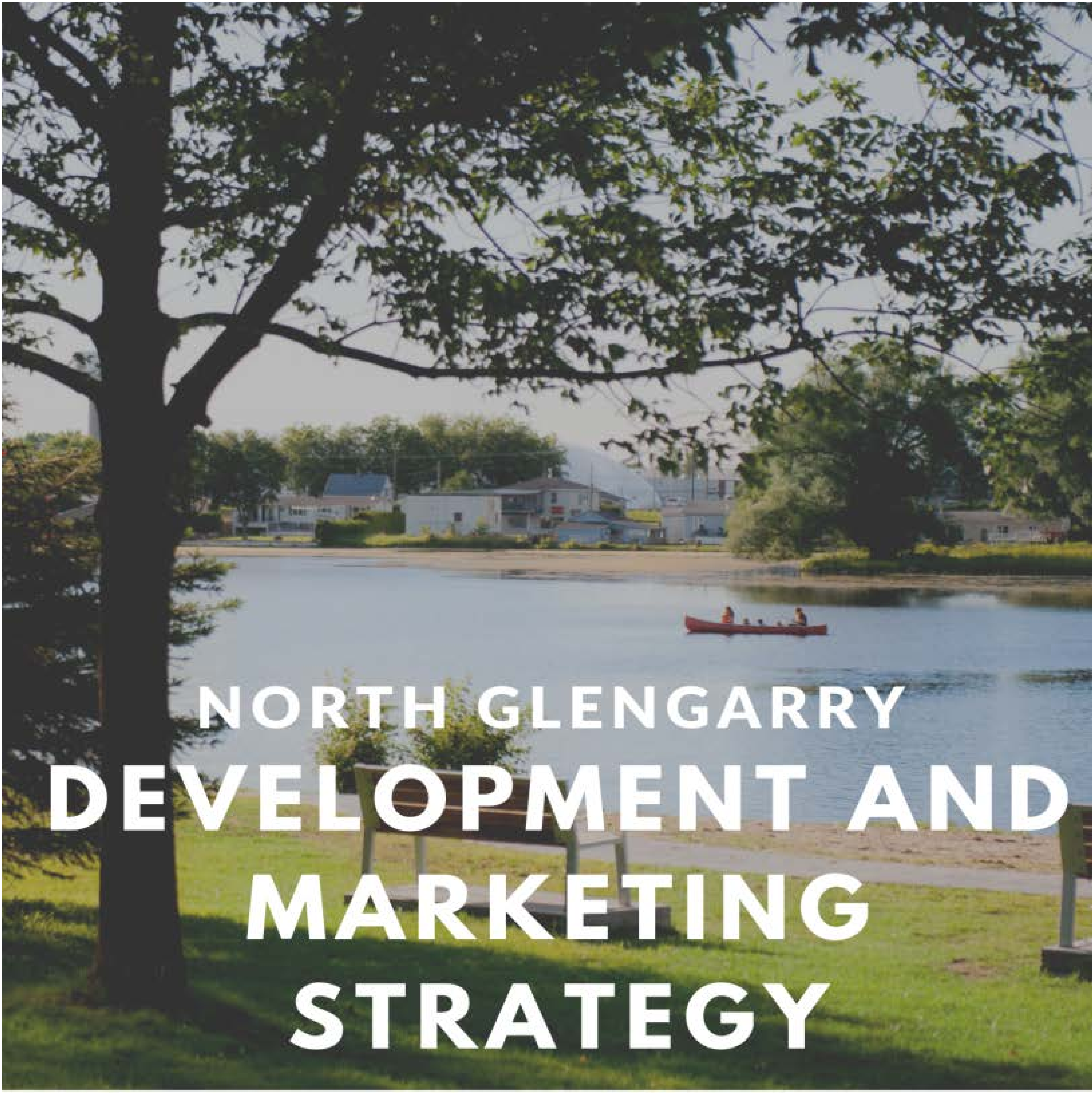

NORTH GLENGARRY DEVELOPMENT AND MARKETING STRATEGY

SEPTEMBER | 2020

North Glengarry Nord

Ontario's Celtic Heartland
Le centre celtique de l'Ontario

MDB INSIGHT

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SETTING THE STAGE: THE CASE FOR RESIDENT ATTRACTION

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The Challenge Facing Rural Communities

Resident attraction and retention is an issue with which communities across Canada are grappling. Often discussed in terms of the attraction and retention of "talent" (largely characterized as skilled labour), communities are experiencing a variety of rapid demographic and economic changes that are altering the way their local economies operate. These changes include:

- Low birth rates and aging populations
- Increased mobility of talent based on lifestyle preferences and entrepreneurial opportunities (most especially for the millennial generation)
- The increasing role of innovation, creativity, and knowledge-based employment
- The widespread use of new technologies that give people an ability to work from any geographic location and still tap into a global client basis
- Increased urbanization that is positioning cities as magnets for people due to changing economic, cultural, and lifestyle preferences

To add to these longer term trends, society is now dealing with the social and economic consequences of the COVID-19. While still early to draw definitive conclusions, it appears that the pandemic has accelerated most of these trends, especially the use of technology to work remotely. The emergence of COVID-19 has also added another consideration: health safety that comes with lower density communities.

COVID-19 aside, most of the long-term trends have contributed to a migration of talent to certain hubs of activity, often located in large urban centres. The result of this migration has led to a "hollowing out" of many rural communities as younger generations leave to pursue education or employment opportunities elsewhere. These youth often do not return to their home communities, creating a gap in talent that limits local business growth, places a negative strain on school systems, and discourages new investment in the community. Rural communities throughout Ontario and Quebec have faced many of these challenges.

Rural Renaissance

That said, many rural communities in Ontario have been able to stem the tide of population loss. This is especially true for communities that are within the commuter sheds of large cities. Around Ottawa, this would include communities in Renfrew, Lanark, Leeds & Grenville, Prescott-Russell and Stormont-Dundas-Glengarry Counties. Three of these communities are profiled later in the document to offer how they have been successful. Even those that are a little further out, such as Hastings and Prince Edward Counties have done excellent jobs of appealing to people looking for an alternative from cities. To accelerate the rural renaissance, a lot of discussion and research has been created to understand what drives talent to leave or stay in certain areas. Best practice themes that have emerged from this research include:

- **Having a robust place-based reputation** – strong reputations and positive overall place branding are important in piquing the interest of talent (especially for quality of life migrants)
- **Having a critical mass of enticing employers and job opportunities** – places that can demonstrate they have a variety of good employers and job opportunities are seeing success in talent attraction, and retention as talent actively seeks new challenges and does not stay in one job for long
- **Demonstrating being a "liveable community"** – above and beyond employment opportunities, talent is always looking for communities that can demonstrate they have a good quality of place, such as a vibrant cultural scene, opportunities to participate in the social life of the community, and a pleasant physical environment
- **Having good housing options** – access to well-suited housing that comes in a variety of forms (such as short-term living, apartments, and single-detached houses)
- **Being accessible to the world** – talent in this day and age lives a relatively mobile life, expecting easy transportation access to the outside world to go on trips, participate in national and international networking events and conferences, and be able to tap into creative impulses that go beyond any single community
- **Having a safe, healthy, and clean local environment** – talent tends to be drawn to places where health, safety, and sustainability are priorities and avoid those places where crime, congestion, and environmental problems are obvious
- **Delivering exceptional public services** – talent can be a demanding target group, expecting high quality in the available public services such as schools, day-care, and local infrastructure
- **Having an open social climate** – an open, inclusive, and tolerant climate attracts talent to become part of a community. This atmosphere also acts as a foundation for creativity and innovation, two elements that are also essential factors in attracting and retaining talent
- **Having an "X-Factor"** – attracting and retaining people to a community often has a less measurable "hidden" factor that connects people to a place on a personal level that makes them want to live there (such as having attended school there, a family or friend connection, and attending a cultural or professional event)
- **Peripheral link to a major centre** – communities that lie on the edge or in close proximity to a major centre often provide affordable accommodation with access to the job opportunities and diversity of a major centre that is a magnet for growth

North Glengarry has many of these characteristics. Some are more prevalent than others, but the assessment that is the subject of this report concludes that North Glengarry has more than enough to offer to be successful. What it needs now is a plan that concurrently, attracts interest from residential home builders to develop its shovel-ready lands while gaining the interest of prospective residents who are excited about the opportunity to own a home in a beautiful rural community.

02

SITUATIONAL ANALYSIS

Township Strategies/Plans that Support this Initiative

The Township of North Glengarry completed an economic development strategy in 2016 at the same time that the United Counties completed their economic development strategy. Residential growth and development was identified as a high priority, primarily under the Creative Professionals target market. Furthermore, the Ottawa and Montreal metro areas were pinpointed as the most likely origin of these investors and new residents.

At the time, water and sewer infrastructure/capacity was seen as the primary limiting factor to large-scale success. Since then, the Township has been effectively dealing with this matter. Earlier in 2020, the Maxville water project was completed and high on the Township's list of current corporate goals is improving the capacity of wastewater treatment in Alexandria. In that same 2019-2023 Corporate Strategic Plan, the Township has identified "Develop a plan to attract residential development" as a primary goal.

As indicated by the Township's Economic Development Office, interest in locating to North Glengarry has been quite strong. In both 2019 and early 2020, the Township fielded several inquiries from small business operators and potential residents. There have been successes over the last nine months with the opening of La Buvette Restaurant, Stonehouse Vineyard, and Wood Brothers Brewing, construction of Theoret Residential 16-plex apartment project, and expansion of Butchers to Go. Reports are that inquiries continue to be frequent and a number of residential, commercial and industrial projects are in the wings looking for final approvals or confirmation of investor interest.

The Township's proactive efforts to accommodate small business and residential development are paying off. The timing seems right to increase marketing and promotion outreach.

Stakeholder Engagement Key Themes

Through the course of the project, there were many ways in which the community was engaged:

- **Workshop with the Township's Community Development Committee:** The project consulting team met over videoconference with North Glengarry's Community Development Committee. The Committee is chaired by Deputy Mayor Carma Williams and includes local business and community leaders. Amongst the outcomes were a confirmation that the most likely target markets to attract to North Glengarry are families with young children (or looking to start a family) and independent professionals who can run their business remotely.
- **Public Stakeholder Workshop:** Held on Zoom and Facebook Live, residents, business owners and frequent visitors of North Glengarry were encouraged to attend. Dozens of attendees took part in this feedback session to determine the vision for the future growth of North Glengarry, and whom they felt were the Township's best bet to attract as future residents. Due to the use of Facebook Live, this workshop has been viewed nearly 780 times which confirms that visitor traffic was brisk.
- **Online Survey:** 127 individuals from North Glengarry and the surrounding areas participated in an online survey. This survey directed specific questions to residents of North Glengarry, enticing them to reflect on the positive attributes of the region and why they decided to live there. Further, non-residents were directed to questions to identify their opinions and perceptions of North Glengarry

and gauged their preferences and needs when seeking a new place to live. The survey aimed to identify potential target markets to direct advertising for the area and to gather valuable inferences about the needs of this target market. The complete response summary can be found in Appendix B.

- **Interviews with Realty Community:** Several residential developers and real estate professionals were consulted for their opinions on the potential for North Glengarry to attract residential investment. The perceptions are that North Glengarry has a location that would appeal to city dwellers and those that can work or run their businesses remotely. There was an emphasis on the prospects for rural communities to capitalize on concerns brought forward by COVID-19. Every interviewee was not aware of the improvements to water services in Maxville, and the respondents had suggestions on how to reach their industry with the message that North Glengarry is 'open for business'. These suggestions are reflected in the action plan.

Below are the main themes that arose from the input.

Quality of Life – The survey of non-North Glengarry residents identified that the respondents placed a high level of importance (8.8 out of 10) on quality of life when considering a place to live. Further, the residents of North Glengarry rated the quality of life as one of the most significant comparative advantages of the community over Ottawa/Montreal and residents also chose this factor frequently as a reason they had moved to North Glengarry. Participants of the community and committee workshops spent substantial time discussing the cultural and recreational activities in the region, often noting these attributes as some of its greatest strengths. This comparison reinforces the fact that the quality of life in North Glengarry is one of its greatest strengths for attracting new residents, and this should be emphasized through marketing and attraction initiatives.

Jobs and Employment Opportunities – The availability of jobs was the factor to which respondents believed Ottawa/Montreal had the most advantage over North Glengarry. Further, residents who indicated they might leave at some point in their lifetime rated the 'Availability of employment opportunities for my skillset' as the top factor which might cause them to leave the region. Non-residents showed high levels of agreement with the statements, "I would move to the North Glengarry for a higher rate of compensation," and "I would move to North Glengarry for the same rate of compensation." These respondents reported low levels of agreement with the statements, "North Glengarry has better employment opportunities for my skillset than my present location" and "I am likely to find a suitable or better job in North Glengarry." Taking the average across all respondents, safety/low crime rate, affordable housing, and cost of living were all rated as more important when deciding on a place to live than compensation/salary and job advancement opportunities. These findings indicate that while the availability of jobs and employment opportunities may be a limiting factor for individuals considering living in North Glengarry, these are not necessarily the most important factors for prospective residents. Workshop participants identified a substantial opportunity for employment growth due to the proximity to Ottawa and Montreal, ease of transportation, and the available development opportunities in the area. The rise in remote work also presented an option, as people can live in the area with a high quality of life and low cost of living while working from home. Further economic growth and land development can help to improve the availability of jobs, which would strengthen North Glengarry's ability to leverage its most substantial assets, such as quality of life and low cost of living.

Housing Options – When asked about their ideal setting to live, the non-resident survey respondents picked rural hobby farms and village/hamlet settings more frequently than all other options. Further, 42% of non-residents responded that they were willing to commute 30 minutes to an hour for work. Given its characteristics, these factors make North Glengarry a favourable location to live for individuals with these preferences who could still commute into Ottawa or Montreal. However, 81% of North Glengarry residents surveyed rated the availability of existing desirable housing options as somewhat or much better in Ottawa/Montreal compared to North Glengarry. Interestingly, the majority of residents also rated the housing prices better in Ottawa/Montreal compared to North Glengarry. These findings may indicate that despite many non-residents' having stated a preference for rural homes with short commute times, the low availability of housing stock in the area may be preventing individuals from settling in the township. Participants in the workshop related that housing prices are very reasonable in North Glengarry. They hoped to see more housing options become available, particularly for mixed levels of income and family size. Young families were identified as a particular interest group, as these individuals may be more likely to move before their children get to school age which would also aid the areas dwindling school populations. To attract these young families, housing developments that include an array of sizes and costs would be beneficial.

Potential for Remote Workers and Broadband Internet – The COVID-19 pandemic has undoubtedly made many Canadians rethink their living and working situations. Remote work has become a standard practice in many organizations, and rural communities have a chance to attract new residents without local job offerings. Non-residents of North Glengarry gave an average rating of 7.2/10 in terms of their level of agreement with the statement, "North Glengarry would be a great place to live while working remotely," which was the second-highest-rated statement. Nonetheless, the "Availability of broadband internet" was one of the residents' top reasons that they had speculated might cause them to move away from North Glengarry. A significant portion of the conversation during community and committee workshops was spent discussing the importance of high-speed internet and cell phone service, particularly during a time when remote work is on the rise. These responses show that there is a significant potential for North Glengarry to attract remote workers, but the availability of broadband internet is a limiting factor to achieving this goal. More information is needed regarding the current availability of broadband internet, and the needs for improvement to further assess this perception.

Economic Base Analysis Highlights

The economic base analysis identified key contextual findings regarding the demographic and economic characteristics of North Glengarry. These characteristics of North Glengarry were compared to the broader county (in the United Counties of Stormont, Dundas and Glengarry) and to the Province of Ontario. Most of the findings in this section, serve to inform the strategy by providing the current economic and demographic context of North Glengarry. The detailed findings, along with tables representing the data, are included in Appendix A. Some key themes from this detailed analysis which were pertinent to the current study are listed below:

- The overall population growth in North Glengarry was small compared to the United Counties of Stormont, Dundas and Glengarry and the province (Figure 1, Appendix A). The median age (shown in Figure 3, Appendix A) increased from 47.2 in 2011 to 50.9 in 2018 in North Glengarry, which was higher than the 2018 median age in both the United Counties of Stormont, Dundas and Glengarry (46.8) and the province (41.5). The growing population suggests room for improvement in the level of growth within the Township, since the surrounding areas have been able to achieve higher growth rates and lower median age.
- In 2018, North Glengarry had a lower share of external migrants than Stormont, Dundas and Glengarry County and the province, but higher levels of internal migrants (Figure 13, Appendix A).
- The median value of dwelling in North Glengarry in 2018 was only 54% of the median in the Province of Ontario. The median monthly shelter costs for rented dwellings in North Glengarry in 2018 ($807) was $222 less than the province (Figure 6, Appendix A). These shelter costs include, where applicable, the rent and the costs of electricity, heat, water and other municipal services.
- In North Glengarry and the surrounding county, the proportion of individuals with post-secondary education or training was 10% lower than the province (Figure 11, Appendix A).
- The unemployment rate was lower than the provincial rate in 2011 (7.9% compared to 8.2% in the province), but as of 2018, the rate was higher (6.4% compared to 5.8% in the province; Figure 15, Appendix A). Between 2011 and 2018 North Glengarry had surpassed the labour force participation rate (the proportion of the population working or looking for work) in the rest of the County and reached their participation rate of 62.2% (Figure 15, Appendix A). Compared to the province, Figure 16 in Appendix A shows that North Glengarry also had a higher proportion of self-employed workers (16.9%) compared to the province (11.5%).
- Comparing North Glengarry to the province, we were able to determine the industries with a relative advantage based on the density of employment in that sector. Using 2-digit NAICS codes, Agriculture, forestry, fishing and hunting; Utilities; Other services (except public administration); and Transportation and warehousing were the industries with a higher proportion of employment in North Glengarry compared to the province. Agriculture, forestry, fishing and hunting; Utilities; and Health care and social assistance were the industries a high or moderate advantage in North Glengarry that were observed to be growing between 2011 and 2018 (Figure 19, Appendix A).
- An analysis of relative growth in industries in North Glengarry compared to the province identified that Agriculture, forestry, fishing and hunting; Administrative and support, waste management and remediation services; and Real estate and rental and leasing are all growing industries, supported

mostly by local economic factors. These industries diverged in a positive direction from the provincial employment trends (Figure 20, Appendix A).

- In terms of occupations, North Glengarry experienced the largest growth between 2011-2018 in Trades, transport and equipment operators and related occupations; and Management occupations (Figure 23, Appendix A).
- Workers in North Glengarry commuted to other census sub-divisions more frequently compared to the province (52.5% compared to 42% for the province; Figure 24, Appendix A). Further, approximately 25% commuted outside of the census division, which is higher than the rest of the United Counties of Stormont, Dundas and Glengarry. The most frequent commuting destinations were Ottawa and Cornwall, and the most frequent occupational groups of commuters were in professions related to Public administration and Construction (Figure 25, Appendix A).
- In North Glengarry in 2019, 68% of businesses had no employees, and 16% had 1-4 employees. Retail trade; Health care and social assistance; and Construction are the industries with the largest number of businesses with employees. Agriculture, forestry, fishing and hunting; Real estate, rental and leasing; and Construction are the industries with the largest number of businesses without employees (Figure 28, Appendix A).

SOARR Assessment

A SOARR Assessment is a model for reflecting on strategic planning by studying identified Strengths, Opportunities, Aspirations, Risks and Results (SOARR). It is a forward-looking model, taking elements of what would traditionally be affiliated with a Strengths Weaknesses Opportunities and Threats (SWOT) analysis and using insights gained through stakeholder consultations to inform what is desired for the future and how to know when our aspirations have been met. The key concepts underpinning the SOARR model are outlined in the figure below. In essence, the SOARR Assessment represents a summary of all the key learnings uncovered to date so that some preliminary directions can be explored for the Economic Development Strategy.

Key Considerations for a SOARR Analysis

STRENGTHS
What can we build on?

- What are we doing well?
- What key achievements are we most proud of?
- What positive aspects have individuals and enterprises commented on?

- **Food scene:** North Glengarry's food scene, farm to table, and culinary experiences were mentioned numerous times throughout the workshop as something to celebrate. The Quirky Carrot, Gaetan's Chip Truck, La Belle Sorel and the North Glengarry Restaurant were some of the specific destinations that residents appreciated.
- **Entrepreneurialism:** Stakeholders appreciated the entrepreneurial culture that is found in the township.
- **Arts and culture:** Stakeholders specifically appreciated North Glengarry's concerts and arts events.
- **Hospital:** Stakeholders noted that the hospital was a key component for the area's continued prosperity and that it had a great reputation. The health care sector was identified in the economic base analysis as one of the industries relative strengths compared to the province that was also growing.
- **Schools:** Residents appreciated the variety of both English and French language schools for their children to attend, and it was noted as a significant strength.
- **Friendly:** The people and their welcoming nature were noted multiple times.
- **Bilingualism:** Stakeholders noted that bilingualism might be an underappreciated asset of the area.
- **Affordability:** Current residents noted that a low cost of living was a significant factor in their decision to move to North Glengarry.
- **Community and quality of life:** Current residents noted that the sense of community and quality of life was a major factor in their decision to move to North Glengarry. The economic base analysis identified a relatively high proportion of commuters that lived in the Township but commute elsewhere. This finding speaks to the quality of life in the area, as many workers accept a longer commute to enable them to live within it.
- **Accessible and interactive Township Council:** Residents appreciated the accessibility of their Council.
- **Historic architecture:** Residents appreciated the historic feel of the area.

OPPORTUNITIES

What are our best possible future opportunities?

- What changes in demand do we expect to see in the future?
- What external forces or trends may positively affect development?
- What are the key areas of untapped potential?
- What weaknesses or threats can be converted into SMART improvements?

- **Housing:** Housing was, by far, the greatest need when preparing to attract new residents to North Glengarry. Stakeholders discussed a tight real estate market and there was discussion that the demand for housing existed. The economic base analysis suggested that employment in the real estate and housing industry was growing, and this was accounted for mostly by growing local demand. The stakeholders identified that the Township just needed to attract housing development to increase the supply of housing and accommodate for the new residents that they hoped to attract. Preferred housing types included bungalows or starter homes, and smaller units (for singles or couples).
- **Young families:** Workshop participants and survey respondents identified young families as a preferred target market that would grow the township in the long-term. The economic base analysis identified that North Glengarry had a higher median age than the surrounding county and the wider province, which implies lower proportions of working-age individuals.
- **COVID-19 and work from home:** With the new reality of COVID-19 and its impacts on the workforce, stakeholders saw an opportunity to attract new residents from Ottawa or Montreal who held full-time jobs based out of those cities but were able to work remotely.
- **Internet:** The promise of enhanced internet connectivity would give North Glengarry the ability to attract more remote working individuals and entrepreneurs.
- **Coworking space:** Some stakeholders noted that the creation of a coworking space would put North Glengarry at an advantage to attracting new residents and business owners who work remotely.
- **Water and sewer:** Maxville's water project and the upgrade to Alexandria's lagoon will position North Glengarry to attract residential developers.
- **Better website and external marketing:** Some stakeholders felt that the Township's website and external marketing messaging are underselling the area.

A — ASPIRATIONS
What do we care deeply about achieving?

- What are we deeply passionate about?
- As a region, what difference do we hope to make (e.g. to residents, for institutions, to businesses)?
- What does our preferred future look like?

- To increase the township's population.
- To be a community on the cutting edge of culture, local food, festivals and events, etc.
- To have lively main streets with thriving independent businesses.
- To become an innovative and creative community that attracts millennials, families and retirees.

R — RISKS
How will we recognize and mitigate or eliminate potential risks?

- What challenges do we need to be aware of?
- What policy shifts could impact our aspirations?
- What contingencies should we have in place to address threats or unexpected consequences?

- Failure to upgrade internet connectivity would leave North Glengarry behind competitor communities in attracting a remote worker base of new residents.
- Failure to attract housing developers will leave North Glengarry without the ability to attract new residents due to lack of housing options.
- COVID-19 and its impacts on downtown and storefront retail businesses may persist and threaten the health of the township's main streets.

R — RESULTS
How will we know we are succeeding?

- What are the key goals we would like to accomplish in order to achieve these results?
- What meaningful measures will indicate that we are on track toward achieving our goals?
- What resources are needed to implement our most vital projects and initiatives?

- Census to Census population growth.
- New housing starts.
- More independent remote working professional services businesses.
- New retail and hospitality businesses.
- Increased activity in downtowns Alexandria and Maxville.

03

STRATEGIES TO ATTRACT RESIDENTIAL DEVELOPMENT

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MDB INSIGHT

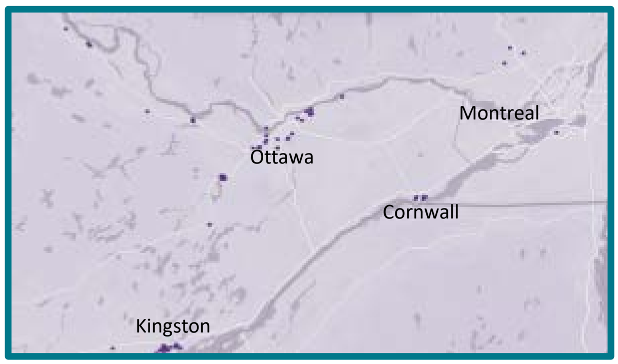
New Resident Market Segments

Based on the data and community input, and discussions with members of the Township's Community Development Committee, the following personas are those that should be considered as North Glengarry's best opportunities for resident attraction. The market segments were created through Environics Analytics PRIZM profiles, which include demographic, behavioural, financial, health and psychographic insights. These profiles are matched to postal codes in Canada where these market segments live. The bright purple pixels on the maps indicate these locations.

Families with Younger Children

These segments are inspired to find a less expensive and healthier environment to raise their young families. They require relatively easy access to their jobs in Ottawa and Montreal and the ability to work remotely. There will be increasing interest from these personas during the COVID-19 pandemic and beyond. They are middle-class income earners who will appreciate the value of the homes available for sale or being built in North Glengarry.

Stressed in Suburbia: Middle-income, younger and middle-aged suburban families



Located in the older suburban neighbourhoods of midsize cities, *Stressed in Suburbia* offers a portrait of busy, working families. Hardly homogenous, households may contain couples, families with children and lone-parent families, maintainers range in age from 25 to 54, and children include toddlers and teenagers. Nearly 80% own their homes, a mix of singles, semis and row houses. Most are third-plus-generation Canadians. With moderate educations and midscale incomes from two wage earners, they pursue wide-ranging interests—from sports like cross-country skiing and golf to cultural activities like country music concerts and dinner theatres. These residents often drive domestic pickups, eat at drive-throughs, and vacation using their campers. Mindful of saving money, many do their home improvements and landscaping. **AVERAGE HOUSEHOLD INCOME: $102,402; AVERAGE HOUSEHOLD NET WORTH: $321,484.**

Familles Typiques: Younger and middle-aged, suburban Quebec families

Familles Typiques is a classic francophone segment, a collection of younger and middle-aged suburban families with children under the age of 15. These households are three times more likely than the national average to consist of common-law unions with kids. With their mixed educations, residents hold a variety of jobs in health, business and the trades. And their midrange incomes go far in their communities where residences—a mix of singles, semis and low-rise apartments—are valued at 40% below average. Fond of outdoor sports, residents enjoy cycling, skating, skiing and playing racquet sports. After all that exercise, they reward themselves by going out to a French restaurant or kicking back with a glass of pinot noir at home. **AVERAGE HOUSEHOLD INCOME: $106,929; AVERAGE HOUSEHOLD NET WORTH: $266,592.**

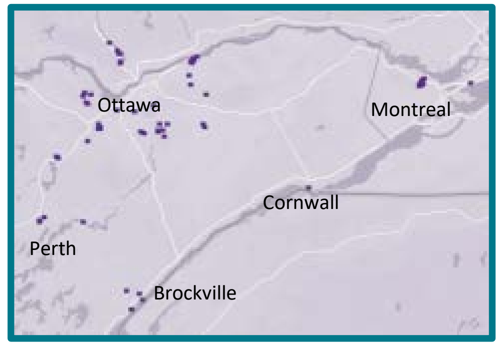
Modern Suburbia: Multi-ethnic younger and middle-aged suburbanites

With one of the highest percentages of suburban households, Modern Suburbia is a magnet for younger and middle-aged, diverse families with young children. Many of these acculturated households contain first- and second-generation Canadians from Asia and South Asia. With their university and college educations, they earn upper-middle-class incomes that allow them to own new single-detached, semi-detached or row houses. Modern Suburbia members have crafted active lifestyles for their relatively large families. They participate in team sports, including basketball and hockey, often followed by a trip to a pizza or burger restaurant. For a splurge, they head to kid-friendly venues such as amusement parks, zoos and aquariums. And many rely on their mobile phones for everything from banking to streaming music. **AVERAGE HOUSEHOLD INCOME: $137,614; AVERAGE HOUSEHOLD NET WORTH: $479,204.**

Dreamers: Remote-Operated & Lifestyle/Main Street Business Owners

These segments have the means to move. They are motivated by the fact that they can operate their business from home or a small office and easily visit their clients in Ottawa/Montreal or make a quick drive to catch a flight to Calgary, New York or Mumbai. For those that have more of a local business base, they are also motivated to start their café, retail boutique, or art studio in a less expensive environment. They will be interested in a variety of housing types that are common to North Glengarry including larger homes on country properties, single-detached suburban developments and more inexpensive upper-floor apartments and row homes.

Turbo Burbs: Middle-aged upscale suburbanites



The wealthiest suburban segment, Turbo Burbs is a haven for middle-aged families enjoying the fruits of their labour. Found in the outer-ring subdivisions of large cities, the segment mostly contains families with children between the ages of 10 and 25. More than 90% of households live in recently built houses, often graced with gardens and decks. The adults have parlayed mixed educations into well-paying jobs in finance, education and government. Many spend a lot of time in their cars to commute to work and chauffeur their teenage children to after-school activities. While these families live well, participating in outdoor sports and travelling extensively, they also give back to the community, volunteering their time and donating freely to charities. **AVERAGE HOUSEHOLD INCOME: $212,649; AVERAGE HOUSEHOLD NET WORTH: $1,483,649.**

Kick-Back Country: Rural, middle-aged upscale families and couples

The wealthiest rural lifestyle, Kick-Back Country consists of middle-aged families and older couples living in rustic areas near large and medium-sized cities. The maintainers tend to be between 45 and 64 years old, their children from 5 to 24. Despite mixed educations, they earn impressive incomes from well-paying jobs in mining, construction, trades and transportation. Nine out of ten households own a home, typically a spacious, single-detached house. Here beyond the urban sprawl, driveways often contain compact SUVs and large pickups for commuting to work, hauling boats and campers, and travelling to the city for shopping. They aren't too remote for big-city nightlife, but they also like staying home to watch TV sports and listen to country music radio stations. **AVERAGE HOUSEHOLD INCOME: $145,714; AVERAGE HOUSEHOLD NET WORTH: $935,079.**

Investment Readiness/Competitiveness Assessment

North Glengarry fares quite well when compared with the primary factors that young families and creative professionals use to determine whether or not the region is a good location for their business on a full-time, year-round basis. The following table offers some perspective and is presented not only as a state of the current situation but as a gauge for what needs to be improved for the community to be consistently successful.

✔✔	Performance is very positive and may present a competitive advantage.
✔	Performance is positive.
✔✘	Performance is positive in some ways and harmful in others.
✘	Performance could improve for this location factor.
✘✘	Performance is significantly lacking and may present a competitive disadvantage.

Living in North Glengarry: Residential Factors

Critical Location Factor	Local Performance	Explanation
Bilingualism	✔✔	Few places in Canada offer a better opportunity to communicate in both French and English without the expectation of either.
Getting Involved in the Community	✔✔	Input from workshops indicates that the percentage of people involved in the community is probably reasonably high compared to urban areas. “Community” is thriving, and the general friendliness will make it easy to integrate “whether you want to or not”!
Housing Availability and Cost	✔	The housing market is currently hot. Listings are not on the market long and, while frustrating for some buyers, it does create enthusiasm that can be leveraged. Even with demand greater than supply, housing values are tremendously low compared to Ottawa and Montreal, and homeowners have the opportunity to carry significant capital with them to lower their mortgage. Available supply must be improved for the positive to be sustained.

Critical Location Factor	Local Performance	Explanation
Shopping Amenities	✔	It depends on what you want. Both Maxville and Alexandria have nearby access to grocery stores and specialty foods. If you want warehouse/large format retail like Walmart and Costco, the closest options are Cornwall or Ottawa. If you want your eggs, veggies, and meat from a local farmer, then North Glengarry is a positive over the big city.
Natural Surroundings and Heritage	✔	North Glengarry is a beautiful place to live with quiet countryside. It lacks dramatic vistas and natural features that offer an iconic symbol or widely recognized destination. Well-kept historic buildings in the area also add to the local scenery.
Elementary and Secondary Schools	✔ ✘	Anecdotal evidence indicates that the quality of the school systems is solid. However, the perceived sustainability of local schools is an ongoing challenge in North Glengarry. Population growth will change this, but early investors with families may be concerned about this.
Recreation, Arts and Culture	✘	The absolute essentials for recreation are there – a soon to be refurbished ice arena, soccer and softball fields, and an indoor recreational facility. However, compared to suburban communities of Montreal and Ottawa, the quality of facilities and variety of sports and recreation are less. Equally so for the arts community, there are avenues for people to participate, but they are likely to be considered fewer than what people are used to.

Small Business in North Glengarry: Doing Business Factors

Critical Location Factor	Local Performance	Explanation
Business Community	✔	Several positive changes can be seen on the main streets of both Maxville and Alexandria. On and behind the main streets, there are some vacancies, but Alexandria's industrial businesses are mostly holding their own and looking for workers. There are good stories to tell in the agriculture sector, which is vital for a rural hub like North Glengarry. Overall, this activity is inspiring to investors.
Availability of Buildings	✔	Commercial space in every category is not going to be available. Still, an independent entrepreneur looking for small office space, a location on main street or a location in a small plaza, the opportunities are there.
Population Change	✖✖	Estimates from 2018 indicate a slight increase in population since 2016, but the trend from 2006 to 2016 was gradual decline. Lack of population growth makes it more challenging to attract businesses who depend on local population.

Factors Important to Both New Residents and New Small Business Operators

Critical Location Factor	Local Performance	Explanation
Proximity to Airports	✔✔	Alexandria is an easy one hour drive to international airports in both Ottawa and Montreal. This offers consumers a great selection of routes and pricing.
Time Lost to Traffic Congestion	✔✔	Are you kidding me?
Proximity to Highways & Markets	✔	North Glengarry offers excellent access to Highways 417 and 401. A substantial benefit is that the community is located nearly equidistant to Ottawa and Montreal. However, for those that are closely aligned to just one of those cities, there are many places closer.
Emergency Services	✔✘	The area has local fire and emergency services, with region-wide enhanced 911.
Health Care Facilities	✔✘	There is a full-service hospital in Alexandria. Access to health practitioners appears to be good. Seniors housing is available throughout the area, but more home care and extended care will be required as the population ages.
Colleges and Universities	✔✘	High school graduates will be doing their post-secondary education outside of North Glengarry. If you want them close, college options are close as Cornwall and plenty of university and college choices in Montreal and Ottawa.
Broadband Internet	✘	Broadband service is mixed. It is good enough for most business applications and streaming activity in Alexandria and Maxville, which is the primary focus of this study. Some rural areas are fortunate enough to be alongside a current or planned fibre or cable route. For those that are not, they are left with wireless or satellite options that are less reliable. It was identified in the public survey as one of the factors whereby residents may consider moving away. Overall, it will be looked upon as a potential barrier.

Competitive Advantages and Competitive Disadvantages

Unless extenuating circumstances such as the need to move closer to an aging parent, new residents and creative professionals have a tremendous number of choices. The following statement of competitive advantages and competitive disadvantages aims to identify how North Glengarry is positioned against the vast numbers of communities that will welcome their investment.

Competitive Advantages (to be emphasized in public relations and marketing)	Competitive Disadvantages (factors to improve)
▪ **Value for Money** – Sell your home in the city and lower your mortgage or upsize for the same price. ▪ **Nearness to Two Big Cities –** Many communities are close to one metro. Far fewer are within an hour's drive of two. ▪ **Everyday Serenity –** North Glengarry offers a quiet escape every day, not just on the weekend or a vacation. ▪ **Easy Bilingualism –** Speak your choice of English or French. ▪ **Community Involvement –** If you are interested, there is a community of likeminded great people for you to know.	▪ **Broadband Internet** – Understanding that most communities in rural Eastern Ontario are facing this challenge, there needs to be an emphasis on the excellent quality in some locations and improvements needed in others. ▪ **Recreation and Arts** – Diversity of program offerings will be less than the cities so focus on quality, the fact that these activities are a very short drive from home and those that are excelling have choices of advanced programs in Ottawa and Montreal.

Lessons from Communities in Similar Situations

There are a number of communities in the Ottawa labour market that have successfully increased their population through intentional residential development. Three case studies are outlined below with lessons that will be reflected in next section's action plan.

Town of Carleton Place

The Town of Carleton Place has experienced significant growth over the last 20 years. Its historic downtown is a 20-minute drive to Kanata and 40 minutes to downtown Ottawa. Residential development has increased significantly in recent years. This has largely been a response to converting Highway 7 to a four-lane freeway eastbound to Highway 417. That project was completed in 2012. After a decade of population growth of ~4% between 2001 and 2011, growth between 2011 and 2016 was more than doubled at 8.5%.

The prospect of residential growth prompted the need for land use planning and growth management to ensure that Carleton Place's amenities and infrastructure could accommodate its growing population.

Commercial growth also occurred as a market response to the Town's growing population. An example of one such development was Carleton Place Colonnade, a retail hub on Highway 7 in the town's east end. That site was a 64-acre farm owned by a landowner whose intentions were to develop and sell the land. The landowner worked with Colonnade Bridgeport, an Ottawa-based real estate investment and development firm, to attract major retailers to a 20-acre retail centre. The remaining 44 acres were rezoned to residential to coincide with the timing of the completion of Highway 7 and were sold to a major home builder. [1]

In 2013, the Town (through the Chief Administrative Officer and Director of Planning and Development) collaborated with six private landowners to develop a conceptual design plan for the area around Highway 7. The land that this plan covers was annexed from Beckwith Township by the Town of Carleton Place in 1997 as part of the Town's urban boundary expansion. The lands within the Conceptual Design Plan (CDP) were owned by nine different landowners and comprise much of the developable land within the town. The municipality and those landowners joined together to establish a unified vision for the lands to ensure it was a cohesive, complete community. This CDP is used to guide the assessment of individual planning applications to the Highway 7 South community. [2]

The Town also maintains an active online interactive map of its pending development permits. [3] This map reveals all pending permits with the Town, many of them residential, or mixed-use residential.

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[1] https://colonnadebridgeport.ca/pf/carleton-place-colonnade/

[2] https://carletonplace.ca/photos/custom/112110-UDG-Report%202013%20July24.pdf

[3] https://carletonplace.ca/developmentmap.php

There are a series of lots that are zoned residential where the Town understands that the owner of the property is investigating and may be submitting an application for the development of the property.

Best Practices Observed

The Town of Carleton Place's growth has largely been private sector driven, but the Town has taken a proactive approach to urban planning and growth management. Its planning department maintains close relationships with private developers and has shown evidence of a collaborative relationship with private landowners as evidenced by the CDP for lands in Highway 7 South.

Officials break ground on Carleton Place arena project |Image sourced from InsideOttawaValley.com

Town of Arnprior

Arnprior's growing population is often attributed to the expansion of Highway 417. The highway expansion resulted in a boom in housing developments, and a 13.4% population increase between the 2006 and 2011 census years, followed by an 8.4% increase between 2011-2016. It is the second fastest-growing municipality in Eastern Ontario.

Arnprior's approach to residential growth and the interest it was receiving from developers was twofold: shovel readiness, and an open-door policy. In 2013, it invested in a Water and Wastewater Master Plan and a new water treatment plant to add needed capacity to its water treatment system as a result of population growth. All lands that were redeveloped were privately owned, predominantly farmland. Those lands were purchased by developers, and the Town worked to ensure that it was as easy as possible for developers to acquire permits and begin development, while still following statutory requirements for permitting.

Arnprior's growth has been so significant that the Town began to run out of residentially-zoned land. In response, in 2017 it updated its Comprehensive Zoning Bylaw to encourage densification within the town's boundaries.

Arnprior did not directly undertake any targeted resident attraction. However, it did support developers by focusing tourism efforts that encouraged day trips by Ottawa residents, which had the effect of increasing awareness of Arnprior as both a tourism destination and a place to live.

Best Practices Observed

The Town of Arnprior took a relatively hands-off approach to its residential development success, though it was proactive in important ways. First, it invested in critical infrastructure that it would need to service a growing population, as it did with the water treatment plant. Second, it was committed to working with developers to eliminate red tape and make residential development as easy as possible. Its approach to day-trip tourism from Ottawa was a smart marketing strategy to showcase Arnprior to prospective residents from that market.

Construction crews work to improve infrastructure and enhance the Arnprior streetscape | Image sourced from [CBC.com]

Municipality of North Grenville

Kemptville Landing - New Home Community Development in North Grenville | Image sourced from HomeFinder.ca

Another Ottawa-area municipality that has experienced residential growth as a result of highway expansion is the Municipality of North Grenville, which includes Kemptville. Highway 416 expansion was completed in 1998 and, not coincidentally, North Grenville's population has grown since then. Between the 2011 and 2016 Censuses the population grew by 13.4% and it continues to be one of the fastest-growing communities in Eastern Ontario.

The Municipality's approach to resident attraction was not passive. They invested in a water treatment plant to add needed capacity in anticipation of residential and associated commercial development. Beyond that, the municipality made it as easy as possible for developers to invest in the area. Some of the things that the municipality did to support residential developers were:

- Offer flexibility in zoning amendments
- Foster an open-door policy for developers at the municipality
- Hosting a 'Golf Day' for residential developers and the broader network of investors and influencers
- The creation of an Economic Development Advisory Committee, with which they invited developers to sit on the committee
- Creation of a Development and Review Team, which included planning staff, economic development, building permit staff, the CAO, and any other internal interested parties to answer questions about the development process and ensure that developers were able to navigate the municipality efficiently.

- The creation of the Invest North Grenville website, which includes an inventory of all available land and contact information. The maintenance of this website involves maintaining relationships with all area realtors and landowners to ensure the inventory is up to date.
- EcDev Breakfasts, where developers and local realtors were invited to network with local officials
- An ambassador program with local realtors. Realtors were provided with a North Grenville business card in recognition of their role in selling the area.

Best Practices Observed

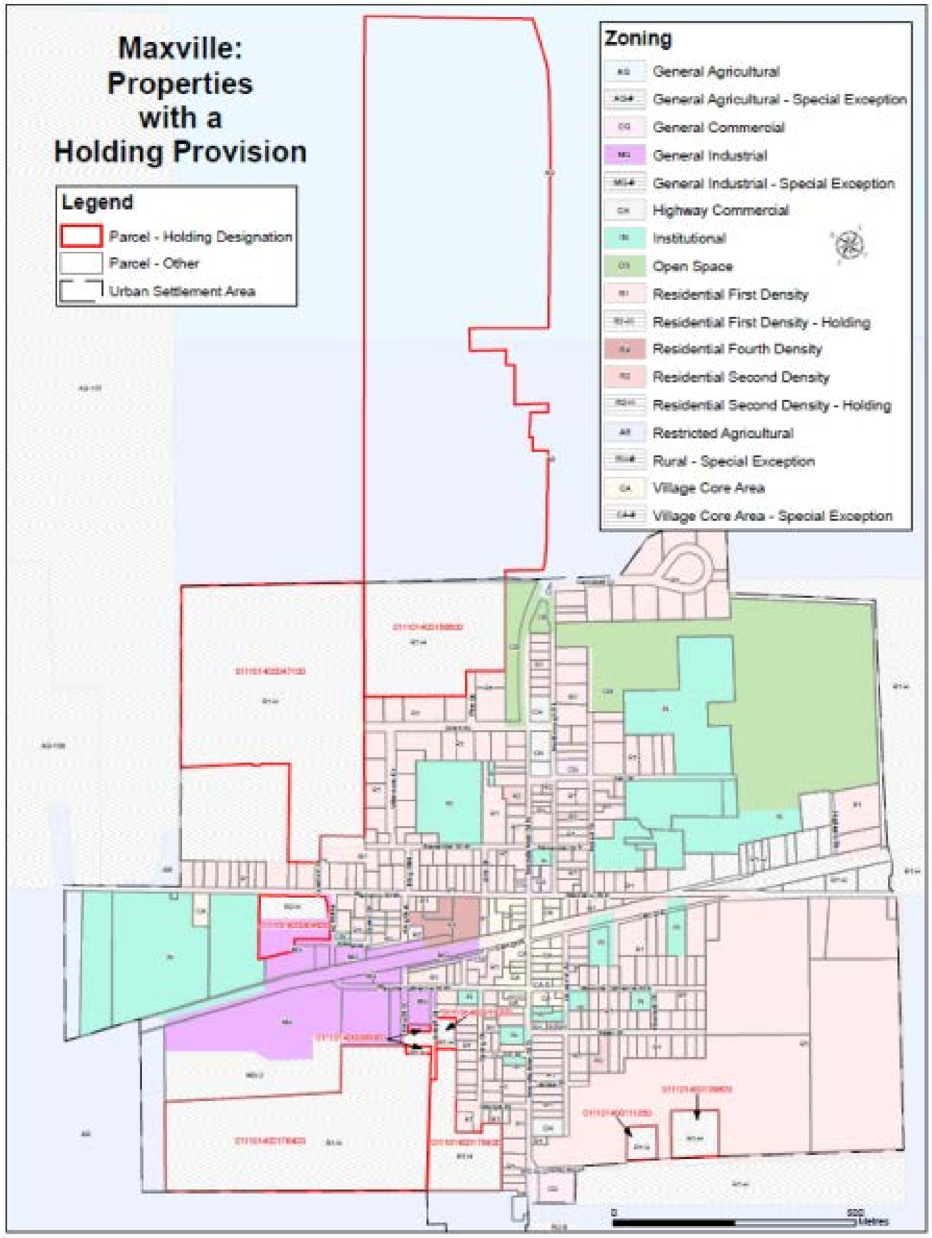
The most distinguishing feature of North Grenville's approach was the effort taken to gain the attention and trust of the Ottawa-area development community. The result of this effort was widespread interest and wider choice of development opportunities. It also led to a faster pace of development which added more quickly to tax assessment and revenue.

Housing Development Opportunities in North Glengarry

Maxville

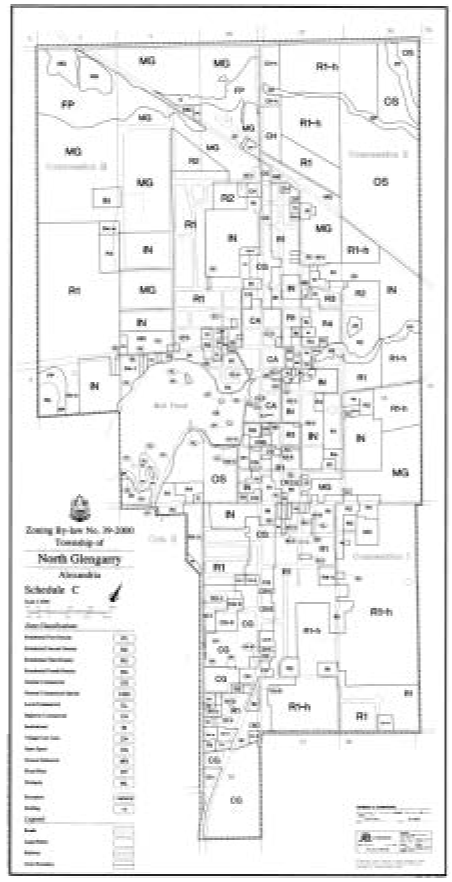
As described earlier in the report, the urban village area of Maxville has the most significant potential for near-term development. The municipality has invested in municipal water and sanitary sewer infrastructure. It is now installed to support residential growth.

Maxville has other attractive amenities including being a five-minute drive from Highway 417, a 40-minute drive to the edge of Ottawa's urban area, reasonable broadband internet, and some essentials when it comes to shopping like a grocery and hardware store.



Very importantly, Maxville also has at least one motivated landowner who sees the potential for growth. The land is properly zoned R1 within the northwest corner of the Urban Settlement Area. The zoning permits single detached dwellings, group homes, and accessory apartments. It contains a "hold" that will be lifted once conditions of development are met. This is not an unusual situation. It will not surprise nor concern developers. This landowner is not interested in being the developer. Rather, they would like to engage in a partnership with an experienced developer that brings forward an inspiring plan.

Alexandria

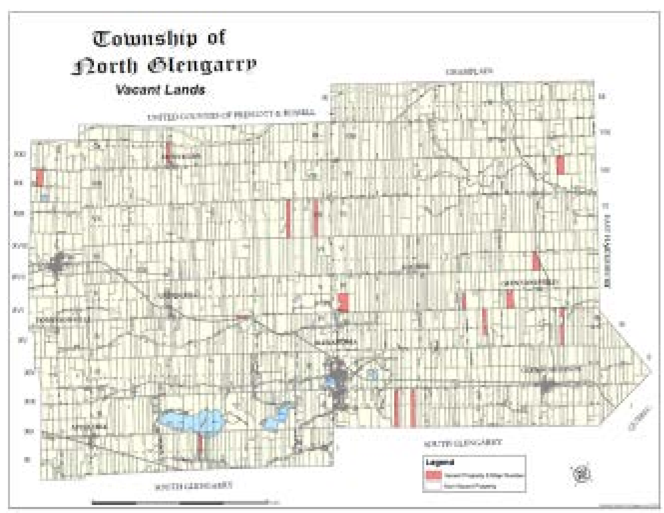


The urban village area of Alexandria is the township's largest centre and the hub for commercial, industrial and government services activity. It is a continually changing community, and there are visible signs of recent private investment. Residentially, there is a new 16-plex being constructed and, if all continues to go smoothly, a new seniors' village will be completed. It is on the cusp of more development; however, impeding further growth is the fact that the capacity of the wastewater system is currently exceeded. A new wastewater system will allow the community to grow. Beyond infill opportunities in Alexandria's built-up residential areas, Maxville should be the Township's primary focus until the wastewater issues are resolved.

Rural Lands

As shown in red in the figure below, 66 vacant lots may have the potential for new homes.

In terms of potential subdivisions, 16 lots are larger than 10 acres. Most (15) are zoned Agricultural with seven of these having wetland or floodplain restrictions. One property is zoned Rural with a floodplain and wetland restriction. If more than one dwelling is desired on these lots, all developers will need to complete a Plan of Subdivision as well as rezoning and amendment to the property's Official Plan designation.



All 66 vacant lots can be immediately developed with one home. There is a mix of infill lots in the township's many hamlets (13 lots), Residential First Density on the fringe of Alexandria (3, which may be hindered by sewage capacity), and the others are zoned Rural (14) or Agricultural (36). The latter only permits a dwelling that is an accessory to the lot's agricultural use.

The most exciting aspect of this is the potential for new estate-style subdivisions which would diversify the township's housing stock.

04

RECOMMENDATIONS AND ACTION PLAN

NORTH GLENGARRY NORD
Ontario's Celtic Heartland
Le centre celtique de l'Ontario

MDB INSIGHT

Investment Mix Priorities

The following table indicates where in the investment lifecycle, the Township of North Glengarry should be focusing its efforts on new residents and creative professionals. The investment lifecycle includes the following categories:

- **Further Investigation** – The degree to which the opportunity needs refining before ready for full-scale promotion.
- **Partnership Development** –The importance of identifying partnerships to help bring success.
- **Product Development** – The need to invest time and money in improving the product.
- **Promotion** – What the effectiveness of a promotional campaign would be if it were to start today.

Further Investigation	Partnership Development	Product Development	Promotion
There is no need for further investigation. For many years, the Township has been investing in a long-term plan to improve water and sewer infrastructure. The housing market is hot, and the municipality has been receiving investment inquiries. Members of the community are looking forward to this type of investment.	The timing is perfect for emphasizing relationship-building with land developers and realtors. **<u>This should be a high activity in the immediate term for the Economic Development Office.</u>**	Maxville is ready for residential growth, and this urban village area should be the township's highest priority. Alexandria has some infill lots that can be immediately developed upon. Still, larger-scale subdivision development is dependent on some final improvements to wastewater treatment and a couple of years away. This is a broader municipal priority. Broadband internet improvements need to continue to be advocated for.	The Economic Development Office should be "priming the pump", but full-scale promotion is likely a year away. Priming includes having a campaign in draft stages and budget allocated to fulfil it. Developers will be additionally motivated if they can see the Township's commitment to making the project a success. Given the importance that these investors place on community and the number of "ordinary people with extraordinary stories" it would be beneficial to include community members directly in the attraction effort.

Critical Path to Success

In Maxville, the Township has a product that does not need fine-tuning. Moving towards subdivision development in Maxville should be the Township's number one priority. **When it comes to the residential development initiative, emphasize staff time and financial resources towards this priority.**

While successfully manoeuvring this path, the Township will create relationships in the residential development industry. It will also result in the Township developing promotional and public relations campaigns. These results will benefit the community when Alexandria is ready for new larger-scale development or when rural landowners are interested in country estate subdivision development.

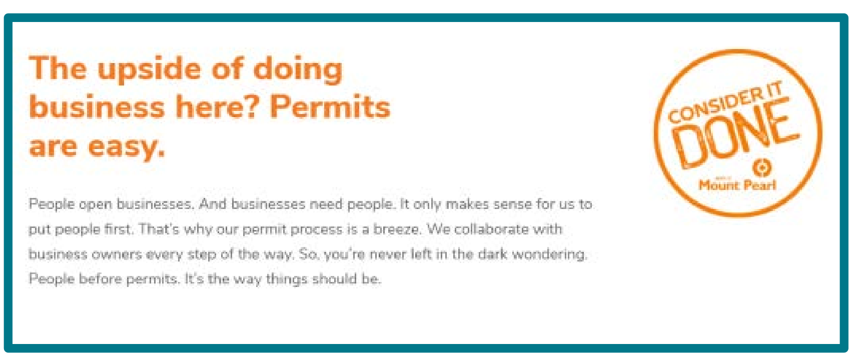
Critical Step 1: Confirm Interest of Maxville Landowners to Pursue Subdivision Development

Land investment opportunities in Maxville require one further level of due diligence before the field is narrowed. Once narrowed, a specific property or properties will become the focus. One property is knowingly in need of a third-party development company. If there are other interested landowners, they may or may not require such support. Before holding such meetings, create a cohesive and consistent message around the goals and township's motivation to approach property owners. List properties on "real estate" portal (possibly at Township level if not yet possible at Counties level).

Critical Step 2: Create Township Development Teams

One team will consist of technical experts who will support the landowner and land developer in understanding the opportunities and challenges of the site which leads to a clear understanding of the site's development potential. This will include officials at the United Counties (e.g. planning, roads), Conservation Authority, and utility providers. Agree to a development process flowchart. When developers indicate an interest and begin to ask questions, the support of this team will be essential to getting accurate responses quickly. There is a significant opportunity to impress developers who are used to working within larger municipal structures, such as the City of Ottawa.

Another team will consist of community-minded ambassadors who will be available to answer questions from potential home buyers about aspects of living in North Glengarry (e.g. leaders in the arts and sports community, representatives of the school boards).



City of Mount Pearl, NL's award-winning Consider it Done Campaign plays against the old guard in neighbouring St. John's. | Image sourced from www.consideritdone.mountpearl.ca/streamlined-permits

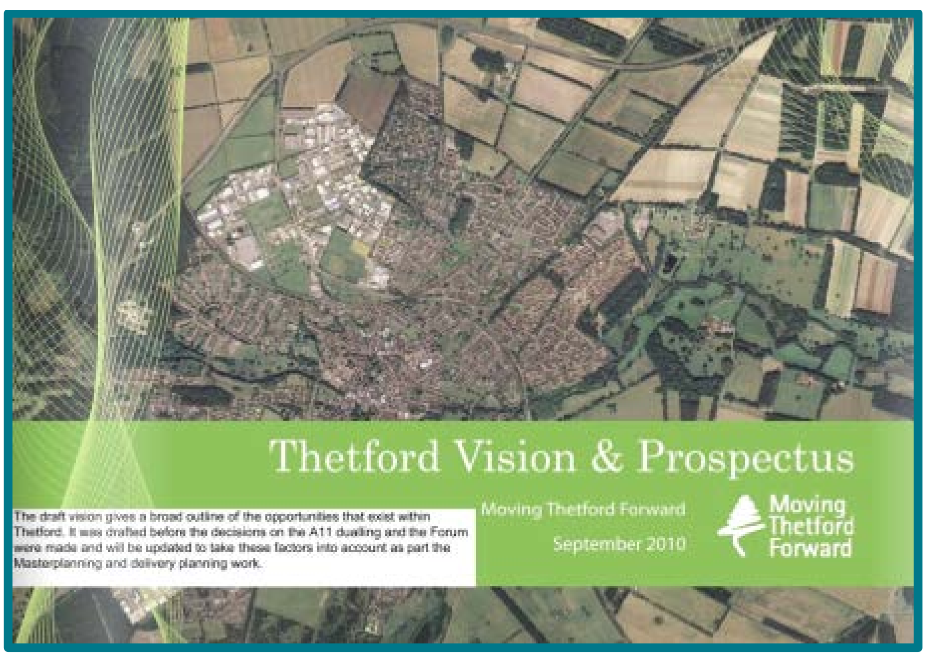
Critical Step 3: Develop a Prospectus and Secure Land Developer

At this point, the balance between Township and landowner activity/partnership requires negotiation. Consideration should be given to the degree of Township funding that goes towards these initiatives. However, the benefits of being thorough in Step 1 (giving all landowners equal opportunity to participate and display their readiness) will allow the Township to take its participation as far as it would like.

A prospectus should be created that describes the opportunity, including laying out an ideal vision, the technical nature of the available property(s), general development scenarios (potential number of dwellings), Maxville's amenities, desirable target markets and potential within those markets, and the support available from the Township including keen elected officials/planning/development team and marketing/promotions. At a minimum, the prospectus will be electronic (web-based) but, given the degree of commitment required by the 'buyer' consideration should be given to printed materials. The prospectus can cost nothing but staff/landowner time to put together or it can cost as much as $20,000 if professional design and high-quality materials are used for printed pieces. Consideration should also be given to aerial photo/video content.

Create a list of land developers who have the potential to be interested. One of the most revealing outcomes of interviews with developers is that they did not know North Glengarry had upgraded its water and sewer infrastructure. Begin with those in Eastern Ontario, Ottawa and Montreal as their knowledge of ultimate purchaser (the home buyer) will be greatest. Initiate communication with them through a combination of introductory conversations, in-person meetings, and in-community familiarization tours.

Securing the land developer is a negotiation that will involve the landowner and the developer, but the Township can still play a role in answering developer questions.

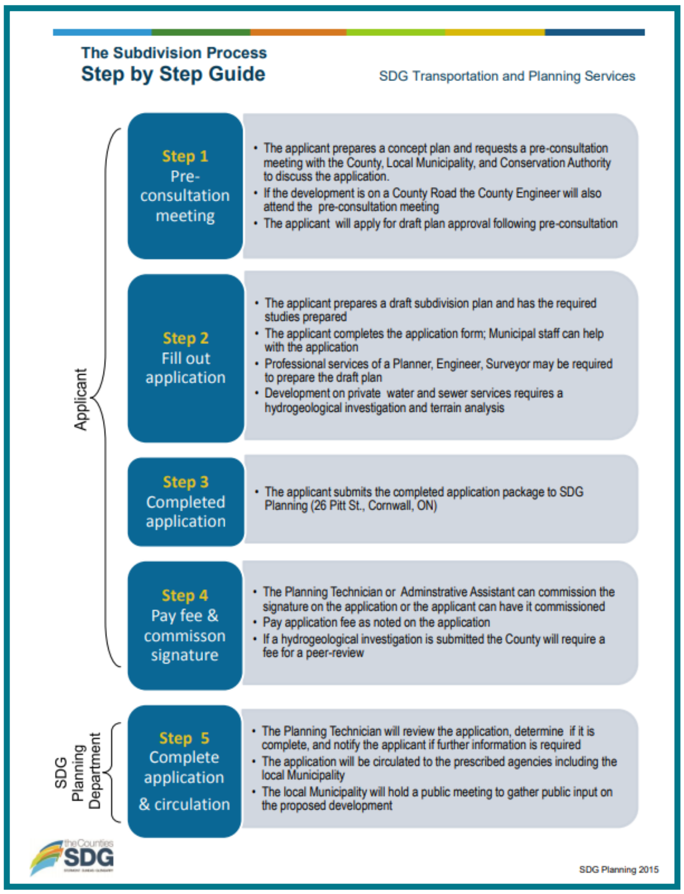


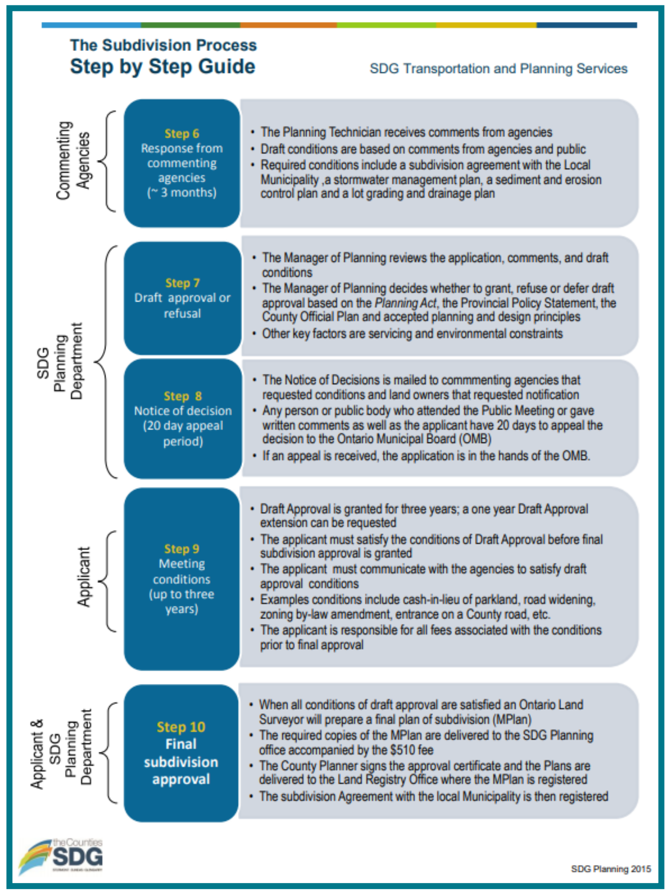
Example of a Prospectus for Early Stage Residential Development | Image sourced from www.yumpu.com/en/document/read/12040702/draft-thetford-prospectus-breckland-council

Step 3: Initiate the Development Process

Creating a Plan of Subdivision will be an area of expertise that the land developer will have either internally or outsourced to a third-party consulting team.

It is helpful to have a flowchart to display to developers the expectations and legal requirements of the development process. A number of flowchart formats were investigated, but the one that best fits the objectives of this project is one that has been published by the United Counties of Stormont, Dundas and Glengarry. This was confirmed with the Township's planning staff. All of the United Counties' local municipalities will follow the same process. The process applies to subdivision development in an urban village area such as Maxville or Alexandria and it applies to rural country/estate subdivision development.





Step 4A: Reaching out to Home Buyers

The timing of marketing, promotion and public relations will depend on the specific situation, but it should take shape early in this critical path, so that the Township's credibility and interest is on display when aiming to secure a land developer.

The actions in this step take on more importance at Step 9 of the Counties' flowchart. At that point, Draft Approval has been granted and it will be relatively clear how long it will take for the land developer to satisfy the conditions.

Once conditions are satisfied (Step 10 in the flowchart) then marketing, promotions and public relations of the new development can go public. Again, it will be important for the Township and the land developer to understand who is doing what and how costs and effort of time will be shared.

The directions with which this can go are only limited by imagination and budget, but the land developer and the Township will have benefits to bring to the process. Utilize the Counties' economic development site and potential online land search application as well.

A subdivision-specific website is a critical investment attraction tool. There are also a great number of examples of communities that have used testimonials of people who have recently moved from the city. In Eastern Ontario, Prince Edward County's www.buildanewlife.ca and Hastings County's www.hastings.ca/i-left-the-city can serve as excellent guides. The look and feel of the website and its messages should be attuned to a more rural lifestyle and display a connection to the competitive advantages that are characterized earlier in this report. Emphasize the contribution that every person makes to building a strong community and describe their success.

Email distribution lists of people who are connected to North Glengarry or are interested in North Glengarry such as existing citizens and business owners, graduated high school students, people who once worked in the community (e.g. OPP, health care, schools) and use this list to support public relations activities.

Incentive programs can be created to lure new residents or reward locals who make a referral are possibilities that hold interesting potential. Social media campaigns using social/interactive media, networking, email distribution, website postings, and newspaper/radio/television appearances. These are also opportunities for other organizations (e.g. Chamber of Commerce) to play a high profile role in the campaign.

Step 4B: Reaching out to Real Estate Professionals

Real estate professionals are an essential subset of the marketing and outreach effort. Realtors will be a significant source of leads, so they need to know of this opportunity. They will be fielding requests from homeowners in Ottawa and Montreal who want to sell their property and relocate.

The efforts in Step 4A will influence this target market, but the Township should consider specific outreach or incentives. Examples include hosting familiarization tours or events that realtors attend in North Glengarry or developing gift baskets of locally-made goodies that are sent upon completion of a deal.

Secondary Activities

While the above critical path is the recommendation for the primary use of staff time and departmental funds, there are a few other activities that should be considered and potentially done concurrently during ‘downtime’.

- **Preparing for the next campaign** – Begin reaching out to the 16 owners of larger vacant rural properties to gauge their interest in subdivision development. Gauging environmental restrictions will be an important consideration during these conversations. Do the same with landowners in Alexandria and Maxville who have vacant residentially-zoned properties. This can be done quite early in the process.
- **Commercial gap analysis** – During the research for this project it was sometimes difficult to separate the “Maxville needs this before people will come”. The Township could spur commercial business interest by completing a commercial gap analysis that more clearly prioritizes the types of retail and services that the township could support at its existing population level and with more people once homes are built and occupied. The Township may also be able to adapt its successful Community Improvement Plan to align with business needs.
- **Understanding the potential of infill lands** – The successful marketing, promotions and public relations campaign described above will serve to increase general interest in the community. People will be interested not just in new subdivision property. Some may want to build in more established neighbourhoods. The Township has a good list of these properties but the development potential and landowner interest in selling has not been defined. Clarifying the inventory of sellable properties will give the Township’s economic developers another avenue to attract residents. This could also apply to vacant second-floors of commercial main street buildings that could be home to apartments.

Summary of Critical Path and Other Actions

	Critical Step	Responsibility/ Budget
1	**Confirm Interest of Maxville Landowners to Pursue Subdivision Development** • Conduct due diligence with all landowners in Maxville with "subdivision-ready" land; be clear on the Township's motivation and commitment; identify those to proceed with. • List properties on "real estate" portal (possibly at Township level if not yet possible at Counties level).	Outreach: Township staff time (40 hours); little money (e.g. mileage); the portal can be an extensive undertaking and knowing that this is a possibility through the United Counties will save considerable time and money
2	**Create Two Township Development Teams** • One team will consist of technical experts who will support the landowner and land developer in understanding the opportunities and challenges of the site which leads to a clear understanding of the site's development potential. • Another team will consist of community-minded ambassadors who will be available to answer questions from potential home buyers about aspects of living in North Glengarry.	Township staff time (20 hours); little to no money
3	**Develop a Prospectus and Secure Land Developer** • Negotiate future activities and costs with landowner. • Develop prospectus. • Create list of potential land developers, communicate with them, secure land developer.	Township staff time (considerable); cost of prospectus can range from minimal to $20k (less money will equate to more staff time); cost to communicate with land developers can also range from minimal (phone calls only) to $5k (multiple in-person or hosting)
4	**Initiate the Development Process** • Support the completion of the Plan of Subdivision.	Township staff time could be significant and more than just EcDev; money is minimal
5A & 5B	**Reaching out to Home Buyers & Real Estate Professionals** • Negotiation with land developer on who does what when it comes to marketing, promotion and public relations.	Requirement of Township staff time and budget are highly dependent on land developer's approach; Township's broader support of living in North Glengarry is also highly variable and dependent on County support

Other Steps	Responsibility/ Budget
Country estate and Alexandria subdivisions • Reaching out to the owners of larger vacant rural properties and lands in Alexandria to gauge their interest in subdivision development. • Follow similar process to the critical path identified for Maxville.	Township staff time (100 hours) and little money (e.g. mileage) in the early stage. Effort ramps up significantly once process enters step 3 of Critical Path. Keep in mind, that hard costs could be less or minimal if Maxville campaign has been successful and development interest is coming to North Glengarry.
Commercial gap analysis & Community Improvement Plan • Prioritize the types of retail and services that the township could support at its existing population level and with more people once homes are built and occupied. • Based on results, adapt Community Improvement Plan so it appeals to the target sectors.	Third party analysis: $5-20k; Post-study implementation/sales support will require significant staff time and budget of minimum $5k; the CIP budget is a significant variable to be determined.
Understanding the potential of infill lands • Clarify the inventory of sellable infill properties • Leverage marketing/promotions/public relations campaigns for subdivision development.	Township staff time (60 hours) and little money (e.g. mileage) in the early stage. Like country estate/Alexandria subdivisions, the Township will be largely on maintenance mode when it comes to marketing/promotions/public relations.

05

APPENDIX A: ECONOMIC BASE ANALYSIS

North Glengarry Nord

Ontario's Celtic Heartland
Le centre celtique de l'Ontario

MDB Insight

This economic base analysis overviews socio-economic, labour force and industry composition in North Glengarry. The results are derived from the following sources:

- Statistics Canada, Census Profile, 2016
- Statistics Canada, Census Profile, 2011
- Statistics Canada, National Household Survey Profile, 2011
- Manifold Data Mining, 2018 Estimates
- Statistics Canada, Canadian Business Counts, 2019

The Township of North Glengarry is presented in comparison to Stormont, Dundas and Glengarry County and the Province of Ontario.

Manifold Data Mining Inc. produces 2018 estimates of certain demographic and economic variables from the Canadian Census using their proprietary methodology. For the metrics which are estimated by Manifold, these 2018 estimates are used in place of the most recent (2016) Census information.

Demographic Portrait

Between 2006 and 2018, the population of North Glengarry reduced by 180 people, a decrease of 1.7%.[4] Over the same period, Stormont, Dundas and Glengarry County had a population growth of 7.2% and Ontario had a much higher growth rate of 17.2%.

Figure 1: Total population change in North Glengarry, Stormont, Dundas and Glengarry and Ontario, 2006-2018.

Year	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
2006 Census	10,635	110,399	12,160,282
2011 NHS	10,251	111,164	12,851,821
2016 Census	10,109	113,429	13,448,494
2018 Manifold Estimates	10,455	118,309	14,256,800
2006-2018 Population Growth rate	**-1.7%**	**+7.2%**	**+17.2%**

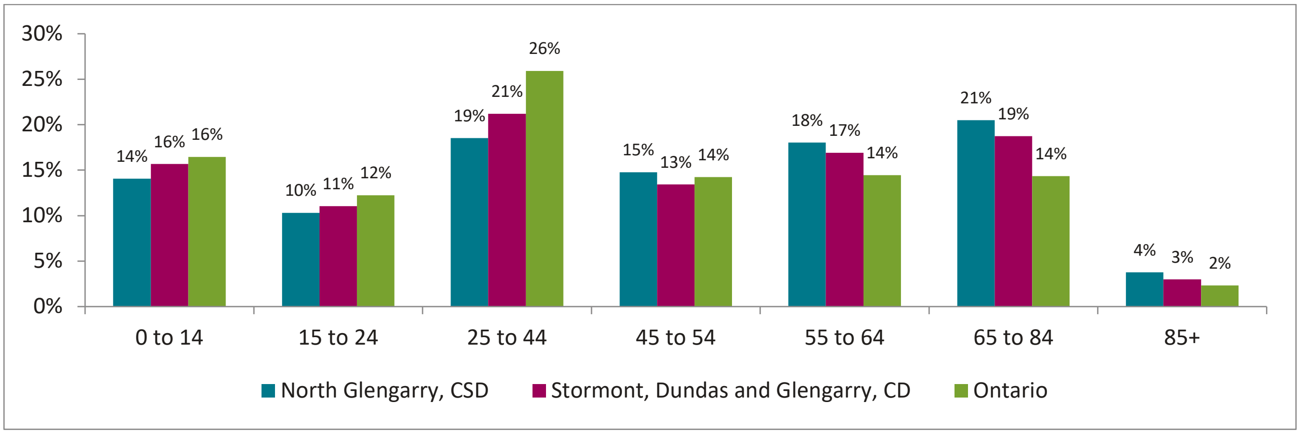
Source: Statistics Canada; 2011 National Household Survey, 2006 & 2016 Census Profiles, 2018 Manifold Estimates

Age distributions, as shown in the figure below, shows that North Glengarry has an older age distribution compared to both broader areas, with variances between 1% to 7%. The Township of North Glengarry and Stormont, Dundas and Glengarry County tended to have higher proportions of individuals in the categories 55 and older than the Province of Ontario, and lower proportions of individuals in the categories below 45. Meanwhile, Figure 3 shows that North Glengarry's median age (50.9) is older than

[4] Caution must be taken in comparing 2018 Manifold estimates and previous Census and NHS data. When calculating its forecast, Manifold takes into consideration the underreporting that Statistics Canada says is common during Census years.

the median age of Stormont, Dundas and Glengarry County, and both are older than the rest of Ontario (41.5).

Figure 2: Age characteristics, percentage of overall population – detailed categories.



Source: Statistics Canada; 2016 Census Profile

Figure 3: Median Age of Population, North Glengarry, Stormont, Dundas and Glengarry and Ontario 2016

Year	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Median age population 2011	47.2	45.6	40.4
Median age population 2018	50.9	46.8	41.5

Source: Statistics Canada; 2011 National Household Survey, 2018 Manifold Estimates.

Dwelling Characteristics

Most of the housing in the Township of North Glengarry are single detached houses, followed by low-rise apartments, and row houses. The share of people living in single-detached houses was higher in North Glengarry compared to both Stormont, Dundas and Glengarry County and the province.

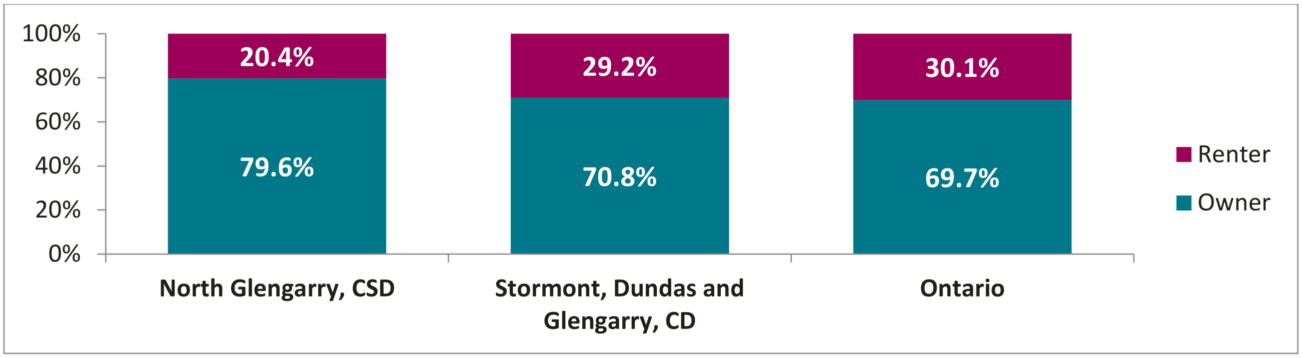
Figure 4: Occupied dwellings by type, percentage of overall population, Township of North Glengarry 2018

Type of dwellings	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Total	**100.0%**	**100.0%**	**100.0%**
Single-detached house	79.9%	70.1%	54.2%
Apartment in a building that has five or more storeys	0.1%	2.5%	17.2%
Semi-detached house	3.2%	6.0%	5.6%
Row house	4.0%	4.5%	3.4%
Apartment or flat in a duplex	1.4%	3.3%	9.0%
Apartment in a building that has fewer than five storeys	8.3%	12.2%	10.1%
Other single-attached house	0.4%	0.4%	0.2%
Movable dwelling	2.8%	0.9%	0.3%

Source: 2018 Manifold Estimates

In North Glengarry, most dwellings are occupied by owners, and the share of people renting dwellings represent 20.4% of the Township's residents. In addition, the share of owners is higher than both Stormont, Dundas and Glengarry County and Province of Ontario.

Figure 5: Occupied dwellings by type, percentage of overall population, 2016



Source: Statistics Canada; 2016 Census Profile

The median value of dwellings in North Glengarry has grown approximately 39% between 2011 and 2018, which was similar to Stormont, Dundas and Glengarry County where the increase was 38%. Median values suggest that houses in North Glengarry are priced significantly lower than the rest of the province.

The Township of North Glengarry also recorded a similar median rent cost in 2016 to the rest of Stormont, Dundas and Glengarry County. The median rent cost in the Township is low, however, compared to the province.

Figure 6: Average dwelling and shelter costs for rented dwellings

Characteristics	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Median value of dwellings ($) - 2011	$170,279	$174,851	$300,862
Median value of dwellings ($) - 2018	$235,934	$240,760	$435,785
Median monthly shelter costs for rented dwellings ($) - 2011	$651	$665	$892
Median monthly shelter costs for rented dwellings ($) - 2016	$807	$807	$1,029

Source: Statistics Canada; 2011 National Household Survey Profile, 2016 Census Profile. 2018 Manifold Estimates.

Income

The median income of North Glengarry in 2018 was similar to that of Stormont, Dundas and Glengarry's residents which was slightly lower than the province. Between 2010 and 2018, median individual income had grown 18% in North Glengarry and 24% in Stormont, Dundas and Glengarry County, compared to 18% in Ontario.

Figure 7: Median total individual income in the Township of North Glengarry, ON 2010-2015

Characteristics	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Median total income in 2010 among recipients ($)	$27,985	$27,911	$30,526
Median total income in 2018 among recipients ($)	$33,106	$34,708	$36,160
% change	18%	24%	18%

Source: Statistics Canada; 2011 National Household Survey Profile, 2018 Manifold Estimates.

Shifting to the subject of median household income, North Glengarry's median income has grown 21% since 2010. North Glengarry experienced a similar increase compared to Stormont, Dundas and Glengarry County and Ontario. North Glengarry's median household income is within $100 of the median house income in Stormont, Dundas and Glengarry County, and $13,719 lower than the provincial median house income.

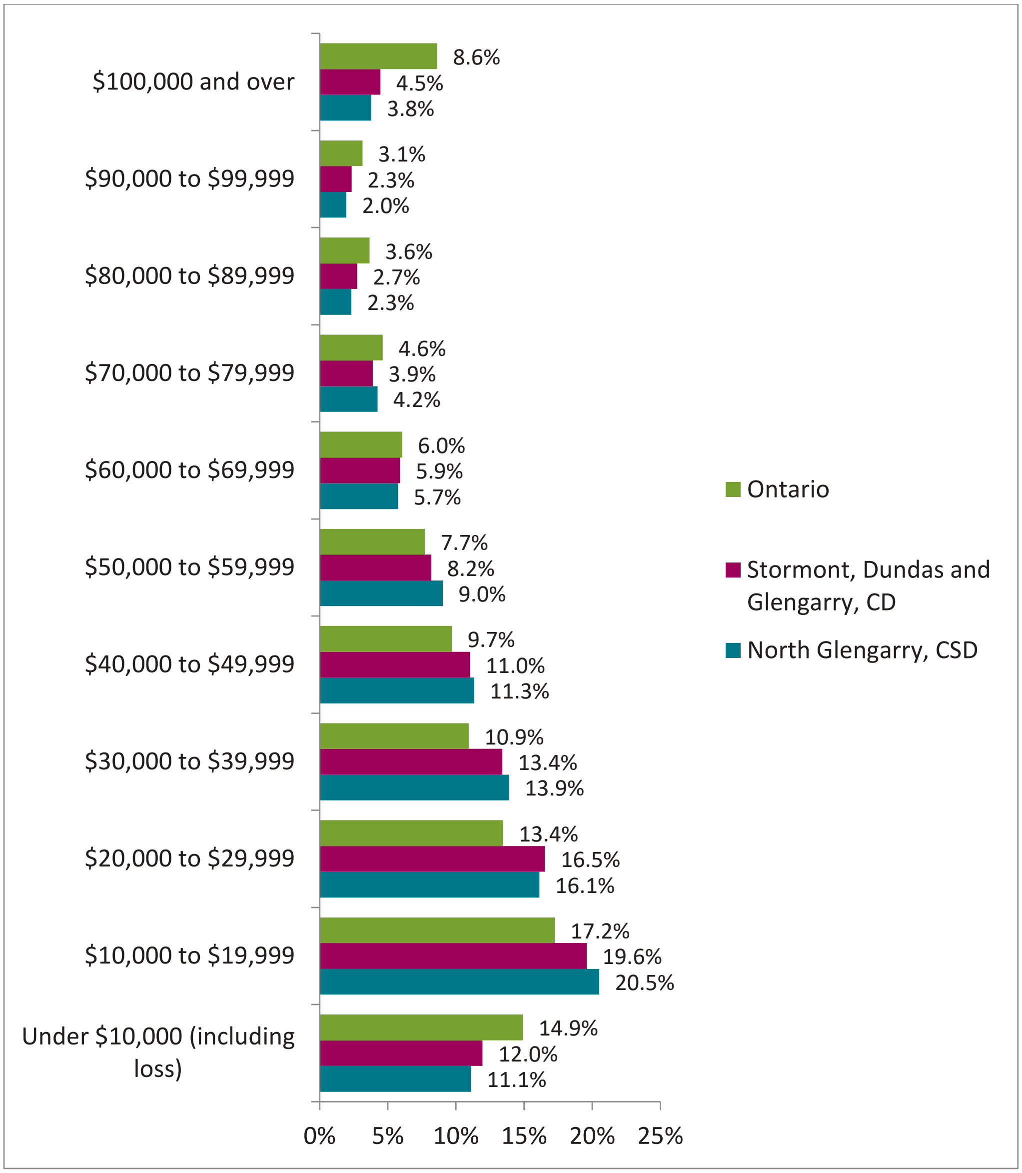
Figure 8: Median total household income in the Township of North Glengarry, ON 2010-2015

Characteristics	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Median total income of households in 2010 ($)	$54,922	$54,944	$66,358
Median total income of households in 2018 ($)	$66,220	$66,307	$79,939
% change	21%	21%	20%

Source: Statistics Canada; 2011 National Household Survey Profile, 2018 Manifold Estimates.

In terms of individual income distribution, the figure below shows that the Township of North Glengarry has a higher share of individuals with income between $10,000 and $30,000 compared to the province. The Township of North Glengarry had a lower proportion of individuals earning less than $10,000 and more than $100,0000 compared to the rest of the province.

Figure 9: Individual income distribution, percentage of overall population, 2018



Source: Statistics Canada: 2011 National Household Survey Profile, 2018 Manifold Estimates.

Education

Education attainment can be looked at as an important descriptor of labour force capacity. The figure below summarizes skilled labour proportions for comparator areas, which is composed of those people that have completed an apprenticeship, trade certificate, or college or university degree, diploma or certificate. By 2018, the proportion of skilled labour aged 25 to 64 years in North Glengarry and Stormont, Dundas and Glengarry County had gained on that of the province, increasing from 49% in 2011 to 54% in 2018.

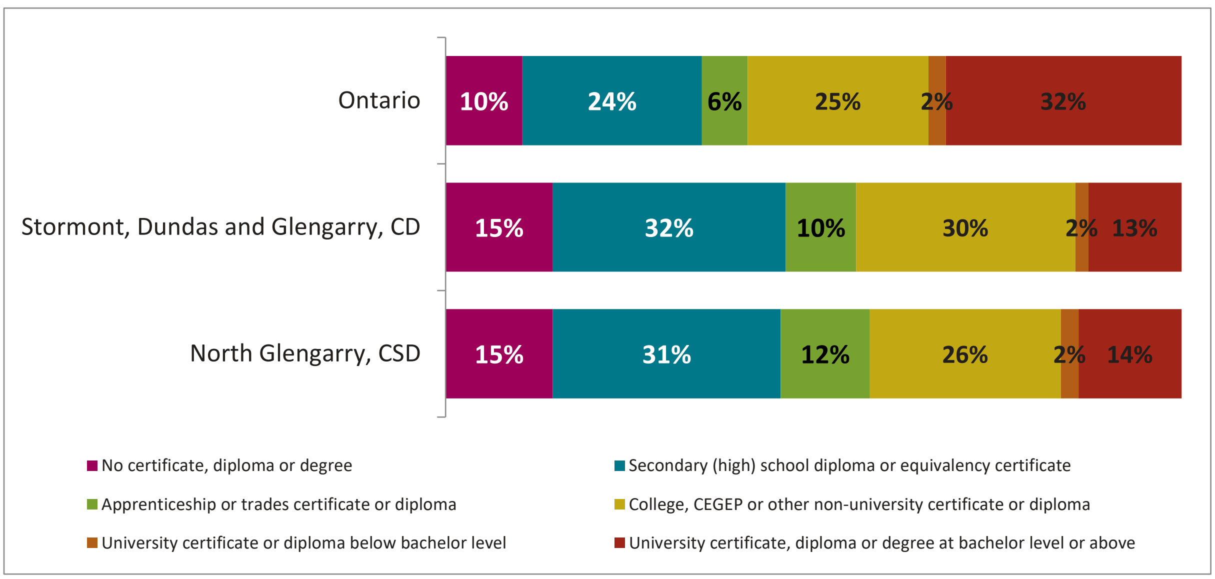
Figure 10: Proportion of population (ages 25 to 64) with post-secondary or apprenticeship education (skilled labour)

Year	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Skilled Labour 2011	49%	53%	65%
Skilled Labour 2018	54%	54%	65%

Source: Statistics Canada: 2011 National Household Survey Profile; 2018 Manifold Estimates.

Figure 11 shows that the Township of North Glengarry has a similar share of people with college, CEGEP or other non-university certificate or diploma compared to Stormont, Dundas and Glengarry County and the province. The Township of North Glengarry also has a larger proportion of people with apprenticeship or trades certificate or diploma comparison to the other areas. However, in terms of university education above bachelor level, the Township and Stormont, Dundas and Glengarry County both have relatively lower levels of individuals with this level of training compared to Ontario.

Figure 11: Highest level of education attainment (ages 25 to 64), % of the population, 2018



Source: Statistics Canada; 2018 Manifold Estimates.

The largest proportion of individuals' major fields of study in the Township of North Glengarry are architecture, engineering, and related technologies, as well as business, management and public administration. These are also the most common fields of study in Stormont, Dundas and Glengarry County.

Figure 12: Major field of study (ages 25 to 64 years), percentage of the population, 2016

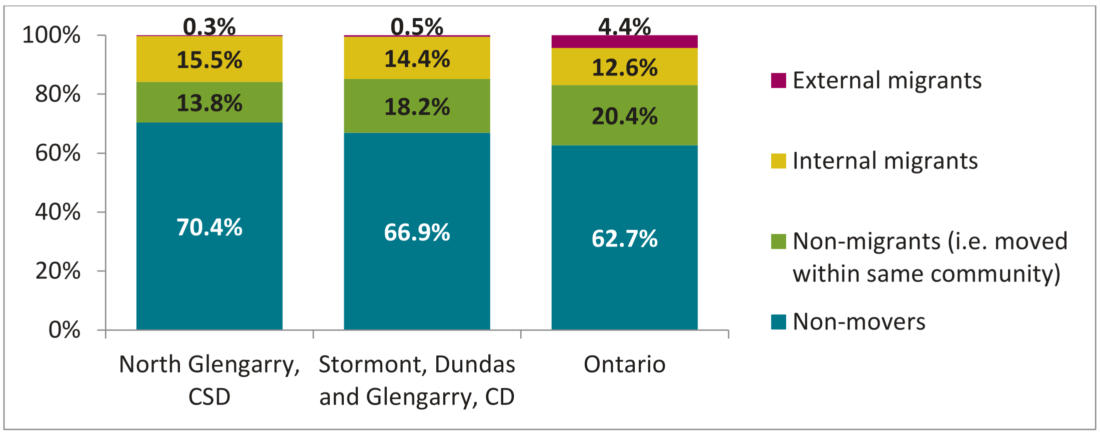
Major field of study	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Total	100%	100%	100%
No postsecondary certificate, diploma or degree	52.2%	53.1%	44.5%
Education	4.2%	3.5%	3.2%
Visual and performing arts, and communications technologies	1.3%	1.3%	2.4%
Humanities	2.3%	2.0%	3.3%
Social and behavioural sciences and law	4.3%	4.5%	7.3%
Business, management and public administration	7.5%	8.4%	11.5%
Physical and life sciences and technologies	1.7%	1.2%	2.4%
Mathematics, computer and information sciences	1.5%	1.3%	2.7%
Architecture, engineering, and related technologies	9.7%	10.2%	10.5%
Agriculture, natural resources and conservation	3.2%	2.0%	1.1%
Health and related fields	7.3%	8.4%	7.8%
Personal, protective and transportation services	4.8%	4.2%	3.1%
Other	0.0%	0.0%	0.0%

Source: 2018 Manifold Estimates.

Mobility

The movement of people within a community or to the community from somewhere else constitutes mobility. Statistics Canada tracks this in two ways, by asking if a household has moved within the past year and asking if a household has moved within the past five years. As of 2018, most people in North Glengarry, Stormont, Dundas and Glengarry County, and Ontario had either stayed where they were five years earlier or moved somewhere in the same geography. In 2018, North Glengarry had a lower share of external migrants than Stormont, Dundas and Glengarry County and the province, but higher levels of internal migrants.

Figure 13: Mobility characteristics 5 years ago, 2018



Source: 2018 Manifold Estimates.

Labour Force

According to the standard definition employed by Statistics Canada, the employed are persons having a job or business, whereas the unemployed are without work, are available for work, and are actively seeking work. Together the unemployed and the employed constitute the labour force [5].

Between 2011 and 2018, the Township of North Glengarry labour force grew by 605 people, from 4,980 to 5,585; which represents an increase of 12%. This metric was higher than that experienced by Stormont, Dundas and Glengarry County (5%) but the same as the province's increase of 12%.

Figure 14: Labour force size, 2011-2018

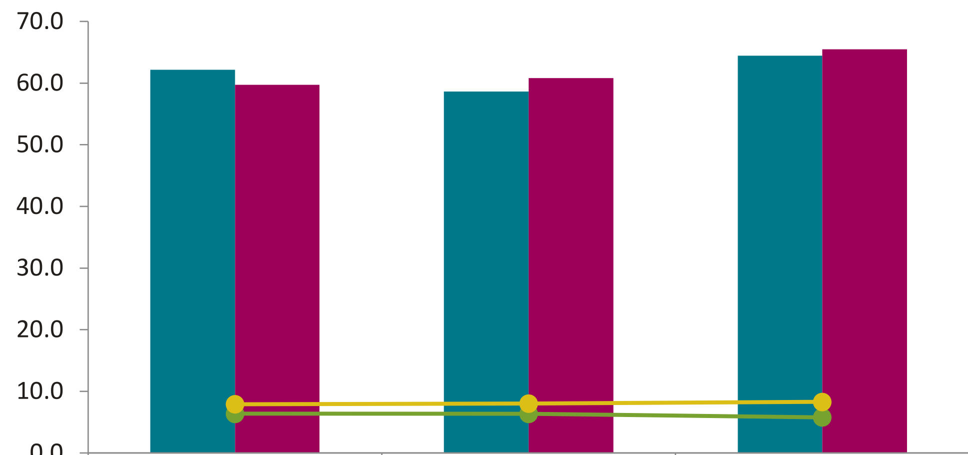
Labour Force Size	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
In the labour force 2011	4,980	55,470	6,864,990
In the labour force 2018	5,585	58,471	7,675,900
Net (+/-)	605	3,001	810,910

Source: Statistics Canada; 2011 National Household Survey; 2018 Manifold Estimates.

[5] Statistics Canada. Retrieved on January 7, 2019 from < https://www150.statcan.gc.ca/n1/pub/81-004-x/def/4153361-eng.htm>

Unemployment rates had decreased in all areas between 2011 and 2018. The Township of North Glengarry had a lower unemployment rate than the province in 2011, but the rate experienced a smaller decrease from 2011-2018. The participation rate is also important because out of the total people qualified to enter the labour market (aged 15 and over) it indicates what proportion is either employed or actively looking for employment. Participation rates had fallen in Stormont, Dundas and Glengarry and the province, but increase in North Glengarry by 2.5 percentage points. Note that people looking for work can also include those receiving employment insurance.

Figure 15: Labour force status, percentage of population, 2011-2018



	North Glengarry, CSD	Stormont, Dundas and Glengarry, CD	Ontario
Participation rate 2018	62.2	58.6	64.5
Participation rate 2011	59.7	60.8	65.5
Unemployment rate 2018	6.4	6.4	5.8
Unemployment rate 2011	7.9	8.0	8.3

Source: Statistics Canada; 2011 National Household Survey; 2018 Manifold Estimates.

Turning to the class of worker, 81.6% of the labour force in North Glengarry works as employees. The Township also registered the highest share of self-employed people with 16.9%.

Figure 16: Class of worker ratio, 2018

Labour force status	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Employee	81.6%	86.3%	86.1%
Self-employed	16.9%	11.6%	11.5%

Source: Statistics Canada; 2018 Manifold Profile

Employment by Industry

In the figure below, North Glengarry and Stormont, Dundas and Glengarry County have larger proportions of their labour force concentrated in North American Industry Classification System (NAICS) industries such as construction and manufacturing. Both also have an important percentage of their labour forces working in retail, health care and social assistance, and educational services.

Figure 17: Employed labour force by industry, percentage of labour force, 2018

Industry (NAICS)	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Total	100%	100%	100%
Industry - NAICS2012 - not applicable	0.8%	2%	3%
11 Agriculture, forestry, fishing and hunting	7.0%	4%	1%
21 Mining, quarrying, and oil and gas extraction	0.0%	0%	0%
22 Utilities	0.7%	1%	1%
23 Construction	10.2%	8%	6%
31-33 Manufacturing	13.8%	11%	10%
41 Wholesale trade	4.0%	4%	4%
44-45 Retail trade	10.7%	12%	11%
48-49 Transportation and warehousing	6.6%	7%	4%
51 Information and cultural industries	2.0%	1%	3%
52 Finance and insurance	3.6%	3%	5%
53 Real estate and rental and leasing	0.6%	1%	2%
54 Professional, scientific and technical services	4.1%	4%	7%
55 Management of companies and enterprises	0.0%	0%	0%
56 Administrative and support, waste management and remediation services	1.6%	6%	5%
61 Educational services	6.9%	6%	7%
62 Health care and social assistance	10.7%	12%	10%
71 Arts, entertainment and recreation	1.2%	2%	2%
72 Accommodation and food services	4.0%	5%	6%
81 Other services (except public administration)	6.1%	4%	4%
91 Public administration	5.2%	7%	7%

Source: 2018 Manifold Estimates.

The figure below shows the number of people working in each NAICS sector for 2011 and 2018. Most notably, declines are evident in Manufacturing (-102); followed by construction (-46); Finance and insurance (-42); and Information and cultural industries (-37).

Sectors that saw notable growth over this period include Agriculture, forestry, fishing and hunting (+168); Administrative and support, waste management and remediation services (+143); Health care and social assistance (+126); and accommodation and construction (+308).

Figure 18: Employed Labour Force by Industry (Number of People), 2018

Industry (NAICS)	2011	2018	Net (+/-)
Total	4,980	5,585	605
Industry - NAICS2012 - not applicable	40	122	82
11 Agriculture, forestry, fishing and hunting	350	518	168
21 Mining, quarrying, and oil and gas extraction	0	10	10
22 Utilities	35	70	35
23 Construction	510	464	-46
31-33 Manufacturing	685	583	-102
41 Wholesale trade	200	233	33
44-45 Retail trade	535	530	-5
48-49 Transportation and warehousing	330	350	20
51 Information and cultural industries	100	63	-37
52 Finance and insurance	180	138	-42
53 Real estate and rental and leasing	30	110	80
54 Professional, scientific and technical services	205	211	6
55 Management of companies and enterprises	0	8	8
56 Administrative and support, waste management and remediation services	80	223	143
61 Educational services	345	368	23
62 Health care and social assistance	535	661	126
71 Arts, entertainment and recreation	60	102	42
72 Accommodation and food services	200	223	23
81 Other services (except public administration)	305	326	21

Source: 2018 Manifold Estimates.

Despite the insight gleaned from the above, further analytical tools allow for an assessment of industry competitiveness relative to the overall province. These tools can prove insightful for understanding what industries make sense to promote for further growth or monitoring for potential declines.

A location quotient analysis explains which industries employ a competitively higher proportion of people than the province. A score of 1.25 or greater represents a sector of relative strength, a score between 0.75 and 1.25 represents a sector that is on par with the province (1.0 represents perfect parity), and a score below 0.75 represents a sector of comparative weakness. Also pertinent are the trends over time and their direction, which indicate that potential opportunities or threats need to be addressed. Based on the above considerations, the following observations emerge from the data in the figure below:

- Competitive sectors in 2018 include: Agriculture, forestry, fishing and hunting; Utilities; Other services (except public administration); and Transportation and warehousing.
- Moderate or high competing sectors experiencing growth include Agriculture, forestry, fishing and hunting; Utilities; and Health care and social assistance.
- Notable declines are evident in Construction; Information and cultural industries; Manufacturing; and Finance and Insurance.

Figure 19: Employment location quotient (LQ) analysis – concentration of employed labour force by industry

Industry (NAICS)	LQ 2011	Strength	LQ 2018	Strength	Change	Trend
11 Agriculture, forestry, fishing and hunting	4.76	High	6.21	High	1.44	Growing
21 Mining, quarrying, and oil and gas extraction	0.00	Low	0.35	Low	0.35	Growing
22 Utilities	0.85	Moderate	1.48	High	0.64	Growing
23 Construction	1.68	High	1.27	High	-0.42	Declining
31-33 Manufacturing	1.35	High	1.12	Moderate	-0.24	Declining
41 Wholesale trade	0.90	Moderate	1.08	Moderate	0.17	Growing
44-45 Retail trade	0.98	Moderate	0.89	Moderate	-0.09	Declining
48-49 Transportation and warehousing	1.48	High	1.35	High	-0.13	Declining
51 Information and cultural industries	0.77	Moderate	0.43	Low	-0.34	Declining
52 Finance and insurance	0.68	Low	0.46	Low	-0.22	Declining
53 Real estate and rental and leasing	0.31	Low	0.90	Moderate	0.59	Growing
54 Professional, scientific and technical services	0.55	Low	0.48	Low	-0.07	Declining
55 Management of companies and enterprises	0.00	Low	0.62	Low	0.62	Growing
56 Administrative and support, waste management and remediation services	0.36	Low	0.84	Moderate	0.49	Growing
61 Educational services	0.95	Moderate	0.90	Moderate	-0.05	Declining
62 Health care and social assistance	1.07	Moderate	1.15	Moderate	0.09	Growing
71 Arts, entertainment and recreation	0.57	Low	0.82	Moderate	0.24	Growing
72 Accommodation and food services	0.66	Low	0.61	Low	-0.05	Declining
81 Other services (except public administration)	1.42	High	1.39	High	-0.03	Declining
91 Public administration	0.78	Moderate	0.84	Moderate	0.06	Growing

Source: 2018 Manifold Estimates. Adapted by MDB Insight

*Although some companies have a high concentration, the total number of people employed in the sector might be small (see Figure 18).

Figure 20 presents the results of another analytical tool called a **shift-share analysis**. The shift-share articulates the factors which drive changes in employment through three primary considerations:

- Reference Area Growth Effect: The impact that changes in the overall broader economy at the provincial level have had on local employment in a given sector, leading to an increase or decrease in local employment.
- Industrial Mix Effect: The impact that changes among different industries of the economy have had on local employment in a given sector, leading to an increase or decrease in local employment).
- Differential Shift: The impact that local factors have had on increases or decreases in local employment (i.e. changes that cannot be explained by those in the reference area growth effect or industrial mix effect).
- The data below indicate the following:
- Overall, changes in the labour force were driven by growth in the reference area growth effect (+589; i.e. growth of ON's economy), and by changes in the local factors under the differential shift (-56). Small decreases were attributed to industry changes. In total, the gains and declines resulted in a net gain of -32 new jobs for the Township of North Glengarry.
- Increases were most evident in Agriculture, forestry, fishing and hunting; Administrative and support, waste management and remediation services; and Real estate and rental and leasing (due mostly to local factors); and Health care and social assistance (due to a mix of all factors).
- Declines are most evident in manufacturing (due to industry and local factors), and Construction (due to local and provincial factors); and Finance and insurance (due mostly to local factors).

Figure 20: Ontario/Township of North Glengarry – Shift Share Analysis

North American Industry Classification System	Area Growth Effect	Industrial Mix Effect	Differential Shift	Total
Agriculture, forestry, fishing and hunting	42	5	122	168
Mining and oil and gas extraction	0	0	0	0
Utilities	4	1	30	35
Construction	61	44	-151	-46
Manufacturing	82	-62	-121	-102
Wholesale trade	24	-29	38	33
Retail trade	64	-16	-53	-5
Transportation and warehousing	39	13	-33	20
Information and cultural industries	12	1	-50	-37
Finance and insurance	21	2	-66	-42
Real estate and rental and leasing	4	4	72	80
Professional, scientific and technical services	24	13	-31	6
Management of companies and enterprises	0	0	0	0
Administrative and support, waste management and remediation services	10	5	129	143
Educational services	41	0	-19	23
Health care and social assistance	64	11	51	126
Arts, entertainment and recreation	7	4	31	42
Accommodation and food services	24	18	-19	23
Other services (except public administration)	36	-10	-6	21
Public administration	31	-37	19	13
Total	**589**	**-32**	**-56**	**501**

Source: 2018 Manifold Estimates. Adapted by MDB Insight

Calculation does not include “not applicable industries

Employment by Occupation

The figure below shows the percentage of the labour force employed by occupational category in 2018. Occupations in Trades, transport and equipment operators and related occupations have the highest percentage of labour force employed in North Glengarry, followed by Sales and service occupations.

Figure 21: Employed labour force by occupational category, percentage of labour force, 2018

Occupations (NOC)	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Total	100%	100%	100%
Occupation - not applicable	2%	3%	3%
0 Management occupations	13%	10%	11%
1 Business, finance and administration occupations	13%	13%	16%
2 Natural and applied sciences and related occupations	5%	4%	7%
3 Health occupations	6%	7%	6%
4 Occupations in education, law and social, community and government services	10%	10%	12%
5 Occupations in art, culture, recreation and sport	2%	2%	3%
6 Sales and service occupations	17%	22%	23%
7 Trades, transport and equipment operators and related occupations	22%	19%	13%
8 Natural resources, agriculture and related production occupations	4%	3%	2%
9 Occupations in manufacturing and utilities	6%	6%	5%

Source: 2018 Manifold Estimates

The figure below shows the number of people working in each occupation as defined by the National Occupational Classification (NOC) for 2011 and 2018.

Occupations that experienced major growth in North Glengarry include Trades, transport and equipment operators and related occupations (+313) and Management occupations (+156). The only occupation classification that experienced a significant decrease in North Glengarry between 2011 and 2018 was in Business, finance and administration occupations (-91).

Figure 22: Employed labour force by occupational category (number of people), 2011-2018

Occupations (NOC)	North Glengarry 2011	North Glengarry 2018	Net (+/-)
Total	4,980	5,585	605
Occupation - not applicable	40	122	82
0 Management occupations	565	721	156
1 Business, finance and administration occupations	790	699	-91
2 Natural and applied sciences and related occupations	250	265	15
3 Health occupations	265	340	75
4 Occupations in education, law and social, community and government services	490	586	96
5 Occupations in art, culture, recreation and sport	115	118	3
6 Sales and service occupations	980	975	-5
7 Trades, transport and equipment operators and related occupations	920	1,233	313
8 Natural resources, agriculture and related production occupations	210	207	-3
9 Occupations in manufacturing and utilities	340	319	-21

Source: Statistics Canada; 2011 Census Profile, 2018 Manifold Estimates

Commuting Patterns

The Study on commuting patterns measures the import and export characteristics of a region's workforce. A high percentage of outside labour force working in the community depicts the attraction of the region for nearby communities. In contrast, if majority of the workers in the community leave for their work (export of labour force) than it may hint towards lack of proportional opportunities in the community. In the Township of North Glengarry, 21.1% of its residents' commute to a different census division to work; this percentage is lower than in the Stormont, Dundas and Glengarry County but higher than the province.

Figure 23: Commuting destination for employed labour force

Commuting destination	North Glengarry, Township	Stormont, Dundas and Glengarry, County	Ontario
Total	100%	100%	100%
Commute within census subdivision (CSD) of residence	47.5%	48.7%	58.0%
Commute to a different census subdivision (CSD) within census division (CD) of residence	21.1%	27.5%	16.0%
Commute to a different census subdivision (CSD) and census division (CD) within province or territory of residence	25.8%	20.0%	25.2%
Commute to a different province or territory	6.0%	3.7%	0.7%

Source: Statistics Canada; 2016 Census Profile

The analysis from the 2016 Census suggests that 1,575 people commute to North Glengarry from other geographies to work, mostly from South Glengarry, North Stormont, and Cornwall.

Figure 24: Place of residence of the people commuting to North Glengarry, ON 2016

Place of residence	Total
South Glengarry TP	580
North Stormont TP	195
Cornwall CY	160
Champlain TP	100
The Nation / La Nation M	90
South Stormont TP	80
Other Communities (25 census sub-divisions)	370

Source: Statistics Canada; 2016 Census Profile

When it comes to labour force living in North Glengarry, 1,855 people leave the Township to work. Most of the people commute to Ottawa, Cornwall, and South Glengarry.

Figure 25: Commuting destination of people commuting from North Glengarry, ON 2016

Place of work	Total
Ottawa, CY	370
Cornwall, CY	340
South Glengarry, TP	210
Champlain, TP	165
Hawkesbury, TP	140
Other Communities (42 census sub-divisions)	630

Source: Statistics Canada; 2016 Census Profile

In addition to the above commuter pattern data, net import/export of labour was studied by industry to better understand what sectors people are coming or leaving to work in. The results show the Township of North Glengarry is a net exporter of workers (-280). Most of workers commute in to work in Manufacturing (120); Finance and insurance (25); and Accommodation and food services (20). On the other hand, the industries that export the most workers to other communities include Public administration (125), and Construction (80).

Figure 26: Net import/export of workers North Glengarry, ON 2016

Industry (NAICS)	Net import/export
Total	-280
11 Agriculture	-30
21 Mining	0
22 Utilities	-15
23 Construction	-80
31-33 Manufacturing	120
41 Wholesale trade	-30
44-45 Retail trade	-5
48-49 Transportation and warehousing	-50
51 Information and cultural industries	-30
52 Finance and insurance	25
53 Real estate and rental and leasing	-20
54 Professional, scientific and technical services	5
55 Management of companies and enterprises	-10
56 Administrative and support, waste management and remediation services	-45
61 Educational services	-45
62 Health care and social assistance	-5
71 Arts, entertainment and recreation	-25
72 Accommodation and food services	20
81 Other services (except public administration)	-40
91 Public administration	-125

Source: Statistics Canada; 2016 Census Profile

Business Counts

Statistics Canada's Canadian Business Counts provides a record of business establishments by industry sector and size. This data is collected from the Canadian Revenue Agency (CRA). The Canadian Business Counts data records business counts as either "Without Employees" or "With Employees." The establishments in the "Without Employees" category include the self-employed (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Counts data use the Canada Revenue Agency as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than $30,000 are not included.

Focussing primarily at the "Sub-Total, classified" numbers and industry breakdowns, the analysis has found that:

- 68% of all businesses have no employees, with only 1% of business employing more than 100 employees.
- 53% of all businesses with employees employ 1 to 4 people; this represents 16% of total businesses.
- Retail trade; Health care and social assistance; and Construction are the industries with the largest number of businesses with employees.
- Agriculture, forestry, fishing and hunting; Real estate, rental and leasing; and Construction are the industries with the largest number of businesses without employees.
- 9 businesses employ more than 100 people; these businesses are in sector like Manufacturing; Wholesale trade; and Healthcare and educational services.

Note: This section includes all registered companies that have a Goods and Services Tax number, as registered through the Canada Revenue Agency. Results should not be compared directly to existing business directories in North Glengarry as the criteria for registering are different for both. The Canadian Business Counts data are used primarily so that comparisons can be made to the Provincial Distribution of businesses across the same categories.

Figure 27: Business counts in the Township of North Glengarry by industry and business size (number of employees)

Industry (NAICS)	Total	Ind.	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	907	613	294	157	65	33	27	3	8	1	0
Unclassified	67	48	19	12	5	1	1	0	0	0	0
Sub-total, classified	840	565	275	145	60	32	26	3	8	1	0
11 - Agriculture, forestry, fishing and hunting	193	167	26	19	7	0	0	0	0	0	0
21 - Mining and oil and gas extraction	1	1	0	0	0	0	0	0	0	0	0
22 - Utilities	2	2	0	0	0	0	0	0	0	0	0
23 - Construction	81	51	30	18	10	2	0	0	0	0	0
31-33 - Manufacturing	17	8	9	2	2	2	1	0	2	0	0
41 - Wholesale trade	26	11	15	9	2	2	1	0	0	1	0
44-45 - Retail trade	75	34	41	12	16	6	5	1	1	0	0
48-49 - Transportation and warehousing	35	20	15	10	0	1	3	0	1	0	0
51 - Information and cultural industries	5	2	3	1	0	0	2	0	0	0	0
52 - Finance and insurance	29	21	8	3	2	2	1	0	0	0	0
53 - Real estate and rental and leasing	120	106	14	13	1	0	0	0	0	0	0
54 - Professional, scientific and technical services	56	37	19	12	4	2	1	0	0	0	0
55 - Management of companies and enterprises	5	5	0	0	0	0	0	0	0	0	0
56 - Administrative and support, waste management and remediation services	26	15	11	2	4	3	1	0	1	0	0
61 - Educational services	5	3	2	1	1	0	0	0	0	0	0
62 - Health care and social assistance	49	19	30	14	3	2	7	2	2	0	0
71 - Arts, entertainment and recreation	12	9	3	1	0	1	1	0	0	0	0
72 - Accommodation and food services	31	9	22	8	6	5	3	0	0	0	0
81 - Other services (except public administration)	71	45	26	20	2	4	0	0	0	0	0
91 - Public administration	1	0	1	0	0	0	0	0	1	0	0

Source: Statistics Canada, Canadian Business Counts, December 2019

- The table below presents the distribution of businesses with employees in the North Glengarry. Besides Retail trade, Construction, Health care and social assistance, industries such as Agriculture, forestry, fishing and hunting, Other services (except public administration), and Accommodation and food services also have a significant proportion of businesses with employees operating in North Glengarry.

Figure 28: Businesses by industry in North Glengarry, percentage of total businesses with employees, 2019

Industry (NAICS)	Business with employees	%
44-45 - Retail trade	41	14%
23 - Construction	30	10%
62 - Health care and social assistance	30	10%
11 - Agriculture, forestry, fishing and hunting	26	9%
81 - Other services (except public administration)	26	9%
72 - Accommodation and food services	22	7%
Unclassified	19	6%
54 - Professional, scientific and technical services	19	6%
41 - Wholesale trade	15	5%
48-49 - Transportation and warehousing	15	5%
53 - Real estate and rental and leasing	14	5%
56 - Administrative and support, waste management and remediation services	11	4%
31-33 - Manufacturing	9	3%
52 - Finance and insurance	8	3%
51 - Information and cultural industries	3	1%
71 - Arts, entertainment and recreation	3	1%
61 - Educational services	2	1%
91 - Public administration	1	0%
21 - Mining and oil and gas extraction	0	0%
22 - Utilities	0	0%
55 - Management of companies and enterprises	0	0%

Source: Statistics Canada, Canadian Business Counts, December 2019

Again, using the location quotient analysis, where 1.25 or greater represents strength, 0.75 to 1.25 represents proximity to the Provincial distribution, and below 0.75 represents low competitiveness, the sectors with a significantly higher concentration of businesses than the province include Agriculture, forestry, fishing and hunting, and Retail trade.

Figure 29: Business count location quotients (LQ) businesses with employees by industry, 2018

Industry (NAICS)	LQ 2019	Strength
11 - Agriculture, forestry, fishing and hunting	4.75	High
21 - Mining and oil and gas extraction	0.00	Low
22 - Utilities	0.00	Low
23 - Construction	0.98	Moderate
31-33 - Manufacturing	0.71	Low
41 - Wholesale trade	1.10	Moderate
44-45 - Retail trade	1.26	High
48-49 - Transportation and warehousing	0.81	Moderate
51 - Information and cultural industries	0.63	Low
52 - Finance and insurance	0.74	Low
53 - Real estate and rental and leasing	1.18	Moderate
54 - Professional, scientific and technical services	0.49	Low
55 - Management of companies and enterprises	0.00	Low
56 - Administrative and support, waste management and remediation services	0.88	Moderate
61 - Educational services	0.56	Low
62 - Health care and social assistance	1.08	Moderate
71 - Arts, entertainment and recreation	0.77	Moderate
72 - Accommodation and food services	1.18	Moderate
81 - Other services (except public administration)	1.06	Moderate
91 - Public administration	1.25	Moderate

Source: Statistics Canada; Canadian Business Counts December 2019. Adapted by MDB Insight.

06

APPENDIX B: DETAILED SURVEY RESULTS

NORTH GLENGARRY NORD

Ontario's Celtic Heartland
Le centre celtique de l'Ontario

MDB INSIGHT

The Detailed Analysis sections show the results of the online survey of the North Glengarry Development and Marketing Strategy. The survey received 127 responses during June-July 2020.

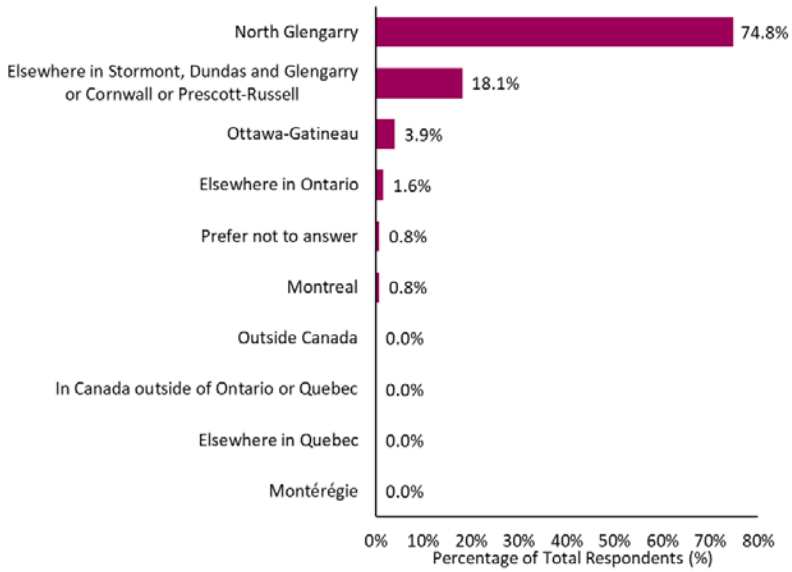
All respondents were first asked to list three words that described North Glengarry. The following is a word cloud of the results of that question. The words that occurred the most often are displayed the largest. Words like “Friendly”, “Rural”, and “Beautiful”, were common descriptors. Other results of this exercise emphasized the Township’s Celtic culture and bilingualism. Some responses, albeit few, signalled the area’s lack of ethnic diversity (“White”), and its slower pace of life and perceived lack of progress (“Slow”, “Tired”, “Old”).

Figure 30: Word cloud results: Thinking of the North Glengarry, Ontario what three words would you use to best describe it?

Contextual Information

At the beginning of the questionnaire, respondents were asked in which area their primary residence was located. This question split the respondents up into two groups: residents of North Glengarry and non-residents. The remaining questions aimed to determine how to attract individuals to the area, both from the resident's experiences in the area and the non-residents perspectives of the area. Figure 1 shows that 74.8% (95 respondents) were residents of North Glengarry, and 25.2% (32 respondents) were non-residents.

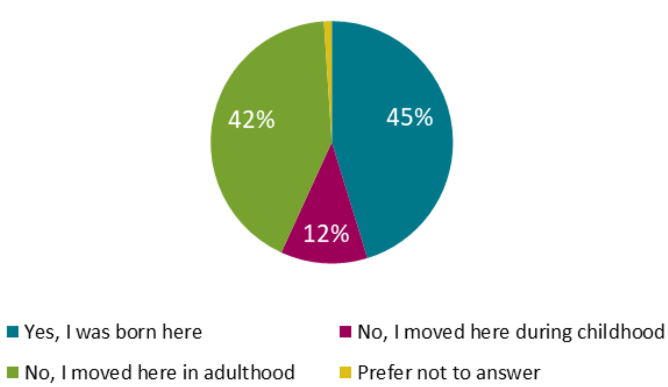
Figure 31: In which area is your primary residence located?



Residents

This section shows the questions which were asked exclusively to the residents of North Glengarry. Figure 2 shows that 45% were born in the region, 12% moved to the region in childhood and 42% moved to the region in adulthood.

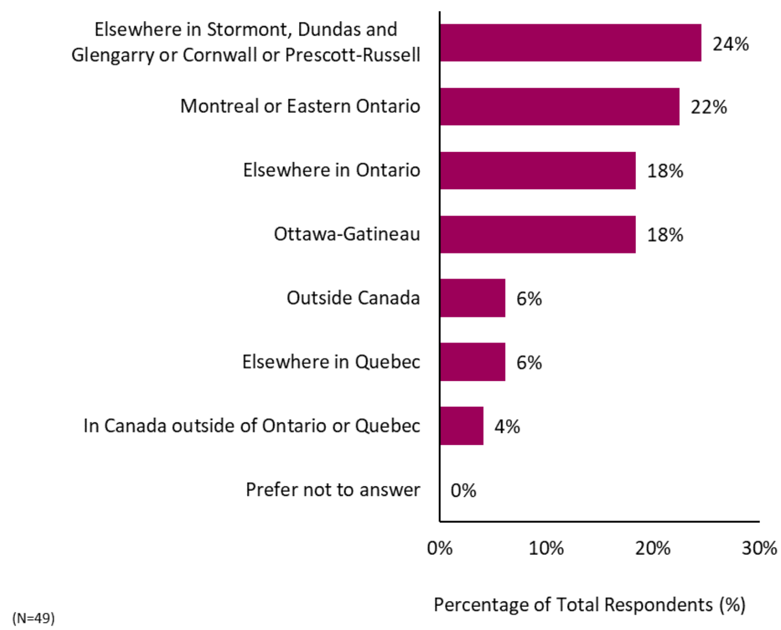
Figure 32: Are you from North Glengarry originally?



(N=9

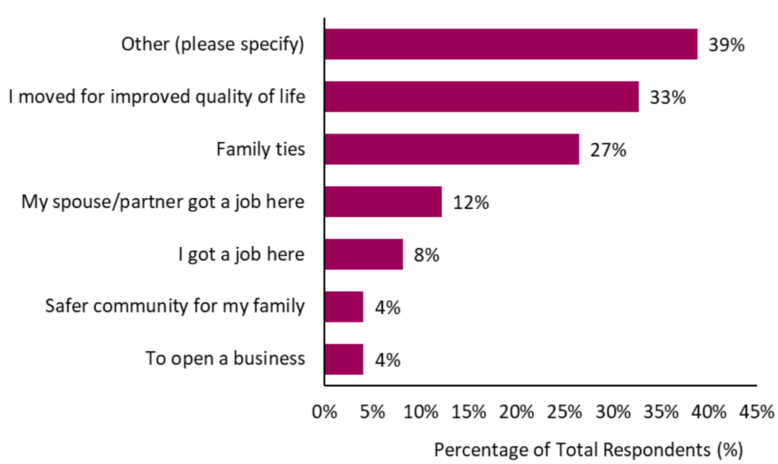
Among the respondents who had moved to the region at some point in their lives, the majority had moved from elsewhere in Stormont, Dundas and Glengarry. Many had also moved from Montreal, Ottawa-Gatineau, or elsewhere in Ontario.

Figure 33: Where did you live before moving to North Glengarry?



Many respondents noted that they had moved to North Glengarry for the quality of life. Another large portion stated that they had moved for family ties in the region. Many respondents also selected the "Other" option and wrote their reasons. Some of these reasons included: Spouses moving to the area, parents moving to the region, better services for childcare/health/special needs, and less expensive housing.

Figure 34: What motivated you to relocate to North Glengarry?



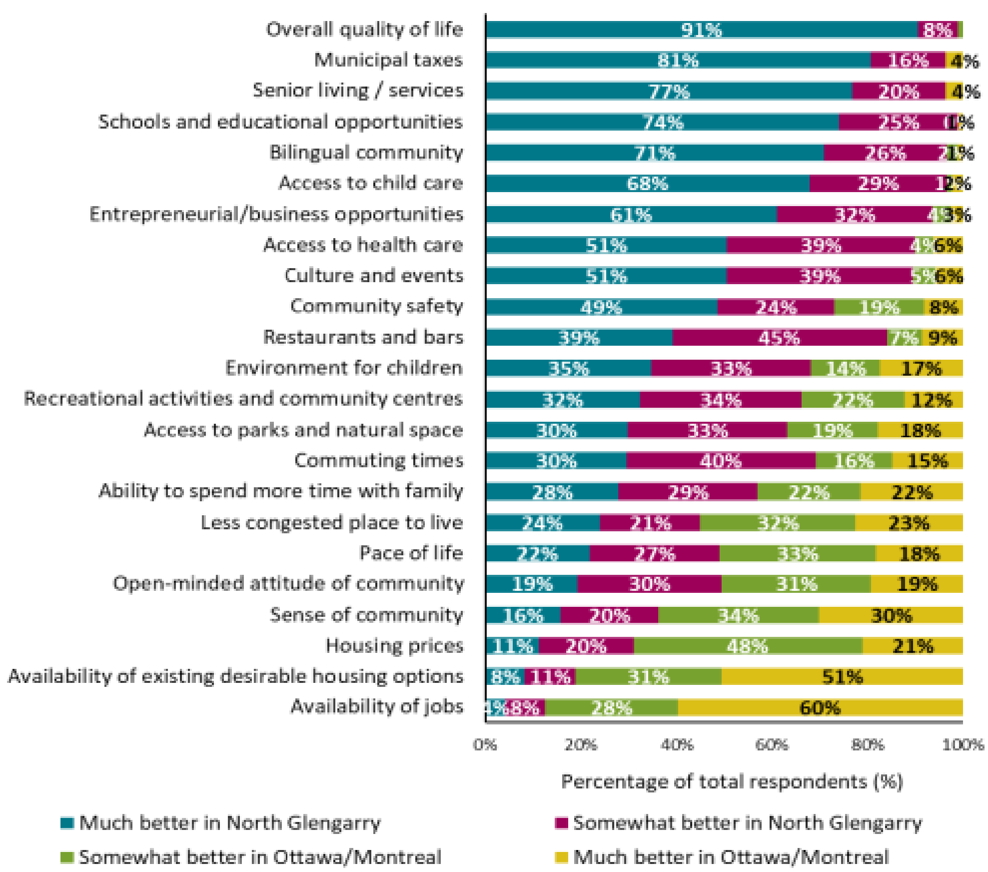
Only 22% of individuals noted that they had moved to North Glengarry alone. 57% responded that they had moved with a spouse/partner, and 29% stated that they had moved with children.

Figure 35: Who made the move with you?

Answer	Percent
Moved alone	22%
Moved with spouse / partner	57%
Moved with children	29%
Moved with other related adults	14%
Moved with other unrelated adults	0%

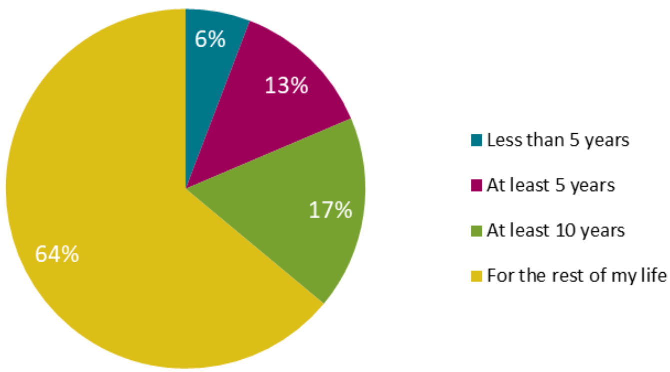
In Figure 6, respondents were asked to compare numerous factors between North Glengarry and nearby metropolitan areas such as Ottawa and Montreal. The most likely factors to be chosen as better in North Glengarry were overall quality of life, municipal taxes, senior living/services, and schools/educational programming. The availability of jobs and the availability of existing desirable housing options were the most likely factors to be chosen as much better in Montreal/Ottawa.

Figure 36: For the following question, we would like you to please consider how the following factors in North Glengarry compare to Ottawa/Montreal.



Among the residents surveyed, 64% responded that they planned to live in North Glengarry for the rest of their life. 17% planned to live there for another ten years, and 13% planned to live in the region for another five years.

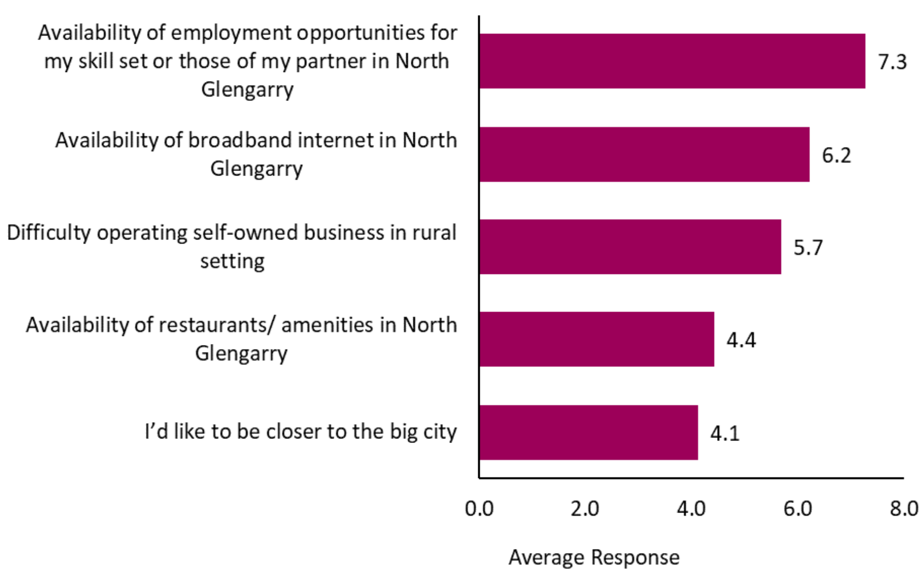
Figure 37: How long do you plan to be living in North Glengarry?



(N=86)

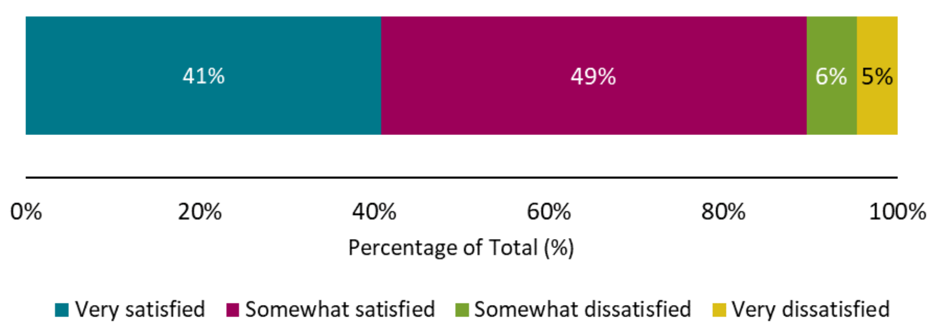
Residents who had responded that they did not plan to live in North Glengarry for life were also asked to rate the level to which various factors might cause them to move away from North Glengarry. The availability of employment opportunities for respondents' skillset was the most highly rated significant factor, followed by the availability of broadband internet and difficulty operating self-owned businesses.

Figure 38: Please rate the level to which the following factors might influence you to move away from North Glengarry? Scale - 1 (Not at all a factor) to 10 (A significant factor)



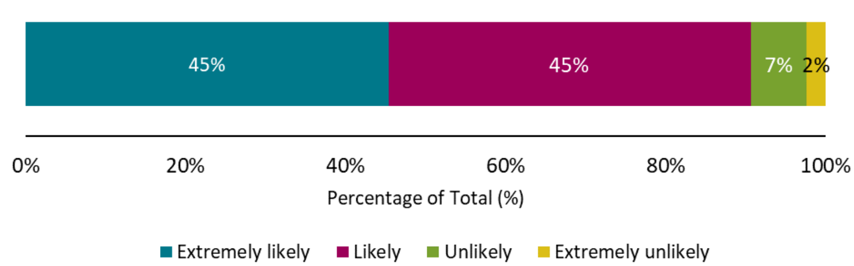
A high proportion of respondents (90%) stated that they were very or somewhat satisfied with North Glengarry's ability to meet their overall needs as a resident. Only 5% noted that they were very dissatisfied.

Figure 39: How satisfied are you with North Glengarry's ability to meet your overall needs as a resident?



Further, 90% of residents noted that they would be likely or extremely likely to recommend North Glengarry as a place to visit or live.

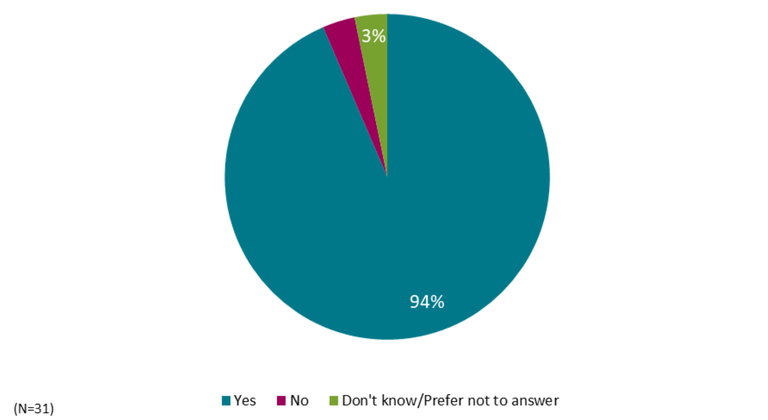
Figure 40: How likely are you to recommend North Glengarry to friends as family as a place to visit or live?



Non-Residents

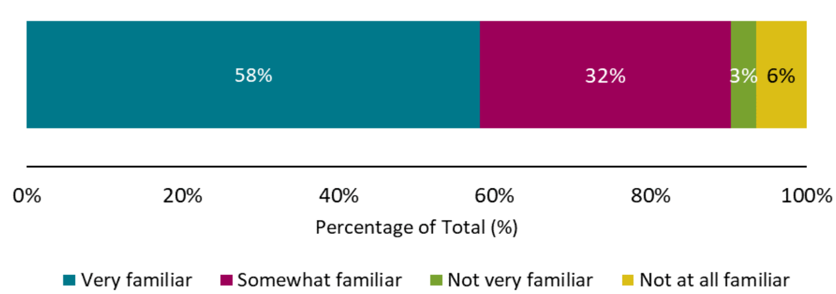
This section outlines the responses of the non-residents who responded to the survey. Among these respondents, 94% reported having visited North Glengarry in the past (Figure 11).

Figure 41: Have you ever been to North Glengarry (including Alexandria and Maxville and the surrounding hamlets)?



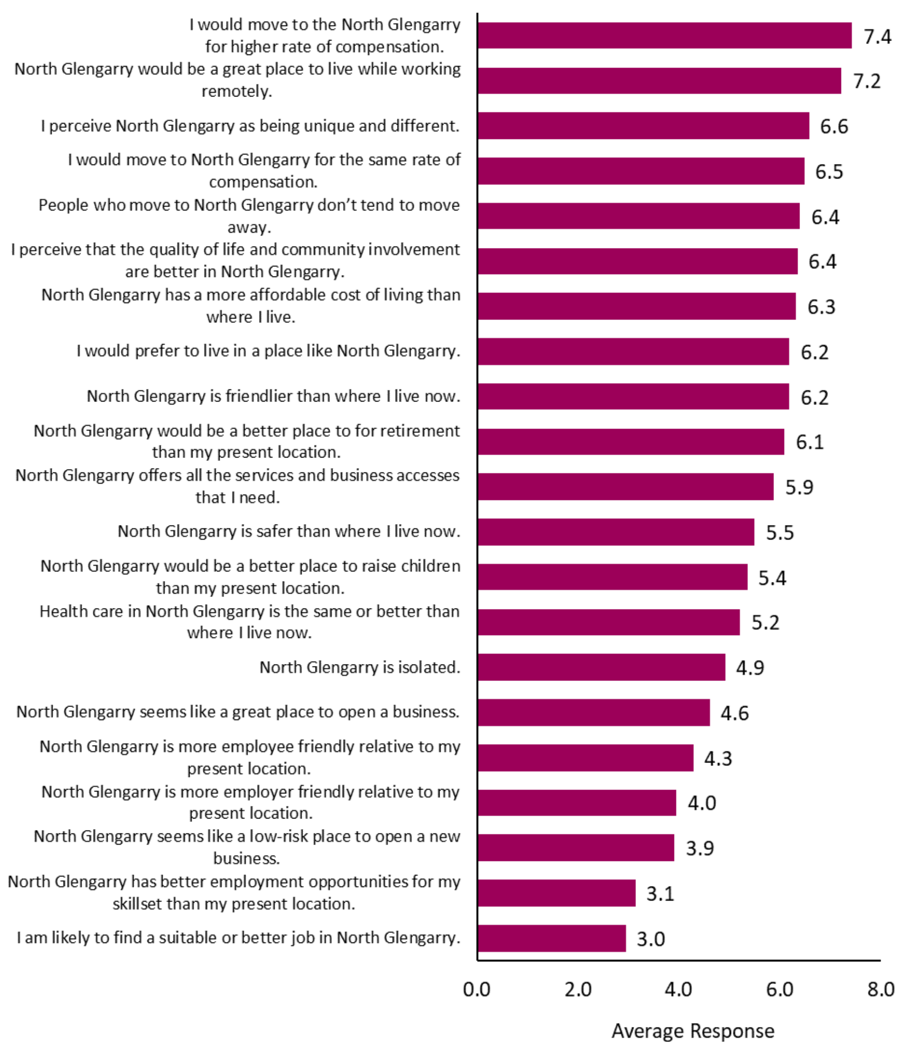
Among the non-residents surveyed, 58% reported being very familiar with North Glengarry, and 32% reported being somewhat familiar. Only 6% noted that they were not familiar with North Glengarry at all.

Figure 42: Please rate your level of familiarity with the North Glengarry.



Non-residents who were at all familiar with North Glengarry were also asked to rate the level to which they agree or disagree with various statements about the region on a scale of 1 (Highly disagree) to 10 (Highly agree). Non-resident respondents were most likely to highly agree with the statements "I would move to North Glengarry for a higher rate of pay," "North Glengarry would be a great place to live while working remotely," and "I perceive North Glengarry as being unique and different." Contrarily, non-resident respondents were the least likely to highly agree with the statements: "I am likely to find a suitable or better job in North Glengarry," "North Glengarry has better employment opportunities for my skillset than my present location," and "North Glengarry seems like a low-risk place to open a new business." The respondents felt neutral on average (average responses near 5) to the statements: "Health care in North Glengarry is the same or better than where I live now," and "North Glengarry would be a better place to raise children than my present location."

Figure 43: How much do you agree or disagree with the following statements? Scale – 1 (Highly disagree) to 10 (Highly agree)



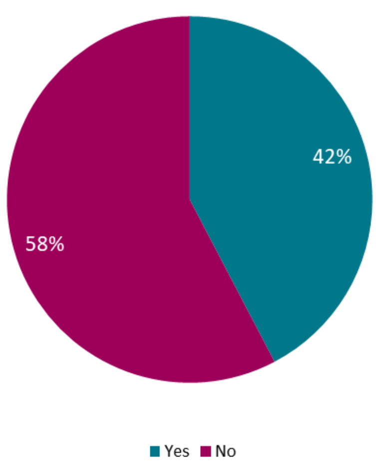
Non-residents reported using the internet, word of mouth, and personal experience most frequently to learn about new places in Canada.

Figure 44: What source of information do you use to learn about new places in Canada?

Answer	Percent
Internet	88%
Billboards/highway signs	12%
Television	35%
Word of mouth and friends	81%
Newspaper	35%
Radio	27%
Magazines	31%
Personal Experience	73%
Tourism material	42%
Social Media	62%
Other (please specify)	0%

The majority (58%) of non-resident respondents had not seen any advertising regarding North Glengarry, but a significant portion (the remaining 42%) had reported having seen advertising or promotional material.

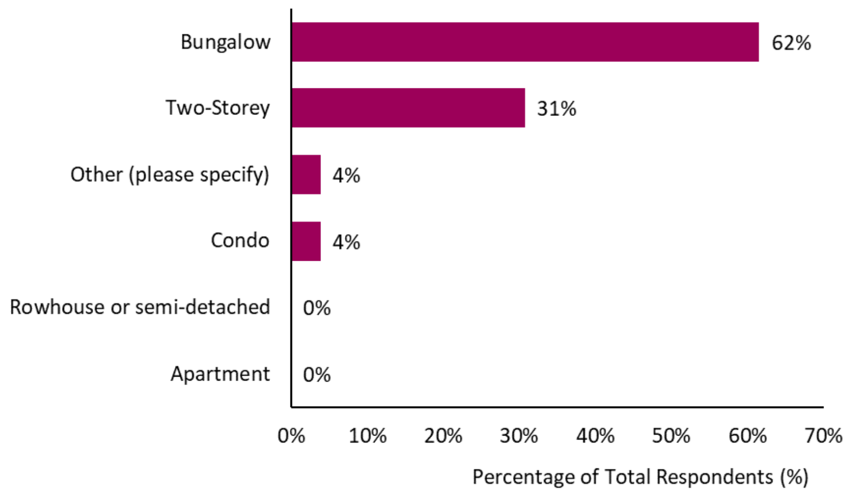
Figure 45: Have you seen or heard any advertising or promotional material about North Glengarry?



(N=26)

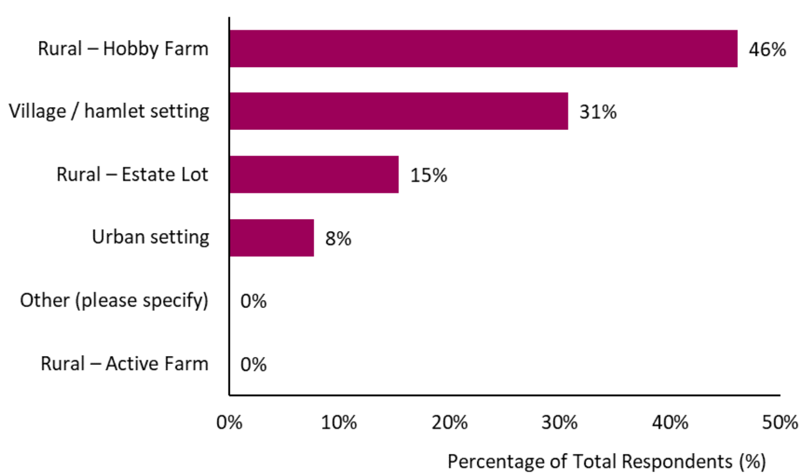
The majority of non-resident respondents reported that if they were to move to North Glengarry, they would be looking for a bungalow. Another large portion (31%) would be looking for a two-story dwelling.

Figure 46: If you were to move to North Glengarry, what type of dwelling would you be looking for?



When asked about their ideal setting to live, 46% of respondents were interested in a rural – hobby farm, and 31% reported a village/hamlet would be their ideal setting.

Figure 47: What is your ideal setting to live in?



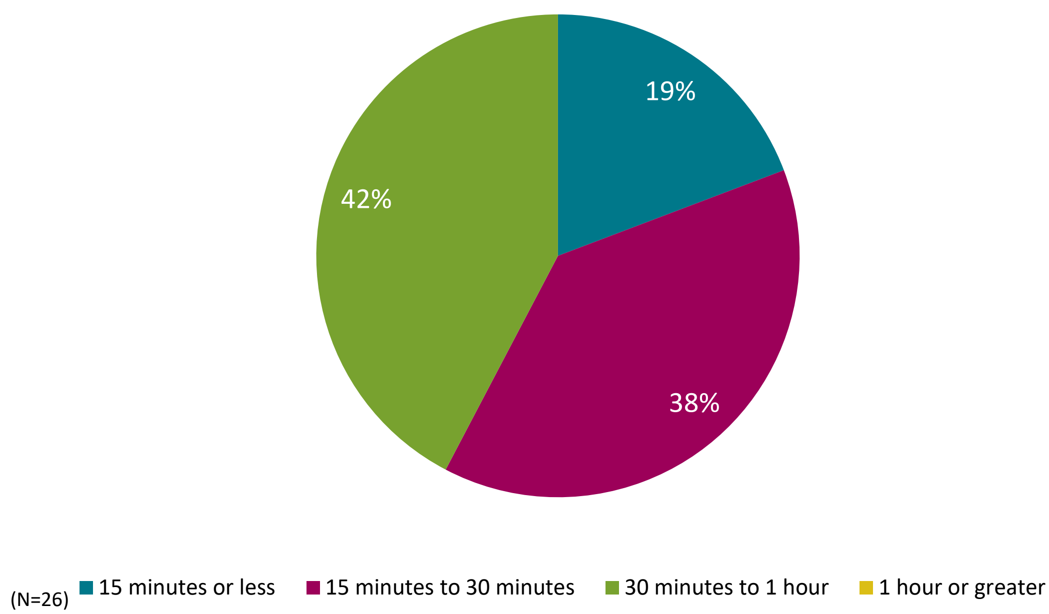
The majority of respondents noted that they would not be looking to move for five years or more. 23% would consider moving in 3-5 years and 12% in 2-3 years.

Figure 48: If you were looking to move, when would that be?

Answer	Percent
Immediately	4%
Less than 1 year	8%
Between 1 to 2 years	8%
Between 2 to 3 years	12%
Between 3 to 5 years	23%
5 years or more	46%

The non-residents surveyed reported various lengths of time they were willing to commute to work. 19% stated that they were willing to commute 15 mins or less, 38% were willing to commute 15-30 mins, and 42% were willing to commute 30 mins to 1 hour. None of the respondents surveyed reported that they were willing to commute more than an hour.

Figure 49: How far are you willing to commute for work?



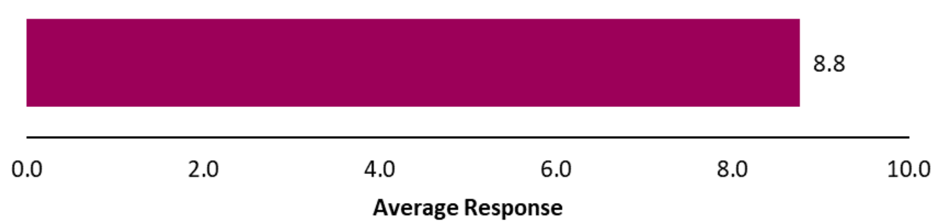
The amenities that the non-resident respondents were most likely to consider necessary when choosing a place to live were medical/health care, green/park spaces, and local shopping.

Figure 50: What amenities would you consider necessary when choosing a place to live?

Answer	Percent
Medical / health care	88%
Green / park spaces	85%
Local shopping	77%
Recreational sports facilities	42%
Anglophone Elementary school	19%
Anglophone High school	19%
Anglophone post-secondary institution	12%
Other (please specify)	12%
Francophone Elementary school	8%
Francophone High school	8%
Francophone post-secondary institution	0%

The non-resident respondents highly rated the importance of quality of life and community involvement when choosing a place to live, giving this metric an average score of 8.8 out of 10.

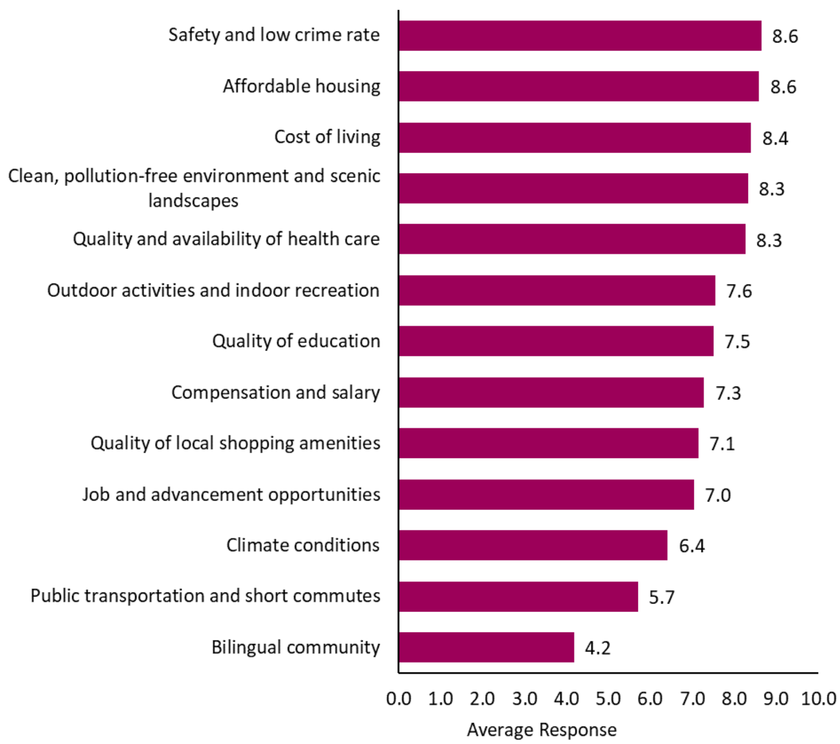
Figure 51: Please rate the importance of quality of life and community involvement when choosing a place to live. Scale – 1 (Not at all important) to 10 (Highly important)



General Population Questions

All respondents to the survey were asked to rate the importance of various factors on their choice of places to live from 1 (Not at all important) to 10 (Highly Important). The most highly rated factors were safety/low crime rates, affordable housing, cost of living, clean/pollution-free environments/scenic landscapes, and quality/availability of health care.

Figure 52: When choosing a place to live, please rate the relative importance of the following factors - Scale: 1 (Not at all important) to 10 (Highly Important)



Demographic Characteristics of Respondents

This section shows the answers to the demographic questions in the survey. The answers show that the sample was from a demographically and socially diverse group of respondents.

Figure 53: Gender of Respondents

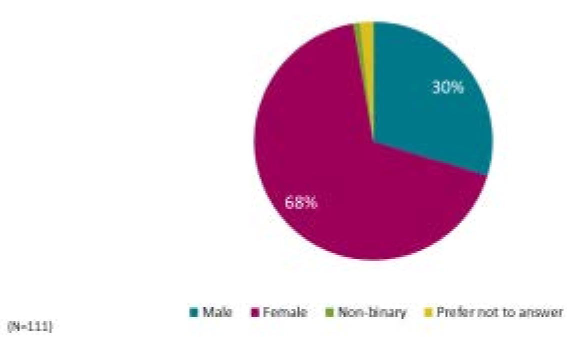


Figure 54: Age of Respondents

Age	Percent
Under 30	16%
30-45	32%
46-55	19%
56-65	22%
65+	8%
Prefer not to answer	3%

Figure 55: Size of Household of Respondents

Question	Average
Number of adults over the age of 18	2.2
Number of children under the age of 18	1.2

Figure 56: Education of Respondents

Answer	Percent
High School Diploma	4%
Some College / Trade School / University	15%
College / Trade School Diploma or University Degree	48%
Post-Graduate Diploma or Degree	29%
Prefer not to answer	5%

Figure 57: Employment status (please select the most relevant to you) of Respondents

Answer	Percent
Too young to work	0%
Presently employed	62%
Presently unemployed but looking for work	5%
Close to retirement	13%
Retired	14%
Prefer not to answer	6%

Figure 58: Household income (before tax) of Respondents

Answer	Percent
$100,000 or more	35%
$60,000 to $99,999	26%
$40,000 to $59,999	12%
Less than $39,999	5%
Prefer not to answer	22%