



Town of South Bruce Peninsula

Assessment of Competitive Position

Prepared For: Town of South Bruce Peninsula

Date:

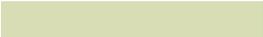
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1 Introduction

The Town of South Bruce Peninsula is committed to fostering economic development throughout its community. As part of its efforts to attract and encourage investment to the municipality, the Town of South Bruce Peninsula has undertaken to create a *Community Profile* that will assist in the development of an investment strategy for the Town and allow the implementation of marketing and promotional initiatives designed to attract interest and investment to the region.

The immediate goal of the project is to develop an accurate, credible, technical, informative and visually appealing community profile that can be used by the Town Councillors and or staff to promote the community as a good place to live, play and do business.

The completion of this study is critical to providing the Town with baseline information that will enable it to move forward in its efforts to attract new investment, create jobs in the community and stabilize the local tax base. Overall, the study will consist of two primary phases:

- A Data Gathering Phase which consisted of identifying local assets; and
- A Data Analysis Phase that consisted of a SWOT analysis and an assessment of local competitive advantages

In developing a Community Profile for the Town of South Bruce Peninsula we have considered similar documents collected from a wide variety of Ontario, as well as the recommendations developed by the Province's Ministry of Economic Development and Trade and the Ministry of Agriculture, Food and Rural Affairs as to the suggested content for Community Profiles.

2 Community Profile

In developing a community's profile, consideration must be given to providing information that relates to:

COMMUNITY OVERVIEW: A few introductory sentences that assist the prospect in learning about the uniqueness of a particular community.

DEMOGRAPHICS: The presentation of population numbers to help the prospect capture a sense for the community's change during the last decade. Tax information indicates a key cost of doing business in the community while labour force information helps a prospect determine their ability to competitively compete for a workforce that meets their need.

TRANSPORTATION INFRASTRUCTURE: Information on trucking firms and rail providers helps a firm determine their ability to meet particular shipping requirements within a reliable and competitive market place. Commercial and local airport information assists in determining the ability to transport personnel, customers, and products as needed by the firm.

UTILITIES: Every industrial firm has its own unique demand for water, sewer, electric, communications, and natural gas use. The company needs to know the service providers and levels of service in order to determine the impact the firm's manufacturing process demands will have on the community. Of course, the firm must also determine that the community has the capacities to meet the utility demands of the planned facility. In addition, there is interest in determining if the community has excess utility capacities to allow for future growth by both the community and the firm.

LABOUR: Information on educational institutions helps a firm assess the ability of a community to meet educational needs of the employee's family. Higher education, medical services, and a list of major manufacturers in the area will also help a prospective firm to understand the area labour market.

MAP: A map should be included that easily identifies the location of the community. Major highways and larger urban areas should be included as a point of reference. These references make it easier for the firm to remember the community, particularly if it is in a rural location.

Taking this into consideration the Town of South Bruce Peninsula's Community Profile is comprised of the following components:

- **A Welcome Message From Mayor**
 - Town of South Bruce Peninsula Council 2003-2006

- **At a Glance**
 - Location (Including Regional Map)
 - Climate
 - Population and Labour Force
 - Major Employers
 - Agricultural Land Base
 - Key Points of Interest
 - Local Services

- **Local Demographics**
 - Population By Age
 - Education Levels
 - Labour Force By Age
 - Labour Force By Occupation
 - Labour Force by Industry
 - Income Statistics
 - Economic Indicators
 - Housing Statistics
 - Building Permit Activity

- **Our Business Environment**
 - Property Tax
 - Cost Per Acres of Commercial / Industrial Land
 - Electricity
 - Natural Gas
 - Water & Sewer

- **Trade and Commerce**
- Financial Services

- **Creating an Environment for Business**
 - Wiarton-Keppel Airport Initiative
 - Peninsula Shores District High School
 - Wiarton Hospital

- **Quality of Life**
 - Health
 - Education
 - Social Services
 - Fire & Safety
 - Housing
 - Libraries
 - Parks & Recreation
 - Events & Festivals

- **Accommodation**

- **Key Contacts**

3 Competitive Positioning

3.1 Macro Demographic Comparison

In completing an assessment of the Town of South Bruce Peninsula's competitive position for attracting and sustaining business investment, it is important to identify the locational elements that demonstrate the strengths and weaknesses of the Study Area relative to other comparative municipalities. This often focuses on select demographics and labour force statistics.

For the purposes of this discussion we have positioned the Town of South Bruce Peninsula within the Stratford-Bruce Peninsula Economic Region, which is a standard unit classified by Statistics Canada. An Economic Unit is defined as an area that contains similar socio-economic characteristics and contains counties which define the zone of influence of a major urban centre or metropolitan area.

The Stratford-Bruce Peninsula Economic Region is comprised of four counties: Perth County, Huron County, Bruce County, and Grey County. Owen Sound (located in Grey County) is the largest city within this Region.

Population Growth

Figure 1 illustrates the rate of population growth in the Town relative to the broader region. In percentage terms the Town has seen a higher rate of growth than the region as a whole.

FIGURE 1
POPULATION GROWTH 1996-2001

	2001	1996	Total Increase	% Change
Town of South Bruce Peninsula	8,090	8,005	85	1.10%
Statford-Bruce Peninsula	286,340	285,627	713	0.03%

SOURCE: urbanMetrics., based on data from Statistics Canada 2001

Population by Age

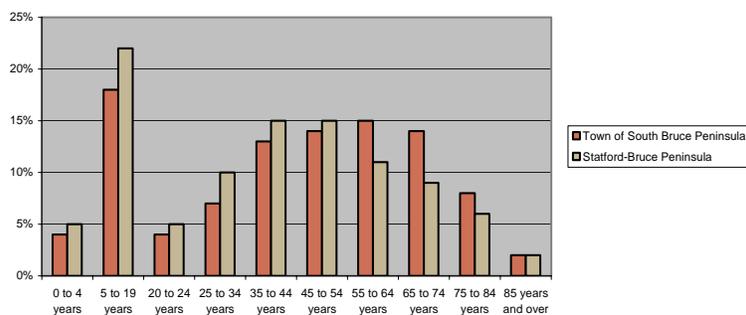
Figure 2 examines the age breakdown of the 2001 population. The largest component of the population at both the local and the regional level is the 5-19 year age group.

The age structure suggests that the Town may face a shortage of labour in the short term as the aging of the workforce coincides with a very small immigration of people aged 20-24 years.

With limited public data available from Statistics Canada with regard to mobility we are not able to determine where this out migration is going. Based on the Economic Regions larger proportion of 20-24 year olds within their overall populations it is fair to suggest that communities like Owen Sound and more particularly the larger urban areas in south western Ontario may be a recipient of a portion of this out migration.

The Town also lags behind the broader region in its percentage of the population that is aged 25-34 years and 35-44. This may also present a problem for the Town in attracting new business investment as these years represent the key productivity years for a labour force.

FIGURE 2
AGE BREAKDOWN (2001)



SOURCE: urbanMetrics inc., based on Statistics Canada 2001

Education Attainment

Figure 3 examines the education attainment of the population 20 years and over. In terms of university attainment, the Town of South Bruce is comparable to the rest of the Economic Region as a whole. The proportion of the Town's population that holds a trade certificate or non-university diploma is higher than the Economic Region suggesting that the Town may have some success in developing and attracting business investment that requires skilled and semi skilled labour.

FIGURE 3
EDUCATION COMPARISONS

	Town of South Bruce Peninsula	Statford-Bruce Peninsula
With a Trade Cert. or Diploma	2,145 (35%)	62,940 (31%)
With a University Degree	640 (11%)	23,045 (11%)

SOURCE: urbanMetrics inc., based on Statistics Canada 2001

Labour Force Indicators

Figure 4 examines the key labour force indicators within the Town and the broader Economic Region. While the Town compares well against the Economic Region with a slightly lower unemployment rate, the Town has a significantly lower employment to population rate or participation rate.

FIGURE 4
PARTICIPATION & UNEMPLOYMENT RATE COMPARISONS

	Participation Rate	Unemployment Rate
Town of South Bruce Peninsula	56.1%	4.3%
Statford-Bruce Peninsula	67.1%	4.4%

SOURCE: urbanMetrics inc., based on data from Statistics Canada, 2001

Labour Force by Occupation

Figure 5 illustrates the labour force by occupation for the Town of South Bruce Peninsula and the Economic Region.¹ The Town of South Bruce Peninsula exceeds the region in terms of the percentage of its labour force that is employed in Sales and Service occupations (28%), Trades, transport and equipment operators (20%) and Management positions (13%).

Upon closer examination, it should be noted that the types of management jobs are mainly managers in retail trade, food and accommodation while, the types of trades jobs include construction, machinists and labourers.

¹ It should be noted that the labour force by occupation relates to the residents of the area and does not necessarily imply that these people also work in the area.

FIGURE 5
LABOUR FORCE BY OCCUPATIONS COMPARISONS

	Town of South Bruce Peninsula		Statford-Bruce Peninsula	
All occupations	3,735	99%	150,150	99%
Management	490	13%	13,420	9%
Senior management	15	0%	1,165	1%
Specialist managers	45	1%	2,475	2%
Managers in retail trade, food and accommodation	290	8%	5,290	3%
Other managers	135	4%	4,465	3%
Business, finance and administrative	350	9%	18,380	12%
Professional	50	1%	1,670	1%
Finance and insurance	70	2%	1,935	1%
Secretaries	80	2%	3,110	2%
Administrative and regulatory	55	1%	1,700	1%
Clerical supervisors	10	0%	600	0%
Clerical occupations	90	2%	9,425	6%
Natural and applied sciences	135	4%	5,345	4%
Professional	50	1%	2,290	2%
Technical	85	2%	3,065	2%
Health occupations	175	5%	7,475	5%
Professional	15	0%	1,105	1%
Nurses and supervisors	80	2%	2,575	2%
Technical occupations	55	1%	1,735	1%
Assisting/support occupations	30	1%	2,060	1%
Social science, education, government and religion	230	6%	8,395	6%
Judges, lawyers, psychologists, social workers, ministers of religion, policy and program officers	55	1%	2,020	1%
Teachers and professors	105	3%	4,420	3%
Paralegals, social service workers and occupations in education and religion	75	2%	1,950	1%
Art, culture, recreation and sport	55	1%	2,985	2%
Professional occupations	0	0%	1,170	1%
Technical occupations	50	1%	1,770	1%
Sales and service	1,050	28%	33,680	22%
Supervisors	20	1%	870	1%
Wholesale, technical, insurance, real estate sales, retail, wholesale and grain buyers	75	2%	2,510	2%
Retail salespersons and clerks	190	5%	5,515	4%
Cashiers	80	2%	2,255	1%
Chefs and cooks	65	2%	2,290	2%
Food and beverage service	145	4%	2,580	2%
Protective services	35	1%	1,585	1%
Travel and accommodation, recreation and sport attendants	35	1%	640	0%
Childcare and home support	105	3%	3,265	2%
Other sales and service	300	8%	12,160	8%
Trades, transport and equipment operators and related	765	20%	27,260	18%
Contractors and supervisors	15	0%	1,195	1%
Construction trades	145	4%	4,160	3%
Stationary engineers, power station operators, electrical and telecommunications	50	1%	2,375	2%
Machinists, metal forming, shaping and erecting	100	3%	2,835	2%
Mechanics	90	2%	4,160	3%
Other trades	45	1%	1,415	1%
Heavy equipment, crane operators and drillers	85	2%	1,320	1%
Transportation equipment operators, excluding labourers	140	4%	5,820	4%
Helpers and labourers	90	2%	3,925	3%
Primary industry-specific	240	6%	17,335	11%
Agriculture excluding labourers	190	5%	15,335	10%
Forestry, mining, oil and gas extraction, and fishing, excluding labourers	10	0%	310	0%
Primary production labourers	40	1%	1,685	1%
Processing, manufacturing and utilities	245	7%	15,875	10%
Supervisors in manufacturing	25	1%	1,145	1%
Machine operators in manuf.	120	3%	6,285	4%
Assemblers in manufacturing	70	2%	4,505	3%
Labourers in processing, manufacturing and utilities	35	1%	4,005	3%

SOURCE: urbanMetrics inc., based on Statistics Canada 2001

3.2 Analysis of Industry Specialization

In order to determine the type and degree of industrial specialization/diversity that may be occurring in the Town of South Bruce, location quotients (“LQ’s”) have been calculated to identify and measure the concentration of industries.

Location Quotients are a commonly used tool in regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. In this case, location quotients will be used to indicate which industry sectors in the Town have a greater labour force concentration relative to the overall average for the broader economic region.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity relative to the regional average. A location quotient of over 1.25 may further indicate that the sector is serving needs that extend beyond the boundaries of the municipality (i.e. the sector is "exporting" goods and services). Location Quotients of 5 and over are very high and may suggest a high level of local dependence on the sector.

Location quotients equal to 1.0 for a given sector suggest that the Town has the same concentration of economic activity as the region. Finally, a location quotient of less than 1.0 indicates a concentration of economic activity that is less than the regional average and may indicate that local needs are not being met by that sector.

In theory, industrial concentration that is greater than the regional average represents the export base of the participating municipalities. Businesses that make up this export base have likely chosen to locate in the area due to certain regional competitive advantages. These competitive advantages can be used to attract further investment in the future, in the same or complimentary industries.

3.2.1 Calculation of Location Quotients

Figure 6 shows the calculated LQ’s for the Town of South Bruce Peninsula. The Town has a comparatively high concentration of labour within *Mining oil and gas extraction; Accommodation and food service; and Professional, scientific and technical services.*

Although the *Agriculture, forestry, fishing, and hunting* industry has a low LQ, it does not mean that a low number of people work in this industry. In fact, there are a significant number of agriculture related jobs in the Town of South Bruce Peninsula. The LQ is low because the Stratford-Bruce Peninsula Economic Region has a higher ratio of agricultural jobs.

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**FIGURE 6
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

BROAD INDUSTRY SECTOR	LOCATION QUOTIENT
21 Mining and oil and gas extraction	9.92
72 Accommodation and food services	2.28
54 Professional, scientific and technical services	1.52
81 Other services (except public administration)	1.43
44-45 Retail trade	1.37
71 Arts, entertainment and recreation	1.36
53 Real estate and rental and leasing	1.33
62 Health care and social assistance	1.32
23 Construction	1.29
61 Educational services	1.23
91 Public administration	1.13
52 Finance and insurance	0.59
56 Administrative and support, waste management and remediation services	0.54
11 Agriculture, forestry, fishing and hunting	0.47
51 Information and cultural industries	0.44
48-49 Transportation and warehousing	0.35
31-33 Manufacturing	0.33
41 Wholesale trade	0.28
22 Utilities	0.16
55 Management of companies and enterprises	-

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

3.2.2 Location Quotients with a High Concentration

As noted previously a location quotient that is greater than 1.0 for a given sector typically indicates a local concentration of economic activity relative to a broader economic area and often comprises the export base for a community. Based on the sector performance noted in Figure 6, we have profiled the key sub-sectors in Figures 6-1 through 6-11. Again only those sub-sectors with a location quotient that exceeds 1.0 are presented.

Mining and Oil and Gas Extraction

**FIGURE 6-1
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

21 Mining and oil and gas extraction	LOCATION QUOTIENT
2123 Non-metallic mineral mining and quarrying	10.00

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001, Place of work data

Accommodation and Food Services

FIGURE 6-2
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

72 Accommodation and food services	LOCATION QUOTIENT
7212 RV (recreational vehicle) parks and recreational camps	10.19
7211 Traveller accommodation	4.38
7221 Full-service restaurants	1.91
7222 Limited-service eating places	1.13

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Professional, Scientific, and Technical Services

FIGURE 6-3
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

54 Professional, scientific and technical services	LOCATION QUOTIENT
5417 Scientific research and development services	8.89
5411 Legal services	2.34
5414 Specialized design services	2.12
5412 Accounting, tax preparation, bookkeeping and payroll services	1.43
5416 Management, scientific and technical consulting services	1.33
5415 Computer systems design and related services	1.33
5413 Architectural, engineering and related services	1.04
5419 Other professional, scientific and technical services	0.90

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Other Services (Except Public Administration)

FIGURE 6-4
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

81 Other services (except public administration)	LOCATION QUOTIENT
8114 Personal and household goods repair and maintenance	4.23
8134 Civic and social organizations	4.04
8141 Private households	3.28
8121 Personal care services	1.51
8131 Religious organizations	1.36
8111 Automotive repair and maintenance	0.93

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Retail Trade

**FIGURE 6-5
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

44-45 Retail trade	LOCATION QUOTIENT
4512 Book, periodical and music stores	3.56
4441 Building material and supplies dealers	3.45
4442 Lawn and garden equipment and supplies stores	2.78
4531 Florists	2.62
4461 Health and personal care stores	2.62
4471 Gasoline stations	2.52
4539 Other miscellaneous store retailers	1.93
4532 Office supplies, stationery and gift stores	1.71
4453 Beer, wine and liquor stores	1.71
4431 Electronics and appliance stores	1.69
4451 Grocery stores	1.51
4481 Clothing stores	1.25
4529 Other general merchandise stores	1.12
4521 Department stores	0.66
4411 Automobile dealers	0.52

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Arts, Entertainment and Recreation

**FIGURE 6-6
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

71 Arts, entertainment and recreation	LOCATION QUOTIENT
7131 Amusement parks and arcades	44.46
7139 Other amusement and recreation industries	2.78
7112 Spectator sports	2.69

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Real Estate and Rental and Leasing

**FIGURE 6-7
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

53 Real estate and rental and leasing	LOCATION QUOTIENT
5312 Offices of real estate agents and brokers	2.96

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Health Care and Social Assistance

FIGURE 6-8
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

	LOCATION QUOTIENT
62 Health care and social assistance	
6215 Medical and diagnostic laboratories	6.35
6219 Other ambulatory health care services	5.23
6241 Individual and family services	2.40
6214 Out-patient care centres	2.16
6244 Child day-care services	1.86
6212 Offices of dentists	1.76
6220 Hospitals (6221 to 6223)	1.36
6213 Offices of other health practitioners	1.23
6230 Nursing and residential care facilities (6231 to 6239)	0.72
6211 Offices of physicians	0.55

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Construction

FIGURE 6-9
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

	LOCATION QUOTIENT
23 Construction	
2311 Land subdivision and land development	8.08
2321 Site preparation work	2.78
2312 Building construction	2.54
2323 Building exterior finishing work	1.85
2322 Building structure work	1.40
2313 Engineering construction	1.02
2325 Building equipment installation	0.54

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Educational Services

FIGURE 6-10
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA

	LOCATION QUOTIENT
61 Educational services	
6111 Elementary and secondary schools	1.36

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

Public Administration

**FIGURE 6-11
LOCATION QUOTIENTS - TOWN OF SOUTH BRUCE PENINSULA**

	LOCATION QUOTIENT
91 Public administration	
9141 Aboriginal public administration	3.56
9120 Provincial and territorial public administration (9121 to 9129)	1.42
9130 Local, municipal and regional public administration (9131 to 9139)	1.13

SOURCE: urbanMetrics inc., based on data from Statistics Canada 2001 Census of Canada, Place of Work data

3.2.3 Competitive Advantage Analysis

In addition, to calculating location quotients for the Town, we have also reviewed the competitive advantage analysis provided for the Town of South Bruce Peninsula on the www.reddigov.on.ca website. This analysis uses a system of 12 categories where each category has a unique term that reflects the relative employment concentration and growth of the sector locally and provincially. The categories are intended as descriptive, not prescriptive.

Each term is comprised of a combination of the three values for provincial sector relative growth (PSRG), local sector relative growth (LSRG) and location quotient (LQ). These are grouped in four categories:

1. If PSRG and LSRG are both "leading"

- **"Driving"** if LQ > 1.25 (high)
- **"Accelerating"** if LQ: 0.75-1.25 (medium)
- **"Rising"** if LQ < 0.75 (low)

2. If PSRG is "lagging" but LSRG is "leading":

- **"Evolving"** if LQ > 1.25 (high)
- **"Transitional"** if LQ 0.75-1.25 (medium)
- **"Moderate"** if LQ < 0.75 (low)

3. If PSRG is "leading" but LSRG is "lagging":

- **"Promising"** if LQ > 1.25 (high)
- **"Yielding"** if LQ 0.75-1.25 (medium)
- **"Modest"** if LQ < 0.75 (low)

4. If PSRG and LSRG are both "lagging":

- **"Challenging"** if LQ > 1.25 (high)
- **"Vulnerable"** if LQ 0.75-1.25 (medium)
- **"Marginal"** if LQ < 0.75 (low)

Based on this analysis, the following industry sectors were identified as 'driving' the Town of South Bruce economy:

- **Wood Industries** – in particular sawmills, planing & shingle mills, sash, door and other millwork, wooden box and pallet industries and furniture and fixtures industries;
- **Construction Industries** – in particular building, developing & general construction, and residential building & development; and
- Trade and Contracting Industries – in particular site work.

In addition, the following industry sectors were identified as 'accelerating' or 'rising' in the local economy:

- **Fabricated Metal Product Industries** - in particular hardware, tool and cutlery industries;
- **Electrical & Electronic Industries** – in particular electronic equipment industries;
- **Wholesale Trade Industries** – in particular petroleum product industries, petroleum products, household goods; and
- **Food & Beverage Service Industries** – in particular food services.

Lastly, the following industry sectors were identified as 'evolving' in the local economy:

- **Agricultural & Related Service Industries** – in particular agricultural industries and service industries incidental to agriculture;
- **Mining, Quarrying & Oil Well Industries** – in particular quarry and sand pit industries and stone quarries.

These industry sub-sectors should form the basis for the Town's business retention and expansion efforts.

Having determined the current concentration of economic activity within the Town of South Bruce Peninsula, the following section provides an understanding of the key opinions of local stakeholders as to the strengths and weaknesses of the local business environment as well as the Town's ability to attract and sustain new business investment.

4 Stakeholder Consultations (SWOT Analysis)

To further substantiate our competitive assessment, a community SWOT Analysis (Strengths, Weaknesses, Opportunities, and Threats) was undertaken to examine the Town of South Bruce Peninsula's overall ability to support the attraction and retention of business and tourism. This has been accomplished through a review of material and reports provided by the Town of South Bruce Peninsula and further supplemented by interviews with local businesses and stakeholders. Overall, the results of this analysis indicate that more community support is needed to help promote tourism, diversify the economy, and create local employment opportunities.

STRENGTHS

- **Natural Beauty:** The Town of South Bruce Peninsula's range of green spaces, beaches, lakes, parks, and agricultural lands helps to attract residents, businesses, and tourists to the area.
- **Strong Sense of Community:** The strong sense of community amongst local residents and businesses strengthens the Town's social and economic networks.
- **A large Amount of Inexpensive Land:** A large amount of inexpensive commercial, industrial, residential and agricultural land has helped attract investors and residents to the Town of South Bruce Peninsula.
- **Festivals:** The large number of festivals (i.e. Warton Willie Festival) in South Bruce Peninsula helps promote community prosperity, tourism, and economic development.
- **Tourism:** The strong tourism industry in South Bruce (particularly in Sauble Beach) has been a key employment generator for the area.
- **Recreation:** The vast array of recreational opportunities (i.e. golfing, hiking, snowmobiling, and boating) has significantly improved the Town's quality of life, which in turn, has helped promote business investment.

WEAKNESSES

- **Poor Infrastructure:** Poor infrastructure (i.e. roads, sewers, and water) has hindered the Town's ability to grow and attract businesses and residents. This has negatively impacted the competitive position of the Town of South Bruce Peninsula.

- **One Season Community:** The number of residents and tourists in the Town of South Bruce Peninsula is significantly higher in the summer than the rest of the year. This makes it difficult for businesses to successfully operate.
- **Lack of Opportunities for Youth:** Employment and post-secondary education opportunities in the Town of South Bruce Peninsula are poor. As a result, little opportunities exist for youth. Consequently, they often migrate to larger urban centres for employment and education opportunities.
- **Lack of Coordination:** A lack of coordination and cooperation exists between different jurisdictions and businesses in the Town of South Bruce Peninsula, which has a negative impact on economic development in the area.
- **Lack of Website Development/Promotion:** There is a lack of website material that promotes economic development and tourism for the Town of South Bruce Peninsula and the Bruce and Grey County Region as a whole. More emphasis on website development is needed, with a proper marketing theme.
- **Inability to Handle Summer Activity:** There are insufficient tourist related services, such as accommodations, retail stores, restaurants, and infrastructure to accommodate the high number of tourists in the summer. Improvements should be addressed in order to minimize the threat of less people visiting.

OPPORTUNITIES

- **Promotion of the Natural Environment:** Greater consideration should be given to promoting industries related to the Town South Bruce Peninsula's natural environment. For instance, eco-tourism (i.e. hiking, camping, and water related activities) and environmental related jobs could be formed (especially for youth).
- **Further Enhance and Promote Sauble Beach:** Sauble Beach is a significant economic generator of employment for the Town of South Bruce Peninsula. An opportunity to capitalize on this should be further explored. For instance, improving services and amenities at Sauble Beach, such as the board walk, parking/traffic, advertising/signage, street improvements, infrastructure services, pedestrian services, lighting, landscaping, and architecture could significantly increase the popularity of this area, which would result in more jobs for local residents.
- **Warton-Keppel District Airport Development:** The Warton-Keppel District Airport has been given approval to offer industrial and resort acreage for development. This includes a Land Lease Development plan that is suitable for a resort hotel, a possible golf course, a bonded warehouse, a combined home/plane site for recreation flyer retirees, an inbound soft adventure

tourism operation, and any dry industries. This will be a major economic boost for the area likely resulting in hundreds of new jobs. Moreover, the expected increased tax base will permit municipal upgrading in many services.

- **Regional Coordination:** A regional economic development organization covering the area of Grey and Bruce County is needed. This will help ensure the marketing of the broader region as both a business and tourist destination, which will help Grey and Bruce County compete against other regions. Further, this could help trigger more investment in advertising, promotion, and website development.
- **Aggregate Resources:** There are many jobs that relate to quarrying in the Town of South Bruce Peninsula. It is important to keep this industry competitive to allow for future expansion. In fact, quarry tours could be promoted to help support this industry and create new jobs.
- **Agriculture:** Opportunities exist to further support the agricultural industry in the Town of South Bruce Peninsula. This could be accomplished by increasing government grants and incentives for small farms. Certain industries, such as agri-businesses, organic farms, and farm markets could also be promoted.
- **Aging Population:** With the aging population there is an opportunity to market the area for early retirees and tourism. The local tourism sector should focus its marketing to those aged between 45 and 65. This should be done by profiling bed and breakfasts, golf courses, hiking, natural areas, water activities, and nature trails in the area.

THREATS

- **Shortage of Skilled Labour:** There is a shortage of skilled labour and ongoing difficulties associated with recruiting employees for positions with local businesses. This is mostly due to the out-migration of youth and the lack of education opportunities that exist. This has an impact on business investment and the quality of life in the Town of South Bruce Peninsula.
- **Poor Planning and Zoning:** There is a lack of planning for industrial development in the Town of South Bruce Peninsula. For instance, no industrial parks or designated employment lands exist (except for the recently approved lands at Warton Airport). Stringent planning restrictions have reduced the opportunities for industrial growth in the area.
- **Competition from Owen Sound:** Business growth and expansion in nearby Owen Sound poses a threat to the survival of small businesses in the Town of South Bruce Peninsula. For instance, many businesses in the Town of South Bruce Peninsula have difficulty competing with the large grocery stores, department stores, and hardware stores in Owen Sound.

- **High Taxes:** Concerns about high tax rates for businesses and residents (particularly on waterfront properties) in the Town of South Bruce Peninsula exist. These high tax rates can hinder future investment, which in turn, negatively impacts local businesses and tourist related services.

- **Shortage of Parking:** There is a shortage of parking in high profile areas, such as Sauble Beach. Concerns have also been raised about the high price of parking. Without an effective parking and transportation plan, visitors might be discouraged from these areas.

5 Investment Readiness

5.1 Summary of Findings

The results of our Competitive Assessment suggest that the Town is in a relatively good position to grow and prosper over the next decade. In particular, our analysis revealed that:

- There is a strong rate of population growth relative to the region as a whole;
- The proportion of the Town's population that holds a trade certificate or non-university diploma is higher than the Economic Region suggesting that the Town may have some success in developing and attracting business investment that requires skilled and semi skilled labour.
- The Town has a comparatively high concentration of labour within Mining oil and gas extraction; Accommodation and food service; and Professional, scientific and technical services.
- That the following industry sectors were seen as 'driving' the local economy:
 - Wood Industries – in particular sawmills, planning & shingle mills, sash, door and other millwork, wooden box and pallet industries and furniture and fixtures industries;
 - Construction Industries – in particular building, developing & general construction, and residential building & development; and
 - Trade and Contracting Industries – **in particular site work.**
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In positioning the Town for improved prosperity, there are some key issues that must also be considered:

- The current age structure suggests that the Town may face a shortage of labour in the short term as the aging of the workforce coincides with a very small immigration of people aged 20-24 years;
- Local businesses are experiencing ongoing difficulties associated with recruiting employees for available employment;
- The Town has not planned for industrial development. There are no industrial parks or designated employment lands exist and perceived stringent planning restrictions have reduced the opportunities for industrial growth in the area;
- The Town's website should be improved in a way that promotes economic development and tourism on a regional basis.