeaways. More than six of the surveyed artists indicated that they have changed a portion of the works they produce, finding ways to produce smaller items at lower price points, to respond to demands of the market.

Service, Sports & Recreation

The growing popularity of certain sports and cultural activities is driving the growth in recreational pursuits like basketball, pickleball, musical theatre, birding, environmental preservation and even arm-drop drag racing. Interest in community-based activities remains strong. This includes, for example, participation in organizations like 4-H, visiting Sandbanks Provincial Park, fishing, and conducting family or personal history research.

What is the outlook of your industry?



Interviewees say traditional youth sports are in decline, predominately related to changing age demographics. In the 2016 census, all age cohorts under 55 years of age experienced decreased numbers. Organizations that offer programming for youth say they are looking for new or modified delivery models to continue to offer these services in our community. A dip in the number of local hockey players means the “house league” includes teams from around the region, forcing players to travel to neighbouring communities to play. This, in turn, raises costs and makes play prohibitive for lower-income families.



Available Public Space

Some sports, such as basketball and pickleball, have seen growth stall due to lack of available court space. At a time when there is greater interest in play, school closures mean there is less available space.

However, participation in court-based sports is on the rise and causing space access challenges. The growth of relatively new sports like pickleball has exponentially expanded court access requirements at the same time as some of this court space is contracting. The closure of some elementary schools over the past 18 months has also eliminated community spaces traditionally available to groups.

Opportunities

1. Supporting Arts, Entertainment and Recreational entrepreneurs in developing experiential tourism opportunities could help close the gap between what tourists seek and what the sector offers.
2. Training in marketing to international audiences would help artists and entertainers expand beyond their traditional clientele.
3. Survey results indicate that a growing number of artists are engaging in e-commerce. More than 60% of respondents report that e-commerce has improved their access to a wider clientele and created less reliance on a seasonal audience. Workshops and other supports to growing e-commerce skills could introduce more stability to interested entrepreneurs.
4. County-held assets, such as Museums, could be utilized to increase the pool of available meeting spaces. Churches and other public institutions could also become a source of community space.

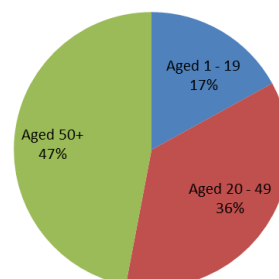
Challenges to Growth & Expansion

Arts & Entertainment Sector

Growth in this sector can be unpredictable, with artists and others facing the challenge of changing trends, changing visitor demographics and increased competition from others, whether locally, regionally, nationally or internationally. Rising local housing prices coupled with growing cost-of-living expenses can put significant financial pressure on artists, making it more difficult to invest in their core business. Fluctuations in available public funding can also make it difficult to plan and implement growth strategies.

Interviewees report that there is sometimes a mismatch in the interests of tourists travelling to Prince Edward County in the high season and offerings from the arts and entertainment industries. While many professional artists are producing high-end, large scale works, they struggle to find buyers amongst young visitors. At the same time, consumers over the age of 50 are divesting of art, rather than acquiring it.

Age Demographics of the Client Base



CLUBS, ORGANIZATIONS, SPORTS & EVENTS

CHALLENGE: VOLUNTEERISM

Traditional, longstanding community organizations are struggling to find volunteers, impacting the ways in which they can operate.

Service, Sports & Recreation Sector

More than half of the responding organizations accumulate more than 2,000 hours of volunteer time each year, reflecting their reliance on committed volunteers willing to make a significant annual contribution of their time and talent.

This is being threatened by changing demographics in the community. For 84% of the organizations interviewed, The County's aging population was

cited as both a challenge in terms of recruiting and retaining volunteers, but also in terms of needing to drop or add services to meet community need.

The changing demographics of the community have also brought new challenges for the delivery of recreational programming in Prince Edward County. Organizations like minor hockey, for example, are having to shift to a more regional scope, while indoor court or gymnasium-based sports are struggling to find available local space to serve both young and old.

Opportunities

1. Artists and other Arts, Entertainment and Recreation entrepreneurs may benefit from workshops that support development of basic business skills in areas like finance, taxation and business planning.

2. This sector would also be a prime candidate for involvement in experiential tourism, which involves developing high quality, high yield experiences that encourage return visits, longer stays and higher spends. Without significantly adding workload, this could help create opportunities to grow annual gross sales.
3. In order to ease demands on volunteers and better align organizational priorities to volunteer capacity, volunteer and board governance training could be offered to assist with recruiting and engaging a new generation of volunteers.

Workforce Challenges

Many creative for-profit businesses look at their products as singular, or items that only they can produce, and do not consider passing their business on to someone else. Some 95% of businesses and organizations in the Arts, Entertainment and Recreation Sector have no succession plan. More than 85% of them have no formal business or strategic plan. Succession planning in the arts sector may need a different approach: there are opportunities for creative individuals to work with and mentor the next generation of creative economy participants.



WORKFORCE CHALLENGES

STRATEGIC PLANNING

Some 95% of businesses and organizations in the Arts, Entertainment and Recreation Sector have no succession plan. More than 85% have no formal business or strategic plan. This limits opportunities for growth and puts their future at risk.

Local not-for-profit organizations offering community-based programming are often staffed and / or organized by local volunteers. It is a significant challenge to attract members and their skills that live outside the community to support many of these groups. Gaps in expertise, interest in the actual activity and an aversion to administration were all cited by these organizations as they struggle to plan for the future.

A lack of succession planning for arts-based businesses can leave entrepreneurs vulnerable. Operating without a strategic vision for the future of arts, entertainment or service and recreation clubs limits opportunities for growth and puts the future of those businesses and organizations at risk.

Gaps in expertise and an aversion to administration amongst staff and volunteers were all cited by service organizations as threats to their future viability.

Meanwhile, a lapse in leadership within service organizations is a serious threat to their long-term sustainability. Recruiting new leadership can be a difficult process, limited by access to relevant talent within PEC's relatively small community.



Opportunities

1. Workshops specializing in business planning for creative entrepreneurs would help identify opportunities for growth and safeguard these businesses against bumps in the market.
2. Strategic planning assistance and training for service and recreational organizations would help them shift to meet the needs of the community and manage and respond to reduced volunteer availability.
3. Succession planning specifically for local

not-for-profit recreation organizations to ensure the long term viability of these groups and the services they provide to the community.

Recommendations:

1. **Provide basic business training:** Continue and expand Winter Survival Workshops, focusing on topics such as social media marketing, customer service, sales, export challenges and opportunities and computer literacy. Basic business skills in the areas of finance, taxation, human resources and health and safety training will further help ensure the long-term success of the business.
2. **Provide specialized workshops on e-commerce:** Prepare creative entrepreneurs with the skills to leverage e-commerce and marketing to international clientele to help grow and stabilize businesses in the sector.
3. **Provide strategic and succession planning training:** Encourage businesses and community organizations to plan for future success and long term organizational health through workshops, programs and partnerships aimed at strengthening governance and volunteer capacity.
4. **Offer training and supports for local volunteers and not-for-profit organizations:** Support governance training that would better equip service organizations and recreation leagues to attract and retain quality volunteers. Encourage volunteer recognition or supports. Strengthen and support the effectiveness of existing volunteer recruitment platforms to help amplify their success.



Leveraging e-commerce

Capitalizing on the opportunities presented by e-commerce, the ability to shop and pay for items online, could help stabilize incomes in the arts and entertainment sectors.

5. **Assess/Inventory community spaces:** Any recreational master plan should include an inventory and assessment of available community space and its uses, dimensions and associated fees. Including municipal assets such as Museums into this count, and working with local spaces of worship, could help better match community needs to community spaces to ensure adequate space for all.

6. **Introduce an online booking system for public spaces:** Streamlining the booking of community spaces by

introducing an online booking system would also automate payment processes and encourage groups to match need with the most suitable space.

7. **Introduce and expand Experiential Tourism opportunities:** Develop a pilot program to support the creation of experiential tourism opportunities, which would introduce greater income stability despite seasonal fluctuation in tourist visits.
8. **Explore permits:** Special events can enhance and improve the quality of life for residents and visitors alike. Introducing a special events permit for festivals and ticketed events could help facilitate the effective planning and execution of safe events. Publicizing the availability of permits for activities like filming could encourage more opportunities that would provide creative employment while generating income for the municipality.

Concluding Remarks

A creative economy is important to the health and vitality of a community, because a vibrant arts and creative scene coupled with plentiful recreation and cultural activities facilitates resident and investment attraction. Families helmed by creative entrepreneurs grow the economy and keep schools open, which in turn offer access to community spaces for sports, recreation and group activities. Young families can also help replenish the volunteer pool and steer organizations toward programming that supports an active and vibrant community.

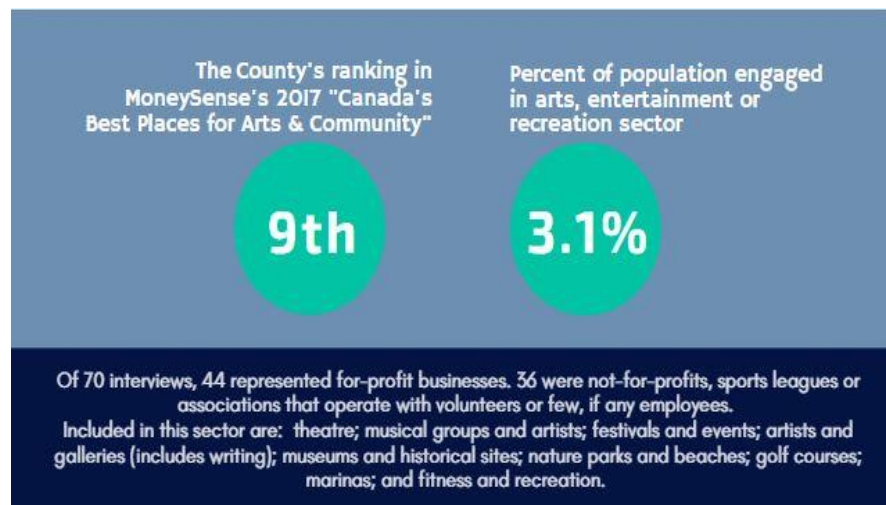
The County is fortunate to have a strong and highly engaged artistic community. *Moneysense*, an online financial news site, ranked The County ninth out of 100 Canadian cities for their [*Canada's Best Places for Arts and Community 2017*](#) report.

Members of the “footloose economy,” who have the flexibility and freedom to work from anywhere, also look for a strong Arts, Entertainment and Recreation Sector when selecting a place of residency. Anecdotally, a substantial number of arts and entertainment entrepreneurs who fit the “footloose” profile indicated that the sense of community, opportunities to be engaged and the perception of a vibrant arts scene brought them to Prince Edward County.

Even emerging sectors with high potential for growth sees arts, culture and recreation as important factors in

choosing where to locate their businesses, as evidenced by the burgeoning cannabis industry. Site selectors place significant weight on a community’s sense of place, its amenities and recreational opportunities when determining locations, since these are important factors for talent recruitment. Being an infant industry with a very limited pool of qualified and appropriately-educated senior scientific personnel, location can be an important factor in attracting top talent.

Finally, arts and entertainment play a vital role in the tourism economy, providing a draw for visitors. There is no question that creative entrepreneurs lend a certain cache to The County, with a plethora of events, studios, galleries, live performances, music, theatre, Museum events, workshops, demonstrations and more, all of which give The County its unique flavour.



Thank you to Businesses

Our sincere thanks to the many businesses and organizations that took the time to meet with us and share the risks and rewards of their endeavours. **The volunteer organizations interviewed represent more than 73,800 volunteer hours per year in our community! This represents a major commitment from dedicated individuals that are vital to the sustainability of our community.** Your input helps us to better understand a very non-traditional sector, with needs unlike any other. We were motivated to take a closer look at this sector because we recognize that the rapid pace of change in the municipality has had a tremendous impact on volunteers, service clubs, recreational groups and others.

An important role for The County will be to foster a creative business-friendly environment that addresses the identified issues such as workforce development, youth retention, adoption of new technology and succession planning support. It's equally vital for The County to identify available public spaces, and plan to meet the needs of its community now and into the future. These are key to the long-term health of this sector, which is vital to ensuring the continued high quality of life for those who currently live here, or are considering relocating to The County.

Todd Davis

Acting Director of Community Development and Strategic Initiatives
The Corporation of the County of Prince Edward

Report Prepared by:

Grace Nyman

Community Development Coordinator
The Corporation of the County of Prince Edward

Trevor Crowe

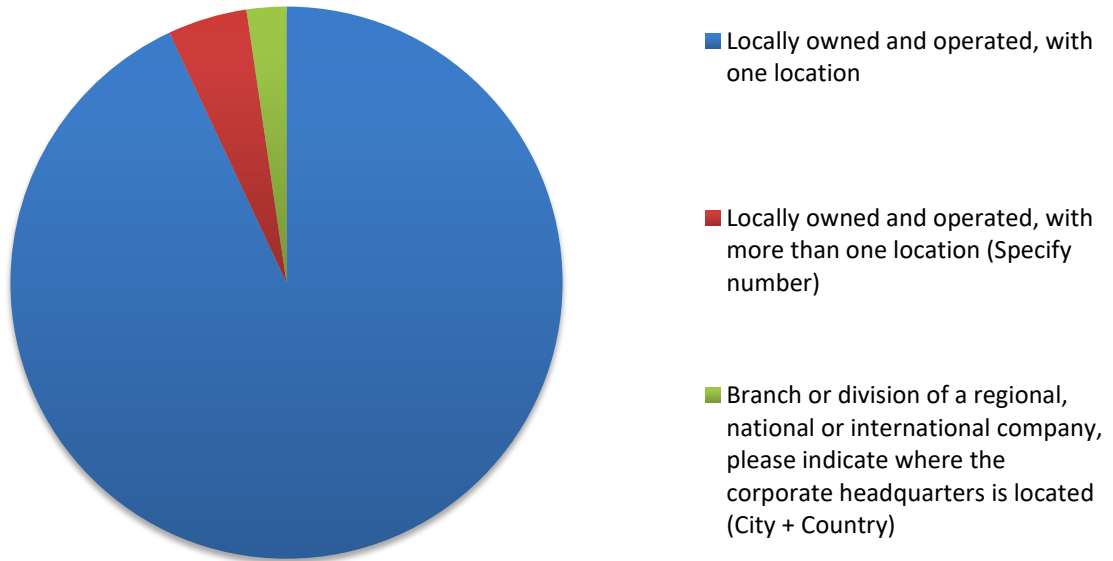
Community Development Coordinator
The Corporation of the County of Prince Edward

Karen Palmer

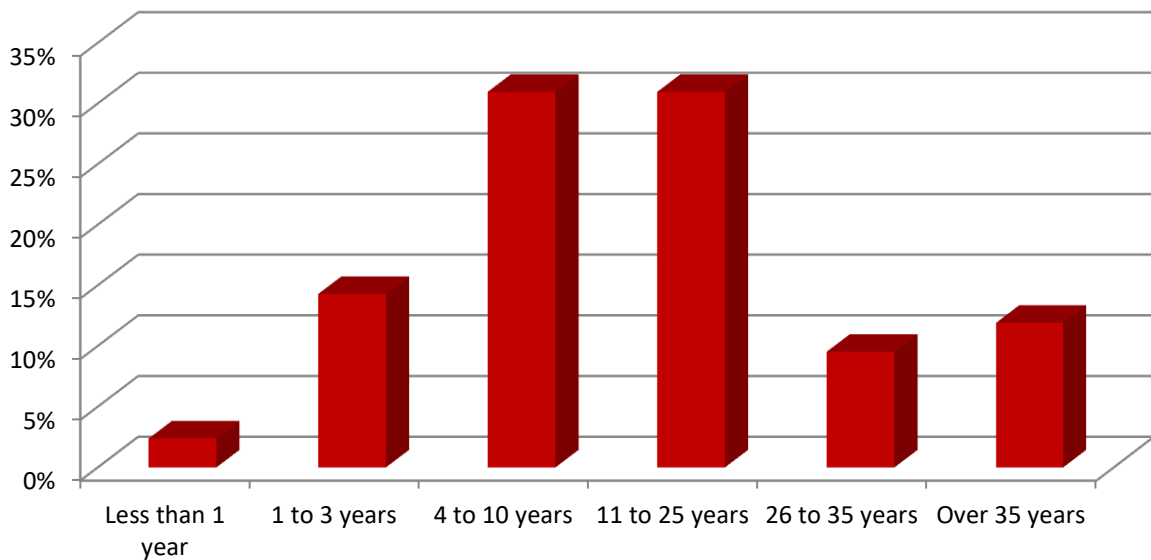
Destination Development and Marketing Coordinator
The Corporation of the County of Prince Edward

Appendix:

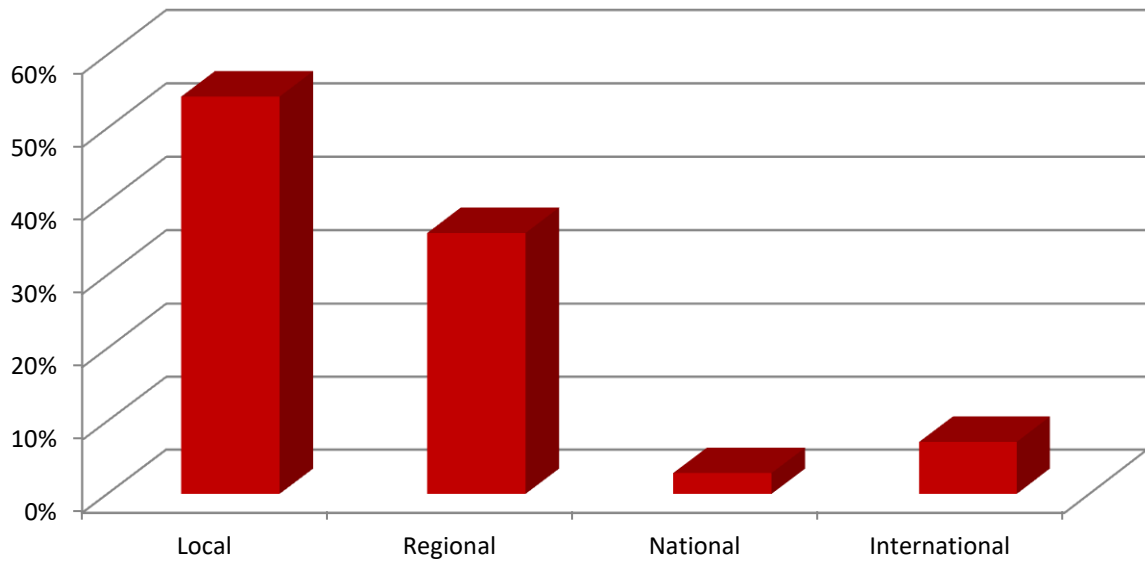
Survey Results for Businesses (not Volunteer Organizations)



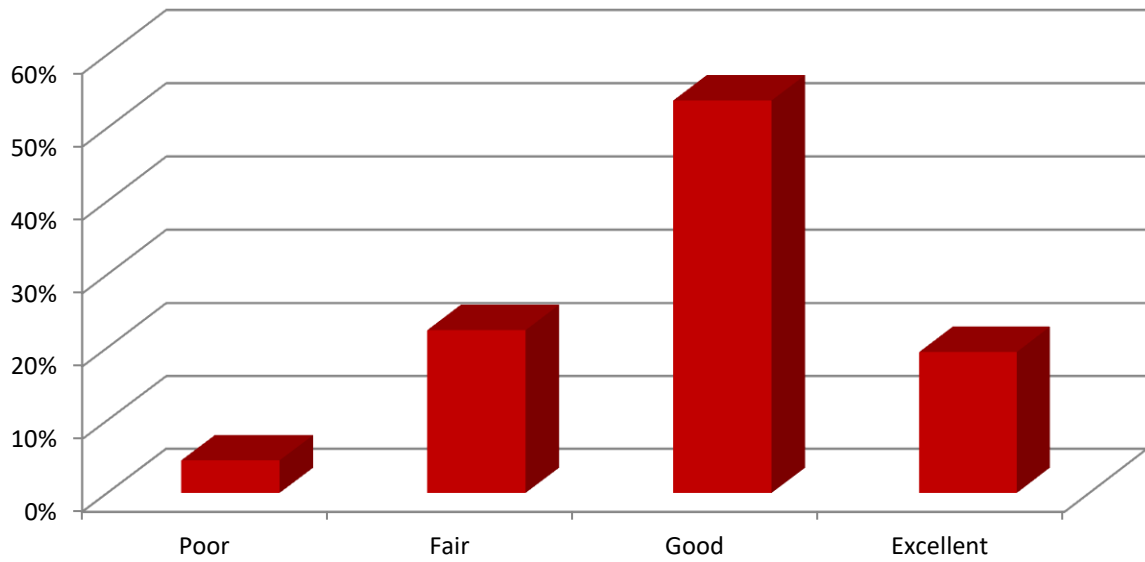
How many years have the current owners been operating the business?



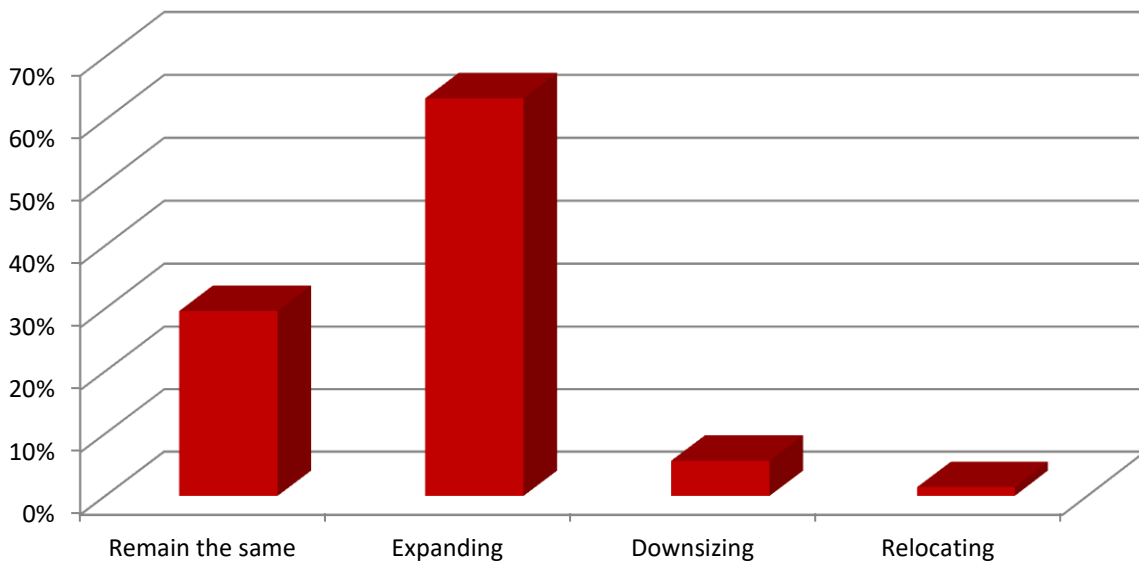
The Primary Market for your Business is...



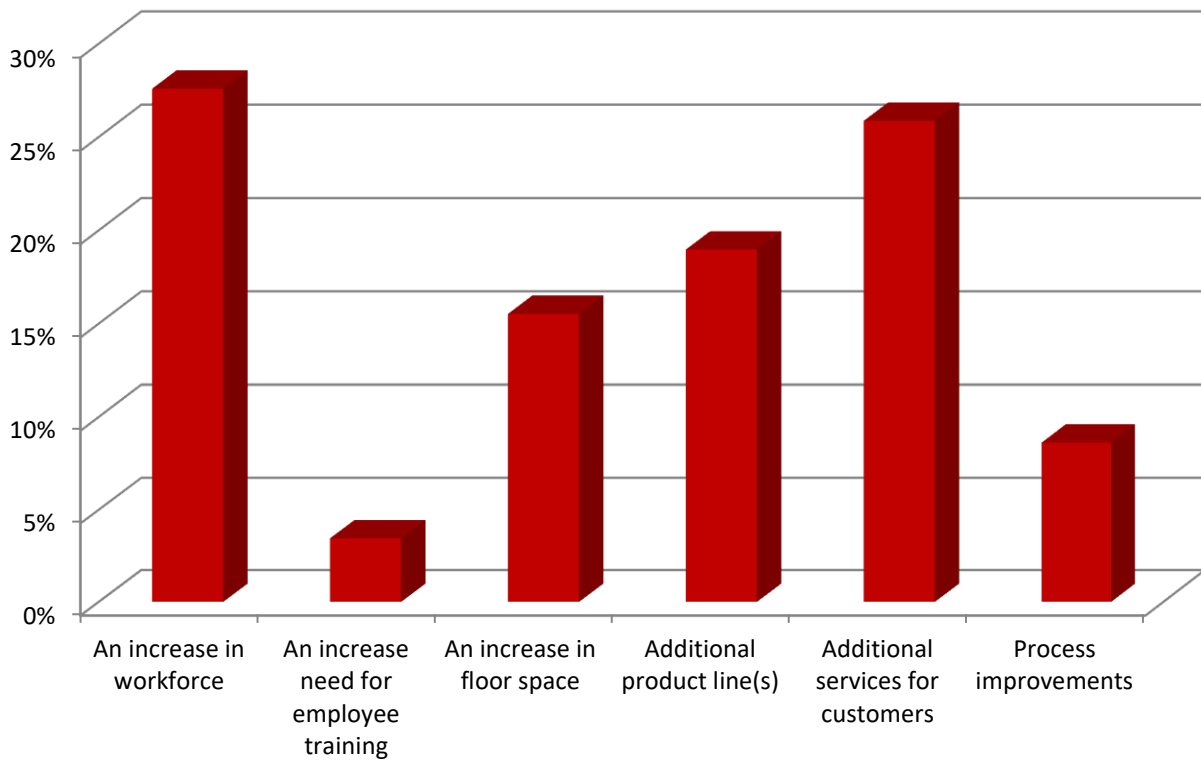
What is your general impression of this community as a place to do business?



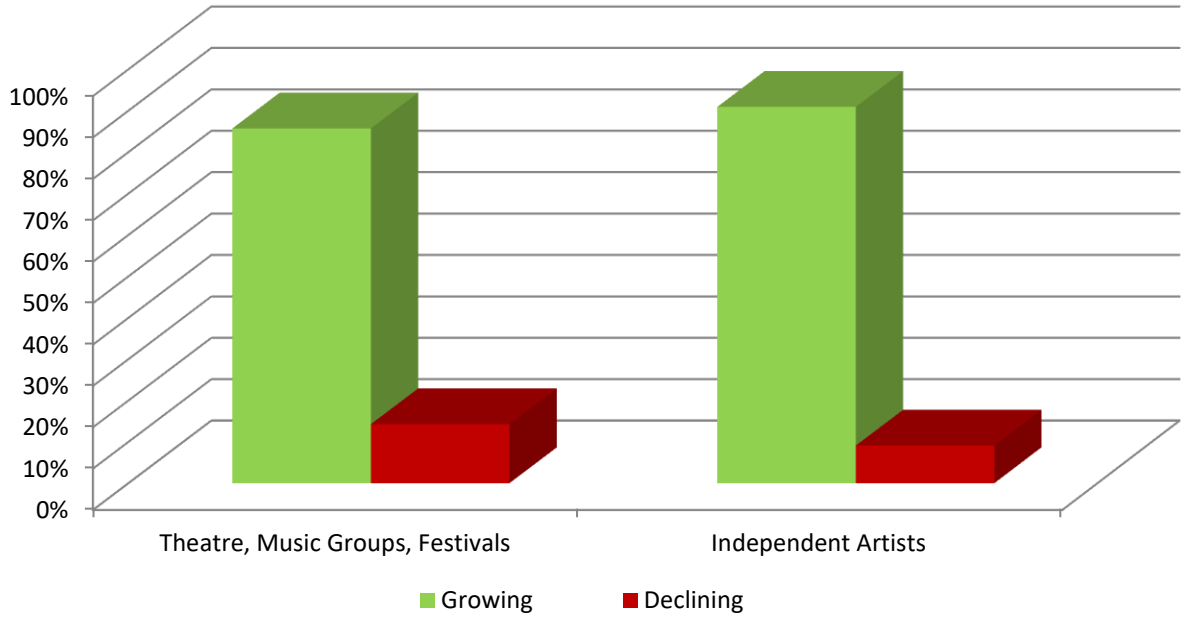
Within the next 18 months, do you plan for your business to:



Will your expansion require or lead to:



What is the outlook for your industry?



Theatre Music Groups, Festivals

"Many good musicians in Prince Edward County."

"Better Internet, more music festivals locally, new entertainers and musicians locally."

"Many new musicians moving to Prince Edward County."

Independent Artists

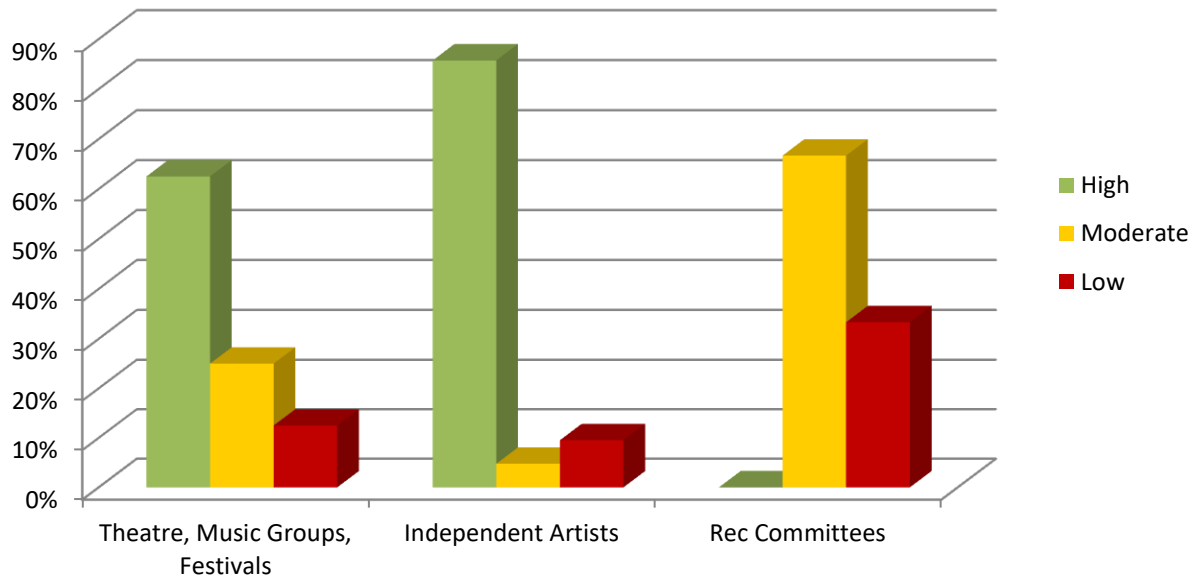
"Increase in artists moving to the area."

"Increase in printmakers coming to the area."

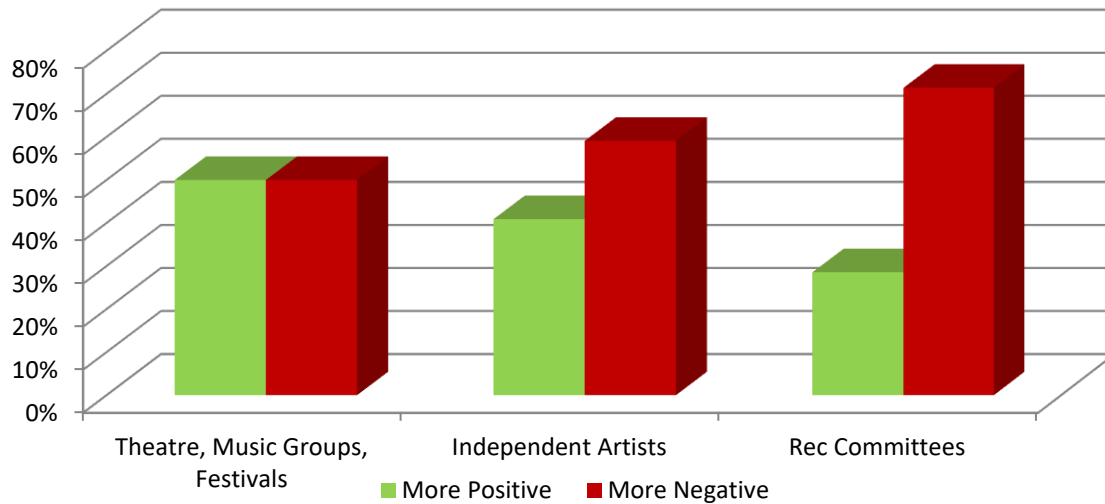
"Many artists moving to The County, but the slice of pie is getting smaller for everyone."

"The way that buying art is changing. Studio tours are losing their appeal. Art fairs and online sales are taking over."

How would you rate your business related to the use of technology?



Has your attitude about doing business here changed in the past 3 years?



Theatre, Music Groups, Festivals

"Playing for less money now than 20 years ago. There are so many musicians willing to play for less."

"We are constantly being asked by many organizations to do their shows for free."

"Getting the theatre up and running, I ran into a lot of obstacles. Attitudes of municipal departments were not supportive."

Independent Artists

"There is so much more going on in The County now, which has resulted in greater competition."

"The County has become a noisy place and it is difficult to rise above the noise."

"Traffic has stopped venturing off of main street and into studios and galleries. There are more businesses and interests, so we've had to change the way to reach our audience by using online, arts shows, outside of The County as well as going to the main street for specific events."

Rec Committees:

"Problem with process when dealing with the municipality. It's not the people, it's the process."

"More rules and regulations around liability. Every time you turn around, you can't do something else."

"No cooperation. Not allowing volunteers to help. Not consulting for input when things are done."

Our Community's Top Advantages as a Place to do Business:

"Location: Everyone has worked together and made Prince Edward County a destination."

"Trusting community. Not like the city."

"Support and cooperation from businesses and organizations in The County."

"International/National reputation as a top destination."

"Tourist draw in the community. A lot of amenities and things going on."

"Community culture - supportive, respect and positive energy."

"Destination with proximity to Toronto, Ottawa, Quebec and US."

"Vibrant economy. We have an audience already coming here."

"Great restaurants, history, beaches, and all the things that make Prince Edward County 'The County.'"

"Combination of the Arts, Wineries, Culinary, Agri-tourism."

"'Grand Slam' of destination marketing efforts."

"Cost of living is better than the city."

Our Community's Top *Disadvantages* as a Place to do Business:

"Process: Getting things done with the municipality. Waiting for permissions. Layers of bureaucracy."

"Lack of accommodation, lack of affordable housing."

"No public transportation."

"Tangle of lack of workforce, lack of public transit and lack of affordable housing."

"Red tape - bureaucracy to make events happen. Cost to put on events now, such as parade. Have to pay for OPP, firefighters can't close roads now."

"Very competitive due to all the various sectors such as arts, gastronomy, recreation etc."

"Aging population and hard to attract youth."

"Donations hard to acquire as so many organizations asking same businesses."

"Volunteer burnout."

"Not a four-season destination. We need a year-round Nordik Spa type product to draw visitors."

"With part-time residents in the community, you lose patrons, volunteers, and fundraising opportunities."

In terms of overall impact on this community as a place to do business, what is the most significant change you would like to see in the next five years?

"A heritage plan would be good to have. See tangible and intangible assets."

"Help from the municipality to aid in helping this project to be affordable."

"Would like The County to grow so utility costs go down."

"Short Term Accommodations, retirees to Florida and lack of families is a problem. I would like to see year-round population diversify and grow."

"Preserve halls and look at how halls are booked, as there are very few assembly-rated halls."

"Look at long-term, multi-year, non-political operating grants for arts and culture."

"Would like to see more energy focused on people who live here full time. We need more housing. We need to celebrate our uniqueness and welcome visitors but serve the citizens."

"Would like to see Prince Edward County become a four-season destination."

"AirBnBs and lack of housing takes away from year-round residents, ultimately taking away more of an audience for musicians to play for."

"Affordability so that can live in the area."

"Increase in younger demographics."

"Would like The County to have a balanced budget and to manage it properly."

"Would like to see the entire municipality, including store owners with store fronts and business owners, embrace festivals, as it could be a win-win for all."

"Planning. We need to get going on the developments."

"Arts funding support by The County."

"Public Transportation."

"Affordable housing for younger people."

"Hospital."

"No central space for kids that is community-centred. Lacking diverse space. Picton Town hall could be good for this."

"Microgranting for the arts."

"Lack of accommodations in The County. Hard to pull in an active audience if there is no place to stay."

"A development plan that protects The County to keep its unique charm and sense of place and not become a big box/cookie cutter development place."

"County wide WIFI/mobile/Internet access."

"Larger support/funding for the Arts. The gateway to The County for future residents and businesses. Help us help you!"

"Support professional artists who are open year-round, the front line ambassadors for visitors/tourists."

"Public Transportation."

"Affordable workers accommodation in the urban areas for staff who work in the tourist industry."

"Promote off-season tourism."

"Transportation and Internet."

"Promote PEC as a place to buy art, just like Scottsdale, Arizona."

"Get tourists exploring the entire County and wards such as Sophiasburgh and Ameliasburgh"

"Work on affordable housing and community space."

"That we don't focus on growing business by attracting people here but rather focus on export. We need to find ways to grow business without tourism. i.e. food, wine, art exports."

"We need to improve our education system. Quality of education receiving at high school level is sad."

"More focus on off-season economic development."

"Get a handle on the AirBnBs, as PEC is losing the community feel."

"More affordable housing, especially for younger people."

"Unification of the arts community. There are so many organizations doing the same."

"Put more of a focus on marketing in higher end magazines, Globe & Mail, etc. to the audience that will actually come here to buy."

"That The County take and show pride in the talent of arts and music by promoting them. Promotion of the arts and music will provide more opportunities for musicians to play and grow their talent and go on the world stages."

"More collaboration between regional and provincial governments/bodies. Not only focus on Prince Edward County but embrace surrounding regions and work together."

"Would like to see the Authors Festival brought back."

"Would like to see a co-working space created to be able to share knowledge, have a space to work, technology and high speed internet, use of photocopiers, printer etc. Close to restaurants etc." (County Coworking is planned to open in Picton)

"Would like to see an arts centre that features space for artists to work and sell their art as well as a theatre for the performing arts. There are so many new artists moving to Prince Edward County but they are scattered around The County and should have a place to be brought together. (i.e. Savannah, Georgia is an example). There is such opportunity with the wealth of talent that have moved here to expand the shoulder seasons through teaching as they have done with the Haliburton School of Art and Design."

"Closson Road should be paved."

"Would like to see housing more affordable in the area. It is a disturbing trend to see the schools closing which is threatening the vibrancy of communities. Take Bloomfield for example: the closing of the bank, the school, the convenience store, makes it hard for demographic such as seniors to be able to stay in the community if they do not have transportation."

"Parking in Wellington and storage space for the Archives."

"Red tape – bureaucracy at all levels: municipal, provincial and federal."

"The municipality shows no encouragement for the work that is done at the Archives. Does not fund them, yet hands out [funds] to other historical places."

"Would like to work more closely with the municipality. For example, a coordinated strategy with signs coming into The County, especially when the lineups are long at the Provincial Park. It would be good to let public know."

"Population growth would be nice. Worried that The County is pricing itself out of the market."

"Would like to see health businesses/organizations working together rather than operating in silos. There is an overlap of programs running and should be working together to advance programs and levels for clients. PEFHT; PEFAC: VON: Community Care. Would like to see the slogan 'County Fit, County Strong.' Would like the municipality to bring the organizations to work together."

"Create a list of heritage properties such as churches that will be available in the next few years and figure out what can be done with them."

"Clearer understanding of who is the voice for marketing in The County. Still too many voices."

"Would be great to see some gym space places to rent for physical activities. Currently there is only the high-school which is in high demand."

"Losing family friendly restaurants."

"Fix Hwy 49"

"Have a boardwalk around the harbour. It is a huge attraction."

"Build a gym facility for the community so that the school gym can be used by students. There are 1,000 students in PEI that need to use the gym but are being pushed out."

"To solve the three major disadvantages: roads, housing and public transportation."

"Would like to see an increase in the number of families in Prince Edward County."

"Transportation service for out of town limits so people have opportunity to utilize the centre."

"Would like to see it easier to do business with the municipality. There needs to be system for getting through municipal processes."

"Would like to see a resurgence of interest in Recreation Committees and their usefulness to a community."

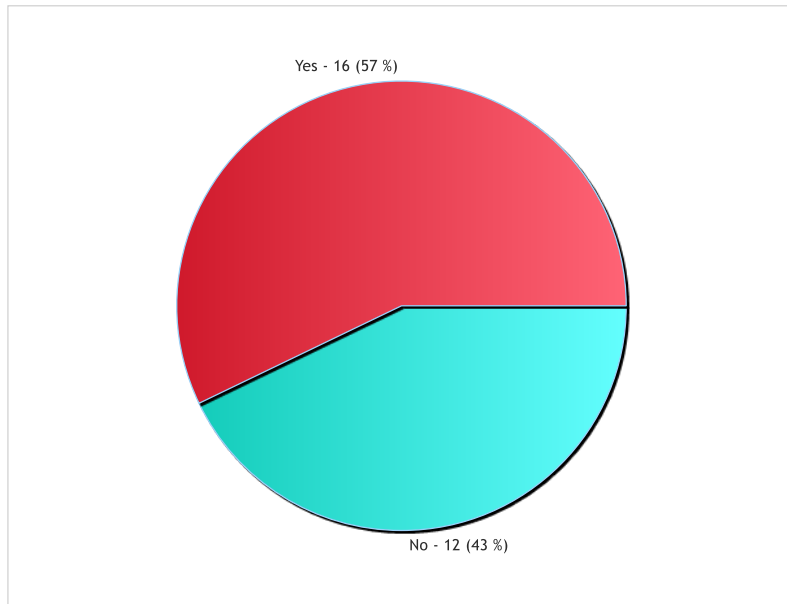
"Would like to see someone working with the Rec Committee from the municipality so that when putting on an event it isn't so frustrating and hard to get things done."

"Asking that the municipality keep the rec committee involved in the planning of parks etc. Keep us in the know and what is planned for spending for the year so they can inform their community members. Don't want to be operating in the dark anymore."

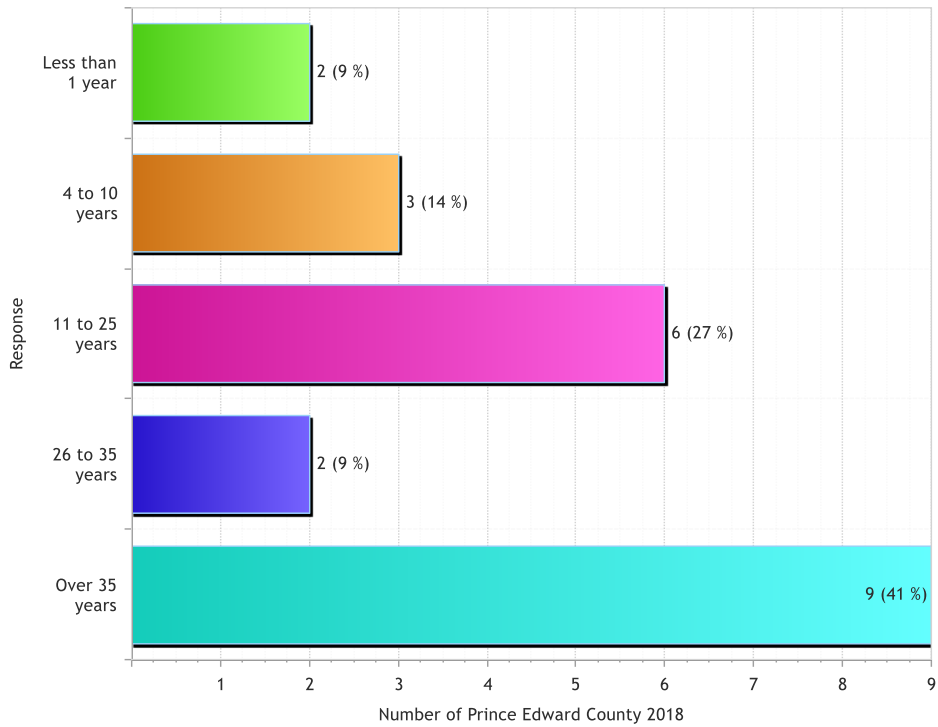
"The County should work closer with the Recreation Committees regarding events such as 'closing the roads.' It is frustrating and tiring out volunteers."

Survey Results for Volunteer Organizations

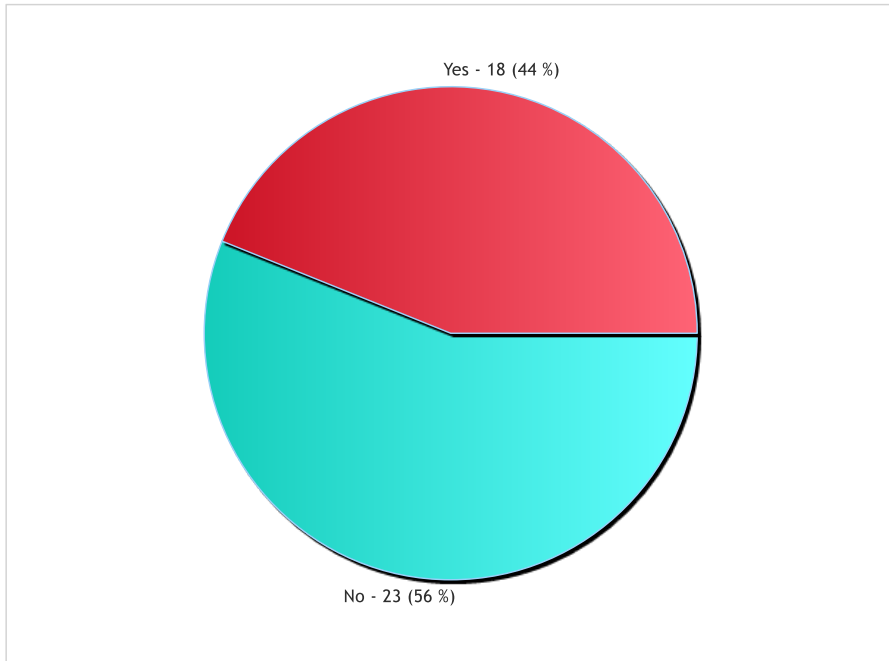
CQ1. Does your organization have a business or a strategic plan?



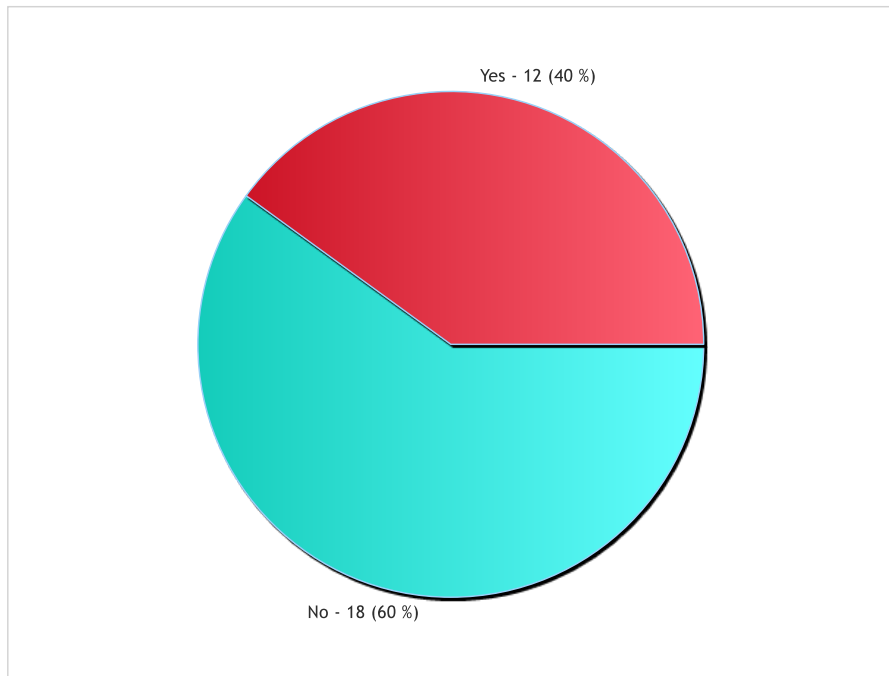
CQ2. How many years has your organization been in operation in this community?



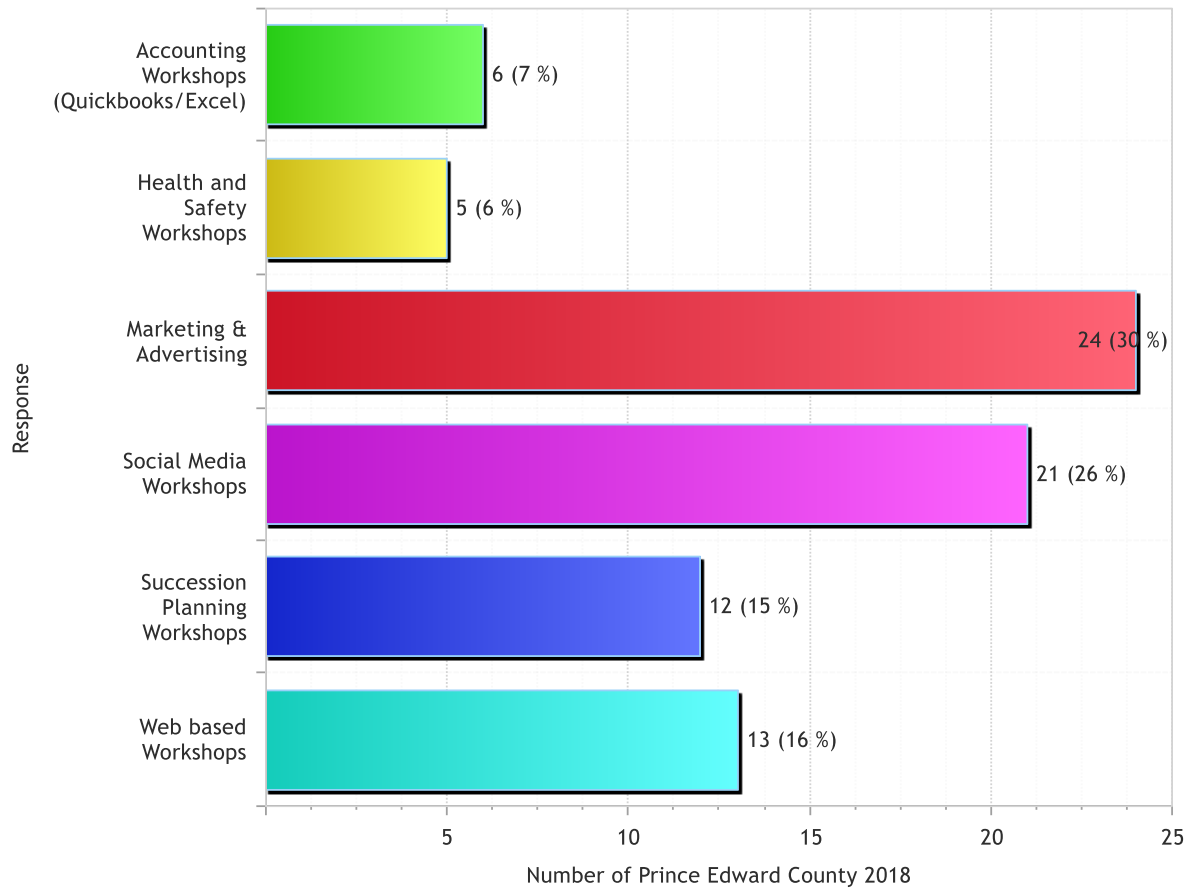
CQ12. Have you identified an employee or individual suitable for incorporating into a succession plan for your business?



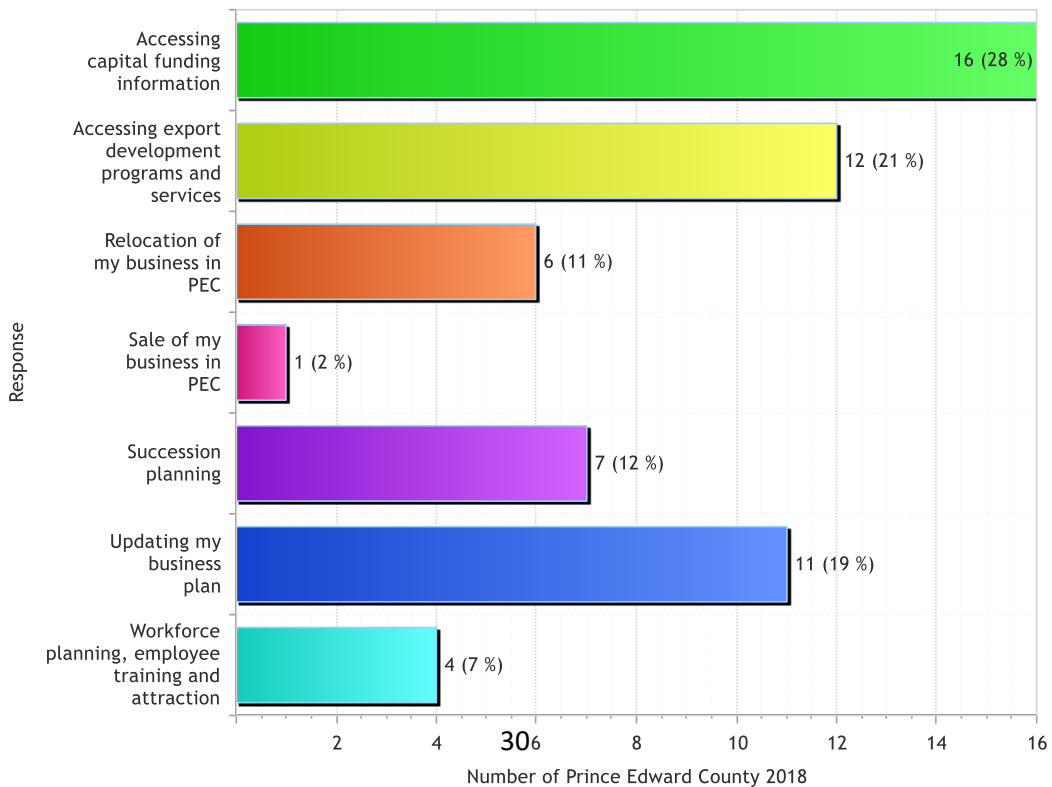
CQ15. Are you looking for a more ideal business location?



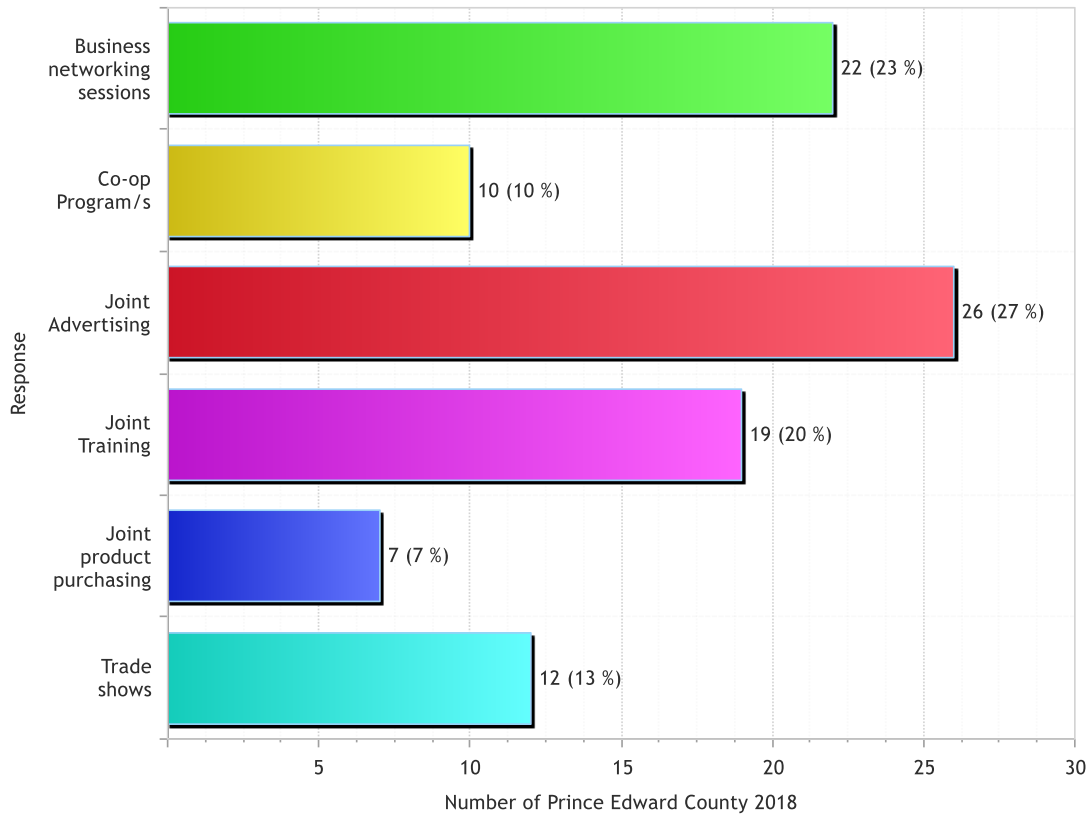
CQ16. What assistance or opportunities would be beneficial to support your business? - Workshops that would be beneficial...



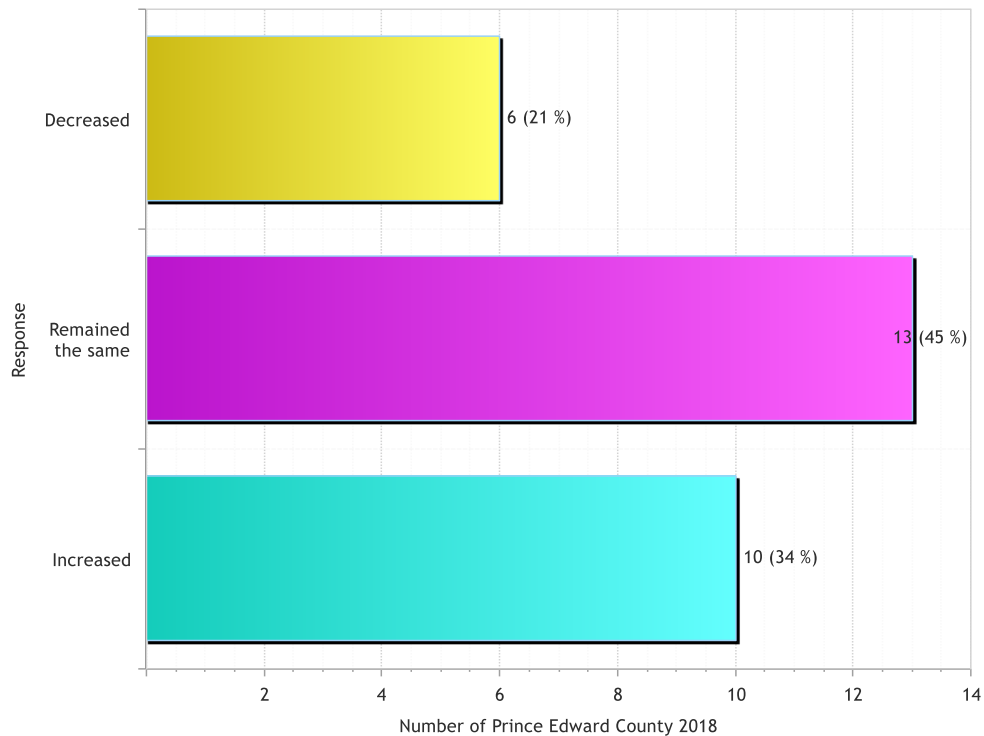
CQ16. What assistance or opportunities would be beneficial to support your business? - I need help with:



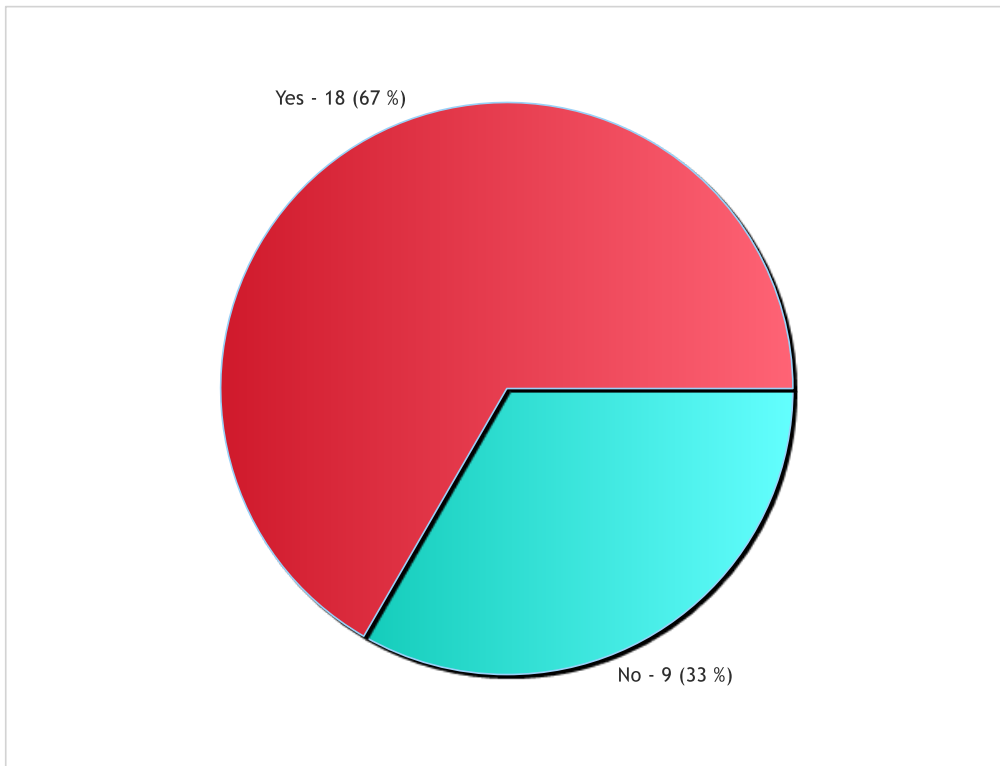
CQ16. What assistance or opportunities would be beneficial to support your business? - I would participate in the following:



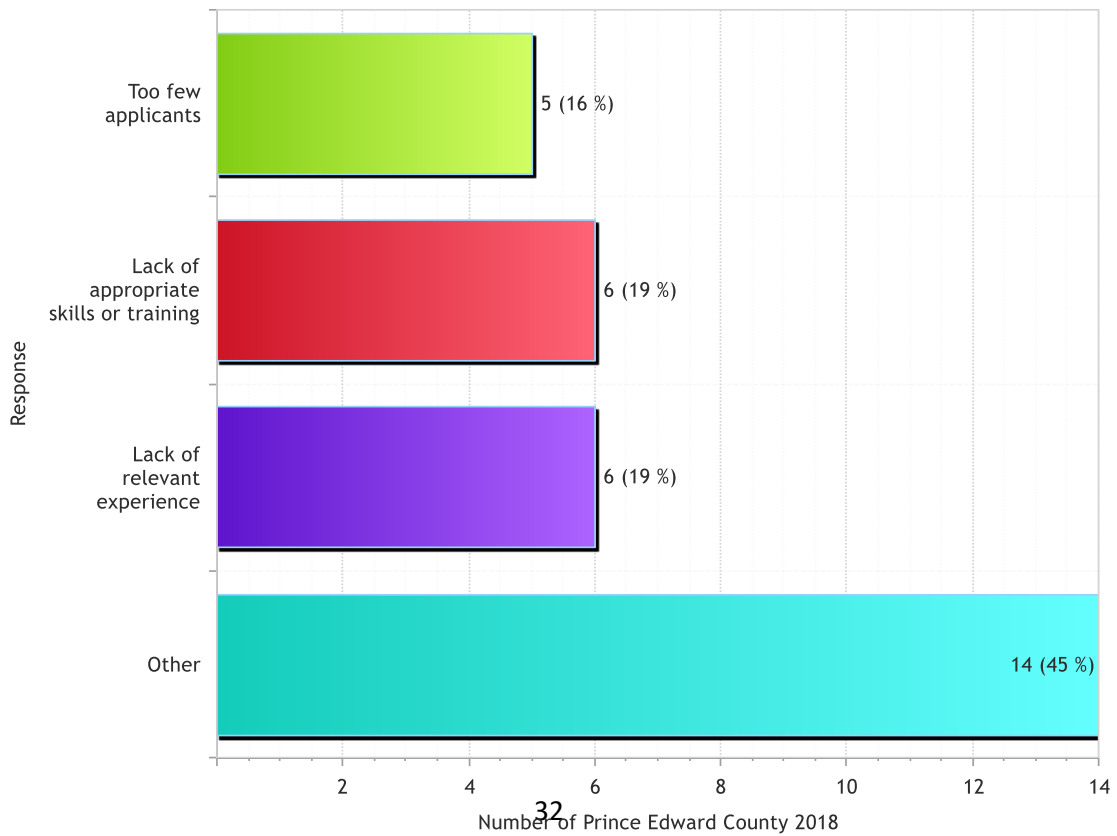
CQ17. During the past 3 years, has the number of volunteers in this business/organization increased, decreased or stayed the same?



CQ19. Does your business currently have difficulty recruiting volunteers?



CQ19. Does your business currently have difficulty recruiting volunteers? - How would you describe your company's hiring challenges? (Select all that apply)



Does your business/organization currently have difficulty recruiting volunteers?

- Lack of recruitment strategy
- Reliability
- Commitment. Have to try not to overwhelm people with work.
- Lack of time and commitment
- Specific position
- Lack of commitment/Millennials don't choose to volunteer
- Volunteer fatigue as the workload is demanding
- Getting word out, as the community is constantly changing
- Number of volunteers and number of hours that are required to dedicate

What occupations do you have difficulty in recruiting for your organization?

- Coaches
- Steering Committee Volunteers
- Board members
- Vice Chair
- Treasurer
- Board Chair
- General volunteers
- Executive Director
- Set builders with theatre backgrounds
- Board of Directors
- Tech, lighting people
- Volunteers to run shows
- Musicians, costumers