GROWING THE CREATIVE-RURAL ECONOMY IN PRINCE EDWARD COUNTY

STRATEGIES FOR INNOVATIVE, CREATIVE AND SUSTAINABLE DEVELOPMENT

PREPARED FOR THE P.E.L.A. INSTITUTE FOR RURAL DEVELOPMENT

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Preface
This report was written and compiled by the students in the Geography Department’s 337 class (Regional Development Planning and Policy) at Queen’s University held in the Winter Term of 2008 under the guidance of the instructor, Dr. Betsy Donald, and teaching assistants Jacinthe Beyea and Candice Christmas. The final report was presented to Dan Taylor, of the Prince Edward County Economic Development Office and Craig Desjardin, of the Prince Edward County, Lennox and Addington Community Future Development Corporation (PELA CFDC) on April 4, 2008.

The students were divided into five teams:

- **Quantitative Data** – Analysed and presented quantitative data for a statistical portrait of PEC working in collaboration with the other teams and designed a Wine Index for comparing Ontario wine regions.
- **Human Capital** – Explored the situation and offered solutions for PEC in areas of demographic change, education, health care provision, and explored the theoretical roots of a creative rural economy.
- **Innovation** – Profiled local innovative firms, analysed the ways in which PEC firms are innovative, examined the emergence of a wine cluster in PEC, and explored policy initiatives to encourage innovative initiatives in The County.
- **Tourism** – Examined PEC’s main tourism attractions, identified target groups of potential tourists, and recommended strategies for increasing tourism in a sustainable manner.
- **Consolidation** – Coordinated the work of the other teams, compiled the teams’ contributions into the final report, ensured consistency and flow, and presented the findings to the clients.

Methodology
This report is based on the academic literature on regional economic development and the knowledge economy, quantitative data acquired through Statistics Canada and several interviews conducted primarily with persons of prominence in the PEC community, and observations from a fact finding trip to PEC on February 8, 2008.
Executive Summary
Prince Edward County (PEC) is at a critical point in its history. In recent years there has been an explosion of investment in The County as it has emerged as Ontario’s newest wine region, as a tourist centre offering a unique mix of culinary, artistic, and heritage amenities, and as a potential site for a knowledge-intensive creative rural economy. Strategies must be implemented to ensure PEC capitalizes on its unique quality of place while maximizing economic growth. This report will describe PEC’s current situation, highlighting its inherent strengths and identifying its areas of weakness in order to offer constructive solutions to grow the Creative Rural Economy in PEC.

Chapter Two: The Creative Rural Economy
Richard Florida’s concept of the ‘creative class’ originally described metropolitan regions, but growing literature has emerged regarding the role of rural regions in producing and attracting creativity. PEC is poised to develop further as an economy centered on this ‘creative class’ because of the abundance of wineries, galleries, theatres, innovative firms, and various festivals in the region. As PEC experiences trends of youth out-migration, the attraction of pre-retirement and retired populations—groups that map well onto rural lifestyles—remains a key strategy to creatively revitalize The County’s economy. Promoting The County as an ‘artistic haven’ will help to attract other ‘creatives’, and will in turn generate economic growth. A number of strategies are presented in this report to foster a creative environment in PEC. One such strategy is to promote a more adventurous economic climate by supporting entrepreneurial activity.

Chapter Three: Youth Retention Strategies
A daunting challenge for PEC is the training and retention of youth. Most youth (15-24) leave The County for educational pursuits or employment opportunities elsewhere, creating an imbalance in the demographic make-up of PEC. Strategies to keep young people within the County should include: the promotion of educational opportunities such as co-op programs in high schools, and the creation of partnerships with nearby post-secondary institutions to develop satellite campuses, as well as promoting youth entrepreneurship. Youth in PEC must be offered more employment opportunities and educational options. This, in turn, will help The County to rejuvenate its economy.

Chapter Four: Servicing an Aging Population
In recent years, the population of PEC has experienced an influx of mature residents (aged 55+). This phenomenon presents new challenges for The County to overcome. PEC must learn how to integrate this demographic group into knowledge intensive and highly skilled occupations. Along with this aging population arise several concerns for PEC. One such issue is the accessibility and availability of healthcare services. Rural regions tend to lack medical resources and The County must develop creative solutions to support residents’ needs. The Community Care for Seniors Program should be expanded to meet the growing demands for transportation to and from medical appointments. Another challenge for The County is physician retention and attraction. To accomplish this, a focus on providing physicians
attractive incentives to practice and live in PEC must be adopted. As well, PEC should consider fostering links with nearby medical schools and encourage young secondary school students to pursue health related professions and services as a career path.

Chapter Five: Innovation
PEC has created an environment where innovative firms can flourish. While there are numerous examples of such firms in The County, four were chosen as areas of focus for this report. It is recommended that PEC work towards expanding the existing wine industry to act as a catalyst for further innovative developments. It is the responsibility of the region to support healthy growth and to monitor development. Additionally, broadband internet would provide the basis for faster and more effective business practices in PEC, making the region more attractive to potential innovative firms looking to relocate, and providing them with the infrastructure to reach their markets.

Chapter Six: Tourism
Tourism is an integral part of PEC’s economic prosperity, attracting more than 440,000 visitors to The County annually. With such a high influx of visitors, the main challenge for PEC in this sector is to maintain an environmentally sound tourism policy, while still continually adapting and transforming the tourism sector to match the demands of the consumer. To better cater to tourists, PEC should consider the creation of themed vacation packages to provide an inclusive and worry-free vacation. As well, low-impact tourism should be considered to preserve the environmental integrity of The County. Activities like ecotourism, cycle tourism, and agri-tourism are all excellent ways The County can stimulate the economy whilst protecting its unique environment.
CHAPTER ONE: A Profile of Prince Edward County (PEC)

HIGHLIGHTS

- **PEC's population is growing steadily at a rate below the provincial average, but comparable to growth rates in other Southeastern Ontario communities.**

- **The past twenty years have seen a demographic shift towards an older population that has resulted from natural generational aging and migration trends. This trend is anticipated to continue over the next twenty years.**

- **PEC’s economy is strong and growing, with notable areas of strength in agriculture, tourism, commerce and industry, and arts and culture that support each other in a diverse and dynamic economy.**

*This Chapter gives a general profile of the socioeconomic makeup of PEC.*

1.1 Demographic Profile

The success or failure of a region’s economy is largely determined by the availability of an educated, skilled, work-aged population. PEC’s most prominent economic issues are directly related to demographic trends. A notable in-migration of retirement-aged professionals, and a simultaneous out-migration of educated youth, has negatively affected the productivity of PEC’s economy. 1 It is important to understand the demographic trends of The County in order to effectively situate the findings and recommendations that follow in this report.

In 2006, PEC had a permanent population of 25 496 people. From 2001 to 2006, PEC’s population grew by 2.4%. Although the growth rate is limited and below the provincial average of 6.6%, this minor increase is noteworthy given that the population shrank by 0.6% between 1996 and 2001. 2 In addition, a growth rate of 2.4% is comparable to growth rates of other Southeastern Ontario jurisdictions as shown in Figure 1-1.
The structure of the population is illustrated in Figure 1-2, showing the age and gender distribution of PEC. This graph demonstrates how PEC is home to a high proportion of older persons (45 years and over) relative to the younger population (15-35 years). In addition, compared to other locations in South-Eastern Ontario, PEC’s population has a significantly higher median age (Figure 1-1).

* Indicates data is from the 2001 Census of Canada
The trend in PEC has been towards a progressively older population, as illustrated in Figure 1-3.

Figure 1-3: Population Change by Age Group – PEC 1986-2006. (Statistics Canada, Census 2006)

Migration to and from PEC has been a major contributor to demographic change. Between 2000 and 2005 the trend has been a net in-migration of older persons to the region, particularly in the 45 to 64 year old age group, as illustrated in Figure 1-4. The net in-migration of older people is complicated by the net out-migration of people in the 18 to 24 year old age group.
The shift towards an older population is projected by Statistics Canada to continue through 2026 as shown in Figure 1-5. The increased number of older persons living in PEC combined with the decrease in younger persons is the most significant feature of PEC’s demography and strategies to cope with this trend will play shape PEC’s future.

1.2 Economic Profile
The four pillars of PEC’s economy, as identified by PEC Economic Development are: Agriculture; Tourism; Commerce and Industry; and Arts, Culture and Heritage. These pillars are supported by a strong network of construction industries and service providers.

Agriculture
Since its settlement, agriculture has been the backbone of PEC’s economy, and it continues to be a strong and growing sector today. In 2006, agricultural receipts in The County totaled $76,727,274, an increase in real terms of 3.75% over the 2001 total. The 770 farms in PEC provide 9% of The County’s employment. The dominant agricultural sectors are dairy, beef, and grains and oilseeds, though viticulture and organic farming have been identified as growing sectors.

Viticulture is a particularly dynamic sector and has experienced tremendous growth in recent years. In 2000, 20 acres of land were used for grape production supporting one winery, while today more than 600 acres are producing grapes supporting over a dozen wineries – the legacy of more than $30,000,000 of investment.
Tourism
More than 440,000 annual visitors to PEC spend an estimated $65.4 million per year, making tourism a critical component of the PEC economy. Tourists are drawn to The County by its combination of natural, cultural, and culinary attractions. Natural amenities, notably Sandbanks Provincial Park, offer opportunities for outdoor recreation. A vibrant cultural and arts community, with numerous galleries, the newly renovated Regent Theatre, and an endowment of heritage buildings and sites, enhances PEC’s tourism potential. Finally, the developing viticulture industry has potential as a major tourism draw. Combined with a strong food services sector offering high-quality dining, PEC is witnessing an emerging culinary tourism industry, and employment growth in culinary sectors has grown rapidly (Figure 1-6).

<table>
<thead>
<tr>
<th>Employment in PEC</th>
<th>PEC</th>
<th>Ontario</th>
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<tbody>
<tr>
<td></td>
<td>1996</td>
<td>2001</td>
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<tr>
<td>Art and Culture</td>
<td>45</td>
<td>135</td>
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<tr>
<td>Technical in Arts</td>
<td>105</td>
<td>135</td>
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<tr>
<td>Chefs and Cooks</td>
<td>150</td>
<td>215</td>
</tr>
<tr>
<td>Food And Beverage</td>
<td>195</td>
<td>205</td>
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Figure 1-6: Employment in Arts and Culinary Sectors. (Statistics Canada, Census 1996, Census 2001)

Commerce and Industry
Manufacturing and value-added industries are a key element of PEC’s economic success, representing 11% of total employment. The Essroc cement plant outside Picton is a major employer and its presence is a sign of the region’s vitality and strong business climate. A strong food processing industry has evolved in support of The County’s agricultural base including cheese production, vegetable packaging, and meat processing. Other significant manufacturing firms include Canada’s largest kayak and canoe producer, which has recently relocated to PEC. Many of PEC’s firms demonstrate strong innovative practices. Several of these firms are profiled in Chapter 5.

Arts, Culture, and Heritage
PEC is home to a vibrant artistic and cultural community that includes over a hundred independent artists and galleries, supported by artistic institutions like the Regent Theatre and the annual Jazz Festival. The arts community is growing as creative individuals relocate to The County to take advantage of the quality of life and the local artistic atmosphere – the number of people employed in artistic fields has increased dramatically (Figure 1-6). This strength is complemented by PEC’s rich and storied history, preserved in the buildings that dot its towns and countryside, creating a noteworthy cluster of artistic, cultural and heritage facilities.

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2 ibid
3 ibid
5 ibid
CHAPTER TWO: Growing the Creative Rural Economy

HIGHLIGHTS

- **PEC is developing a new sector in its economy centered on the growing wine industry, galleries, artist studios, music festivals and the revitalization of the Regent Theatre—all indicators of a rising ‘creative class’**.

- **According to Richard Florida’s Creative Class Theory, regions that can attract and retain the creative individuals will prosper. As PEC’s creative economy grows, innovation remains a strong propellant of economic growth in PEC**.

- ‘Artistic havens’ have emerged as mechanisms to attract other creative people and generate economic growth in The County.

- **PEC should consider implementing the Memphis Manifesto’s 10 principles to ensure the creativity is cultivated within The County. These ten principles are:**

  1) “Cultivate and reward creativity”
  2) “Invest in the creative ecosystem”
  3) “Embrace diversity”
  4) “Nurture the creatives”
  5) “Value risk-taking”
  6) “Be authentic”
  7) “Invest in and build on quality of place”
  8) “Remove barriers to creativity”
  9) “Take responsibility for change”
  10) “Ensure that every person has the right to creativity”

The following section will discuss the implications of Richard Florida’s ‘creative class approach’ on PEC’s rural economy. By analyzing the impact of ‘artistic havens’ and the Memphis Manifesto’s ten principles, this section will show the value of applying Florida’s model as a strategy to attract the ‘creatives’. PEC is already promoting this strategy with the creation of new industries that appeal to the demographic that Florida defines as creative.
2.1 The Creative Class

Richard Florida’s ‘creative class approach’ was designed to describe variations in the growth of urban regions based on the presence of ‘creative classes’. The ‘creative class’ is defined as a wide range of people whose occupations vary from scientists to musicians, who display the ability to make individual judgments. This approach has been widely applied in urban planning and development. Florida’s original model was based on what has been called ‘The Three T’s’ – ‘technology, talent, and tolerance. He saw human creativity, diversity, regional openness, and the presence of a university as natural magnets for attracting ‘creative classes’, which lead to the development of human capital.

Before considering the applicability of this theory in the development of a ‘rural creative economy’ in PEC, a critique of Florida’s hypothesis is necessary. Florida is clear that there is no way of predicting what factors might trigger an upsurge in the development of the ‘creative classes’. Critics have pointed out that his theory does not explain development processes and contains no discussion of mechanisms for applying the model. His work is essentially descriptive and retrospective; presenting correlations and associations, but no causal model that can be used in planning. Jeanne Wolfe takes exception to the lack of focus on income disparity and argues that Florida’s strategies to cater to the creative class come at the expense of the working and service classes. Peck provides another important critique. He argues that Florida’s model depends on an army of service workers trapped in ‘low-end’ and poorly paid noncreative jobs. Peck’s work centres on what Florida describes as the non-creative class. While Florida’s theory ignores this supportive class, Peck has attempted to gain a better understanding of the relationship between the creative and non-creative classes. Applying the model to specific communities also poses challenges—specifically, how to measure the Three T’s. One of the main tenets of Florida’s regional economic development theory is the need for universities, and concentrations of gay households. These are gaps that PEC needs to examine strategically and practically, to determine what short and longer term policies and tactics can be developed to attract new populations and develop institutions of higher learning. It is not clear that the ‘Bohemian factor’ is applicable to rural regions or if there may be other factors that drive rural economic development.

It is important here to trouble the term ‘creative class’ and to realize that creativity means forward thinking, idea generation, and sustainable innovation. Creativity can and must be embraced by all sectors of the economy and across all socio-economic levels. While PEC’s consumers are predominantly cosmopolitans who enjoy fine food, the arts, and wine, The County’s innovative inspiration must begin locally. For example, the culinary industry of PEC must find both a local base and an expansive appeal. Inserting local talents and interests into the culinary sector provides “an opportunity for social inclusion in everyday cultural production, distribution and consumption” (Dr. Donald’s article). The entire community must embrace forward thinking and the generation of new, sustainable ideas across all sectors, regardless of socio-economic status. Creativity can be maneuvered to enhance the lifestyle and cultural experiences of PEC residents and tourists alike.
2.2 The Creative Rural Economy

Though the ‘creative economy theory’ was originally developed for major metropolitan areas, scholars such as David McGranahan have applied the creative class theory to rural areas. Some argue that rural areas can generate economic growth by attracting people in creative occupations who value natural amenities. McGranahan’s research shows that non-metropolitan areas with higher proportions of people in creative occupations tend to have higher rates of patent formation, manufacturing technology adoption, and rates of job growth. He also suggests that creative people are moving to rural areas to seek a higher quality of life. In the case of rural centres, the presence of universities is not always a necessary factor for economic growth. In many regions, ‘artistic havens’ have become mechanisms to attract other creative people and generate economic expansion. It is common for rural areas to have youth retention problems, as high school graduates leave for urban centres in search of higher education and employment. This loss in human capital can be reversed by attracting population groups which map well onto rural lifestyles. McGranahan suggests these families, midlife career changers, and retirees can maintain the rural talent base. Many rural communities acknowledge this out-migration, and market to pre-retirement and retired people in an attempt to reverse negative population trends and revitalize the pool of human capital. These strategies should be considered in PEC.

2.3 The Creative Economy and PEC

A recent research paper by Brian Hracs examined the developing creative economy in PEC. He demonstrates that The County is developing a new sector in its economy centered on the growing wine industry, galleries, craft stores, and the revitalization of the Regent Theatre. He argues that these are all signs of a rising inventiveness in the county. This suggests that recent migration into the county by retirees and others from metropolitan areas such as Toronto are beginning to change the picture of human capital in PEC.

While Hracs’s research identifies a rising creative class in PEC, additional research is required to recognize other conditions that may assist/enhance the role of the creative classes in The County’s economic development. Peck’s paper, “Struggling with the Creative Class,” identifies ten principles that communities need to adopt in order to realize the full potential of the creative idea. These ten principles were established by a gathering of creative advocates (The Creative 100) in Memphis in 2003. Below, PEC will be examined within the framework of the Memphis Manifesto’s 10 principles.

2.4 The Ten Creative Principles Adapted to PEC

The ten principles from The Memphis Manifesto are shown below in bold. The connection of each principle to PEC is discussed and recommendations are provided.

1) “Cultivate and reward creativity – Creativity can happen at anytime, anywhere, and it’s happening in your community right now.”

There are clearly creative people in PEC, and with the development of the wine industry, Fifth Town Cheese, and the Clearwater Designs, PEC is actively supporting the creativity of these people. People have moved to PEC to support these industries and to run their businesses. The County’s support of these developments has benefitted the economy and the agricultural sector in particular.
PEC continues to support local events like the annual Picton Fair, and “TASTE!” – a celebration of regional cuisine. These special events are an exposé of creative people and their products; including crafts, quilt making, and local produce competitions. It can be argued that local events represent a niche or the collection of creative individuals who positively influence the human capital of The County.

**Recommendations to cultivate and reward creativity in PEC:**
The County is experiencing great success in the development of this area already, and expansion will only enhance the success of the model. We recommend that PEC continue to invest in and reward creativity of residents and visitors through creative recognition and community business/artistic support. It is important that the local fair, the wine industry, and creative firms continue to grow to aid in fostering forward thinking in The County.

2) **“Invest in the creative ecosystem”** – The creative ecosystem is defined as including arts and culture, nightlife, the music scene, restaurants, artists and designers, innovators, entrepreneurs, affordable spaces, lively neighbourhoods, spirituality, education, density, public spaces and third places.

PEC continues to invest in arts, music, entertainment and public spaces. The County has an arts council, heritage fund, a historical society and a booming artist community. The history and heritage of The County continue to be an important part of the infrastructure. The County has created attractions related to its natural resources; including bird watching, hiking and cycling.

**Recommendations to enhance investment in the creative ecosystem of PEC:**
Given the above stated strengths, The County has the ingredients necessary to develop the social and cultural infrastructure of a creative environment. Additional development of this infrastructure will enhance PEC’s appeal and ability to attract innovative thinkers.

The County should also consider the advancement of education services. While post secondary institutions are ideal, PEC should also consider building its agricultural and culinary niche by instituting meal programs in public schools and high schools. These school lunch programs would use ingredients exclusively from local farmers, and be prepared by local chefs. A program such as this will help to educate students on the unique quality of place and agricultural amenities available in PEC, while simultaneously providing school children with healthy lunches, and supporting local farmers and chefs.

3) **“Embrace diversity”** – Diversity gives birth to creativity, innovation and positive economic impact. People of different backgrounds and experiences contribute a diversity of ideas, expressions, talents and perspectives that enrich communities.

PEC has a fully developed and dynamic tourism industry. In the summer months, people from many different backgrounds, classes, and social groups are visible in The County. Many of these visitors return each year, and a huge sector of Picton’s economy is geared to provide services to these people on a seasonal basis. Many of PEC’s services, jobs, and events revolve around the tourism season. Individually, a visitor may stay for only a day or two, but seasonal cottagers return annually for longer periods of time. Collectively, the population of The County doubles in the summer months with the influx of
visitors. The tourist industry is PEC’s link to diversity with people coming from different places who are interested in different activities. The large and growing population of retirees continues to contribute to the diversity of The County. Retirees enhance the economy of PEC with the different backgrounds, and new interests and ideas they bring to PEC.

**Recommendations to further embrace diversity in PEC:**
PEC has the potential to capitalize on its tourism sector by developing ways to promote interaction between tourists and locals. The County will have to examine ways to accommodate the influx of the seasonal population. To accomplish this, PEC needs to continue to develop support resources, job opportunities, and social programs for incoming residents and seasonal tourists/cottagers. Integrating newcomers into the social fabric of PEC will greatly enhance the community’s appeal as a region that supports diversity.

4) “**Nurture the creatives – Support the connectors.** Collaborate to compete in a new way and get everyone in the game.”

A cultural and experiential gap exists between newcomers from urban centres and the residents of PEC.

**Recommendations to nurture PEC’s creatives:**
The tension between ex-urbanites and lifelong residents of PEC needs to be addressed by creating community-based connections and collaborations. The aging, retired population holds many viable assets that can be used to further develop the ‘creative classes’ of PEC. Integration of ‘newcomers’ into PEC’s local community will enable PEC to harness the diversity of experiences, skills, and innovative ideas that newcomers bring with them. Further study and development of mechanisms to broaden community interaction and collaboration is needed to gain a better understanding of whether or not this particular recommendation will benefit The County’s economy.

5) “**Value risk-taking – The conversion of a ‘no’ climate into a ‘yes’ climate. Invest in opportunity making, not just problem-solving. Tap into the creative talent, technology and energy for your community.**”

Strategies need to be devised and implemented to promote this particular value. Risk-taking must originate from the local government in PEC. Increasingly, providing a ‘yes’ climate will enable and increase the application of creative ideas and ventures within PEC’s economy.

**Recommendations to increase valuable risk-taking in PEC’s economy:**
Additional research needs to be conducted to inform the development of strategies that encourage PEC’s fostering of a more adventurous economic climate. Risk-taking can be fostered by supporting entrepreneurial leadership within The County. Entrepreneurs always run the risk of being unsuccessful, but with guidance from PEC’s Economic Development Office, entrepreneurial activity can be cultivated in a supportive and collaborative environment. To be entrepreneurial, a region must be willing to take risks—ideally, these risks will result in increased investment, successful business ventures (supported by local and tourist populations), and produce positive contributions to the region’s economy.
6) “Be authentic – Identify the value you add and focus on those assets where you can be unique. Dare to be different, not simply the look-alike of another community. Resist monoculture and homogeneity. Every community can be the right community.”

The County has a unique and distinct identity based on a sense of belonging to a rich and diverse rural environment, strong Empire Loyalist roots, strong family ties, and interconnectedness through generations of kinship. PEC also has a sense of place and attachment to the land. There is a common saying ‘that you can take the boy out of The County, but you can’t take The County out of the boy’. The heritage, history, architecture, and natural beauty of The County make it a very unique place and present the possibility of expanding authentic creativity.

**Recommendations to cultivate PEC’s authenticity:**
The identity of The County continues to be the mainstay in the marketing of PEC. Branding should reflect the unique features of The County, an exercise that should be undertaken periodically to reflect change. Further development of marketing strategies to promote PEC’s brand in strategic target markets will foster progress.

7) “Invest in and build on quality of place – Climate, natural resources, and population are important. However, other critical features such as arts and culture, open and green spaces, vibrant downtowns, and centers of learning can be built and strengthened. This will make communities more competitive than ever because it will create more opportunities than ever for ideas to have an impact.”

The County has promoted the protection of its physical heritage and restoration of architecture, a prime example being the reconstruction of The Crystal Palace. The Province is investing in the development of the Sandbanks Provincial Park area and The County has invested in infrastructure (e.g. roads, water, and sewers). With the protection of the natural environment high on the agenda, nature continues to be a driving force of growth.

**Recommendations to invest in building PEC’s quality of place:**
Further development needs to be considered within the constraints of environmental protection. For example, the artists, designers, and galleries in PEC can benefit from increasing connections to other sectors. One of PEC’s greatest assets remains its unique quality of place. Amid The County’s attempts to expand economic development, economic advancement must never lose sight of PEC’s identity.

8) “Remove barriers to creativity – The removal of mediocrity, intolerance, disconnectedness, sprawl, poverty, bad schools, exclusivity, and social and environmental degradation.”

The County has been effective at regulating scattered development around its communities and adjacent to its waterways. PEC is a picturesque rural community. The County is actively improving its retail services with the expansion of major stores in downtown Picton (e.g. Books & Company).

**Recommendations to remove barriers to creativity in PEC:**
The education sector will benefit from the creation of internship programs in the wine and tourism sectors. In the short term, these can be achieved by partnering with established institutions in Kingston
and/or Belleville. Long term strategies could include creating a satellite campus in PEC for a nearby learning institution, specializing in culinary/tourism/agriculture.

Another significant barrier to creativity (and the marketing/promotion of creativity) in PEC is the lack of access to broadband internet. It will be necessary to remove this impediment to fully realize the creative potential of PEC’s economy.

9) “Take responsibility for change – Improvise, make things happen and develop a ‘do it yourself’ enterprise.”

It is important that the community be involved in decision-making processes, to foster inclusivity, creativity and grass-roots solutions.

Recommendations to facilitate change:
As PEC continues to cultivate a creative rural economy, the local community must work together and in collaboration with local government, to envision and implement creative enterprises. The voices and ideas of local citizens must be embraced by local government to facilitate a sense of belonging and shared responsibility—sentiments that are vital in fostering a ‘creative economy’. With the entire community focused on mutual goals, creative changes will emerge more easily, and foster a supportive, nurturing environment.

10) “Ensure that every person has the right to creativity - The highest quality lifelong education is critical to developing and retaining creative individuals as a resource for communities.”

The creative people moving to The County infuse the region with broad educational backgrounds, skills, and talents. The residents of PEC have access to higher education in Kingston, Belleville, and Toronto.

Recommendations to ensure that everyone has the right to creativity:
It is recommended that partnership opportunities with external post-secondary institutions be explored. The focus of these partnerships should be on PEC’s strengths and emerging clusters like the arts, hospitality, culinary, and viticulture sector. To enhance lifelong learning in The County, guest artisans, academics and professionals will be brought in to offer seminars and workshops for the community members. PEC also has needs with respect to healthcare and the aging population. PEC should explore strategies that mesh existing clusters with local service needs, to create a novel array such as health tourism.

Conclusion
In summary, PEC is currently experiencing a shift toward the ‘creative economy’ model. With infrastructure and ‘creatives’ already living in The County, there is a need to attract more of these people to help diversify and integrate innovation into the traditionally rural economy. PEC needs to focus future development on the attraction and retention of innovative and creative thinkers, and ensure creativity is embraced across all socio-economic levels, and in all sectors of society.
9 The Memphis Manifesto was conceived at a conference hosted by Richard Florida and others in Memphis in June 2003. The event was sponsored by a local business development group called “Memphis Tomorrow. 
http://www.norcrossga.net/user_files/The%20Memphis%20Manifesto.pdf
11 ibid
13 ibid
16 ibid
17 ibid
18 Brian Hracs, Culture in the Countryside: A Study of Economic and Development Change in Prince Edward County, Ontario. (Toronto: York University, 2005).
19 ibid
CHAPTER THREE: Youth Retention Strategies

HIGHLIGHTS:

- The absence of post-secondary and employment opportunities in PEC is fuelling youth out-migration.

- The loss of the community’s most productive members reduces the overall productivity of the local workforce.

- Strategies to retain PEC youth include:
  1) Involving youth in civic government
  2) Promoting youth entrepreneurship in The County
  3) Promoting the creative rural economy as a retention strategy
  4) Creating partnerships with nearby post-secondary institutions

One of the greatest challenges to the growth PEC economy is the difficulty of retaining young talent. This section will discuss strategies to combat this impediment to growth.

3.1 Youth Out-Migration

“The loss of the community’s most productive members reduces the overall productivity of the local workforce, discouraging high quality employers from remaining in, or moving to, these communities.”

Youth out-migration is a phenomenon occurring in rural communities across the country. Many youth leave these places in search of education and employment opportunities that are unavailable in their communities. Many of the out-migrating youth do not return, resulting in an imbalance of the demographic structure of the community.

3.2 Education in PEC as a Barrier to Youth-Retention

Rural youth have fewer opportunities to attend post secondary education, which in turn lowers the overall level of education attained by rural youth. In PEC, 47% of the population aged 15-24 do not have a high school diploma, compared to the provincial average of 40%. The Ontario average for holding a university degree is 37.2% for the 25-34 year age category, compared to a rate of 18.9% in PEC (Figure 3-1). Dianne Looker argues that rural youth’s lower educational aspirations are related to limitations within rural high schools. Rural schools may be unable to offer the range of classes or the extra facilities that a better resourced urban school may have. However, Looker also argues that while rural schools may tend to have fewer resources, they are smaller and more integrated with the community, allowing them to function more effectively than urban schools. The County can use this social capital by creating programs at the high school level to promote continued education and...
educational opportunities. The Prince Edward and Hastings County School Board has a co-op program in place within its high schools, however, this program must be expanded. Currently the focus is on manufacturing and police foundations.\footnote{27} It will be advantageous for the County to introduce more co-op programs that engage with emerging industries like viticulture and the culinary arts. The Limestone District School Board has developed a focus program for secondary students which could be emulated by the Prince Edward and Hastings County School Board. The programs are organized into four categories: broad based technology programs, career/unique programs, Ontario youth apprenticeship, and referral programs that allow students to explore a specific field of interest. They also facilitate community partnership, strengthening the ties between students and The County. These initiatives will decrease youth out-migration by stimulating youths’ interests in local industry.

![Educational Attainment Ages 25 - 34](chart.png)

Figure 3-1: Educational Attainment by Age, PEC and Ontario. Statistics Canada 2006.

### 3.3 Educational and Employment Opportunities within The County

As mentioned above, out-migration for educational purposes is one of the primary reasons for the exodus of youth from The County. Following the completion of a degree or diploma outside of The County, very few PEC youth choose to return to their home communities.\footnote{28} Obtaining a higher education benefits these youth by increasing their access to high status, high paying jobs.\footnote{29} Fellegi (1996) describes rural out-migrants as the “best and the brightest”\footnote{30}. The loss of these educated, high-skilled youth will negatively affect the overall productivity of the community.

Dupuy, Mayer & Morisette reported an unemployment rate for 15 to 29-year-olds (who were not full-time students) in 1996 of 16.8% in rural areas, compared to 11.9% in urban areas\footnote{31}. This indicates that rural youth are disadvantaged in terms of employment opportunities as compared to their urban counterparts. Tourism is a major economic pillar in PEC and thus, many employment opportunities tend
to be seasonal. This does not provide long-term stability for youth looking for gainful employment, and may partially explain the high out-migration rates of PEC’s educated youth (Figure 3-2).

![Figure 3-2: Rural Small Town (RST) Out-migration by Highest Level of Education. (Statistics Canada 2002)](image)

### 3.4 Four Initiatives to Retain PEC Youth

**Involve youth in civic government**
Capitalize on the social capital within the school system and encourage youth to become involved in civic operations. This will include creating a forum for youth discussion and participation, or government sponsored internship programs. This allows the youth to realize their role as important actors in the community. Another idea is to offer a “job-shadow” day, where interested students can shadow local government officials for the day. Involvement in local-government might spark young people’s interests in participating in municipal politics, and encourage them to consider continued involvement or employment in local-government after graduation.

**Promote youth entrepreneurship**
Promote government sponsored youth employment strategies that provide funding for student entrepreneurship. The tourism industry provides a great opportunity in this respect. For example, PEC could hold a “three-minute-pitch” competition, where entrepreneurial youth develop a summer business plan, and have three minutes to pitch their idea to council. The best business plan/pitch wins, and the victorious student will win funding to help establish their summer business.

**Integrate youth into creative economy initiatives**
Encourage co-op programs that relate to more “creative” industries to diversify the types of training and employment opportunities youth might seek within The County. Also, to promote youth interest in the creative economy, local high school art classes should take a field trip to a local artist’s studio, or the downtown artist co-op gallery. Hands-on experiences will help youth to understand the unique artistic opportunities available in their home community, and may encourage talented youth to stay in PEC.
**Create partnerships with nearby post-secondary institutions**

Develop a satellite campus of an existing educational institution that specializes in hospitality, viticulture, culinary arts, or healthcare within The County. Nearby colleges that could support this kind of venture include St. Lawrence College (Kingston), Loyalist College (Belleville), and the Liaison College of Culinary Arts (Kingston). The Cowichan Valley Region profiled in Appendix B is an example of a region that has successfully fostered relations with nearby post-secondary educations, being home to a satellite campus of the Malaspina University-College based in Nanaimo.

Work in partnership with an out-of-County educational institution to create a program tailored to industries in The County (viticulture, culinary arts, homecare or healthcare etc.). With partnership programs in place, PEC youth will return with relevant skills in areas of projected growth. Niagara College has developed a two-year Winery and Viticulture Technician Diploma which should be replicated in conjunction with a nearby institution, such as St. Lawrence College, which has existing hospitality and culinary programs. Brock University has a Cool Climate Oenology and Viticulture Institute, which provides undergraduate and graduate programs in conjunction with a co-op program. PEC wineries should consider hosting University/College co-op students—in the hopes of attracting youth upon graduation.

PEC businesses should also consider attending job/employment fairs at local universities and colleges. A presence at recruitment events might increase an awareness of the unique employment opportunities available in PEC.

**Conclusion**

*By implementing the steps outlined in this segment, PEC will be able to address the challenge of youth out-migration and mitigate its negative effects on the economy.*

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22 Craig DesJardins, Interview by Andrew Jones, March 7 2008, *Interview with Craig DesJardins*.
26 ibid
27 Shirley Roloson, Interview by Andrew Jones, March 7 2008, *Interview with Shirley Roloson*.
30 ibid
CHAPTER FOUR: Servicing an Aging Population

HIGHLIGHTS:

- PEC is experiencing an aging population, resulting from in-migration, and natural aging of the existing population.

- PEC needs to integrate its large semi-retired population into the economy through knowledge intensive and skilled occupations.

- Retirees are attracted to The County by a high quality of life, but often expect the same high quality infrastructure they experienced in the city. These expectations represent a level of service that a rural community will find very difficult to maintain.

- As provincial and local governments struggle to meet the service demands of an aging population, opportunities for private sector entrepreneurship simultaneously emerge.

- Shortages of General Practitioners and specialists have been identified as a particular area of weakness in PEC’s healthcare sector, and shortages are expected in increase in the future.

- Many elderly PEC residents are forced to travel outside of The County for medical appointments. This creates issues of transportation and accessibility.

- PEC needs to develop doctor attraction and retention strategies. This report suggests retention challenges be addressed through; (i) Public policy; (ii) By examining the role of medical schools and; (iii) Grassroots/local strategies.

PEC is experiencing an aging population, resulting from in-migration, and the natural aging of the existing population. An increasingly older population has both positive and negative impacts for a region, and presents specific human capital challenges. The following section will outline these challenges and demonstrate how they pertain to PEC

4.1 The Economic Impacts of an Aging Population in PEC

Migration trends and projected population changes clearly illustrate the increased presence of an older, semi-retired population in PEC (Figures 1, 2, 3, 4). Increasingly, this demographic is moving away from large urban centres, and into rural areas such as PEC. While this trend is an excellent opportunity to capitalize on the in-migration of employment experience and higher education, it also presents new challenges for the region.
It has been determined that labour mobility—in terms of geographical, occupational and “job-to-job” mobility—is inversely related to age. Thus, as PEC’s population ages, the likelihood of local retirees seeking new employment decreases. While an influx of skilled professionals can be beneficial to a region’s economy, this decreased labour mobility may negatively affect productivity. It is therefore very important for PEC to realize creative approaches to incorporate an aging population into the productive work force of the local economy—simply attracting more retirees to the County is not enough.

The labour productivity of skilled, semi-retired professionals moving to the region should be very high. The challenge is finding ways to integrate this demographic into knowledge intensive/skilled occupations. According to projected data supplied by PELA CFDC, the participation rate of the 55 year age group is expected to increase significantly until 2021 (Figure 4-1). Craig Desjardins (Director, PELA CFDC) notes that the median age in PEC is 47.7 years. While an influx of skilled professionals can be beneficial to an economy, labour mobility remains low in PEC’s older, retired and semi-retired population.

![Workforce changes PEC, by year and selected age](image)

4-1: Workforce Changes in PEC by Year and Age. PELA CFDC.

4.2 Servicing an Aging Population
In addition to the in-migration of an older population, PEC is experiencing a general aging of the population. This trend may decrease the labour productivity of the region due to a shifting demand for
labour-intensive services. As well, an extremely high percentage of retired in-migrants to PEC come from major urban areas (Toronto, Ottawa, Montreal). Retirees are attracted to The County by the quality of life, but often continue to expect the high quality infrastructure they experienced in the city (such as roads, transportation services, hospitals and healthcare services). These expectations represent a level of service that rural communities find very difficult to maintain. However, there is an opportunity for PEC to improve existing infrastructure. Affordable, centralized housing has been identified by residents as a necessary area of growth in the region. PEC should increase its inventory of affordable and centralized housing to serve an elderly population. This initiative will decrease the transportation needs of seniors, facilitate interaction of like-minded people, and support the economy of the central business district in Picton.

4.3 Entrepreneurial Opportunities to Service an Aging Population
An aging population demands increasing domestic and health care services. The downloading of government responsibilities and limited funds for senior programs has led to the inability of the public sector to fulfill these demands. As provincial and local governments struggle to meet the service demands of an aging population, opportunities for private sector entrepreneurship simultaneously emerge. Job strategies and training for elder care will support entrepreneurial ventures. Some examples of entrepreneurial opportunities include: shopping services, home meal delivery, in-home domestic services, health tourism, home-care, and fitness programs. These entrepreneurial opportunities will stimulate employment in all levels of the labour pool, and contribute to the economic growth and quality of life in The County.

4.4 Healthcare Challenges in PEC
PEC faces several healthcare challenges. Of great importance are issues of accessibility, service availability, and physician attraction and retention. The following section will address challenges specific to PEC and suggest strategies for improving healthcare services in The County.

*Impacts of an Aging Population on the Healthcare Sector*
Despite the Canadian healthcare system’s emphasis on equity, rural areas continue to represent medically underserved populations. PEC is no exception. With an aging population and a physician shortage, healthcare presents a significant human capital challenge. Shortages of general practitioners and specialists have been identified as a weakness in the healthcare system of PEC, and shortages are expected to increase in the future. Only 9.4% of all physicians are located in rural areas, compared with 21.1% of the Canadian population living in rural areas. In comparison to the rest of Canada, Ontario has a lower number of total physicians for every 100, 000 people. As the Canadian population ages, so do our physicians. There is an increased demand for young doctors in Ontario, particularly in rural areas such as PEC.
Accessibility and Services Available in PEC
Adequate access to healthcare services remains one of PEC’s key healthcare challenges. As a rural region, specialized services are not available at the local hospital; therefore, PEC residents are forced to travel further to other hospitals for medical appointments and surgeries. Exacerbating this issue is the fact that many elderly people do not drive and must rely on friends and family to assist them in accessing critical healthcare services. PEC’s Community Care for Seniors Program offers transportation to medical appointments for seniors in high need. This program should be expanded and promoted to meet the growing transportation demands of PEC’s aging population.

4.5 Doctor Retention and Attraction

Public Policy
Policymakers at the provincial and federal level play a key role in addressing healthcare workforce issues in rural areas. Ontario’s Ministry of Health and Long Term Care has a multi-year, health human resources strategy known as HealthForce Ontario. Its main purpose is to increase the number of nurses, doctors, and other healthcare professionals working in the province. A large component of HealthForce Ontario is the Marketing and Recruitment Agency. Only recently have some of the medically underserved areas in Southeastern Ontario received significant research and focus on their healthcare challenges. There remains a great deal to be done. In British Columbia, doctors are paid fee rate incentives to work in rural areas, and these fee rates rise in increasingly remote areas. Doctors in British Columbia are also paid higher rates for seeing seniors in an effort to meet mounting healthcare demands from this demographic. Evidently, the Ontario government must augment aid in the provision of incentives to encourage physicians to locate in rural areas. PEC should be a vocal advocate of incentive programs, and should present this issue to Leona Dombrowsky, (Prince Edward-Hastings MPP) as a major concern that requires provincial assistance.

Role of Medical Schools
Medical schools play a key role in addressing the urban-rural healthcare inequalities. Incentives in medical schools, including financial aid, selective admissions, advising, and specialized curriculums help to encourage physicians to move to rural areas upon graduation. The Northern Ontario School of Medicine (NOSM) is an example of a medical school incentives program. Identified as a ‘lagging region’, it is hoped that the NOSM will ease the healthcare workforce shortage in the North. The NOSM has a unique approach to medicine, focusing on the local requirements of healthcare in Northern Ontario. Significant improvements have been made in the physician to patient ratio in Northern Ontario and these have been attributed to its medical school. Additionally, priority admission is given to qualified, local, northern-students interested in pursuing their MD. Rural students are underrepresented in medical schools, and thus, admissions processes must appreciate the fact that individuals raised in rural areas are more likely to practice in rural areas.38 This could serve as a practical way to combat current rural physician shortages. PEC should foster greater links with Ontario’s medical schools, and the provincial government, to promote bursaries, financial incentives, and selective admissions processes. PEC should provide a small, annual scholarship/bursary to local students going into medicine. The
scholarship will be awarded through a competitive application process, and will only be administered in years when a local student is accepted into medical school. In return for the award, the student will be encouraged to maintain bi-annual communication with The County. This kind of local funding will help to maintain strong links with local students throughout their medical studies, and will ideally encourage them to set up practice in The County upon graduation.

**Grassroots and Local Strategies**

Grassroots and local strategies in PEC are effective approaches to attracting back individuals who have left The County for medical school. The Society of Rural Physicians of Canada (SRPC) and the NOW Alliance are grassroots coalitions with a mission to improve physician recruitment and retention in Ontario. Currently, Prince Edward/Lennox and Addington Community Futures Development Corporation (PELA CFDC) is involved in attracting doctors and is studying the factors that motivate medical professionals. Dr. Craig Campbell, Director of Professional Affairs at The Royal College of Physicians and Surgeons of Canada, identifies factors that will influence whether or not physicians will relocate to a rural area. Dr. Campbell finds that,

“...there are probably a number of factors that affect the likelihood that physicians would consider practicing in rural areas. One – if they grew up there and have some familiarity of the place and what it means to live there. Two – whether the rural area has the resources to facilitate the way in which they’ve been trained. Three – a lack of a peer group to sustain ongoing professional development.”

Dr. Campbell has also indicated that rural regions must play a key role in attracting and retaining physicians:

“Part of it is providing those physicians with the resources they need and making sure they have an opportunity to have all the diagnostic services they require. Many regions will offer more money in terms of salary, give them more time off for professional development that they [the region] pay for. Get better access to information, funding programs for CME [Continuing Medical Education] and offer a commitment to providing necessary resources.”

Medical facilities are lacking in rural areas, making it difficult to retain and attract physicians and medical staff. With the high cost associated with establishing a medical practice, an opportunity for PEC to attract and retain General Practitioners and specialists is to build a modest, but fully functioning, medical center. If The County invests in the physical infrastructure and maintenance of a medical facility, physicians will be provided with increased resources and have access to networking opportunities with other professionals. This limits the high cost and risk of starting a stand-alone medical practice. New graduates will be able to start a practice for low costs and can share many of the administrative aspects of the business, like reception, accounting, and technicians. Specialists could work on a rotating part-time basis at the medical center. The provision of high-quality and low-cost infrastructure to physicians will help to combat many of the factors that currently discourage new graduates and physicians from locating in The County.
Undeniably, it is important to encourage young people to pursue medicine. Dr. Campbell suggests:

“Create your own doctors. Get down to the root cause. Allow students to realize that it’s within the realm of possibility. [That they can actually become doctors. Many believe that it’s not even possible to go to school to become a physician, for social, cultural reasons.] If they believe they can be physicians, and are encouraged to pursue medicine as a profession, they are more likely to come back. They have a history with the place, they have a connection.”

Targeting a segment of graduating medical students and keeping track of where students from The County go, will provide The County with opportunities to draw medical professionals back. As with every aspect of talent retention and attraction, promoting the unique quality of life that PEC offers to doctors is of key importance. This represents another component identified by Dr. Campbell in attracting physicians to the region; “Offer attractive incentives – golf, skiing, boating, cottages. Show them what the benefits actually are. You have to be able to live there, not just work there.” A variety of opportunities exist in attracting and retaining physicians in PEC. Public policy, in tandem with grassroots and local strategies, should promote the quality of life and potential for salary incentives to attract and retain healthcare professionals in PEC.

33 ibid
34 Craig DesJardins, Interview by Andrew Jones, March 7 2008, Interview with Craig DesJardins.
35 ibid
37 ibid
38 ibid
39 Dr. Craig Campbell, Interview by Sarah Campbell, March 16 2008, Interview with Dr. Campbell.
40 ibid
41 ibid
42 Dr. Craig Campbell, Interview by Sarah Campbell, March 16 2008, Interview with Dr. Campbell.
43 Dr. Carl Jones, Interview by Andrew Jones, March 7 2008, Interview with Dr. Jones.
CHAPTER FIVE: Encouraging Innovation in PEC

HIGHLIGHTS:

- **Case studies of four local innovative firms:** Fifth Town Artisan Cheese Corporation, Scout Design, Buddha Dog, and Huff Estates

- **Innovation is defined as the interactive process of collective learning that relies on tacit knowledge and skill development**

- **Three pillars of innovation strategy**
  1. Think and act regionally
  2. Promote competitive advantage
  3. Nurture entrepreneurial activity

- **Existing firms in PEC exude innovation practices through:** inter-firm cooperation, environmental initiatives, creative knowledge and forward thinking.

- **Innovative reputations of local firms provide a certain ‘buzz’ about PEC, which will attract more talent to the region**

PEC, a forerunner in innovative business practices, is emerging as one of Southeastern Ontario’s most promising regions. The following chapter will discuss both established and emerging business within The County and how they have made use of innovative practices within their everyday operations. Four firms in PEC were interviewed and placed throughout the chapter as case studies in order to document their innovative practices. They include Fifth Town Artisan Cheese, Huff Estates, Buddha Dog, and Scout Design. These firms represent emerging innovative activity, which works to stimulate regional growth. It should be noted however, that by no means are the innovative firms located within PEC restricted to those discussed. Many other firms have taken the forward approach to innovative thinking and environmentally sustainable business practices.

“Companies are mutually reinforcing and this is what makes Prince Edward County a star!”

- Petra Cooper, Fifth Town Artisan Cheese

5.1 What is Innovation?

Innovation is described as an interactive process of collective learning that relies on tacit knowledge and skill development, and is a key driving force of economic and social development. Firms benefit through collaborative learning and integration environments, which results in shared knowledge. Innovative knowledge is vital for the economic success of firms participating in PEC. Innovation is the
Innovation may be described as challenging the common conceptions presented by the status quo. Petra Cooper, owner of Fifth Town Artisan Cheese Company, provides the following explanation:

“Innovation is...doing something that is taking into account the leading-edge thinking in the area or the discipline, technology, consumer tastes, and values. It is doing a lot of things differently and not conventionally. We were told many times in the early days that we couldn’t do an artisan cheese dairy... It’s about putting together a whole lot of variables in a whole different way, doing things that other people are not necessarily doing. It holds a level of risk, too.”

- Petra Cooper, Fifth Town Artisan Cheese

Dan Taylor, of the Prince Edward County Economic Development Office, believes that innovation produces creative solutions for overcoming daily challenges faced by businesses. PEC is successful in creating opportunities where none existed before. This is shown in the region’s agglomerating food, tourism and wine sectors. Andrew MacKenzie, owner of Buddha Dog, interprets innovation as “being able to question how things are being done instead of doing things because that is the way it has always been.”

FIFTH TOWN ARTISAN CHEESE

The Fifth Town Artisan Cheese Company is an environmentally and socially responsible enterprise dedicated to producing handmade cheeses using fresh, locally produced goat and sheep’s milk. Fifth Town Cheese has been in development for the past four years and has recently just opened its doors! Located near Waupoos, Fifth Town Cheese compliments PEC’s current agricultural activity and allows local farms to flourish. Fifth Town Artisan Cheese will have a production process unlike any other in North America. They believe in traditional processes of cheese production that entail intensive labour and less mechanization. Artisan cheese is made by hand and ages naturally in contrast to modern mass production processes which inject flavour into the cheese in order to replicate the aged taste. Petra Cooper’s innovative process is a first in Canada.

Cheese production is extremely energy intensive and in response, Cooper has decided that her firm’s energy will be generated by a combination of solar and wind power. Fifth Town also boasts a geothermal heating system. This strong environmental consciousness has contributed to Fifth Town Cheese earning the only Platinum LEED (Leadership in Energy and Environment Design) qualification among dairy producers in North America (see Appendix B).
Innovation encourages the development of new products and services, and new ways to design, produce, or market existing products and services. If a certain process originates from one place and is then adapted to another region, adapting that process to the region’s conditions is innovative. Increased levels of globalized competition have heightened the pressures on firms and regions to promote their competitive advantage. New products, forms of production, and forms of industrial organization are the result. They emphasize learning, co-operative inter-firm relations, and process improvements.

5.2 Innovation Strategies for Rural Regions

Innovation is a driver of rural economic development. The literature in this area points to a number of innovative solutions that can help rural regions develop strong economies.

Recent restructuring of the global economy and the migration of many people from rural to urban areas has caused economic difficulties in many rural regions. Increasing labour costs, agricultural streamlining, and manufacturing decline has dramatically reduced the number of jobs available in these areas, posing significant problems for rural economies. Innovative strategies, which focus on maximizing the competitive advantage of a region, are now the focus of many policy and developmental recommendations. At the same time however, we are seeing a shift in the number of people migrating back to the rural areas in pursuit of a better quality of life, and a more wholesome environment.

**SCOUT DESIGN**

*Rene Dick, a graphic designer and owner of Scout Design, believes that PEC provides a naturally innovative environment. The firm migrated from Toronto in October 2005, based on the superior quality of life offered by PEC. Dick explains that innovation is about finding creative solutions to problems in a new way. Meanwhile, the region’s laidback rural environment allows him to remain family oriented. The firm now benefits from forward and backward linkages with other actors in the area. For example, Scout Design offers internships for students from Loyalist College. They also collaborate with the tourism sector, local writers, and photographers to produce material for local clients. The geographic location of PEC protects the firm from the highly competitive industry in Toronto, while being able to attract new local business. A lack of high-speed Internet remains one of the larger impediments to Scout Design. Graphics design requires the transmission of large files over the internet, so broadband connectivity is essential. To cope, the firm often provides its work to clients by mailing compact discs.*

*The Three Pillars of Innovation Strategy*

There are three main pillars to developing a successful innovation-based economy, which apply directly to PEC. These strategies include the process of thinking and acting regionally, promoting competitive advantage within the region, and promoting and nurturing entrepreneurial activity.
i. **Thinking and Acting Regionally**

It is important for a region to operate as a cohesive unit with common goals. The impacts of a competitive global economy are felt at the regional level. Thus, economic analysis and strategies must be developed and implemented on the local stage. This strategy applies directly to PEC in that the region breeds on its own success. Firms are able to cooperate with one another, helping each to grow in opportunity and success without the fear of local competition.

ii. **Promote Competitive Advantage**

In order to promote healthy competitive advantage within PEC, policy strategies must be tailored to specifically meet the needs and capabilities of the region. In other words, the region must excel in a particular economic niche. By comparing PEC’s unique assets with new market opportunities, the region will find its source of competitive advantage. Often this will include finding a key export (as rural areas often do not have the critical mass required to be self contained economies) and niche areas such as tourism, value-added agriculture, and PEC’s growing winery operations. It is vital that The County capitalize on its unique assets to maximize competitive advantage.

iii. **Promoting and Nurturing Entrepreneurial Activity**

Entrepreneurs are important actors in innovative economic development. Entrepreneurial activities are an excellent source of innovative high-growth business. As exemplified within PEC, innovative firms such as Buddha Dog and Scout Design have experienced tremendous success within the relatively limited market niche of the region. These entrepreneurs have significant impacts on the region’s economy due to their forward-thinking processes and practices. “They have product solutions and aspirations that go well beyond the local jurisdictional boundaries.”

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**BUDDHA DOG**

Buddha Dog was co-founded in 2005 by Andrew MacKenzie and Andrew Hunter in Picton Ontario, with the intention of developing a creative product that would suit everyone, young and old. What exactly is a Buddha Dog? It’s a hot-dog, fully loaded with everything from speciality cheese to unique sauces, all of which are sourced from PEC. Andrew MacKenzie uses a joke to encapsulate the spirit of the firm: “What did the Buddha say to the hot-dog vendor? Make me one with everything!”

MacKenzie states that “innovation challenges the status quo, and innovative firms are not afraid to ask why.” MacKenzie has a strong belief that Buddha Dog is breaking new ground by taking an interest in the community and promoting each individual supplier through one innovative product. “It is more of a vehicle than a hot-dog business,” MacKenzie asserts. “Our modus operandi is about promoting others”. The PEC community thrives by functioning as a group and forming linkages between firms to promote innovation.

Since opening their doors, Buddha dog has expanded to the Toronto market, opening a store on Roncesvalles Avenue to further spread the word about the wonders of PEC. With respect to the future, MacKenzie is enthusiastic, “we always know there are ways of being better. Maybe that’s innovation; we’re willing to make a bunch of mistakes”.
Clusters in a Rural Region

Clusters are thought of as increasingly important for regional economies. Many companies locate themselves in close proximity to one another in order to take advantage of economies of scale, thick labour markets, and reduced transaction and transportation costs. Each of these variables leads to increased levels of market and competitive advantage. Furthermore, transfer of knowledge and innovation is more common within cluster economies. “Knowledge flows or leaks unintentionally and technologies spread to smaller companies.”

Historically, clusters have favoured urban areas and high tech industries. This means that rural areas need to define their own growth clusters and convince their governments that their economies also operate as systems and that they can grow without the urban economies of large cities. In other words, PEC cannot simply expect clusters to form and flourish on their own. “Rural regions need to better leverage the potential of their clusters.”

Clustering is becoming more popular in rural regions such as PEC. Congestion in urban areas has created dissatisfaction and out-migration, while new information and communication technologies allow talent to move to rural areas. This presents an emerging opportunity for rural regions to attract talented innovators through place factors, such as quality of life. Rural regions are most often physically distant from urban centres, leading to greater transportation costs. Also, the changing economy has forced rural regions to seek solutions to new problems; solutions that knowledge and innovation can provide. Rural economic development must focus on the unique strengths of each area, rather than concentrating on ameliorating generic weaknesses. Thus, in focusing on a niche market, rural regions should also seek to take advantage of the clusters that may form or already exist. In the case of PEC, vineyard and winery operations offer a developing cluster, currently competing with the likes of the Niagara Region.

A Wine Index was developed to compare the performance and maturity of Ontario’s four wine regions normalized based on area. The data used in the calculations, and a further explanation of the Index can be seen in Appendix B. Compared to the Niagara, Pelee Island, and Lake Erie regions, the density of viticultural activity in PEC is significantly lower as seen in Figure 5-1. This suggests that the PEC has tremendous potential to intensify its emerging viticulture industry.

<table>
<thead>
<tr>
<th>Region</th>
<th>Index Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward County</td>
<td>0.32</td>
</tr>
<tr>
<td>Niagara</td>
<td>1.33</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>4.91</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>0.65</td>
</tr>
</tbody>
</table>

Figure 5-1: Final results, Wine Index. (See Appendix C)
HUFF ESTATES

Huff Estates is a winery located in Bloomfield, Ontario, and is part of an emerging innovative wine cluster in the region. The firm is owned by Lanny Huff, and opened for business in 2004. The 150 acre estate features an Inn with 21 guestrooms and a retail store for on-site wine sales. Huff Estates is young, but shows great promise. In 2007, their wines won five medals at the 2007 Art Vino Awards and two medals at the 2007 Ontario Wine Awards.

Wine making is a process firmly rooted in tradition, and Huff Estates adapts many of their processes from long-established French methods. Simultaneously, Huff Estates is maintaining their innovative edge by utilizing fermentation processes that do not required added yeast, due to soil conditions in the County. Additionally, as part of the wine economy in PEC, Huff Estates takes advantage of the strong community collaboration and atmosphere of trust. Being located in this unique environment allows wineries to share costs, as well as the occasional shared transportation opportunity and joint marketing possibilities.

5.3. Innovation of Firms in PEC

This section is designed to exemplify how each of the four firms showcased in this chapter are innovative in their business practices and personal values. Through inter-firm cooperation and support, environmentally sustainable initiatives, and forward thinking, each firm proves to be a leading player in the region. It should be noted however that this list of four firms is not by any means exhaustive, as many other business initiatives in PEC follow the same beliefs and ethical practices.

Inter-firm Cooperation

- Firms share knowledge and ideas with others:
  “People think you need to keep your ideas close to your chest, but I go far and wide with our plans and pick their brains because in the end our project is completely different than what we thought four years ago. It has evolved in something much better because of that.”
  - Petra Cooper, Fifth Town Cheese

- Huff Estates strives to develop linkages within PEC’s wine cluster, with future hopes to be a viticulture destination.

- Buddha Dog and Fifth Town Artisan Cheese Company support local farmers: Buddha Dog’s are made of 100% PEC aged beef, while the cheese produced at Fifth Town will be made with goat and sheep’s milk from local dairy farmers.
  “The community [of firms] here is really good at supporting each other’s business. We buy from each other, which is hugely important.”
  - Petra Cooper, Fifth Town Cheese
Environmental Sustainability

- Fifth Town Cheese uses geothermal energy, as well as solar and wind power to lower their footprint on the Earth (see Appendix B), and avoid unpleasant rising energy costs.

- Fifth Town Cheese will be the first LEED Platinum certified dairy in North America: “By being the first green dairy in North America, it will buy us some PR attention that will raise attention about our cheese and help our effort.” - Petra Cooper, Fifth Town Cheese

- Buddha Dog furnishes their restaurants with recycled materials from The County: counters are constructed from reclaimed floorboards from an old farmhouse, while the remaining wood is extracted from non-functioning County barns.

Creative Knowledge and Forward Thinking

- Scout Design is a firm that continuously seeks new opportunities and innovative ideas that will allow them to reach their operational goals in the most creative and rewarding manner.

- Firms are not afraid to challenge the status quo: “Innovation is not being concerned by the status quo, being able to ask why, and unfortunately so many people do things because that is the way it has always been done.” - Andrew MacKenzie, Buddha Dog

- Continuous improvement is met through interactive learning and problem-solving: “We always know there are ways of being better, whether we are making it quicker, faster, fresher...you just want to continually do better.” - Andrew MacKenzie, Buddha Dog

5.3.1 Promoting Growth Through Innovation

Innovative entrepreneurial activity from firms like Fifth Town Artisan Cheese, Buddha Dog, Huff Estates and Scout Design all promote growth throughout PEC. Their innovative production processes create new jobs and allow other businesses to thrive due to forward and backward linkages. The innovative reputations of local firms create a ‘buzz’ about PEC, and in turn, attract more people to the region. These innovative firms incorporate PEC into many facets of their business and share the common goal for The County to grow and prosper. Buddha Dog, for example, significantly markets PEC, offering a prime example of how thinking and acting regionally gives firms a competitive advantage. The economy is constantly changing, and so firms must remain innovative in order to succeed. These innovative firms are the new face of economic expansion and will bring continued growth to The County.

“That’s a huge challenge, how do you manage all the attention you’re getting and the growth that comes with that, yet at the same time, retain the character that makes it attractive in the first place? It’s a fine, fine line.” - Andrew MacKenzie, Buddha Dog
5.4 Recommendations and Future Directions
The following are proposed suggestions to further economic development in PEC. Recommendations are based on the research and interviews conducted for this report.

1) **Take advantage of innovative public policy**
Federal and provincial governments offer a wide range of programs and funding options to facilitate innovative initiatives. PEC must research these policies with respect to its own economic development objectives and actively seek out the opportunities that presents themselves (see Appendix B).

2) **Support and develop the emerging wine cluster**
The formation of a wine cluster in PEC is progressive for a rural region. However, clustering needs to be encouraged and reinforced in order to ensure healthy growth and economic development. Figure 5-2 shows the geographical proximity of winery operations located throughout The County. As the wine cluster continues to expand, talented workers will be attracted to the region, breeding further success throughout PEC.

**Prince Edward County Wine Cluster**

![PEC Wine Cluster Map](http://www.thecountywines.com/pecwa_map.html)
3) **Provide regional broadband internet**

One of the major impediments to doing business in PEC is the lack of reliable, affordable broadband internet. In today’s global economy, firms must be able to quickly upload information onto websites and communicate with other firms to increase linkages and productivity. A barrier faced by Fifth Town Artisan Cheese and Scout Design, as well as other firms, is the lack of reliable internet. Petra Cooper stresses the inconvenience of unreliable internet connection: “I have satellite, but it’s down right now, and I’m using dial-up. It’s also very expensive. All I can really do is petition KOS [Kingston Online Services] to put up another tower near me.” This is an area where policy makers within The County can make a tremendous difference. Both Cowichan Valley and Saltspring Island have effectively implemented rural broadband internet (see Appendix B), proving it’s not only possible but imperative to continued success in PEC.

4) **Incorporate artists into business to market PEC**

There is strong potential to increase value through creativity. Initiatives to increase cooperation between the artistic, creative, and entrepreneurial classes develop opportunities for growth. Arts on Main, an arts cooperative, is a successful example of this collaboration of artistry and conventional business. Focus needs to be placed on fostering these relationships.

5) **Increase exports**

The small size of this rural region requires attracting outside capital to the region. Exposure is gained when firms sell their products outside of the region, increasing publicity for the firm and the region. Some of the firms interviewed are successful in exporting their products and are interested in increasing this area of their business. “My business partnerships are local, but my client base would definitely be national.” - Rene Dick, Scout Design

6) **Establish indicators relative to PEC**

Statistical analysis is often unkind to PEC because numbers cannot account for some aspects of The County’s economy. In the future, PEC could develop indicators that examine categories such as food quality, culinary awards, and viticulture achievements, through the use of visitor surveys, firm surveys, questionnaires and further quantitative data exploration.

7) **Integrate local value-added agriculture into the community**

The successes of PEC’s culinary and wine industries are largely a result of export and tourism markets, which expose value-added food culture to areas outside of The County. Buddha Dog, for example, now operates in both Picton and Toronto, bringing knowledge of PEC to the big city. Culinary and wine industries should re-focus and connect their products with the local community. Community understanding of value-added agriculture will provide the food and wine industries with local support, useful for future growth. For example, local food providers can offer a gourmet food delivery service to cater to the abundant numbers of senior citizens residing in PEC, working in partnership with established organizations such as the Meals on Wheels Program. By partnering with local wineries, a wine delivery option could be added. This will allow those who have mobility challenges to experience the county without leaving their homes. As well, food producers and local cooks should supply PEC
schools with healthy eating choices through breakfast and/or lunch programs, as well as educate students about the culinary field through extra-curricular programs such as after school cooking classes.

8) **Develop a weekend market for local businesses, farmers, and artists to sell their wares**

Holding a market weekly in an accessible downtown location provides a great opportunity for many artists, farmers, and businesses to both advertise and sell their products. This concept is well suited to PEC because of the number of local artists in the region and agricultural related businesses. Saltspring Island in British Columbia successfully implemented this concept. Widely renowned, the Saturday market in Saltspring allows over 100 artists to advertise and sell their goods (See Appendix A). The market is another way to integrate local food and wine into the community. The market can also be an exciting social event and promotes regional cooperation and cohesion.

**CONCLUSION**

"From a city viewpoint, I look like a success for moving away and following my heart.”

- Rene Dick, Scout Design

*Regions must be innovative to succeed in today’s economy. To promote economic development, PEC should encourage innovation throughout the community. The firms profiled show that PEC has made great strides towards becoming an innovative region, but more work remains. The strategies outlined in this report will help foster increased innovation throughout the region. This chapter is a springboard for further discussion around innovation in The County, and will provide momentum to further these initiatives. The County will enhance innovation by embracing the initiatives outlined in this report.*

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46 Dan Taylor, interview by Samantha Hicks, March 7, 2008, *Interview with Dan Taylor*.
49 ibid
51 ibid
54 ibid
58 The “Vino Awards” is the annual wine competition open to all participating wineries in the Rocky Mountain Wine & Food Festival, one of the premiere events on the Food and Wine Calendar in Canada.
CHAPTER SIX: Marketing Strategies for Sustainable Tourism

HIGHLIGHTS

- Tourism will continue to stimulate and create growth in PEC as long as strategies are sustainable, unique and diverse in nature.

- PEC’s unique blend of arts, heritage and culture, and their wide range of outdoor pursuits and accommodations make it a sought-after destination for tourists from nearby Toronto, Montréal, and Ottawa.

- Tourism in PEC would greatly benefit from a system of visitor monitoring and analysis to enable a better understanding of tourist demands and tailoring of product offerings.

- The greatest challenge for PEC is to anticipate potential impacts of this sector, both positive and negative, and to plan in a sustainable manner. Tourism strategies and tactics should highlight and promote the distinct environment of PEC, while protecting the integrity of the region’s landscapes, both cultural and natural.

Attracting 440,000 visitors annually, accounting for roughly $65.4 million in local revenues, tourism has emerged as a key component of regional economic growth in PEC. Fuelled by the enjoyment of its unique cultural and natural amenities, and supported by unprecedented growth in its viticulture and culinary sectors, there is no questioning the growing importance of PEC as a premiere tourist destination in Ontario.

Tourism is a careful balance of marketing, product development, as well as service and infrastructure development that provides many of the amenities that residents enjoy, while generating beneficial spin-offs for the community. However, sustaining and increasing growth within the tourism sector is no simple task. A number of challenges currently face The County: whether spurred by fears that a booming tourism sector could impinge upon the region’s unique place effects; a feeling that growth and successful environmental management are contradictory forces; or competition from other Ontario tourism destinations’ aggressive tourism marketing, these forces threaten PEC’s current success.

Effectively identifying and mitigating these challenges will be critical to the continued growth of PEC’s tourism sector. However, as long as strategies are sustainable, unique and diverse, tourism will continue to reinforce regional economic growth in a positive manner. Moreover, tourism will play an important role in the development of PEC’s creative rural economy. Undoubtedly, the tourism sector of PEC has much to contribute to the development of a substantial “people climate” and is well situated to offer creative individuals an environment rich with natural, historical and cultural amenities.
6.1 Target Markets and Demographics
PEC must begin to examine the potential of nearby markets and focus tourism marketing on specific, high yield groups and demographics. In examining market and demographic demands, it is clear that The County is well situated to becoming a booming tourism destination based on its distinctive natural advantages, as well as its ability to offer unique, specialized, and natural experiences. Markets are not simply an accident of geography; there are many other factors and behaviours to consider. It is essential that The County collect more empirical data in order to better grasp the specific demands of accessible markets.

Baby Boomers
Encompassing individuals born between 1946 and 1964, Baby Boomers comprise the largest population segment in Canada. PEC should actively target Boomers as a means to promote a more active tourism base that generates higher levels of revenue for The County. Baby Boomers represent 9.8 million residents in Canada, equaling 33% of the overall population. Almost four out of every ten Canadians travelling within Canada were baby boomers in 1996, accounting for 53% of total domestic expenditures.

Baby Boomers have a high disposable income, tend to be stressed workaholics, are increasingly active and healthy, seek high quality experiences, and are interested in educational and adventurous pastimes. Many of the dominant pull factors for Baby Boomers - such as educational pastimes, active and healthy experiences, and a relaxing atmosphere - are present in PEC, creating a natural destination if marketed correctly. The benefits which PEC will draw from attracting Baby Boomers are high, and marketing to this segment would be a fruitful investment.

Special Group Marketing
A key opportunity for PEC to expand their tourism market, and develop their “creative class” would be to attract diverse social groups into the region. One potentially high-return group is the Gay and Lesbian market. PEC exudes a vibrant culture with sun, sand, events and high quality cuisine; all of which have the potential to attract gay tourists. The potential for growth in Ontario’s multi-billion dollar tourism market has received a boost since Canada passed legislation in 2005 approving gay marriage, specifically as American couples frequently cross the border to hold same-sex weddings.

The gay market is easy to reach with highly targeted marketing campaigns, as this group has its own magazines, newspapers, and tends to cluster residentially, easing direct mail campaigns. The domestic gay travel market of Canada equaled $5.4 billion in 2006. Lesbian, gays, bisexuals and transgendered travelers spend double per trip that of their straight counterparts ($1168 compared to $627) and are twice as likely to go on a vacation or leisure trip. The economic returns for PEC would be extremely beneficial and serve to strengthen this economic pillar. Socially, gay tourism will sustain the high-end culture which PEC wants to exude, and adds to PEC’s image as a creative rural destination.

Overall, gay tourism is predicted to be a high-return investment for PEC, adding to the region’s diversity and ability to attract creative, talented individuals; while maintaining the special cultural and environmental integrity of the area.
**Marketing to Women**
PEC should look to engage in marketing toward groups of professional and affluent women who are interested in vacations of personal indulgence. By binding together the experiences of food, wine, culture, and pampering, The County has high potential as a retreat for individual and groups of women.

Marketing to women is a good product fit, and marketing should emphasize escaping from the family, the job or the city (and the stress associated with each) to enjoy a tranquil weekend which does not involve a lot of travel, fuss or logistics.

**Empty Nesters (45-54)**
Educated and affluent, this group enjoys historical attractions and unique personal learning and growth experiences; making it a good fit for PEC. Empty Nesters care about cultural and historical attractions, personal growth experiences, outdoor activities, health and fitness, shopping and dining, quality and value. Adults travelling without children comprised almost two-thirds of overnight trips in 1996 compared to 58% in 1980. In contrast, the share of travelers taking their children along has fallen to 35% in 1996 compared to 42% in 1980. This shift is largely attributed to the fact that an increasing number of boomers are travelling without their children: almost three-quarters of older Boomers travelled without children in 1996.

**Mature/Seniors Market (55+)**
Travel ranks as one of the top leisure activities for men and women over 50. They travel more frequently than their juniors, and their stays tend to be longer. Those who are at least 55 years of age will represent an increasingly sizeable proportion of the province’s population. They currently account for approximately one-quarter of the adult population (26%) but will represent about 40% by 2026 (41%). In 1996, travelers over 50 accounted for one-quarter of the visits to museums and art galleries. In 1996 mature travelers (aged 51 and over) accounted for almost one-quarter of overnight domestic travel expenditures. By 2016, mature travelers will account for almost one-third of travel spending, as the baby boomers mature. This demographic enjoys feeling well-taken care of, experiencing culture and history, outdoor recreation, natural wonders and parks, and frequently travel off-season.

**6.2 Marketing Strategy**
While specific aspects of PEC’s tourism sector, such as Sandbanks Provincial Park or the growing viticulture industry stand out as the cornerstones of the region’s tourism sector, it is important not to over-emphasize the short-term development of smaller, individual components. In fact, it is the unique blend of historical, natural and outdoor activities, culinary attractions, wineries, and a host of intimate bed and breakfast accommodations that synergize to create a unique experience that can only be found in PEC. Thus, successful developmental strategies should not over-emphasize the region’s individual tourism components, but focus on the experiential sum of these factors. It is the combination of special places, events and experiences, as well as their intrinsic interconnection with the rural lifestyle of The County that creates a unique place effect (See Appendix D). Maintaining an effective balance of the various components of the region’s tourism sector will be critical in sustaining PEC’s key competitive advantage: a charming, non-commercialized, rural environment that produces a unique culture; and provides a distinctive, authentic, tourism experience.
6.3 Strengths

6.3.1 Location and Accessibility
The region’s prime location in Ontario’s ‘golden triangle’ makes PEC less than a four hour drive from the major cities of Toronto, Montréal, and Ottawa. An international gateway (Toronto) and two U.S. border crossings (via ferry through Wolfe Island seasonally and the 1000 Islands International Bridge at Ivy Lea year-round) are also within a three hour drive. As the largest population centre in the province, Toronto is a major market for all other parts of Ontario. By 2026, this city will represent a full fifty percent of Ontario’s adult population. See Figure 6.1 for the importance of the Ontario market to PEC tourism.

6.3.2 Arts, Heritage, and Culture
PEC’s rich cultural heritage can be experienced through its numerous museums, historic sites fused with Loyalist traditions, architectural heritage, and agricultural attractions. All of these components combine to allow visitors to learn about the region’s historical significance. With 11 Provincial Historic Site plaques, six community museums, 53 galleries and artist studios and several agricultural attractions (such as an emu farm, a wild boar ranch, and an abundance of organic vegetables available along roadside stands); PEC has a strong tourism core located in this diverse sector.

6.3.3 Wine and Cuisine
The future staple of the region, wineries, have fuelled recent growth in The County and blend well with the artistic, creative character of PEC. Since the year 2000, PEC has gone from less than 20 acres of high quality European vines to over 600 acres, making it the second largest viticulture area in Ontario, and the fastest growing wine region in Canada.

Additionally, the growing wineries of the region mesh well with other facets of the tourism sector. “Research in Canada reveals [that] those who have an interest in wine and cuisine are considerably
more likely to seek out vacation experiences associated with romance and relaxation, exploration (visits to historical sites and natural wonders) and personal indulgence.” In particular, the wine industry complements the arts and culinary sectors of PEC. With 49 restaurants and pubs, there is no shortage of places to experience local cuisine prepared by award-winning chefs. Jamie Kennedy, Michael Potters, and Michael Sullivan are three popular chefs who have recently established themselves in The County. Furthermore, potential exists in incorporating more locally grown food into the region’s fine dining experiences, while a growing reputation for specialty food products like artisan/gourmet cheese continues to develop.

6.3.4 Festivals and Special Events
The County’s wide array of festivals and events serve to draw visitors in throughout the year. The County frequently promotes tourism through a vast assortment of concerts and events such as the annual Jazz Festival, Music Festival, and Birding Festival. Many festivals highlight local talent, promote natural produce such as maple syrup and pumpkins, and are appealing to a wide range of age groups. “Maple in The County” and the “Terroir Wine Festival” were both named within the list of Ontario’s Top 100 Festivals in 2008, while others such as “TASTE!” and “County-licious” have quickly become regional mainstays, generating repeat visits.

6.3.5 Outdoor Activities
PEC’s natural resources allow for numerous outdoor activities such as bird watching, cycling, hiking, kayaking, scuba wreck-diving, water skiing, golfing and fishing; particularly in the summer months, though there is potential to expand the season into the fall (i.e. the promotion of autumn colour tours). With 11 publicly accessible boat launches, eight marinas, six diving areas in Lake Ontario along the Southern shore, three golf facilities, as well as a cross country ski trail and a snowmobile system, PEC is well positioned to attract visitors seeking active outdoor recreational experiences.

6.3.6 Accommodations
The range and number of accommodations available in The County caters to a diverse group of visitors with different tastes and price points. There are over 4,500 options to choose from, including RV sites and campgrounds, cabins, cottages, lodges, resorts, inns, hotels, motels, and a host of unique bed and breakfasts.

The largest roofed accommodation in the region offers 50 rooms. The lack of a mainstream commercial presence lends a unique ‘hominess’ quality characteristic of the community, creating intimate and specialized experiences with an abundance of niche appeal.

6.3.7 Beaches and Natural Areas
Sandbanks Provincial Park, which boasts giant sand dunes and golden beaches, forms two of the largest freshwater bay-mouth sandbars in the world and attracted over 450,000 people to the region in 2004.

PEC offers tourists 800 km of shoreline and 27 natural parks, providing an ideal environment for windsurfing, canoeing, sailing, boating, sunbathing, and swimming. While individuals and families continue to arrive in the area for its famous aesthetics and beaches, The County must focus its strategy on enticing Sandbanks goers into the community. Sandbanks visitors typically bring their own camping
gear and food, and therefore contribute minimally to the regional economy, which impacting local infrastructure like roads and sanitation. A key priority is to increase the expenditures Sandbanks visitors contribute to PEC’s economy through focused targeting strategies and promoting The County as an integral component of the ‘Sandbanks visit’.

6.4 Weaknesses
Tourism continues to enhance the economy of PEC, however there are areas in which The County falls short. While all of PEC’s shortcomings in the tourism sector are not necessarily deterrents to growth, they should be taken into account when planning effective short-term and long-term tourism strategies.

6.4.1 Lack of Visitor Monitoring/Analysis
Tourism is an inherently variable industry that is intrinsically connected to external forces, and repeatedly experiences growth and decline. Due to this volatility, it is important to ensure proper visitor monitoring, documentation, and analysis so local operators can better understand the market. Both the supply-side (businesses providing goods and services to tourists), and the demand-side (the number and characteristics of visitors to the area) are important areas to research. An on-going system of data collection will be crucial in the development of unique goods and services that reflect and properly service extra-regional demand. Reflections of customer experiences and a better understanding of their wants and needs are valuable to the development and sustainability of tourism in the region. To ensure constant development and new revitalization of key attractions, better timely information is needed in order to efficiently track the industry’s performance. Without this data, efforts to match tourism ventures with market demands will be hit-or-miss, resulting in lost opportunities, or worse, decline in market share.

6.4.2 Labour Shortage
Tourism is a labour intensive economic sector which is dependent upon well-trained, professional workers. PEC is comprised of an aging population with low birth rates, and is largely perceived as a retirement destination. This mature demographic produces concerns regarding potential labour shortages, as the major demographic groups typically engaged in front-line tourism work (teens and ‘twenty-somethings’) are projected to decline. Additionally, labour within the tourism industry requires specific training catered to the accommodation industry. Currently, PEC does not offer proper training and education programs catered to tourism-related labour. Programs like SuperHost® should be investigated in the short term, while hotel and hospitality training should be investigated as a long-term training and development strategy for The County.

6.4.3 Internet Presence lacks Functionality
Developing a strong marketing presence in the region’s selected target markets is crucial to increasing visitation. The improved use and availability of the internet has allowed visitors to have greater control over their travel experience. While the internet allows for easy comparative shopping and booking, PEC lacks on-line resources to book accommodations. To remain competitive, significant attention must be devoted to the function of the region’s web site(s). An example of such a weakness is the dysfunctional “Accommodation Association of Prince Edward County” website and their online accommodation
bookings/availabilities. Many accommodations are not included in the Association, while finding the actual site requires significant navigation away from the main PEC website.

Comparisons to other tourism destinations, such as Cowichan Valley and Salt Spring Island (British Columbia) reveal the relative shortcomings of PEC’s web-based presence. In reviewing the websites of Cowichan Valley and Salt Spring Island, it is evident that all three regions provide similar tourism attractions such as natural amenities, recreational sports, arts and festivals. However, the web sites from the other regions are more dynamic in promoting tourism products. PEC could improve its website as shown in Figure 6-2 to better advertise the vibrant culture and attractions of the region. Greater appeal of and accessibility to information is highly recommended. While opportunities to utilize web marketing to increase The County’s capacity for market and product tracking are highly valuable, PEC must also continually evaluate its market, seek to understand consumer demand, and keep attractions original, all the while maintaining its local heritage, environmental integrity and unique blend of amenities.

<table>
<thead>
<tr>
<th></th>
<th>Prince Edward County</th>
<th>Cowichan Valley</th>
<th>Salt Spring Island</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chamber of Tourism and Commerce website</td>
<td>More difficult to navigate, crowded, lots of print, few pictures</td>
<td>Easy to navigate, brighter, spacious layout</td>
<td>Very dynamic, easy to navigate, colourful, spacious layout</td>
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<tr>
<td>Accommodations</td>
<td>Listings, web address, no pictures</td>
<td>Listings, web address, no pictures, more modern layout</td>
<td>Listings, web address, pictures, attractive layout</td>
</tr>
<tr>
<td>Calendar of events</td>
<td>Limited events, and few dates for particular months</td>
<td>Activities posted for everyday, year round</td>
<td>Activities posted for everyday, year round and members have access to post activities</td>
</tr>
<tr>
<td>Virtual Tours</td>
<td>Still images for particular events</td>
<td>360 virtual tours of attractions and photo gallery</td>
<td>360 virtual tours of attractions, parks, landscape</td>
</tr>
</tbody>
</table>

Figure 6-2: Comparing Tourism Websites of PEC, Cowichan Valley, and Saltspring Island.

6.5 Threats
If not addressed properly, a number of threats pose significant problems to the continuing success of PEC’s tourism sector. Environmental degradation, community resident concerns, varying seasonal performance, unpredictable weather patterns, and a lack of public services are the main threats to long-term and balanced growth within the tourism sector. PEC must take into account the risks associated
with too much success, particularly within the summer months. Tourism growth must be managed from a position which views sustainability as the utmost priority and consideration must be given to the additional costs (infrastructural, environmental, public services, etc.) that will be associated with improperly managed growth.

6.5.1 Community/Environmental Concerns
The will of local residents, as expressed in interviews with residents and business owners, is to uphold and preserve the natural heritage, beauty, and culture of the region. While tourism is undoubtedly a profitable enterprise, a potential threat to growth exists should local residents use political connections to stifle potential expansion. Central concerns from community members have included the immense seasonal changes in traffic, both on and off the roads, as the majority of PEC’s visitors flood in between the months of June and September; increasing amounts of waste generated, as well as increasing vehicular emissions from the influx of traffic; escalating demand and competition for services; and concerns of increased crime rates.

Concern has been raised that over-development within the tourism sector will change the community and region permanently. The challenge for local communities is to anticipate both positive and negative impacts and to plan for sustainability. While many of the claims of residents are not empirically substantiated, such as perceptions of higher crime rates, their conceptualizations (whether real or imagined) still create opportunities for community opposition to tourism promotion. In order to sustain The County’s unique landscape, whilst promoting regional economic development, PEC must be mindful of protecting the surrounding environment, and working in a co-operative fashion with the residential community.

6.5.2 Slow Growth in Winter Season
With irregular snowfall in the region, activities like snowmobiling, cross country skiing and ice fishing are not guaranteed. Relying on these outdoor activities to fuel a winter economy is not sensible, as weather conditions are not certain. While winter tourism levels should be sustained, growth strategies within this season are risky and should not be viewed as a top priority. The County should consider different, non-outdoor based winter getaways if accommodation and culinary operators are willing to further develop the winter market.

6.5.3 Concerns of Summer Saturation
The magnitude of growth and development of The County’s tourism sector, particularly in the summer, must be considered. Tourism in PEC is saturated between the months of June and September (Figure 6-3). A lack of accommodation occupancy within the summer quarter is highly indicative of seasonal saturation. Sandbanks Provincial Park has had to turn visitors away due to a lack of accommodations.
Planning should take into account the increasing costs associated with road damage, the expansion of parking lots, increased waste collection, and a greater demand for public facilities in the summer quarter. Sustainable planning, management, and growth of The County’s tourism sector must be made a top priority.

6.5.4 No Natural Heritage Preservation Plan

Overdevelopment, with no heritage preservation plan in place, can ruin the unique cultural characteristics the region has to offer. If development begins to happen rapidly with no proper management mechanisms in place, the natural advantages of PEC will be threatened. Careful management and effective long-term strategies dedicated to preserving and maintaining the unique architectural, archaeological, natural, and historical heritage of the region will be central to protecting this sector. PEC currently has a Heritage Advisory Committee in place, however this is not enough to ensure the long-term maintenance and sustainability of its unique heritage and history.

The threats to The County will require the careful management of visitor-influx without overdevelopment. These threats cannot be ignored, and each must be addressed to sustain the natural beauty and character of PEC.

6.6 Opportunities/Recommendations

Taking note of the varying strengths, weaknesses and target markets nearby, a number of strategies and recommendations have been constructed to encourage further growth. The key to future opportunities in The County will be optimizing their unique strengths, while not damaging the environment that
makes The County as a popular tourism destination in the first place. While tourism is undoubtedly a profitable enterprise, key steps must be taken to guarantee continuing success.

6.6.1 Themed Travel Packages
A key opportunity within PEC’s tourism sector is the development of themed travel packages. Packaging creates a convenient and well-organized itinerary for visitors, which not only utilizes the strengths of The County in the most proficient manner; but also allows visitors to spend their time efficiently and free from worry. Visitors are increasingly looking for an experience which is not only pleasurable, but educational. Thematically linking the experience of visitors to the culture and heritage of The County will advance the tourism sector and allow growth to be managed in effective ways which do not alter the unique culture of PEC.

Learning Packages
Take advantage of the six museums PEC has to offer, the Prince Edward County archives, and the 11 historical site plaques scattered throughout the region. The County has a Loyalist historic tradition and a number of natural attractions, like birding, which are both enjoyable and educational reasons to travel to PEC. Genealogical tourism is a growing niche market. Utilizing genealogical centres like the Marilyn Adams Genealogical Research Centre, the PEC Archives, and the Archives & Collections Society in Picton will allow visitors to research their ancestral heritage, while fostering a valuable learning experience.

Romantic Getaway Packages
With an intimate cultural feel and an abundance of bed and breakfasts, PEC is perfectly situated as a romantic getaway location for couples. Marketing The County as an escape from the stressful lifestyle of major urban centres and the strains this can have on relationships will be an effective marketing strategy. Romantic getaways increase overnight stays, often in higher end accommodations. Wining, dining, spa indulgence and outdoor activities are all available and can be clustered into interesting getaway menus.

Personal Indulgence Packages
With pleasure as the most commonly cited reason for visiting PEC (57% of visitors in 2004)\textsuperscript{78}, there is no denying that despite an increasing importance of education and learning, tourism is strongly rooted in demands for pampering and personal indulgence. PEC should seek to expand its inventory of spas and health resorts, and create a wider array of retreats for individuals and small groups, to relax and be pampered.

Many Canadians are seeking alternative medicines and therapeutic treatments. This is an opportunity that The County can capitalize on, by attracting alternative and traditional medicine practitioners to the area and packaging their services with area accommodations and “therapeutic” landscapes. In 2006, nearly three-quarters of Canadians (74%) had used at least one alternative therapy sometime in their lives.\textsuperscript{79} The most commonly used complementary and alternative medicines and therapies were massage, prayer, chiropractic care, relaxation techniques, and herbal therapies.\textsuperscript{80} Extrapolation of the Canadian population suggests that during the latter half of 2005 and the first half of 2006, Canadians spent more than $5.6 billion out of pocket on visits to providers of alternative medicine, compared to nearly $2.7 billion in 1997.\textsuperscript{81}
Therapeutic landscapes are places, settings, situations, locales, and milieus that encompass both the physical and psychological environments associated with treatment or healing, and the maintenance of health and well-being. PEC, with its lush natural settings, abundance of coastline, and natural aesthetics, is a perfect location for practices of holistic medicine—also known as nonconventional, alternative, complementary, or traditional medicine. PEC should take advantage of its natural aesthetics and quaint atmosphere within a newly emerging body of research which views place, in both its psychological and physical sense, as a key component to health.

**Packaging Synergized Tourist Experiences**

While challenging to organize, packaging in general is a beneficial strategy. Currently, visitors are required to plan their own retreats; booking accommodations, navigating their own tours and calling for dinner reservations on their own. This level of ‘tourist autonomy’ is a barrier to growth. However, successful packaging is presently a legal impossibility as The County lacks Tourism Industry Council of Ontario (TICO) licensing. TICO is an organization mandated by the Ontario government to administer the Ontario Travel Industry Act of 2002, which governs all of the approximately 3,000 travel retailers and travel wholesalers registered in Ontario.

PEC currently does not have a travel retailer or wholesaler registered under TICO guidelines, and thus they are legally unable to create package deals. All efforts should be made to ensure and gain TICO licensing in order to develop successful packages which utilize the various components of The County’s tourism sector. The potential for growth in tourism in The County does not lie in its individual components, but in the overall experience and the synergy that these deliver. Linking together The County’s wineries, fine dining, and intimate accommodations within a singular, pre-planned travel package will increase growth in the sector. As a short-term strategy, the County should consider partnering with Canadian Discoveries in Kingston, a firm with extensive experience in the development and management of tourism packages.

**6.6.2 Meeting Demands – Low Impact Tourism and Niche Marketing**

While the strengths of The County must be optimized, there must also be considerable attention paid to demand. A major fear within the region’s tourism sector is a concern with stagnancy, offering the same experiences and products every year. Instead, tourism in The County must take a progressive approach by researching their targeted markets and the specific demands that are being made and meeting them in a way which does not alter The County’s fundamental character. Fortunately, contemporary tourism demands and the demographics of nearby target markets mesh well with the experiences and products The County has to offer. The development of niche marketing as a progressive tourism strategy will be highly effective.

**Ecotourism**

Ecotourism is defined as the purposeful travel to natural areas to understand the cultural and natural history of the environment, taking care not to alter the integrity of the ecosystem; while producing economic opportunities that make the conservation of natural resources financially beneficial to local citizens. Ecotourism fits within the needs of PEC, as a fine line exists between developing the tourist sector and preserving the region culturally. PEC’s natural amenities, such as its abundance of parks,
ample birding opportunities, and hiking and canoeing trails create an experience in which visitors can study and appreciate the region’s natural environment in an enjoyable and active manner. Visitors should be encouraged to learn about nature first hand by hiking, walking, and canoeing throughout the paths and rivers that make The County unforgettable, and by studying the many animals and birds that call the region home. Through the promotion of ecotourism, PEC can maintain the environmental integrity of the region; please local citizens by conserving and preserving natural resources; and rejuvenating the tourism sector in an efficient and sustainable manner.

**Cycle tourism**

Cycle tourism fits within the broad strategy of PEC in that it promotes environmentally sound, sustainable tourism within a growing, highly profitable market. Primarily within the ages of 30 to 55, bicycle tourists are predominantly white collar workers who use all types of accommodation; from campsites to 5 star hotels, relying on cafés and restaurants along the route for food and other amenities.\(^8^4\) Research suggests that the interests of cycle tourists fit perfectly with the products and services PEC has to offer. Cyclists are more likely to take part in participatory learning activities, attend live art performances while on trips, and stay in public campgrounds.\(^8^5\) Cycling is the tenth most common outdoor activity in Canada.\(^8^6\) Cyclists were the third most likely to have taken a trip within their own province/region.\(^8^7\) By establishing infrastructure like bicycle paths, The County will further promote its creative rural economy through the attraction of creative individuals.

**Agritourism**

Agritourism is helping many farmers survive in today’s marketplace. Diversification strategies may include attracting visitors and incorporating a tourism element into farm operations, while the County’s unique wineries creates a niche opportunity for wine lovers to engage in scenic tastings, tours, and purchases. Agritourism works to expand existing businesses, create new festivals, and farmer’s markets, and tie this all together regionally to attract visitors.

Over the last two years, 11.7% of adult Canadians participated in agritourism while on an out of town, overnight trip.\(^8^8\) Fruit picking was the most popular activity, followed by dining on a farm, and visiting a harvest or other farm operations.\(^8^9\) Within PEC, agriculture remains a dominant economic sector. Utilizing this increasingly unique characteristic within the tourism sector will be beneficial to its continuing sustainability. A potential niche development is the new alternative energy processes local farmers are using. Providing local farmers are interested in conducting these types of tours, partnerships could be established with outbound travel trade operators who sell agri-tours. PEC should consult with ‘Taste the County,’ an organization that could facilitate the further development of agritourism.

**Environmental Solutions**

In accordance with environmental sustainability, tourism planning should make every attempt to mitigate uncontrolled growth. Moreover, the lack of public transit in the summer months should be addressed as a means to decrease traffic emissions and congestion. The promotion of low impact tourism (i.e. agritourism, ecotourism and cycle-tourism) will help alleviate environmental stress, while promoting growth and profitability. A positive environmental image is linked to the construction of a
powerful rural creative economy, and central to the amenities required in attracting creative individuals, e.g. jogging paths, cycling paths, hiking trails, etc.

A seasonal public transportation system should be established to reduce traffic congestion in the summer. Implementing a “park and ride” system and promoting carpooling would decrease the carbon footprint of the region, encouraging environmental sustainability and reduce maintenance costs of Picton’s Main Street. Also, providing public transport will promote safety in the region, giving people the option to enjoy the wineries and world renowned cuisine, without the worry of driving under the influence. Partnerships with transport companies should be forged to create such transportation services in the short term.

**Empirical Evaluation and Effective Growth Management**

The County should undertake an empirical, quantitative market study in order to better understand revenues from various markets versus opportunity costs; as well as adopt a cost-benefit approach to tourism to be linked to this additional data gathering. An examination of day versus overnight visitation to determine which markets deliver the greatest returns, while minimizing opportunity costs such as road maintenance, pollution, and environmental degradation is an effective strategy (See Appendix D).

Included within this evaluation should be an examination of the volume of “day traffic” at Sandbanks Provincial Park, and whether or not attention should be paid to attracting these individuals into the community as a profitable and sustainable enterprise. Based on the potential strength of developing packaging and tourism experiences around the wine and culinary niche, an evaluation of County product offerings should be undertaken to identify gaps, which can then be incorporated into a product development and marketing strategy. This type of analysis should be undertaken for all potential markets as well.

**Conclusion**

*While tourism has a high growth potential, it must be managed in a way that does not damage the community or the environment. PEC’s continuing success as a unique tourism destination in Ontario has been dependent upon many interconnected factors: its natural beauty and abundance of outdoor activities, a unique blend of arts, heritage and history, as well as an emerging destination for wineries and fine cuisine. It is not simply a few independent tourism attractions that make The County a desirable tourist destination, but clusters of tourism product, as well as a synergy with the distinct rural lifestyle, which merge to create a unique experience for visitors.*

*First and foremost, The County must continue to promote its distinct community culture. Central to this idea will be maintaining the range of specialized goods and services, intrinsic community values and lifestyles, as well as its non-commercialized environment. Preserving the region’s environmental integrity, as well as developing successful strategies in accordance with the views of the resident community will be critical in these developments. However, in order to continue to offer a unique experience without the risk of market stagnancy, tourism strategies must be created in accordance with knowledge of extra-regional demand. Marketing to targeted and strategic social and demographic*
groups, while continually reinventing and modifying The County’s products and services in agreement with market expectations and demands, will be necessary in order to sustain growth and success.

Furthermore, a successful and thriving tourism sector can heavily contribute towards the development of a creative rural economy. In providing a higher quality of life for community residents, through the protection and construction of a number of material and immaterial amenities, tourism enables better standards of living than would be available if the sector were non-existent. By continually investing in tourism, PEC can expect to see the development of a regional environment rich with culture, fine dining, natural beauty, and the celebration of Loyalist history; all of which are central to the attraction of talented and creative individuals. It should not be forgotten that the tourism sector not only promotes a creative rural economy, but exists within it. As such, the sector can benefit from the advantages it promises to deliver. By helping to construct and maintain a creative rural economy through effective planning and marketing strategies, tourism will also benefit from an influx of highly skilled and creative individuals, who will further improve the sector and create new opportunities for the region.

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60 ibid
61 Michèle Laliberté. “Baby boomers, the backbone of the tourism industry,” (Quebec Tourism Intelligence Network, Transat Chair in Tourism, Montreal’s School of Management, UQAM, 2007), http://tourismintelligence.ca/2004/05/31/baby-boomers-the-backbone-of-the-tourism-industry/.
63 Michèle Laliberté. “Baby boomers, the backbone of the tourism industry,” (Quebec Tourism Intelligence Network, Transat Chair in Tourism, Montreal’s School of Management, UQAM, 2007), http://tourismintelligence.ca/2004/05/31/baby-boomers-the-backbone-of-the-tourism-industry/.
65 ibid
68 ibid
71 ibid
Rebecca LeHeup-Bucknell. “Maple in the County Wins Top Award,”


Rebecca LeHeup-Bucknell, interview by Paul Deacon, March 2008, Interview with Rebecca LeHeup-Bucknell.


ibid

ibid


The International Ecotourism Society, “Definitions and Principles,”


Canadian Travel Market, “Cycling While on Trips of One or More Nights, A Profile Report,” October 23, 2007,
www.tourism.gov.on.ca/english/research/travel_activities/cycling_cdn.html.

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ibid

Canadian Travel Market, “Participating in Agro-Tourism while on Trips of One or More night,” December 2007,

ibid
Final Conclusions

Prince Edward County has a bright and vibrant future. PEC is blessed with a breath-taking natural setting and is rooted in a strong community that upholds a distinctive ‘County’ culture and a vibrant artistic community. PEC thrives on its unique quality of place – a characteristic that continues to lure tourists and ex-urbanite retirees looking to experience a peaceful yet enriching quality of life. By harnessing the skills and professional experiences of PEC’s expanding retirement population, the County’s aging demographic will infuse the community with a diversity of life experiences and knowledge-intensive skills.

This report has identified a series of recommendations to assist in the growth of PEC’s rural creative economy. Final recommendations include:

- Improving the collection of statistical data, especially in sectors where PEC has obvious strengths (viticulture, culinary and tourism);
- Enhancing local educational opportunities, including new co-operative education programs in local high schools in viticulture and the culinary arts;
- Investing in high speed internet infrastructure so that small and medium-sized businesses can thrive;
- Supporting local producers through various public procurement initiatives;
- Nurturing the local population through investing in affordable housing and other necessary transit and medical infrastructures;
- Encouraging innovation by supporting and rewarding entrepreneurial activity;
- Promoting sustainable tourism that balances tourist demand with ecological integrity and the region’s unique sense of place.

The County is at a crossroads in its development. PEC must remain committed to ecological integrity and historical heritage preservation and enhancement so as not to lose sight of The County’s rich natural and cultural legacy. PEC should continue to grow its emerging culinary and viticulture industries, as these sectors are propelling tourism and providing economic opportunity within the region. PEC must continue to support innovative entrepreneurship and harness the population’s creative potential, while providing quality services to ensure an excellent quality of life for all its residents. If growth and economic development continue to focus on the cultivation of a sustainable and creative economy – while upholding innovative firms and tourism as cementing industries – PEC will undoubtedly enjoy a prosperous future.
Final Recommendations

Improve Collection of Statistical Data:
- Develop statistical indicators to describe and quantify PEC’s viticultural and culinary sectors. (Section 5.4)
- Improve monitoring and documentation of tourism indicators. (Section 6.3.1)
- Undertake a full empirical, quantitative tourism market study in particular researching potential target tourist markets. (Section 6.5.2)

Enhance Local Educational Opportunities:
- Partner with local post-secondary institutions to establish internships in the wine and tourism sectors. (Section 2.4)
- Invite educators from local post-secondary institutions to offer seminars and workshops in PEC. (Section 2.4)
- Create co-operative education programs in local high schools in viticulture and the culinary arts. (Section 3.2)
- Encourage co-operative high school programs in creative and artistic fields and promote links to local studios and galleries. (Section 3.4)
- Work with a local post-secondary institution to establish a campus in The County. (Section 3.4)
- Provide financial assistance through a scholarship or bursary for local students interested in studying medicine. (Section 4.4.3)
- Investigate programs in hospitality training such as SuperHost®. (Section 6.3.2)

Invest in Internet Infrastructure:
- Acquire access to high speed internet for The County. (Sections 2.4, 5.4)
- Update and improve PEC websites. (Section 6.3.3)
- Facilitate on-line booking of PEC accommodations. (Section 6.3.3)

Support Local Producers:
- Establish school lunch programs in PEC high schools using local food prepared by local chefs. (Section 2.4)
- Encourage PEC firms to attend employment fairs at nearby universities and colleges. (Section 3.5)
- Establish a locally owned and operated meal delivery service emphasizing high-quality food and using locally grown and prepared food. (Section 4.3)
- Support firms that export products out of PEC by helping them gain broader exposure. (Section 5.4)
- Enhance community understanding of value-added agriculture to foster local support for County firms. (Section 5.4)
- Establish a weekend market as a venue for local businesses, farmers, and artists to sell their products. (Section 5.4)
**Support the Local Population:**
- Develop resources to assist the integration of new residents into the community. (Section 2.4)
- Invest in affordable housing in Picton. (Section 4.2)
- Expand the transit service to health facilities offered by the PEC Community Care for Seniors Program. (Section 4.4)
- Invest in the physical infrastructure of a basic medical clinic to attract new medical graduates. (Section 4.4)

**Encourage Innovation:**
- Support entrepreneurial activity to encourage risk-taking (Section 2.4)
- Support business ventures in elder care (Section 4.3)
- Research opportunities for support for innovative initiatives for the federal and provincial governments (Section 5.4)
- Encourage and reinforce the intensification of the emerging viticultural cluster. (Sections 5.2, 5.4)
- Foster linkages between local businesses and the local artistic community to increase value through creativity. (Section 5.4)

**Embrace The County’s Enthusiasm:**
- Create a program for recognizing and rewarding the local creative firms and individuals. (Section 2.4)
- Establish a forum for youth participation in local government. (Section 3.4)
- Create government-sponsored programs to fund student entrepreneurship. (Section 3.4)

**Promote Sustainable Tourism:**
- Manage tourism growth from a perspective of sustainability, carefully considering the costs of expanded tourism activity. (Section 6.3)
- Develop travel packages combining The County’s major attractions. (Section 6.4.1)
- Acquire TICO licensing to facilitate the development of travel packages. (Section 6.4.1)
- Offer a seasonal public transportation system. (Section 6.4.2)
- Encourage the establishment of alternative health centres. (Section 6.4.1)
- Establish bicycle paths and advertise PEC as a destination for cycle tourism. (Section 6.4.2)
- Market PEC as a tourism destination to gay and female tourists. (Sections 6.1)
- Promote The County as a destination for romantic getaways, ecotourism, and agritourism. (Sections 6.4.1, 6.4.2)
Appendix A: Comparison Regions

The Cowichan Valley and Saltspring Island Regions have been identified as being useful regions for comparisons to PEC. This appendix consists of a brief description of the economic pillars of each region highlighting similarities to PEC where applicable, and tables summarizing the available Census data comparing PEC to each region.

Cowichan Valley

The Cowichan Valley Region, home to 76,929 residents, is located in the southern part of Vancouver Island between the cities of Victoria and Nanaimo. It is roughly three times the size of PEC in both population and area. Like PEC, it is strategically located near large- and medium-sized cities including Vancouver, Victoria, and Nanaimo. Like PEC, it is an area with a favourable climate and tremendous natural beauty. Both areas have excellent agricultural potential.

The pillars of the regional economy in the Cowichan Valley as identified by the Cowichan Region Economic Development Commission are:

1) Forestry – A long-standing primary extraction industry is complemented by logging supply firms, lumber processing facilities, eco-tourism and other related value-added firms to maximize the local economic development potential of this primary resource.

2) Marine – Primarily recreational boating and windsurfing, but there is a growing aquaculture industry and a kayak manufacturer has recently opened in the region.

3) Manufacturing – Mostly associated with the forestry sector, manufacturing facilities in the region include pulp mills and wood chip factories. There is also a significant manufacturer of docks and marine supplies.

4) Tourism – An estimated 20% of local employment is dependent on tourism. Regional attractions include natural beauty, galleries, studios, wineries, gold courses, museums, and the Cowichan Theatre.

5) Technology – Fibre-optic technology has recently been installed and the region is looking to expand the high-tech sector.

6) Agriculture – Excellent growing conditions. There is a growing emphasis on local food production. There is also an emerging wine industry.

7) Agritourism – Identified as a potential area for significant growth.

Major similarities include:

- Proximity to major urban centres, lower cost of living
- Strong tourist industry driven by a mix of cultural and natural amenities
- Emerging wine regions seeking to grow
- Presence of value-added industries around a primary extraction industry (forestry in Cowichan Valley, agriculture in PEC)
• Strong and growing artisanal community
• Movement towards local specialty food production

**Major differences include:**
• Size (PEC is smaller)
• Presence of post-secondary educational facilities in Cowichan Valley – the Cowichan Campus of the Nanaimo-based Malaspina University-College.
• Presence of fibre-optic technologies in Cowichan Valley
• Presence of local public transit in Cowichan Valley

**Saltspring Island:**
Saltspring Island is the largest of the Gulf Islands found between Vancouver Island and mainland British Columbia. It is home to 9,640 residents. Like PEC, the population of Saltspring Island is significantly older than the provincial average. The island is home to some of the highest property values in the country as its climate, lifestyle, and amenities have made it a popular retirement destination.

Saltspring Island is heavily reliant on the tourism industry, which attracts tourists through its natural beauty, opportunities for outdoor activities, and vibrant arts industry. Saltspring Island is renowned for a highly creative population of artists, craftspeople and musicians, and showcases their works in a weekly market in the central town of Ganges. The Island’s reputation rests on its artistic population, but it is also home to 225 farms (primarily raising sheep), and a significant tourist service sector that includes restaurants, spas, hotels and motels, eight resorts, and more than 40 Bed and Breakfasts.

**Major similarities include:**
• Proximity to major urban centres
• Strong tourist industry driven by a mix of cultural and natural amenities
• Presence of a vibrant arts community
• Significantly older than average population

**Major differences include:**
• Size (PEC is larger)
• Saltspring Island can boast of being home to well-known artists and having a more established reputation as a centre for creativity. The main centre, Ganges, is home to a popular Saturday market that offers local artists and craftsmen a venue to sell their creations
• Saltspring Island is a site of significant real estate development for resorts and retirement homes
• Saltspring Island has facilities for health tourism including spas.
• PEC has more developed agricultural and manufacturing sectors
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<th>Saltspring Island</th>
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<td>24.3</td>
<td>22.1</td>
<td>52.9</td>
</tr>
<tr>
<td><strong>Median Age</strong></td>
<td>47.7</td>
<td>44.4</td>
<td>47.6*</td>
</tr>
<tr>
<td><strong>Total Labour Force</strong></td>
<td>12,570</td>
<td>34,830</td>
<td>4795*</td>
</tr>
<tr>
<td><strong>Median Family Income ($)</strong></td>
<td>49,842*</td>
<td>51,446*</td>
<td>48,793*</td>
</tr>
<tr>
<td><strong>% Population without high school</strong></td>
<td>23.2</td>
<td>19.9</td>
<td>17*</td>
</tr>
<tr>
<td><strong>% Population without post-secondary</strong></td>
<td>50.8</td>
<td>45.2</td>
<td>40.8*</td>
</tr>
<tr>
<td><strong>Labour Participation rate (%)</strong></td>
<td>59</td>
<td>60</td>
<td>61.9*</td>
</tr>
<tr>
<td><strong>Unemployment rate (%)</strong></td>
<td>6</td>
<td>6.4</td>
<td>5.9*</td>
</tr>
<tr>
<td><strong>Workforce Composition (%)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Agriculture and resource-based</td>
<td>8.56</td>
<td>7.35</td>
<td>6.26*</td>
</tr>
<tr>
<td>Construction</td>
<td>7.07</td>
<td>9.25</td>
<td>12.21*</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>11.25</td>
<td>9.29</td>
<td>5.85*</td>
</tr>
<tr>
<td>Wholesale and Retail</td>
<td>13.86</td>
<td>15.78</td>
<td>12.00*</td>
</tr>
<tr>
<td>Finance and Real Estate</td>
<td>4.42</td>
<td>5.13</td>
<td>3.02*</td>
</tr>
<tr>
<td>Health Care and Social Services</td>
<td>12.17</td>
<td>10.92</td>
<td>11.59*</td>
</tr>
<tr>
<td>Education</td>
<td>7.23</td>
<td>7.03</td>
<td>6.78*</td>
</tr>
<tr>
<td>Business Services</td>
<td>16.27</td>
<td>12.99</td>
<td>12.32*</td>
</tr>
<tr>
<td>Other Services</td>
<td>19.16</td>
<td>22.3</td>
<td>29.97*</td>
</tr>
<tr>
<td><strong>Total Agricultural Receipts ($1000's)</strong></td>
<td>76,767</td>
<td>47,524</td>
<td>3,998</td>
</tr>
</tbody>
</table>

* Indicates Data is from the 2001 Census of Canada

Sources: Statistics Canada, Census 2006; Statistics Canada, Census 2001; Statistics Canada, Census of Agriculture 2006

Figure B-1: Demographic and Economic Indicators in PEC, Cowichan Valley, and Saltspring Island
91 Ibid
94 Ibid
Appendix B: Innovation Data

1. Leadership in Energy and Environmental Design (LEED)
LEED is a program developed by the U.S. Green Building Council, a non-profit organization that promotes environmentally sustainable building initiatives. The LEED ratings are developed by consensus-based standard to certify “green” buildings. The point system awards a building project a level of: certified (26-32 points); silver (33-38 points); gold (39-51 points); or platinum (52 points or more). There are 46 projects in Canada listed on the LEED projects website, none yet with platinum certification. Fifth Town Artisan Cheese will be the first firm in Canada with platinum rating.

2. Ecological Footprint
The goal of the Global Footprint Network is to develop Ecological Footprints by advancing the science of sustainability. An Ecological Footprint is a resource management tool that measures how much land and water area a human population requires to produce the resources it consumes, and to absorb its waste under prevailing technology. Today, humanity’s Ecological Footprint is over 23% larger than what the planet can regenerate. This overshoot is maintained and will continue to rise by the liquidation of natural resources. By measuring the Ecological Footprint of a population (individuals, cities, nations, or all of humanity), we can assess our overshoot, which will enable people to take personal and collective actions in support of a world where humanity can live within the means of one planet.

3. Policy Initiatives

Ontario’s Commercialization Network

The Ontario Commercialization Network (OCN), is a system that breaks Ontario into 12 Regional Innovation Networks (RINs). Accordingly, PEC is located in the Eastern Lake Ontario network. The following points are drawn from the Ontario Ministry of Economic Development and Trade’s document on the Ontario commercialization network.

The OCN contributes to the Ontario economy in the following ways:

- Increase knowledge flow and build linkages between industry and the research institutions (e.g., technical information, research discoveries)
- Build industry receptor capacity for uptake and adoption of new technologies (e.g., linking industry to appropriate human resources –technical, management and financial and funding programs, R&D infrastructure)
- Increase regional innovation capacity by addressing commercialization gaps in regional small and medium enterprises (SME) supports and networks (e.g., development of angel investor networks, entrepreneurial training, business mentorship)
- Develop strong networks across the province to increase the accessibility of public R&D infrastructure and resources (e.g., identification and access to public research equipment and laboratory to help firms test new products, identification and access to researchers that could solve technical issues for companies)
• Connect SMEs to provincial resources and assets such as MaRS and Ontario Centres of Excellence (e.g., mapping out the process to link firms to appropriate resources, development of on-line or virtual tools and resources and standard diagnostic tools to help identify a firm’s commercialization priorities and use of a common platform across the various provincial level support organizations)

**Canada-Ontario Municipal Rural Infrastructure Fund (COMRIF)**

COMRIF is a partnership between the Federal and Provincial governments to promote infrastructure development in rural municipalities in Ontario with a goal of improving quality of life. It can be explained as functioning as a “network of networks” and facilitates intra-provincial co-operation and the sharing of best practices. It also provides the Government of Ontario with an expedited resource and service delivery method.”

With a focus on improving services in small urban centres and rural communities, COMRIF promotes economic development by incorporating innovative ideas, such as “green” builds. At the same time, the community benefits overall from better health and safety standards.
**Appendix C: Wine Index**

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Land area (sq km)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Statistics Canada Community Profile</td>
<td></td>
</tr>
<tr>
<td>Prince Edward Census Division</td>
<td>1050.14</td>
</tr>
<tr>
<td>Niagara Municipality</td>
<td>1854.17</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>41.79</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>185.65</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>3131.75</strong></td>
</tr>
</tbody>
</table>

A wine index was created by comparing four of the major wine producing regions in Ontario: Prince Edward County, Niagara, Pelee Island and Lake Erie. Data regarding total number of grape farms, total acres of grape farmland, total number of recorded wineries, total acres of farmland used in wineries, total varieties of wines produced and total number of wines approved by the Vintners Quality Alliance (VQA) in 2007 in each region were used to calculate an index and rank each region’s performance in those respective categories.

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Number farms producing grapes</th>
<th>Number of farms per sq km of land</th>
<th>Farm quantity Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Census of Agriculture 2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prince Edward County</td>
<td>33</td>
<td>0.031424382</td>
<td>0.38</td>
</tr>
<tr>
<td>Niagara</td>
<td>211</td>
<td>0.113797548</td>
<td>1.36</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>13</td>
<td>0.311079206</td>
<td>3.72</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>5</td>
<td>0.0269324</td>
<td>0.32</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>262</strong></td>
<td><strong>0.083659296</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Acres of farms producing grapes</th>
<th>Acres per sq km of land</th>
<th>Acreage Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Source: Census of Agriculture 2006</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prince Edward County</td>
<td>321</td>
<td>0.305673529</td>
<td>0.11</td>
</tr>
<tr>
<td>Niagara</td>
<td>7,857</td>
<td>4.237475528</td>
<td>1.46</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>820</td>
<td>19.62191912</td>
<td>6.76</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>94</td>
<td>0.506329114</td>
<td>0.17</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>9,092</strong></td>
<td><strong>2.903169155</strong></td>
<td></td>
</tr>
</tbody>
</table>
### VQA 2007 Approved Wines

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Number of approved wines</th>
<th># approved per sq km of land</th>
<th>Approval Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward County</td>
<td>4</td>
<td>0.003809016</td>
<td>0.02</td>
</tr>
<tr>
<td>Niagara</td>
<td>614</td>
<td>0.331145472</td>
<td>1.50</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>7</td>
<td>0.167504188</td>
<td>0.76</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>65</td>
<td>0.350121196</td>
<td>1.59</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>690</strong></td>
<td><strong>0.2203241</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** VQA email correspondence

### Number of recorded wineries

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Number of recorded wineries</th>
<th># per sq km land</th>
<th>Approval Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward County</td>
<td>12</td>
<td>0.011427048</td>
<td>0.37</td>
</tr>
<tr>
<td>Niagara</td>
<td>79</td>
<td>0.042606665</td>
<td>1.38</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>2</td>
<td>0.047858339</td>
<td>1.55</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>4</td>
<td>0.02154592</td>
<td>0.70</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>97</strong></td>
<td><strong>0.030973098</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** (2006 vineyard and winery management directory and VQA "The Wineries" website)

### Recorded acres of farmland used in wineries

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Recorded acres of farmland used in wineries</th>
<th># acres per sq km land</th>
<th>Approval Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward County</td>
<td>83</td>
<td>0.079037081</td>
<td>0.06</td>
</tr>
<tr>
<td>Niagara</td>
<td>3708.7</td>
<td>2.000194157</td>
<td>1.46</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>500</td>
<td>11.96458483</td>
<td>8.71</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>11</td>
<td>0.059251279</td>
<td>0.04</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>4302.7</strong></td>
<td><strong>1.373896384</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** (2006 vineyard and winery management directory)

### Recorded varieties of wines

<table>
<thead>
<tr>
<th>Viticultural Areas</th>
<th>Recorded varieties of wines</th>
<th>Varieties per sq km land</th>
<th>Approval Index</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prince Edward County</td>
<td>16</td>
<td>0.015236064</td>
<td>1.02</td>
</tr>
<tr>
<td>Niagara</td>
<td>23</td>
<td>0.012404472</td>
<td>0.83</td>
</tr>
<tr>
<td>Pelee Island</td>
<td>5</td>
<td>0.119645848</td>
<td>7.97</td>
</tr>
<tr>
<td>Lake Erie</td>
<td>3</td>
<td>0.01615944</td>
<td>1.08</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>47</strong></td>
<td><strong>0.015007584</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Source:** (2006 vineyard and winery management directory)
The index that is calculated by weighting all six factors equally, shows Pelee Island as having the best performing industry, followed by Niagara, Lake Erie and finally PEC. All of the statistics used were converted into a per sq km of land mass basis to allow a fairer comparison that considered the actual size of the region, and then divided by the summation of that figure between the four districts divided by the total land area between the four districts. Without this conversion Niagara’s dominance in the wine market, partially due to the fact that it is the largest region of the four, would have skewed the results. However, with this conversion, the index results are now skewed in favour of Pelee Island because it has a dramatically smaller land mass than the other four regions. Therefore, while the index shows that based on its relative size, Pelee Island’s viticulture industry is flourishing, when taken in absolute terms it contributes the smallest portion to the Ontario wine industry as a whole.

Nonetheless, PEC finishes low in each factor, which is likely due to the shorter history of PEC’s viticulture industry when compared to a region such as Niagara, so it should be noted that currently many new wineries are emerging in the county. Unfortunately, detailed data regarding growth in wine production volume, or growth in retail value or sales of wines in each region were not available, which would have allowed more insight into industry growth potential. As only wine sales data for PEC could be found, it was not possible to compare income from wine sales between all four regions. Hence it should be noted that the index does not acknowledge the actual income from wineries nor measures of growth. In actuality, sales in PEC between 2005-2006 increased 191%, and many new wineries are just opening, so it is important to note that the index only reflects the current situation, and may not reflect the potential that PEC may possess.

Also, there are limitations to the factor “VQA approved wines”. VQA data is useful in giving a broad view of where the wines comes from, there are some limitations in their representation of wine origin, because wineries are free to choose which specific appellation for which their wines qualify. For example, a wine can be classified into a sub-appellation such as Niagara LakeShore as opposed to larger appellation Niagara.
Appendix D: Tourism Data

Outdoor Activities
- Bird Watching, cycling, hiking, golfing, canoeing, kayaking, scuba diving, fishing, boating (Cruise Charters), self guided heritage tours.

Festivals
- 29 Festivals, promotes social interaction and community cohesion, advertises strengths and off season growth

Food and Wine
- 15 wineries, 2 breweries, 49 dining establishments, top chefs, organic cuisine

Unique Shopping Experience
- High – end specialty stores (antiques, boutiques and artistry), local produce, farmer’s markets

Resource Endowment
- Fertile soil, maple trees, labour force, unique culture, creative market, beautiful scenery, natural beauty

Art
- 53 galleries and artist studios, 3 gallery tours, 2 performing arts venues

History
- Loyalist heritage, archives, 6 museums, historical heritage sites, historical architecture, economic history rooted in agriculture, genealogical center,

Non-Commercialized Atmosphere
- All privately owned family businesses or small entrepreneurial shops and business

Natural Aesthetics
- Shorelines, beaches, 5 municipal parks, 3 provincial parks, 2 provincial reserves, 2 interpretive trails, 1 multi use trail

Intimate Accommodations
- Bed and breakfasts, small scale hotels and motels, off-site spas

Geographic Location
- Convenient location, situated along the 401, close to major markets, accessible by land, air and sea, moderate climate

Figure D-1: Visualization of Prince Edward County Place Effect
<table>
<thead>
<tr>
<th></th>
<th>Day trips</th>
<th>Overnights</th>
<th>VFR</th>
<th>Camping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visitation by market (#s)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue by market (###) per day spending</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visitation by market (geog)</td>
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<tr>
<td>- TO</td>
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<tr>
<td>- Ottawa</td>
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<td>- MTL</td>
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<td>- Other Ont</td>
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<td></td>
</tr>
<tr>
<td>- Other Canada</td>
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<td></td>
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</tr>
<tr>
<td>- US</td>
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<tr>
<td>- UK</td>
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<tr>
<td>- France</td>
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<tr>
<td>- Germany</td>
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<tr>
<td>- Other</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Opportunity Costs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ie. pollution, sanitation, services, roads</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Costs to attract</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Direct marketing</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Advertising</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Travel Media</td>
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</tr>
<tr>
<td>- Travel Trade</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Consumer Shows</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Ms. Judy Rogers, special consultant to the Ontario Ministry of Tourism in Tourism Market Research and Statistics is highly recommended to undertake a custom market study for PEC. She can be reached at rogers.judy@sympatico.ca or 416.531.9973*

**Figure D-2: Tourism Data Gathering Framework**
Appendix E: Bibliography


Craig DesJardins, Interview by Andrew Jones, March 7 2008, Interview with Craig DesJardins.


Dr. Carl Jones, Interview by Andrew Jones, March 7 2008, Interview with Dr. Jones.

Dr. Craig Campbell, Interview by Sarah Campbell, March 16 2008, Interview with Dr. Campbell.


Shirley Roloson, Interview by Andrew Jones, March 7 2008, *Interview with Shirley Roloson*.


