

North Durham by the numbers

Analysis and commentary

A competitive analysis of North Durham for the Rural Economic Development Strategic Plan 2012

The communities of north Durham Region are innovative, creative and incredibly unique within the larger Regional Municipality of Durham. Comprising of the Townships of Brock, Scugog and Uxbridge, north Durham covers over 52% of the total land area of Durham Region and yet represents only 8.8% of the total population.

By the Numbers is a competitive analysis of north Durham economic development that is a foundation step in the creation of a Rural Economic Development Action Plan. The Action Plan will provide a direction for economic development project priorities; identify partnerships; and instigate opportunities for economic development in rural Durham Region that have a positive impact on the community as a whole- in essence, new opportunities for 'community economic development'.

As local interpretation is central to understanding the meaning of the 'numbers', this document *Analysis and Commentary* is the second phase of the *By the Numbers* economic analysis. The first phase presented the numbers to start a discussion about economic indicator 'numbers', and this second phase contextualizes those 'numbers' in north Durham. It has been developed following consultations with stakeholders of the north Durham business community and has regard to with existing policy, other research such as the Greater Toronto Countryside Mayor's Alliance Economic Analysis (2010), and be supported by consultations.

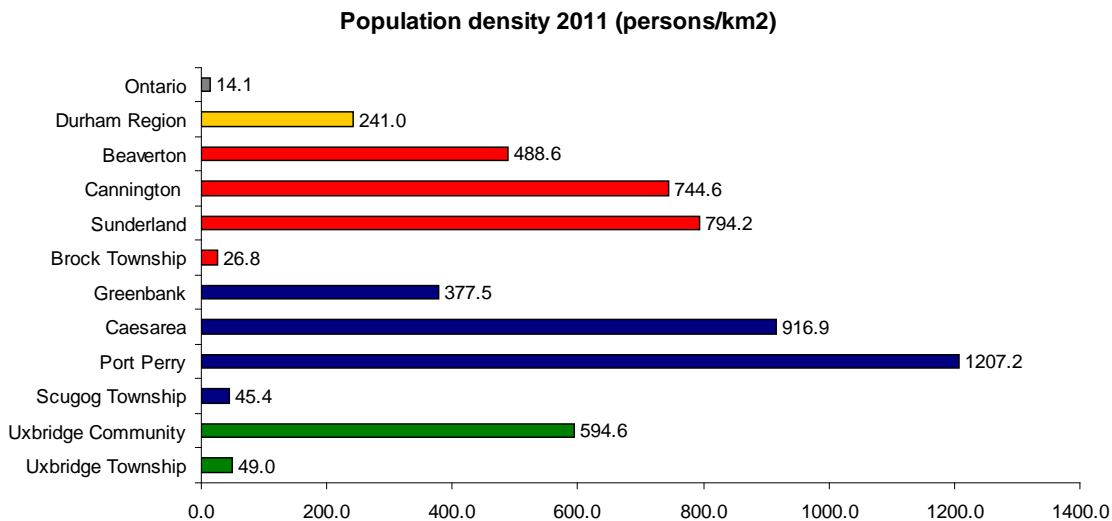
Data used in *By the Numbers* has been gathered with the support of the Ministry of Agriculture, Food and Rural Affairs and is, unless otherwise noted, gathered from the 2006 Census and the 2011 Census. In general, all figures relating to demographics and employment are from the 2006 Census or 2011 Census for which data is available. All figures relating to the number of businesses are from the Business Patterns data, 2011. The Business Patterns data includes businesses that report a corporate income tax (T2) account, are an employer or have an HST account.

NOTE: *By the Numbers* provides an important overview of north Durham however must be used acknowledging the limitations of the data.

The North Durham economy

1.1 Population density

North Durham is a unique area, very rural, and yet in each town or village is very urban with high population densities.



Source: Statistics Canada, Census 2011

The details:

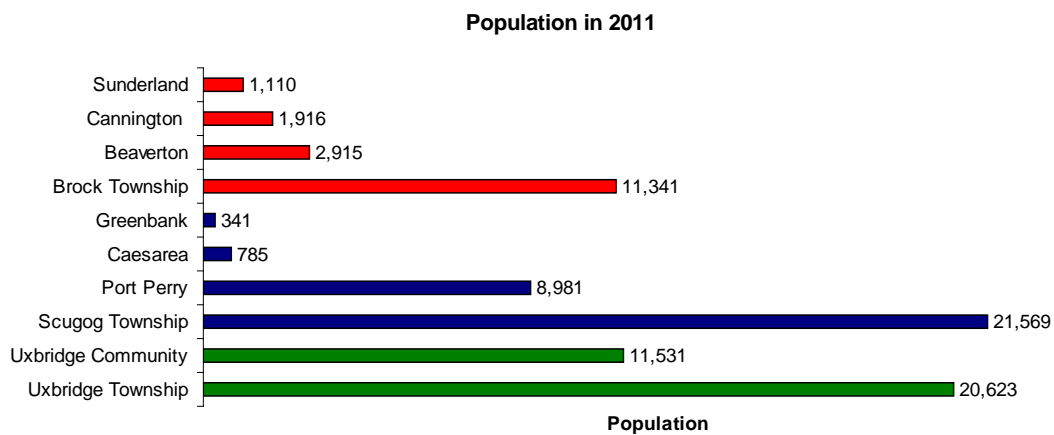
The Township of Brock has the lowest population density of north Durham at 26.8 persons/km², with Sunderland the most densely populated community.

The Township of Scugog has a significant variation in density in its major communities with Port Perry being the most densely populated community in north Durham Region at 1207.2 persons/km².

The Township of Uxbridge is the most densely populated township in north Durham with one major community, Uxbridge at 594.6 persons/km².

1.2 Population

The population of north Durham townships is shared between urban centers, small communities and rural areas.



Source: Statistics Canada, Census 2011

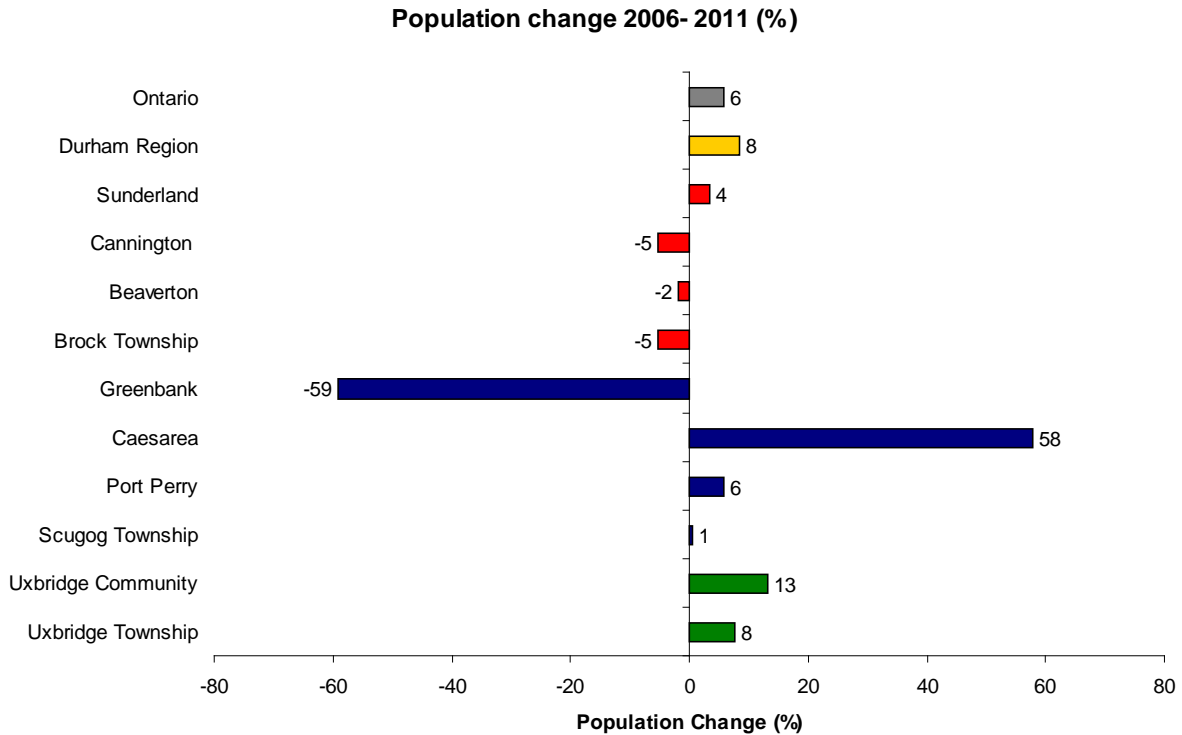
The details:

The Township of Brock is the least populated township in north Durham with the townships of Scugog and Uxbridge having almost comparable populations.

1.3 Population change

Between 2006 and 2011 the population of north Durham townships changed. The Township of Uxbridge grew at the same rate as Durham Region. Several communities in the Townships of Scugog and Brock grew (eg. Caesarea, Sunderland) while others declined in population (eg. Greenbank, Cannington and Beaverton).

What factors could have attributed to the population growth or decline?



Source: Statistics Canada, Census 2011

The details:

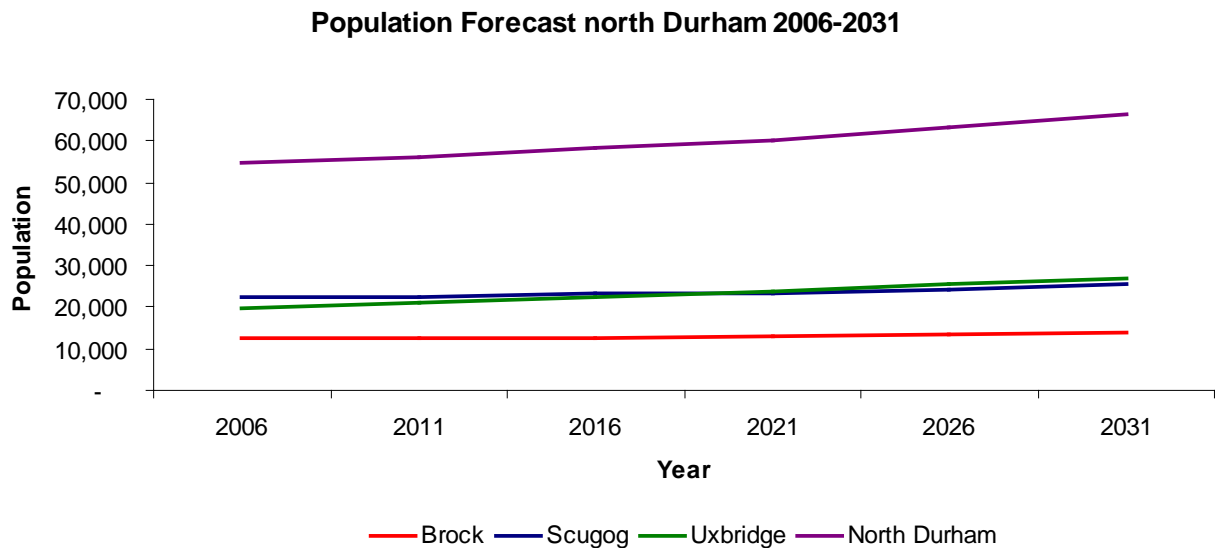
While the Township of Brock experienced overall population decline, the community of Sunderland grew, albeit at a slower rate than Durham Region and Ontario.

The Township of Scugog experienced minimal growth overall. Port Perry grew at the same rate as Ontario, but less than the Durham Region rate of growth.

The Township of Uxbridge was the only north Durham community to grow at the same rate as the Region as a whole.

1.4 Population forecasts

The population of north Durham townships is expected to remain steady until 2031 with the Township of Uxbridge growing to become slightly larger than the Township of Scugog in 2031.



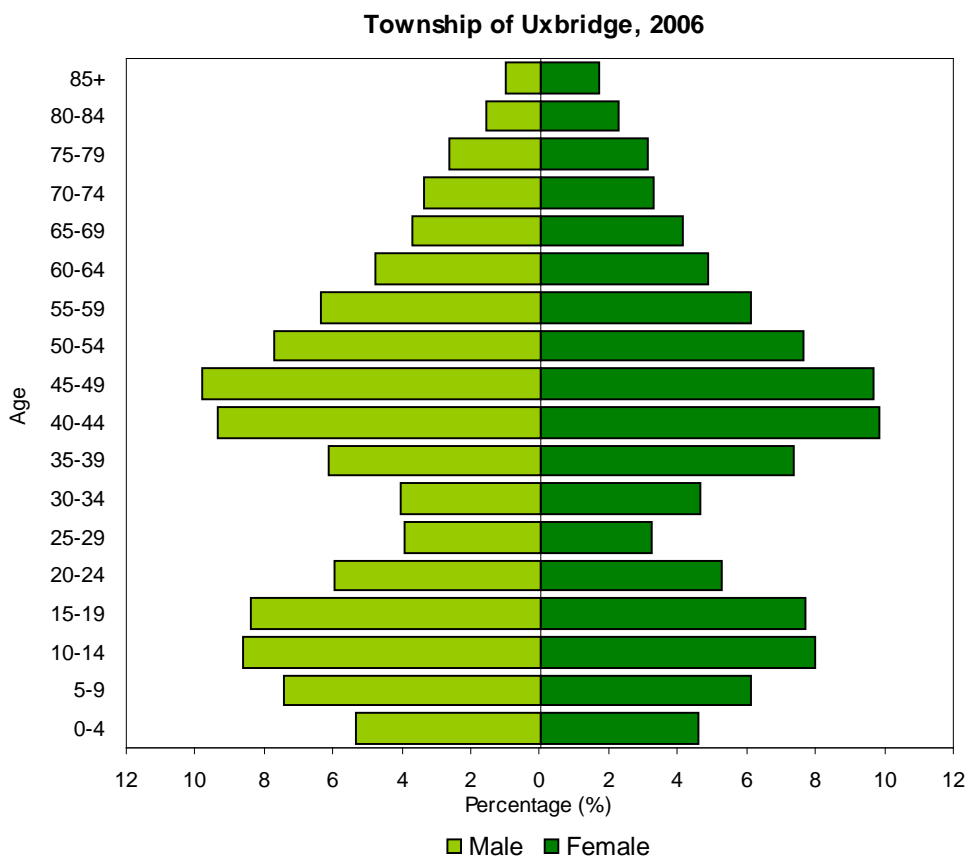
Source: Durham Regional Official Plan Amendment N. 128, Adopted by Regional Council June 3, 2009

1.5 Population pyramids

We can get a deeper understanding of our population composition with population pyramids. The following shows that the north Durham communities have similar profiles. Brock Township has a slightly higher percentage of the population 60+ age range to Uxbridge and Scugog Townships.

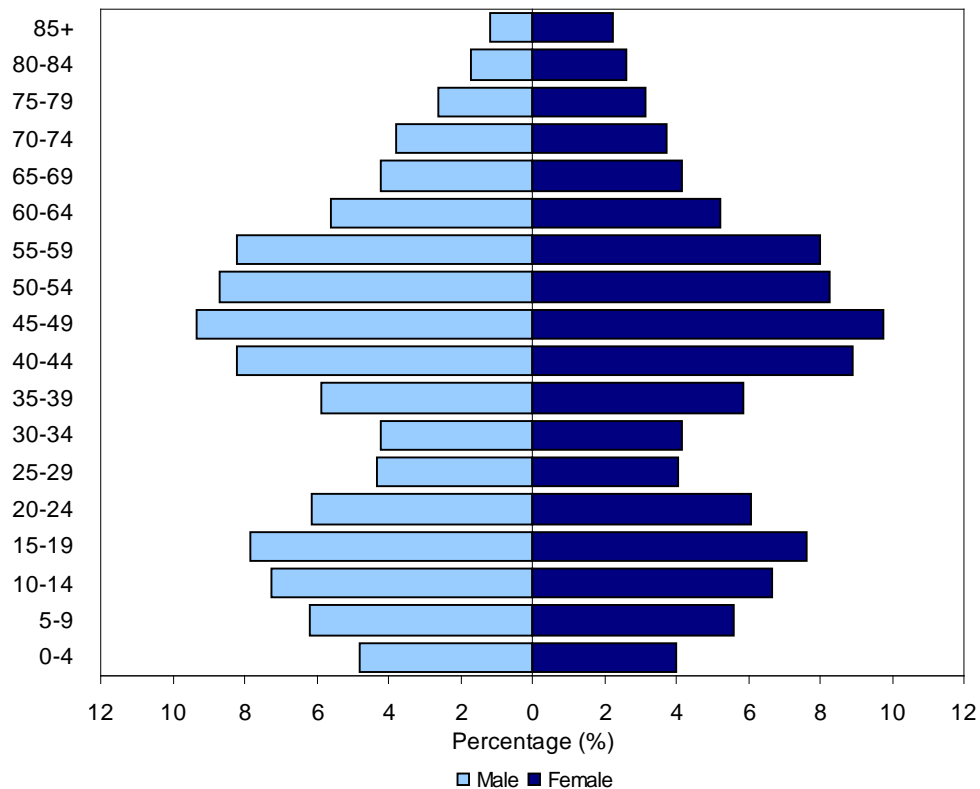
The details:

A comparison of all three north Durham Townships reveals that the Township of Brock has a higher concentration of seniors than Uxbridge and Scugog.



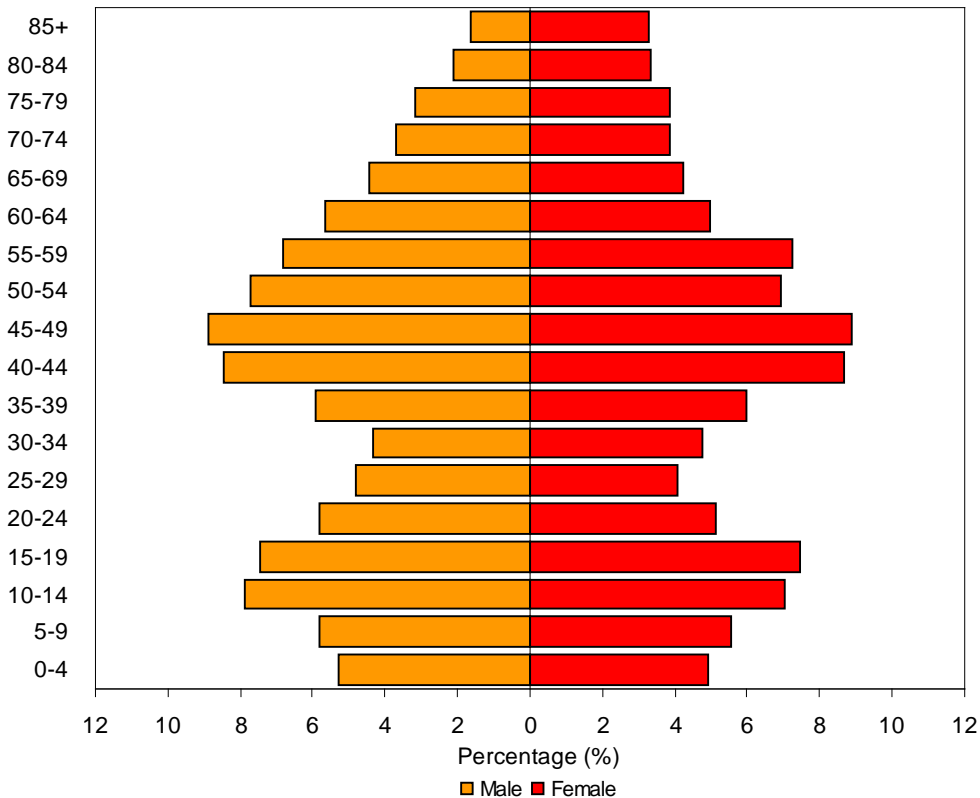
Source: Statistics Canada 2006 Census, Durham Region Planning Department

Township of Scugog, 2006



Source: Statistics Canada 2006 Census, Durham Region Planning Department

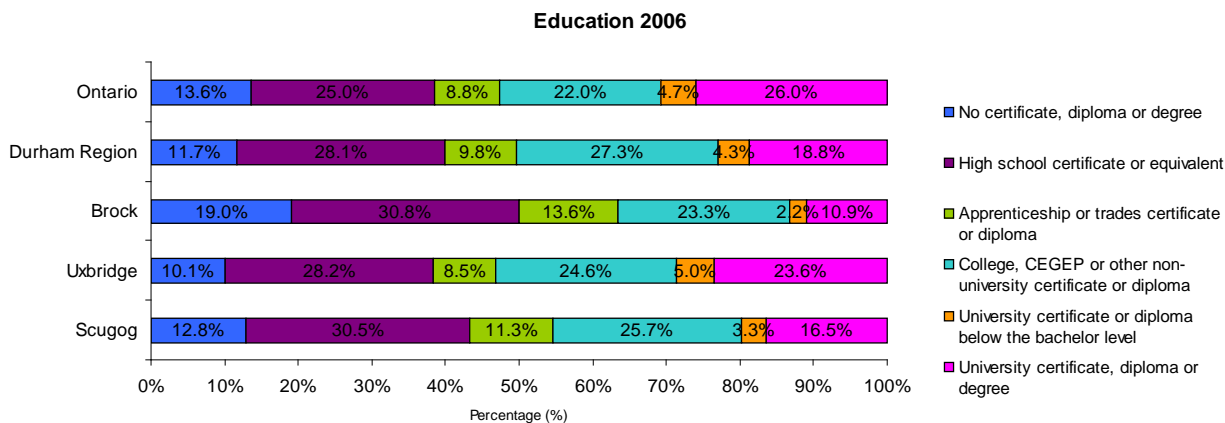
Township of Brock, 2006



Source: Statistics Canada 2006 Census, Durham Region Planning Department

1.6 Education

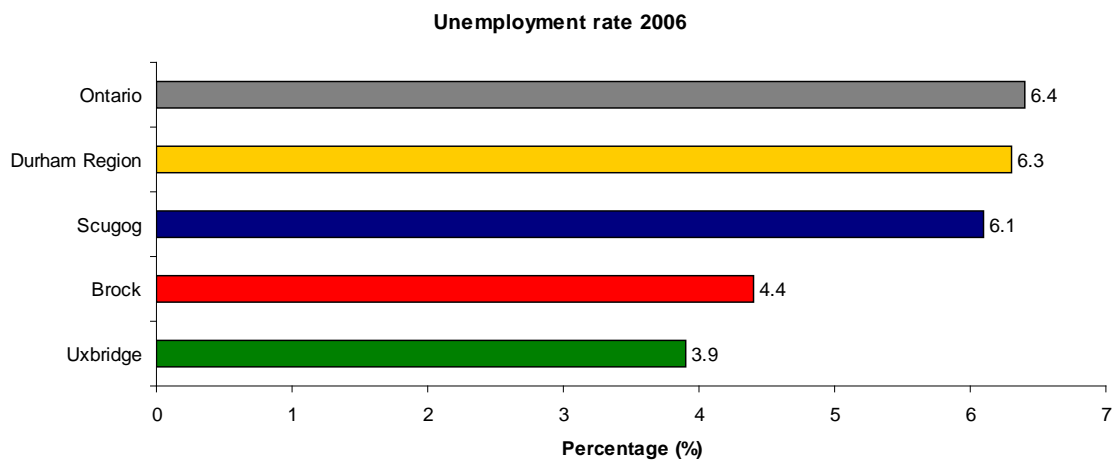
Residents of north Durham have a diverse skills base. In 2006, residents of the Township of Brock had a particular strength in apprenticeships and trades. Residents of the Township of Scugog had a high percentage of college graduates, and the Township of Uxbridge had the highest number of university graduates of north Durham townships.



Source: Statistics Canada 2006 Census

1.7 Unemployment Rate

In 2006, employment in north Durham was strong with the unemployment rate lower than both Ontario and Durham Region. The unemployment rate includes people actively looking for work but does not include unemployed people not looking for work.

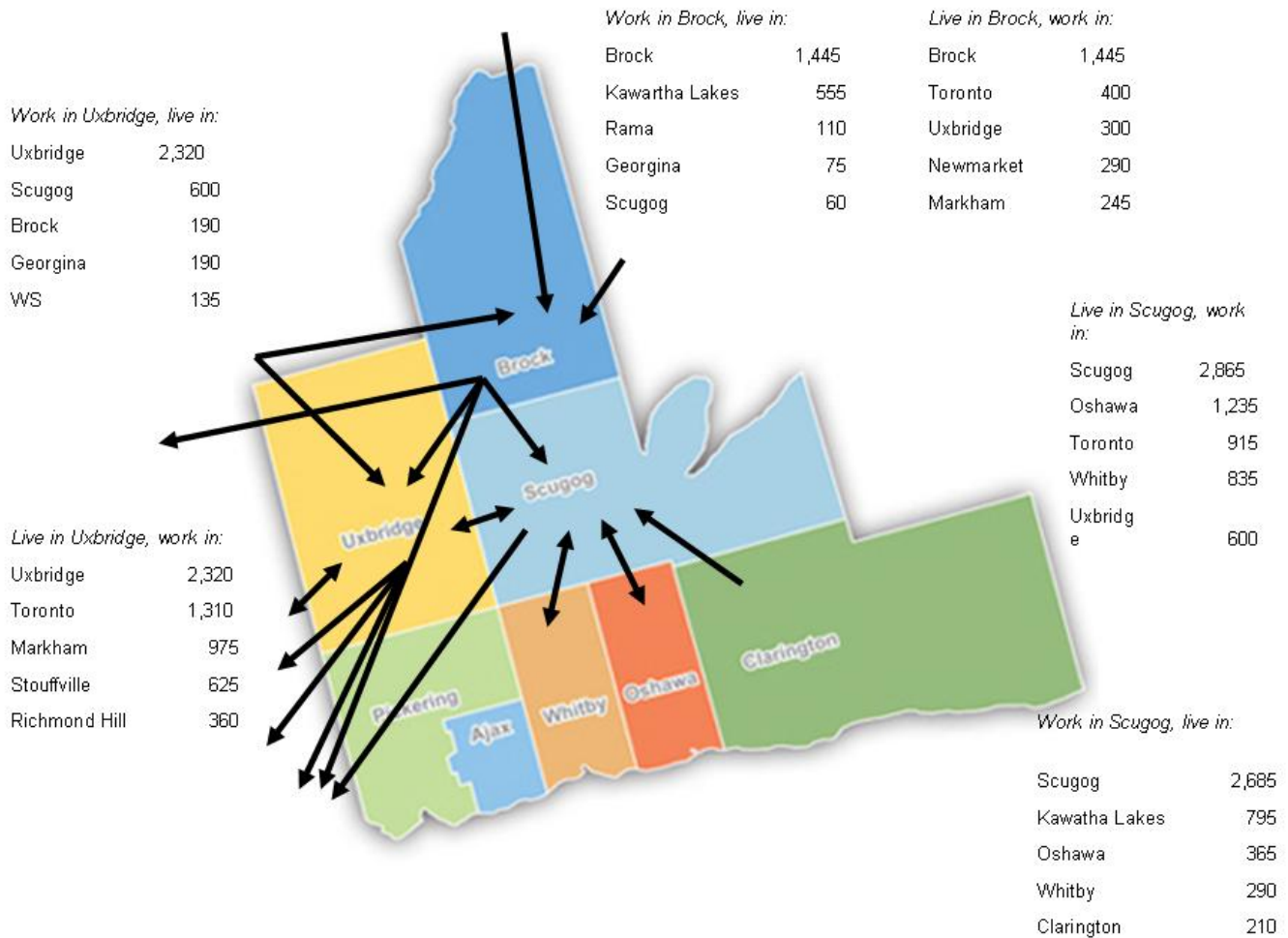


Source: Statistics Canada 2006 Census, Durham Region Planning Department

1.8 Commuting patterns: top 5 locations

North Durham communities have both residents in the labour force and jobs at local businesses- the two are not one in the same. In 2006 local businesses in north Durham offered 15,610 jobs. Across the townships, there were 28,030 people living in north Durham that were employed either inside or outside the community. As a total, 12,420 people left their north Durham community and traveled to their place of work.

Does this ring true to what you know about your community?



Source: Statistics Canada 2006, Ontario Ministry Agriculture, Food and Rural Affairs

The details:

The Township of Brock 6,105 residents in the labour force, 3,300 jobs available in the township. In 2006, if there were a perfect match in jobs and skills of residents, the township would support 54% of residents to live and work in the community. In 2006, only 24% of residents lived and worked in Brock township, 76% commuted to other communities for employment.

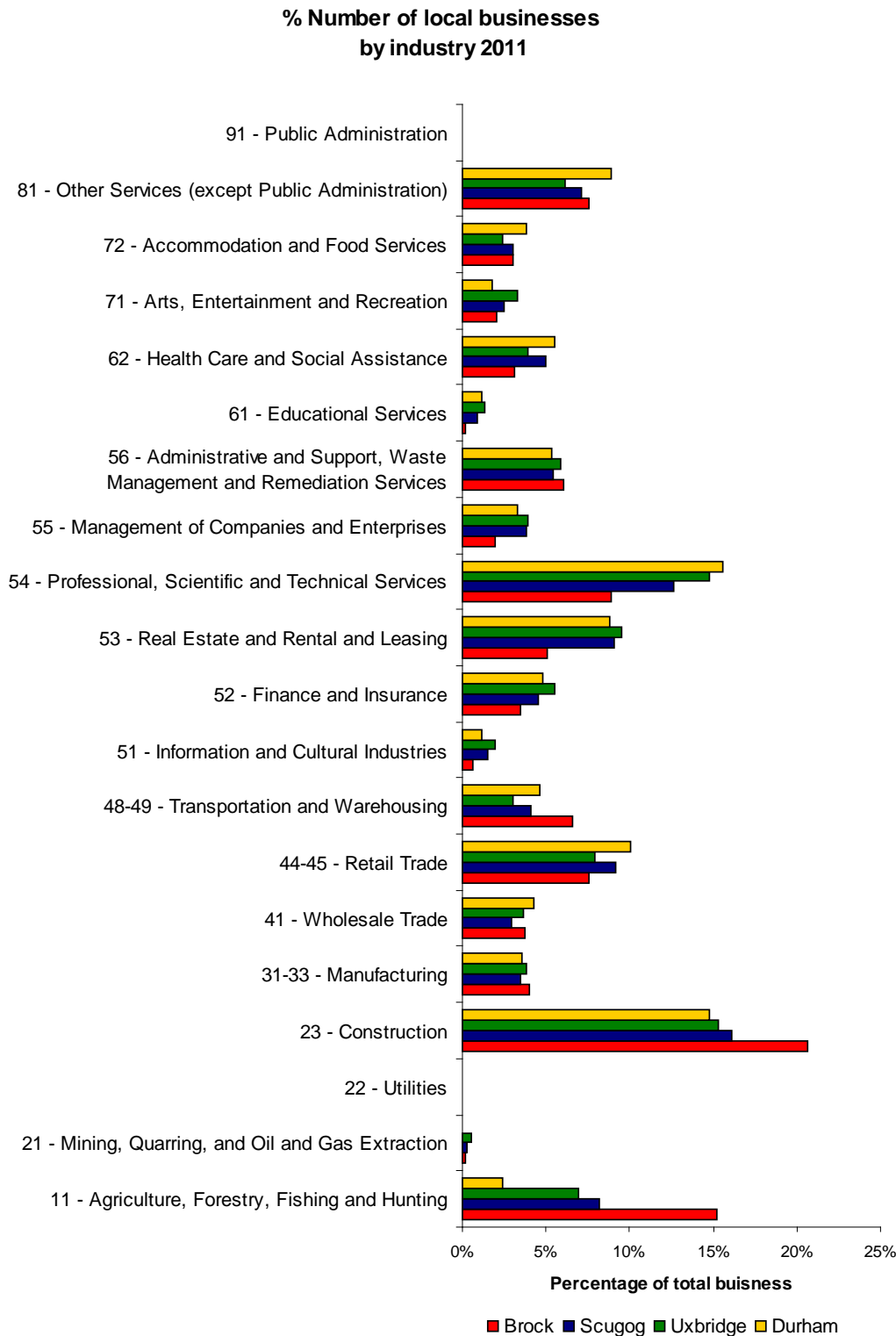
In 2006 the Township of Scugog had a labour force of 11,455 residents and local businesses provided 6,270 jobs in the community. If there were a perfect match of labour skills to jobs, the current resident to job ratio would provide jobs for 55% of Scugog residents. In 2006 only 2,865

residents lived and worked in Scugog (25% labour force) while 75% of residents commuted out of the community for work.

In 2006 the Township of Uxbridge had a labour force of 10, 470 and 6,404 jobs in the township. If there were a perfect match of labour to jobs, the township would only have enough jobs for 61% of working residents. In 2006, only 2,320 residents lived and worked in the community (22% labour force) while 78% commuted outside of the community to work.

North Durham Businesses

In 2011 there were over 4,500 businesses in north Durham in a variety of sectors. These sectors are classified as NAICS codes and have a number of sub sectors within each classification, we are using the aggregate numbers. Concentrations in the number of businesses in a township (called clusters) were found across north Durham in several sectors including; Construction, Professional, Technical and Scientific services, Agriculture, Other Services, Real Estate.



Source: Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs

The details:

The Township of Brock has the highest number percentage of businesses in construction (20.62%). The Townships large rural land base is reflected in the high percentage of agriculture/forestry/fishing/hunting (15.25%) businesses. There is also a significant presence of businesses in professional/ scientific/ technical services (8.92%).

The Township of Scugog, has a high percentage of businesses in construction (16.09%), followed by professional/ scientific/ technical services (12.66%), real estate/rental/leasing (9.06%), and agriculture/ forestry/ fishing/ hunting (8.16%), a reflection on the rural land base.

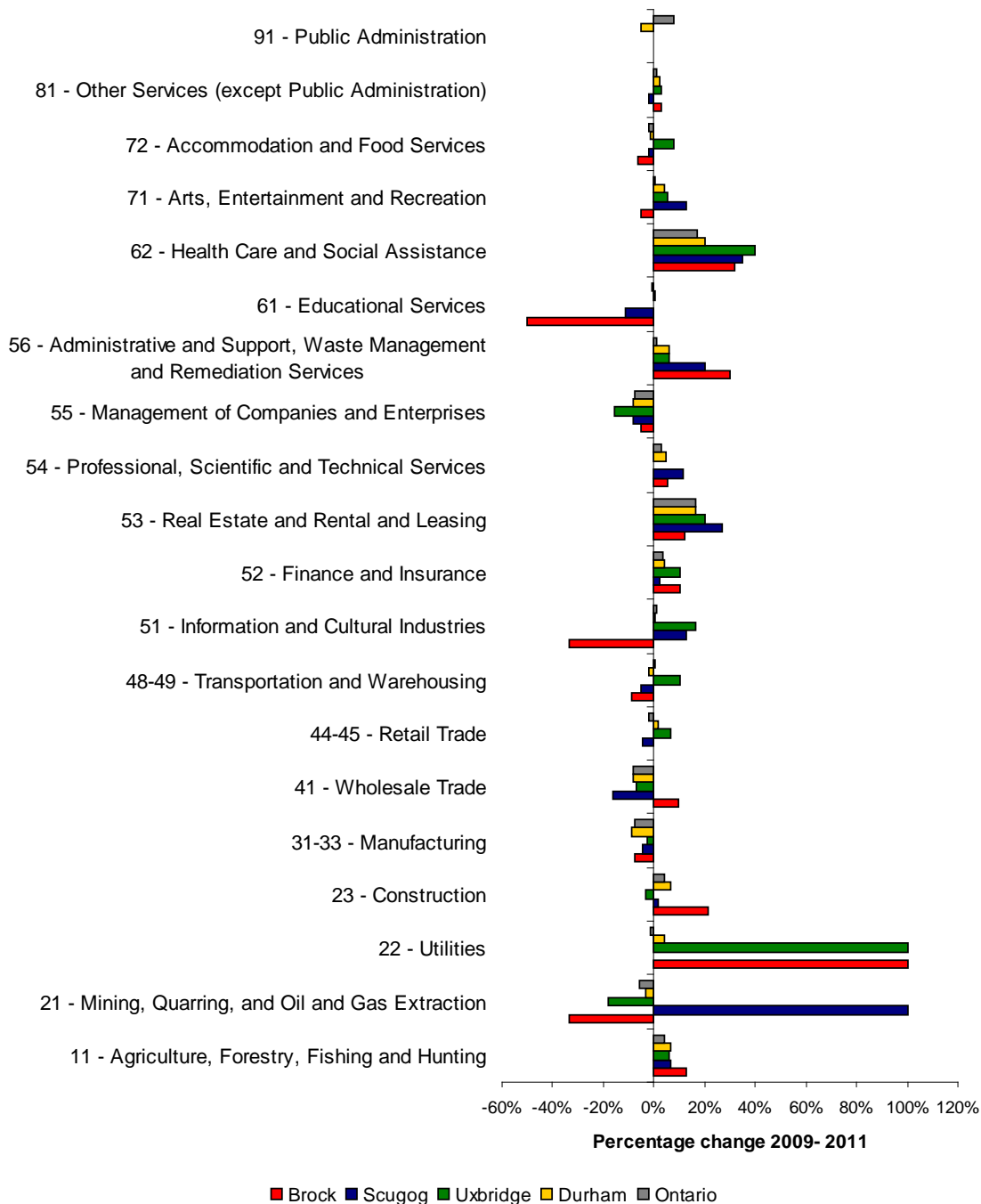
The Township of Uxbridge has a high percentage of businesses in construction (15.34%), followed by professional/ scientific/ technical services (14.73%), and retail trade (7.95%). While agriculture forms a significant proportion of the townships land base, the percentage of businesses in agriculture are not as strong as in Brock and Scugog.

2.2 Change in number of businesses 2009-2011

Between 2009 and 2011 the number of businesses in different sectors across north Durham changed. Several sectors gained businesses (Eg. Health Care, Real Estate and Agriculture) while other sectors lost businesses (eg. Educational Services, Wholesale Trade, and Management of Companies). Ontario is included as a benchmark to highlight how the change in north Durham compares to the province.

What could have caused the growth or loss of businesses in different sectors?

**Change in number of local businesses
by industry 2009- 2011**



Source: Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs

The details:

The Township of Brock experienced an overall net growth of 69 businesses. The highest growth in Administrative/support/ waste management (30.23%, 13 businesses), healthcare/social assistance (31.82%, 7 businesses), construction (21.52%, 34 businesses), and agriculture (12.70%, 16 businesses).

A decline was felt in several industries; educational services (-50.00%, loss 2 businesses), information/cultural industries (-33.33%, loss 3 businesses), and mining/forestry/oil/gas extraction (-33.33%, loss 1 business).

Township of Scugog welcomed overall net growth of 85 new businesses. With growth in mining/forestry/ oil/gas extraction (100.00, 2 businesses), health care/social assistance (34.85%, 23 businesses), real estate/rental/leasing (26.77%, 34 businesses)

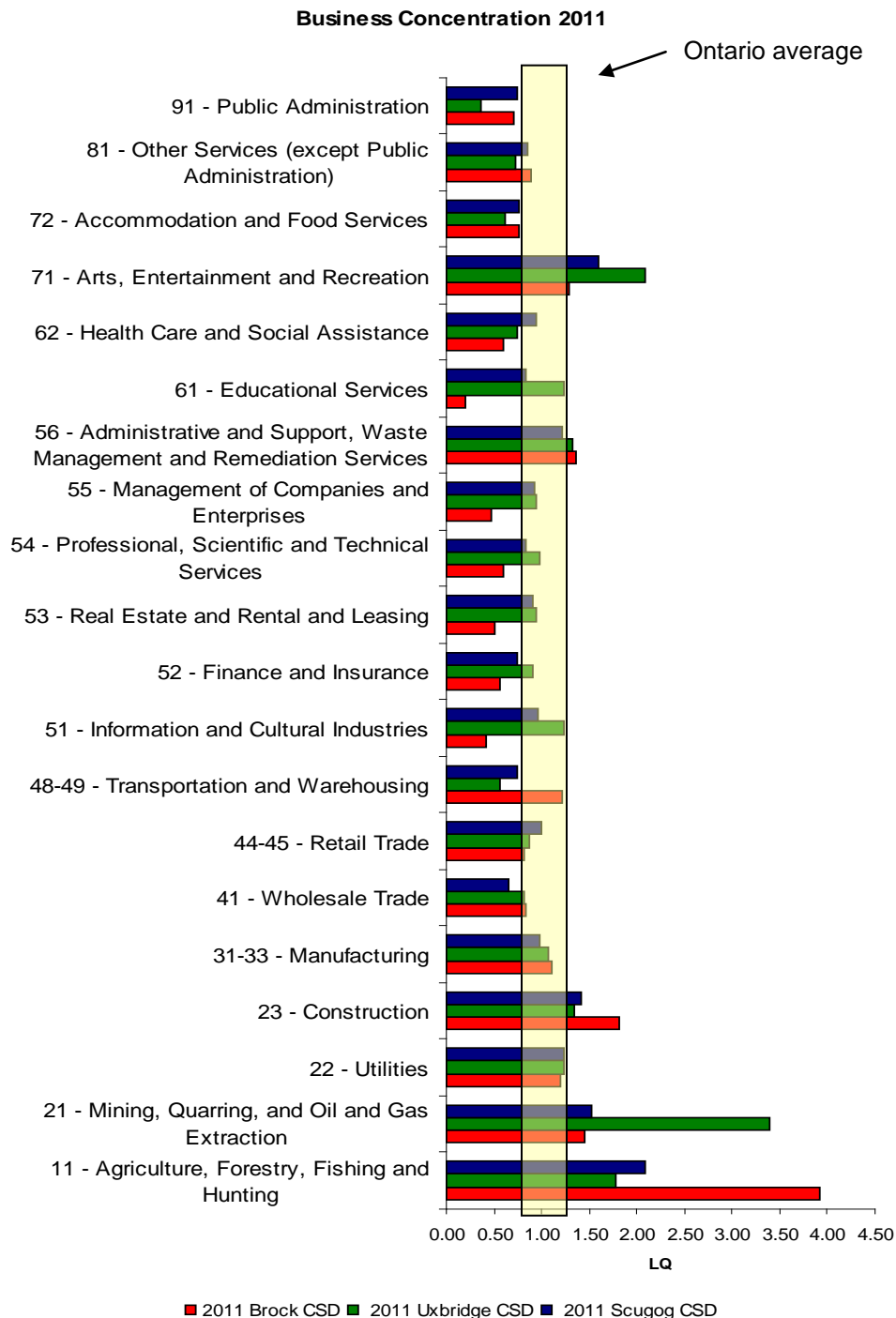
A decline felt in several industries including; wholesale trade (-16.13%, loss 10 businesses), and educational services (-11.11%, -2 businesses)

Township of Uxbridge experienced overall net growth of 69 businesses. The highest percentage of growth was in utilities (100.00%, 1 business), health care/social assistance (40.00%, 20 businesses), and realestate/rental/leasing (20.28%, 29 businesses).

A decline was felt in several industries including; management of companies and enterprise (-15.66%, -13 businesses), mining/forestry/ oil/gas extraction (-18.18%, -2 businesses).

2.3 Business concentration 2011

To identify industries that north Durham has a competitive advantage in, we can compare the number of businesses in north Durham to average concentrations of businesses across. In 2011 north Durham townships had high concentrations of businesses in sectors such as Agriculture, Arts, Entertainment and recreation, Construction, Mining and quarrying when compare to Ontario, suggesting a local 'advantage'.



Source: Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs

The details:

Compared to Ontario, the Township of Brock had the highest concentration (LQ) of businesses in agriculture/forestry/fishing/hunting (3.92), mining/quarrying/oil/gas extraction (1.46), and construction (1.81) suggesting local competitive advantage for these industries

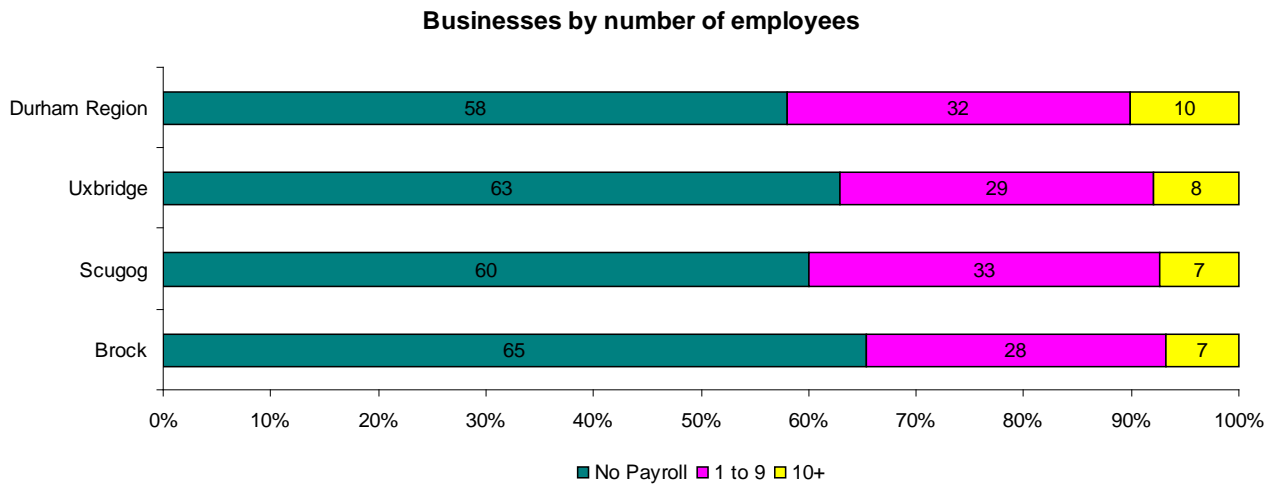
Compared to Ontario, the Township of Scugog had high concentrations (LQ) of businesses in agriculture/forestry/fishing/hunting (2.1), arts/entertainment/recreation (1.59), and mining/quarrying/oil/gas extraction (1.53) suggesting local competitive advantage for these industries

Compared to Ontario, the Township of Uxbridge had the highest concentration (LQ) of businesses in mining/quarrying/oil/gas extraction (3.39), arts/entertainment/recreation (2.09), and agriculture, forestry, fishing/hunting (1.78) suggesting local competitive advantage for these industries.

2.4 Business structure 2011

Small business drives north Durham. Looking at the structure of our business community we can see that over 60% of businesses in north Durham operate without a payroll, about 30% employ 1-9 persons, and 7% employ 10 or more persons.

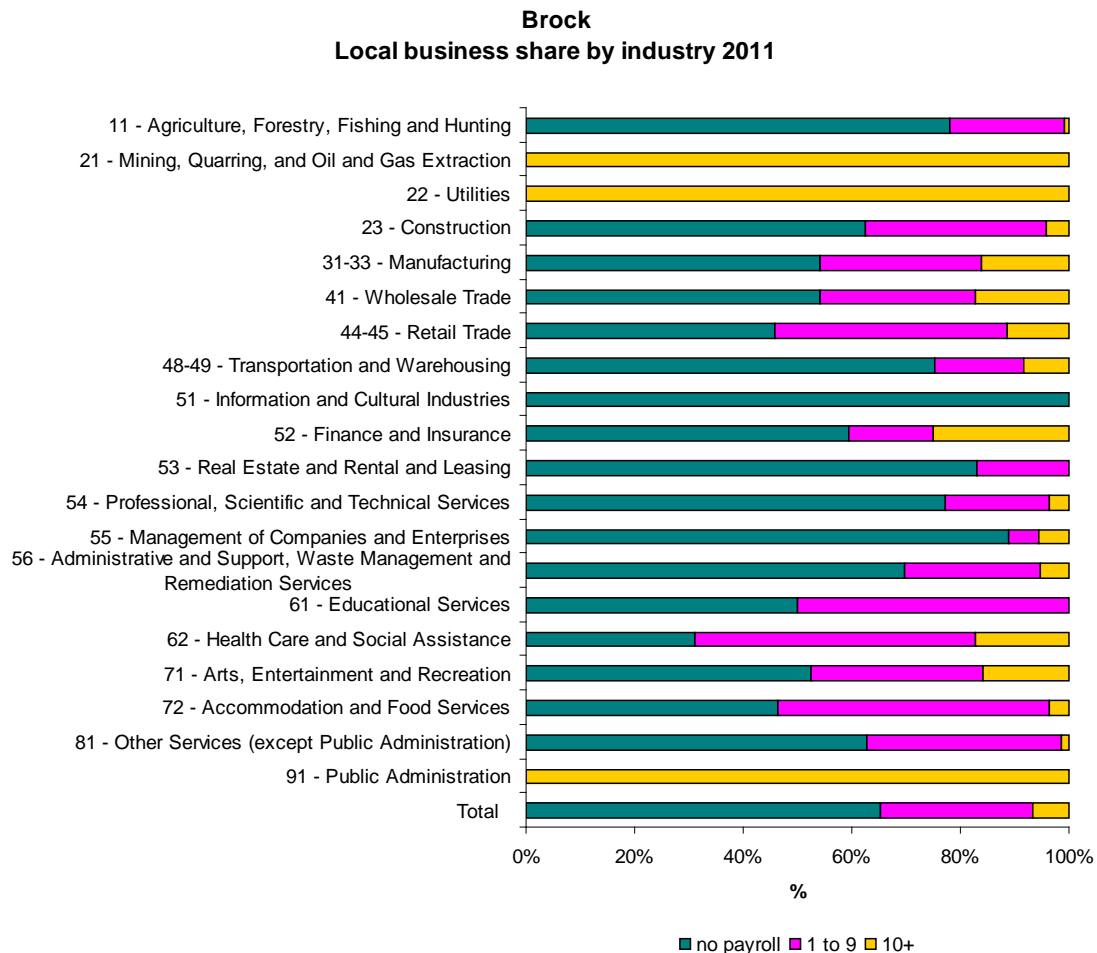
What might be some differences between businesses of different sizes?



Source: *Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs*

2.5 Business structure by industry 2011

We can also get a better understanding of the structure of businesses within sectors. Across north Durham, Public administration, Mining and Utilities are typically larger businesses while Information and Cultural Industries, Agriculture, and Real Estate are typically smaller in employment size.

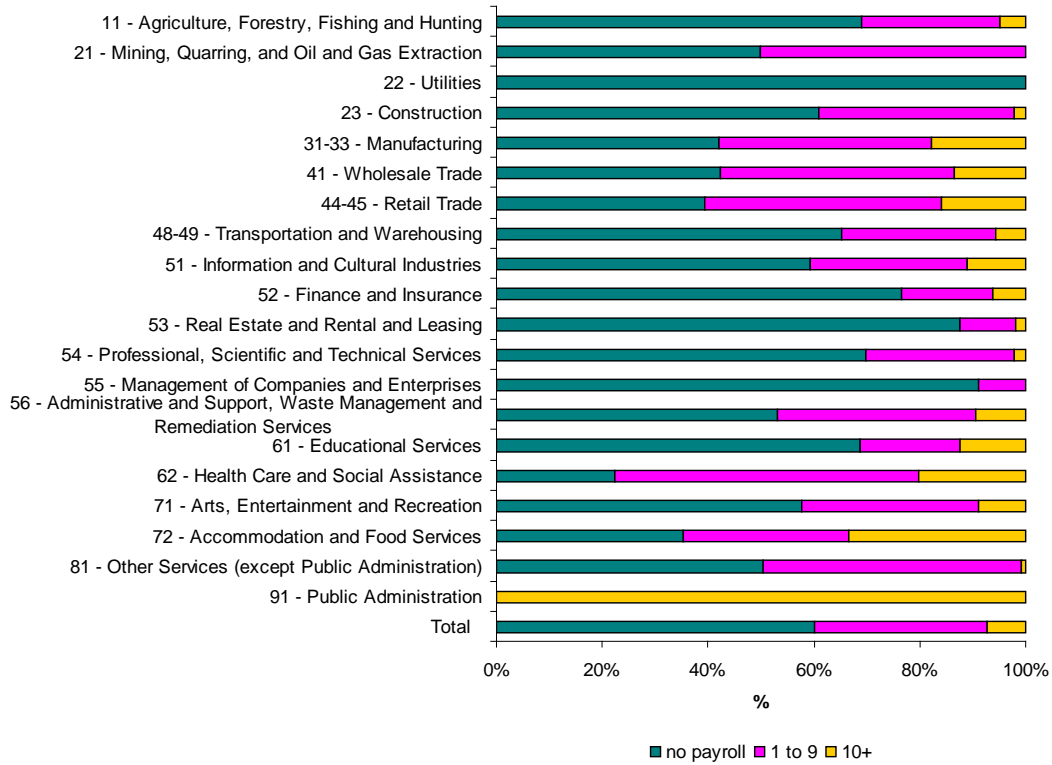


Source: *Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs*

The details:

The Township of Brock typically has larger employers in public administration, quarrying, and utilities. Manufacturing, wholesale trade, health care, and finance and insurance industries also represent larger employers.

Scugog
Local business share 2011

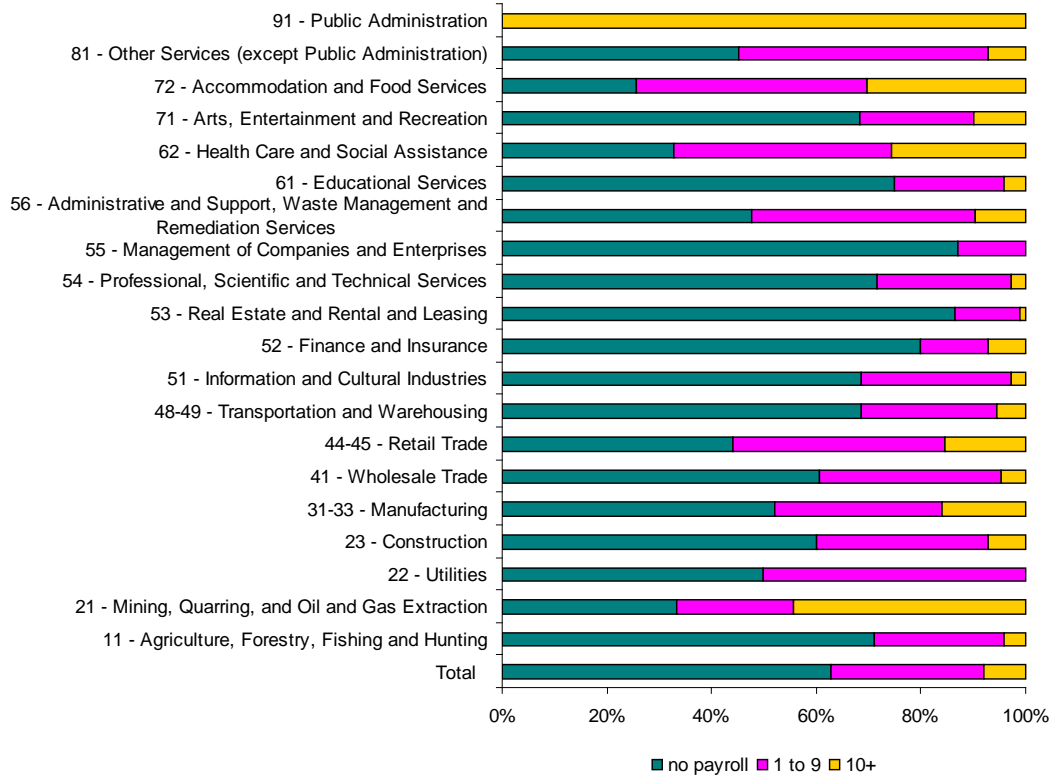


Source: Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs

The details:

The Township of Scugog typically has larger employers in public administration, and accommodation and food services (Blue Heron Casino). Manufacturing, health care and retail trade are also larger employers.

**Uxbridge
Local business share 2011**



Source: Business Patterns Data 2011, Ministry of Agriculture, Food and Rural Affairs

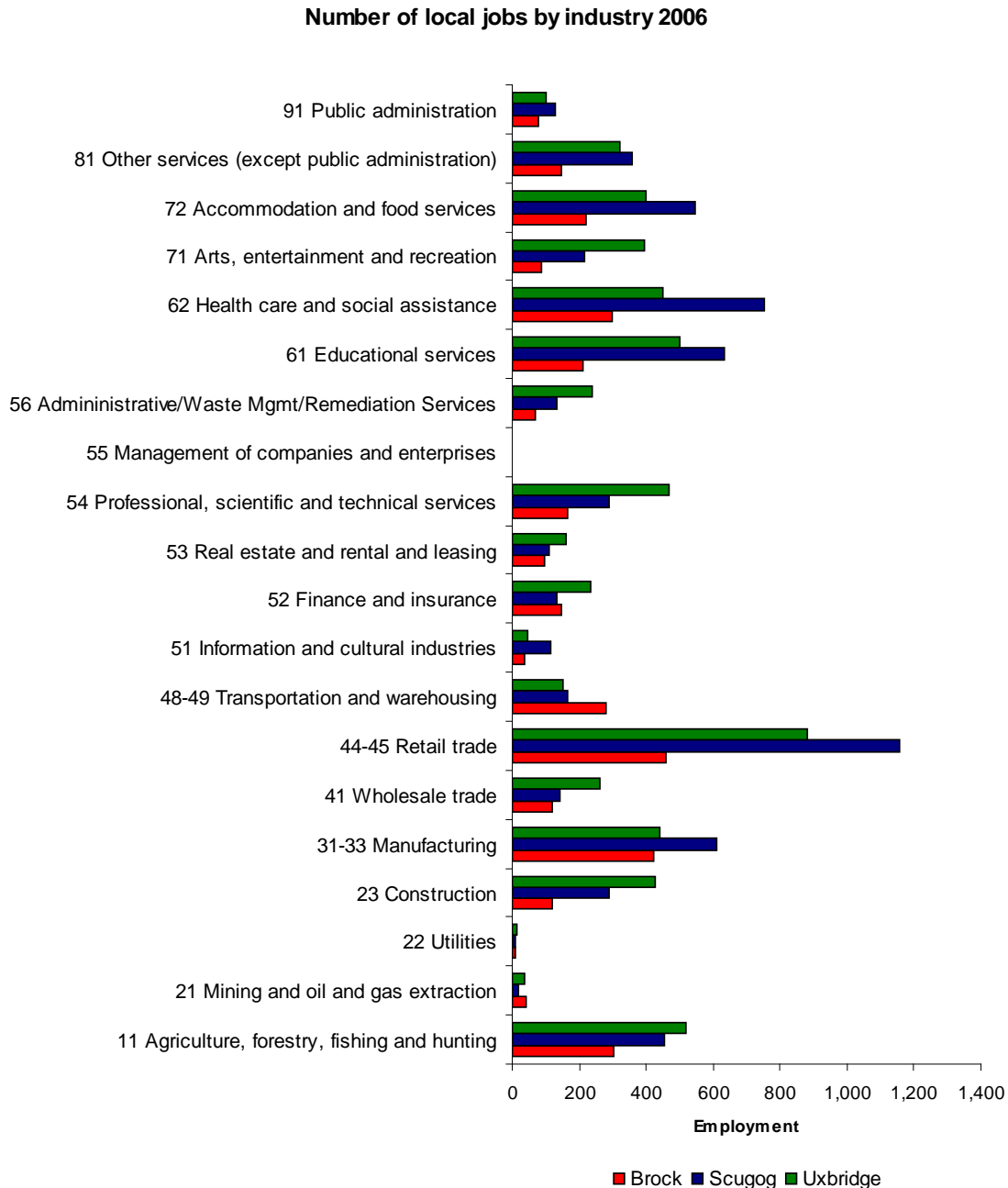
The details:

The Township of Uxbridge largest employers are in public administration and quarring. Accommodation and food services, heath care, manufacturing and retail are also typically industries that are bigger employers.

Jobs in north Durham

3.1 Local jobs by industry 2006

In 2006, north Durham businesses offered jobs in a broad range of sectors. This chart gives us an understanding of what sectors provide the most number of jobs in our communities. Retail, Healthcare, and Manufacturing stand out as major employers across all three townships.



Source: Statistics Canada 2006 Census, Ministry of Agriculture, Food and Rural Affairs

The details:

In 2006 the Township of Brock had 3,300 jobs. The industries with the largest number of jobs were retail trade (460), manufacturing (420) and agriculture (305).

In 2006 the Township of Scugog had 6,270 jobs. The industries with the largest number of jobs were retail trade (1,155), health care and social assistance (755) and educational services (635).

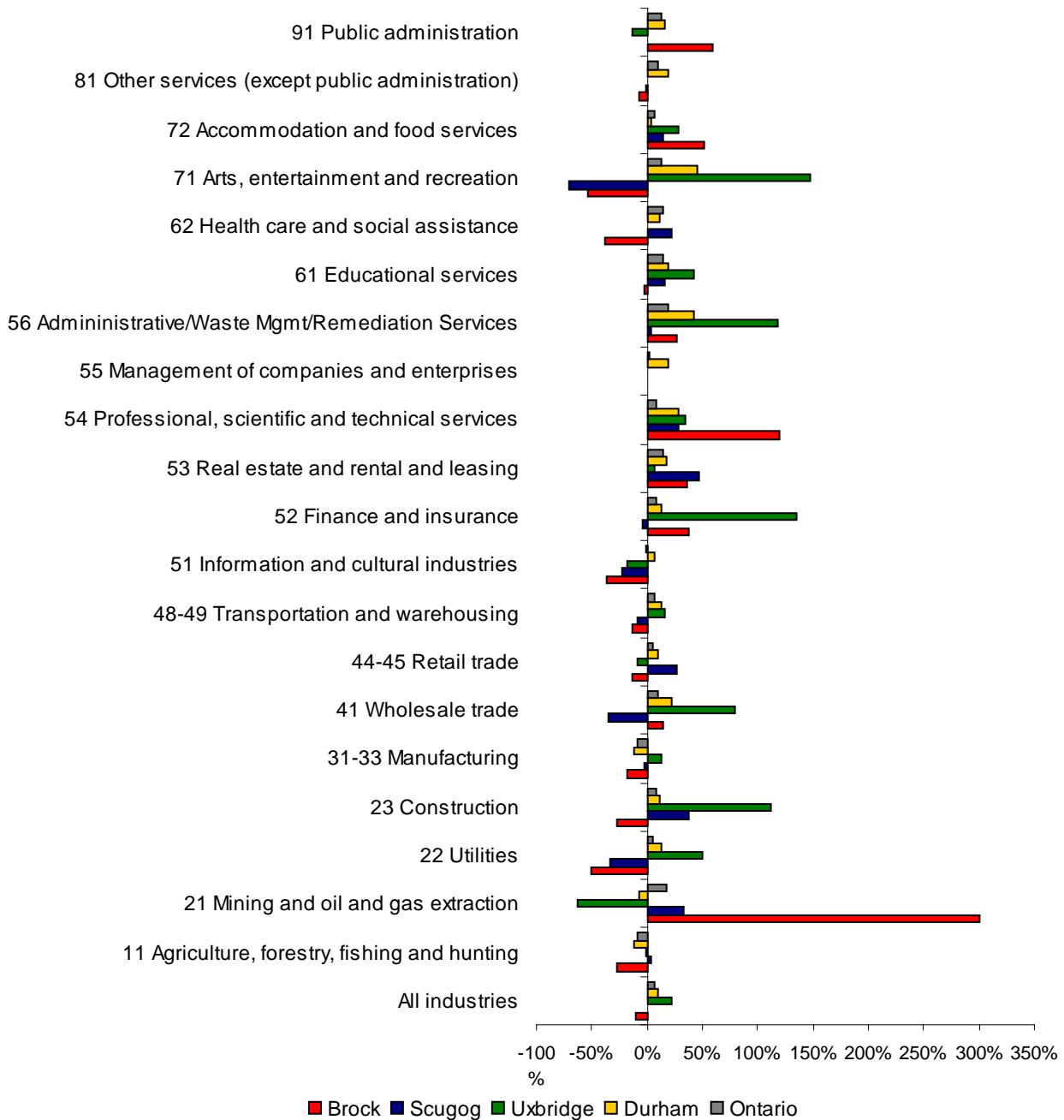
In 2006 the Township of Uxbridge had 6,040 jobs. The industries with the largest number of jobs were retail trade (880), agriculture (520), and educational services (500).

3.2 Change in jobs by industry 2001-2006

Between 2001 and 2006 sectors across north Durham and between north Durham townships shifted in the number of people they employed. Jobs were created in sectors such as Accommodation and Professional, Scientific and Technical across the three townships, however some industries such as Arts, Entertainment and Recreation grew jobs in Uxbridge but lost jobs in Scugog and Brock.

What factors could have attributed to the growth or decline in jobs?

**% Change in local jobs by industry
2001- 2006**



Source: Statistics Canada 2006 Census, Ministry of Agriculture, Food and Rural Affairs

The details:

Between 2001 and 2006 the Township of Brock experienced an overall decline in employment by 10.57% or 390 jobs. Industries that experienced growth include the Mining/oil/gas extraction industry (300%, 30 jobs), Professional/technical/scientific (120%, 90 jobs), public administration (60%, 30 jobs). Additional industries that grew employment significantly include accommodation/food services (52%, 75 jobs) and finance/insurance (38%, 40 jobs).

Industries that experienced a loss of jobs include; Health care/social assistance (-39%, 190 jobs), agriculture (-27%, -115 jobs), arts/entertainment/recreation (-54%, -100 jobs).

Between 2001 and 2006 the Township of Scugog experienced an overall growth in employment on 1.13% or 70 jobs. Industries that experienced growth include; real estate/rental/leasing (47%, 35 jobs), construction (38%, 80 jobs), and Mining/quarring/oil/gas (33%, 5 jobs). Additional industries that grew employment opportunities include Retail trade (27%, 245 jobs), Health care (23% 140 jobs), educational services (15%, 85 jobs)

Industries that experienced a loss of jobs included art/entertainment/recreation (-70%, -510 jobs), wholesale trade (-34%, -75 jobs), information and cultural industries (-35%, -75 jobs)

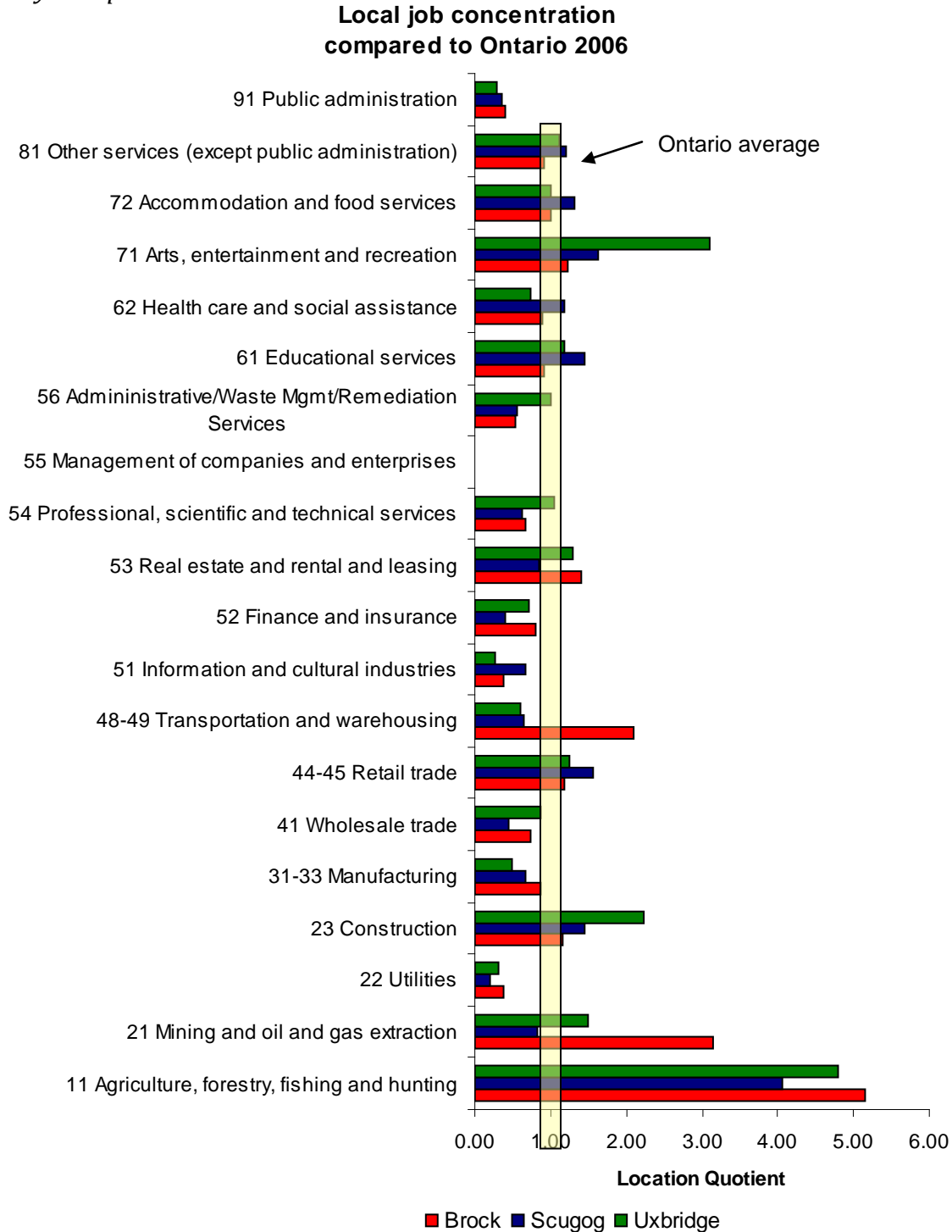
Between 2001 and 2006 the Township of Uxbridge experienced a growth in overall employment of 22.76% or 1,120 jobs. Industries that experienced growth include; arts/entertainment/recreation (147%, 235 jobs), finance/insurance (135%, 135 jobs), and administrative/wastemgt/remediation (119%, 130 jobs). Other industries that grew considerably were construction 113%, 225 jobs), educational services (43%, 150 jobs), professional/scientific/technical (120 jobs).

Industries that experienced a loss of jobs included mining/quarring/gas extraction (-63%, -60 jobs), retail trade (-8%, -80 jobs), public administration (-13%, -15 jobs)

3.3 Employment competitive advantage 2006

Similar to business clusters, we can find what sectors in north Durham have a competitive advantage by looking at employment concentration compared to Ontario. Several sectors in north Durham employed more people than is typical in these sectors across Ontario such as Arts, Entertainment and recreation, Agriculture, and Retail Trade.

Did you expect to see these concentrations?



Source: Statistics Canada 2006 Census, Ministry of Agriculture, Food and Rural Affairs

The details:

Compared to Ontario, the Township of Brock had a high concentration of employment in agriculture (5.16), mining/quarrying/oil/gas (3.14), transportation/warehousing (2.10) suggesting a local competitive advantage for employment opportunities in these sectors.

Compared to Ontario, the Township of Scugog had a high concentration of employment in agriculture (4.05), arts/entertainment/recreation (1.63) and retail trade (1.56) suggesting a local competitive advantage for employment opportunities in these sectors.

Compared to Ontario, the Township of Uxbridge had a high concentration of employment in agriculture (3.80), arts/entertainment/recreation (3.11), and construction (2.23) suggesting a local competitive advantage for employment opportunities in these sectors.

Sectors that impact north Durham

How can we make sense of all the information above? One way to look at it is to classify each industry based on how it is performing provincially, in north Durham and the concentration of the industry in north Durham. This process is called Industry Classification System and is commonly used in Economic Development.

When classified, there are three categories that we can have an influence on in our local community:

Current Strengths: The sector is meeting, and perhaps exceeding, local demand for its goods/ services (exporting outside the local community) and the sector is experiencing growth provincially and locally. A good sector to foster and celebrate!

Emerging Strengths: The sector is not meeting local demand for goods/services (importing from outside the community). The sector is growing provincially and locally. A good sector to grow- import substitution opportunities!

High Priority Retention Targets: The sector is meeting, and perhaps exceeding, local demand for the goods/service (exporting outside the local community), provincially is growing faster than the provincial growth rate but locally the sector is not growing at the same rate as the provincial sector. Why is this? An important sector that needs help!

The other classifications are for sectors that, provincially, are not growing well at a provincial level suggesting that there is a problem at the provincial level with little we can do at the local level. This of course is a guideline that is not perfect but provides a great starting point. If you are interested in looking at every industry and how it is classified, let us know and we will send the information along!

We can analyze in two ways; firstly, by clusters of businesses and secondly, by local jobs.

1. Analyze by cluster, or number of businesses in north Durham

	Brock Business Count 2011	Scugog Business Count 2011	Uxbridge Business Count 2011
Current strength - strong concentration - -sector growing provincially - Local sector growing	11 Agriculture, forestry, fishing and hunting	11 Agriculture, forestry, fishing and hunting	11 Agriculture, forestry, fishing and hunting
	23 Construction	53 Real estate and rental and leasing	53 Real estate and rental and leasing
		62 Health care and social assistance	52 Finance and insurance
		54 Professional, scientific and technical services	
emerging strength -small bas - sector growing provincially -Local sector growing	52 Finance and insurance	NA	62 Health care and social assistance

high priority retention target -strong concentration -provincial sector growing -local sector not keeping pace with provincial sector	NA	23 Construction	54 Professional, scientific and technical services
			23 Construction

2. Analyze by local jobs in north Durham industries:

	Brock Employment (Place of Work 2006)	Scugog Employment (Place of Work)	Uxbridge Employment (Place of work)
Current strength - strong concentration - -sector growing provincially - Local sector growing	21 Mining and oil and gas extraction	21 Mining and oil and gas extraction	Accommodation and food services
	53 Real estate and rental and leasing	53 Real estate and rental and leasing	71 Arts, entertainment and recreation
	72 Accommodation and food services	72 Accommodation and food services	54 Professional, scientific and technical services
		23 Construction	23 Construction
	52 Finance and insurance	61 Educational services	61 Educational services
		62 Health care and social assistance	41 Wholesale trade
			56 Administrative/Waste Mgmt/Remediation Services
emerging strength -small bas - sector growing provincially -Local sector growing	41 Wholesale trade	54 Professional, scientific and technical services	52 Finance and insurance
high priority retention target -strong concentration -provincial sector growing -local sector not keeping pace with provincial sector	81 Other services (except public administration)	81 Other services (except public administration)	81 Other services (except public administration)
	71 Arts, entertainment and recreation	71 Arts, entertainment and recreation	53 Real estate and rental and leasing
	61 Educational services		21 Mining and oil and gas extraction
	62 Health care and social assistance		
	23 Construction		

Where are we going?

“The change we are living through is dramatic. It is as sweeping as the historic shift from agriculture to industry that established the modern economy. We are now experiencing a transformation from the industrial age to the creative age, leading us into uncharted territory that is full of opportunity.”

Ontario in the Creative Age, Martin Prosperity Institute

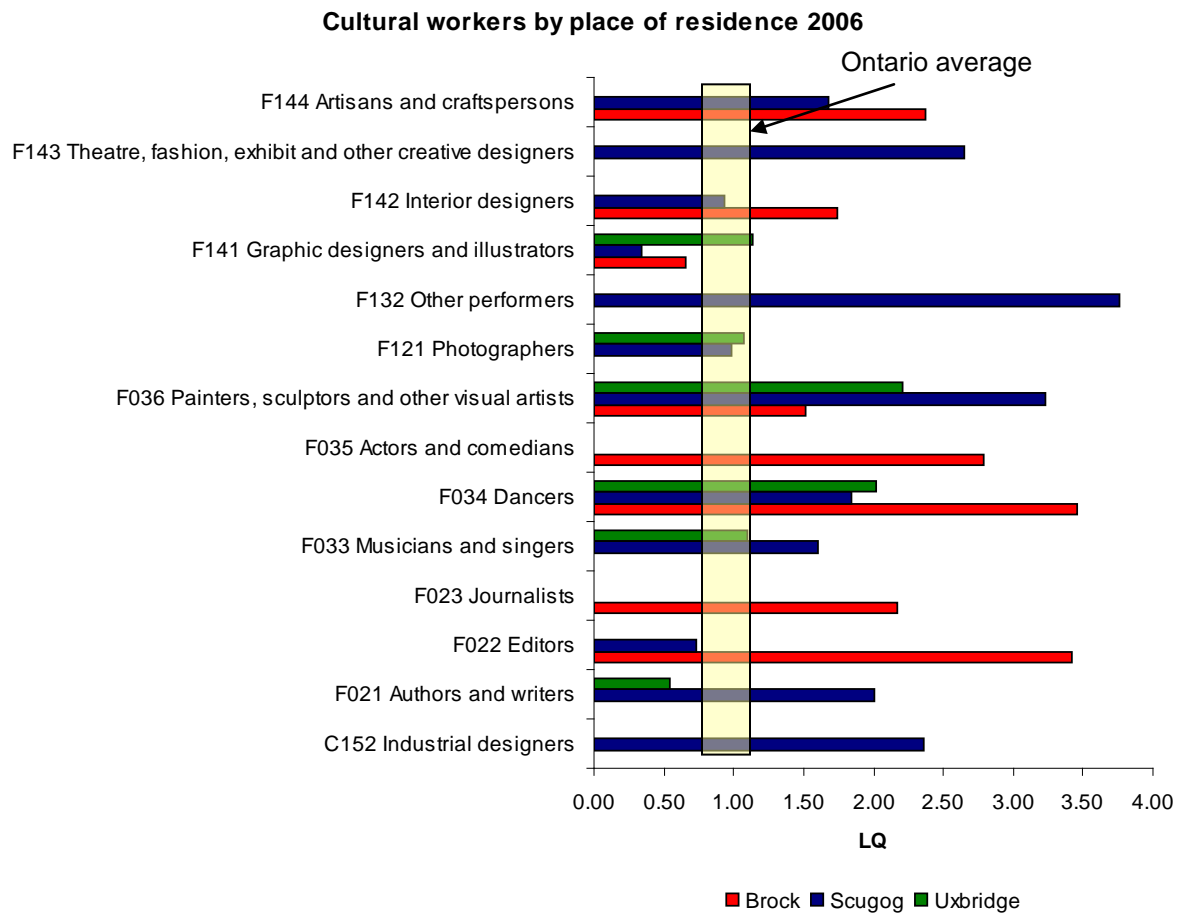
The Ontario economy is shifting. What was once an agrarian economy, in which agriculture fertilized the creation of wealth, transitioned to the modern economy fuelled by industry. Today, the economy is shifting again and is transitioning to a knowledge based economy, an economy where ideas and creativity lead to prosperity. The Knowledge based economy, coined the “creative economy”, includes elements of both the agrarian and manufacturing economies but with a twist. As the creative economy grows, manufacturing and agricultural industries that embrace creativity through innovation, technology and people flourish.

Local companies are embracing the creative economy. Castool, Uxbridge, and Nordstrong, Cannington, are two manufacturing companies that are using talent and technology to set themselves apart from their competitors. Both companies now design and manufacture unique products in Ontario that are used across Canada and throughout the world.

How can we help our north Durham business community flourish in the creative economy?

4.1 Creative economy: residential cultural workers

At the core of the creative economy is the desire for knowledge based workers, workers whose output drives the economy, to be surrounded by innovation, creative and stimulated thought. People engaged in culture as artists, actors and designers are the foundation of creating the 'quality of place' knowledge based workers seek.



Source: Statistics Canada 2006 Census, Ministry of Agriculture, Food and Rural Affairs

The details:

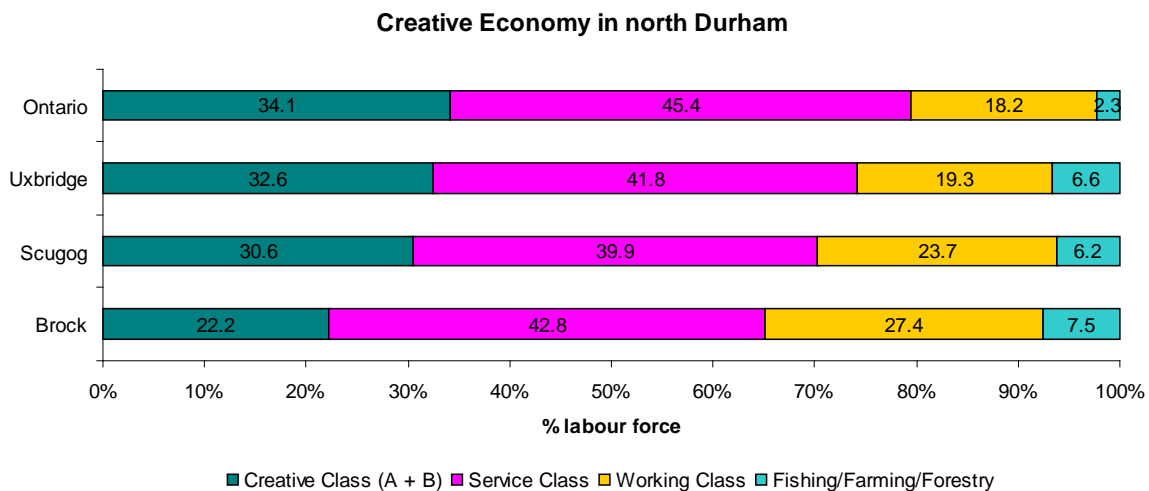
Compared to Ontario, the Township of Brock has a creative residential population, particularly in artisans and crafts people, interior designers, painters/sculptors/visual artists, actors/comedians, journalists, editors.

Compared to Ontario, the Township of Scugog has a creative residential population with high concentrations of artisans/crafts, theatre/fashion/exhibit/creative designers, other performers, painters/sculptors/visual artists, musicians/singers, authors/writers, industrial designers.

Compared to Ontario, the Township of Uxbridge has a cluster of painters/sculptors/other visual artists and dancers.

4.2 Creative economy: north Durham creative economy structure

The Creative Class is the driving employment class in the creative economy. Although lower than the Ontario average, North Durham has a good labour base for a creative economy, with particular labour strengths in working class and agricultural labour.



Source: Statistics Canada 2006 Census, Ministry of Agriculture, Food and Rural Affairs

The details:

The labour force of the Township of Brock is heavily concentrated in fishing/farming/forestry and working class skills.

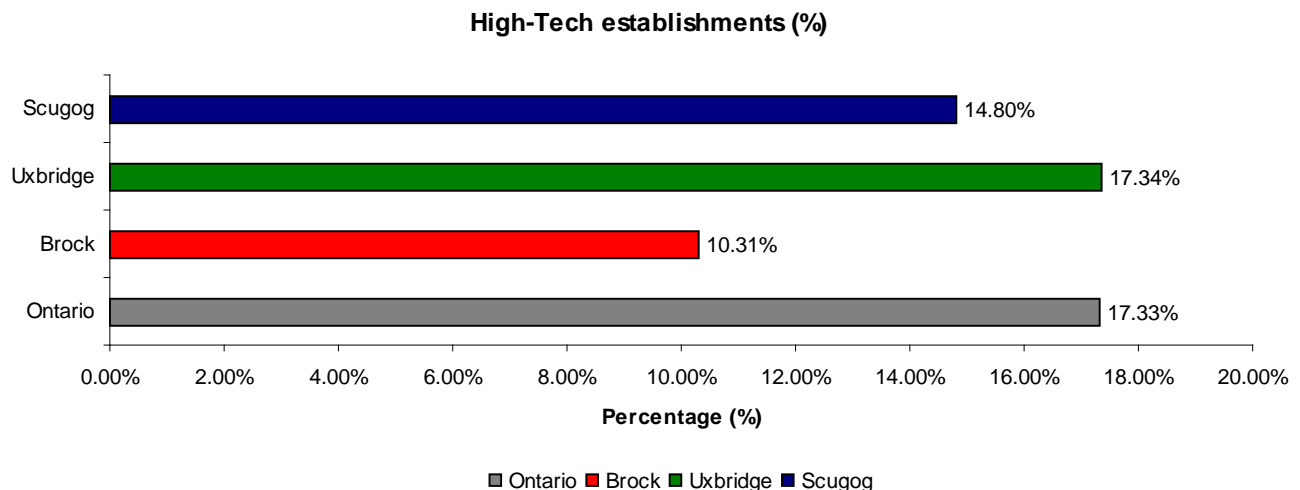
The labour force of the Township of Scugog has a significantly higher percentage of labour in the working class and agriculture (fishing/farming/forestry) than Ontario, with agriculture on par with Uxbridge..

The Township of Uxbridge is the north Durham community most closely aligned with the Ontario creative economy structure. The local strength in agriculture is evident with residential labour employed in fishing/farming/forestry (Agriculture).

4.3 Creative economy: high tech industry

High tech businesses will drive the creative economy. The number of high-tech establishments in Uxbridge is on par with the Ontario average. The following industry sectors have been defined by the University of Toronto, Martin Prosperity Institute as “high tech”;

- 5182 - Data Processing, Hosting and Related Services
- 5191 - Other Information Services
- 5411 - Legal Services
- 5412 - Accounting, Tax Preparation, Bookkeeping and Payroll Services
- 5413 - Architectural, Engineering and Related Services
- 5414 - Specialized Design Services
- 5415 - Computer Systems Design and Related Services
- 5416 - Management, Scientific and Technical Consulting Services
- 5417 - Scientific Research and Development Services
- 5418 - Advertising, Public Relations, and Related Services
- 5419 - Other Professional, Scientific and Technical Services



Source: Statistics Canada, Census 2006

The details:

The Township of Brock has significantly less high tech establishments than the Ontario average. The Township of Scugog has slightly less high tech establishments than the Ontario average. The Township of Uxbridge has a similar percentage of high tech establishments to the Ontario average.

4.4 Growth Forecasting: to 2031

In addition to the shifting structure of the Canadian economy, local economic development opportunities are shaped, to a large extent, by growth forecasting set by

the Province of Ontario and Durham Region. The growth forecasts outlined in the Regional Official Plan are yet to be adopted by the Province but provide a framework for the employment growth rate to exceed that of residential growth.

	2011	2016	2021	2026	2031	% change 2011- 2031
Brock						
Total population	12,385	12,650	12,810	13,325	14,015	13%
Employment	4,025	4,265	4,555	4,670	5,005	24%
Scugog						
Total population	22,585	23,250	23,415	24,355	25,390	12%
Employment	7,955	8,480	8,955	9,240	9,480	19%
Uxbridge						
Total population	20,940	22,545	23,740	25,270	26,965	29%
Employment	6,060	6,950	7,995	8,565	8,970	48%
Durham Region						
Total population	643,980	729,030	809,990	894,575	960,000	49%
employment	225,530	265,115	309,908	332,915	350,000	55%

Source: Durham Region 2009 Annotated ROP 128

The details:

By 2031, the percentage of Durham Region's population living in the north Durham townships of Brock, Scugog and Uxbridge will have declined from 8.8% to 1.5%. The total land area covered will remain steady at approximately 52% of the total Region land base.

The Township of Brock is projected to increase population by 13% and employment by 24%, both of which are below the Regional rate of growth.

The Township of Scugog is projected to increase population by 12% (similar to the Township of Brock) but employment is only projected to grow by 19%. By 2031 the Township of Scugog is forecast to have the highest number of jobs in north Durham.

The Township of Uxbridge is forecast to experience the highest rate of population growth in north Durham at 29% and will become the largest township by population. Employment is also expected to increase significantly by 48% representing 8,970 jobs, an increase of 2,910 jobs from the 2011 figure.

Summary

North Durham is a vibrant community, however we do not always see the details of our local economy, or think critically about our competitive advantages. *Which business sectors drive our local economy? Who employs our people? Do the skills of our residents meet the needs of our businesses? What kinds of businesses are growing?*

Across north Durham, small business drives our economy. Is this a testament to a local entrepreneurial spirit?

All three communities have limited population and employment growth potential which means we need to look creatively at how to grow our local economy. We have a diverse skills base from skilled trades to academics, a diversity of local business sectors with clusters of businesses in agriculture, construction, and arts, entertainment and recreation. Our businesses employ people from our communities and beyond our boundaries with our largest number of jobs in retail, health care, education and manufacturing.

Looking deeper, the data suggests that there are several sectors that we can influence locally such as finance and insurance, professional, scientific and technical services and arts, agriculture entertainment and recreation. Some sectors hold across communities, yet there are a few unique differences between north Durham townships.

In *Brock Township*, the data suggests that a generally unskilled and skilled trade labour force supports businesses inside and outside the community. The local economy is driven by employment in quarrying, finance/ insurance, real estate/ rental/leasing and accommodation/ food services businesses and boast business clusters in agriculture and construction. Looking at growth in both the Ontario economy and locally, in addition to current sector strengths, the data suggests there are additional opportunities for employment growth in wholesale trade and business growth in finance and insurance.

In *Scugog Township*, the data suggests that a generally skilled trade labour force supports businesses inside and outside the community. The local economy is driven by employment in quarrying, real estate, accommodation, construction, education and health care. There are clusters of businesses in agriculture, professional/scientific/technical services, health care and real estate. Looking at growth in both the Ontario economy and locally, in addition to current sector strengths, the data suggests there are additional opportunities for growth in professional/scientific/ technical services.

In *Uxbridge Township*, the data suggests that a highly educated labour force supports businesses inside and outside the community. The local economy is driven by employment in accommodation/food services, construction, education, professional/scientific/technical services, arts/entertainment/ recreation and administrative/ waste remediation services. There are business clusters in agriculture, real estate/rental/leasing and finance/insurance, professional/scientific/technical services and construction. Looking at growth in both the Ontario economy and locally, in addition to current sector strengths, the data suggests there are additional opportunities in finance/ insurance and businesses in health care/social assistance.

The next step is to understand the opportunities presented in *By The Numbers* and develop activities, programs and infrastructure that will address obvious gaps, strengthen existing opportunities and create an environment to foster new economic opportunities that will help transition the north Durham communities into the future.