Final Report

Town of Richmond Hill

Economic Development Strategy

2010 - 2020

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Executive Summary

The Canadian economy is experiencing rapid and far-reaching structural changes, and many communities are struggling to understand how best to position themselves for success in the emerging economic environment. The Town of Richmond Hill has chosen this time to proactively examine its current and future economic opportunities and positioning, and to develop an action-oriented approach to building an economic development strategy that is tangible, practical and sustainable. At the same time, the fundamental changes occurring in the local, national and global economies demand that the approaches taken in developing any new strategy be different from those of the past, to better position Richmond Hill at the leading edge of the 21st Century economy, and prepare the community for tomorrow's opportunities.

This economic development strategy makes a bold statement on the direction the Town must take; setting out a plan for the strategic and sustainable growth of Richmond Hill's economy to 2020. While the Town has a central role in facilitating its implementation, the strategy relies on a mixture of public and private sector resources, as well as active partnerships with the business community, public institutions, and all levels of government. Given the significant economic growth and changes that the region has and continues to experience the successful implementation of this strategy will also be about adapting, learning from success and failure, and refining the approach over time to adjust more quickly to changes in the environment.

Role of Economic Development Strategy

This Economic Development Strategy is consistent with the overall direction stated in the Town of Richmond Hill's Strategic Plan and provides both short-term (5-year) and long-term (10-year) directions and action plans for the Town. The new Economic Development Strategy provides Richmond Hill and the Town's economic development staff with:

- A strategy that will help to achieve the vision and goals of the Town's Strategic Plan;
- An understanding of the Town's role in economic development and the framework within which it operates;
- A solid and factual base of data and information, including the Town's current economic base, on which to base future judgments and strategic directions;
- Clear, concise and practical recommendations for diversifying, strengthening and enhancing the competitiveness of the local economy;
- A detailed SWOT assessment that speaks to key competitive advantages and disadvantages and serves to differentiate the Town's economic development positioning;
- Specific and productive target sectors for future economic development efforts, and positioning statements that reflect Richmond Hill's value proposition to these target sectors; and
- Progressive actions, projects and program concepts that are firmly rooted in community consensus, existing and emerging community priorities, oriented to achieving tangible success in the target areas.

The development of the strategy relied on an extensive review of relevant economic data for the Town coupled with the observations and insight received during the strategy's extensive consultation process. These findings in turn provide the framework for determining the strategic direction of economic development in Richmond Hill both in terms of activities and programming, but also the overarching objectives that will support the strengths of the Town's current economic base and incorporate new opportunities for economic growth.

Summary of Key Findings – Economic Base Analysis

A review of the Town's demographic and economic performance suggests Richmond Hill has benefited from a strong rate of population and employment growth that has contributed to a strong local economy. Despite this, the Town is not yet capitalizing on the potential associated with a highly skilled workforce and the attraction of businesses and enterprises in key growth sectors of the provincial economy. Based on the review of Richmond Hills's economic growth, including the community's recent industry and labour force performance, the following findings are considered relevant to the development of the Town of Richmond Hill's Economic Development Strategy.

- The current population of Richmond Hill has increased 23.2% since 2001, which is similar to the Regional growth rate and well above the provincial average growth rate of 6.6% for the same time period. In order to prepare for continued growth into the future, the Region is in the final stages of adopting Planning for Tomorrow, a growth management initiative. This document will help aid the Town in embracing high levels of growth, while preparing for the future. The Town is also engaged in an Official Plan review which will support this growth.

- A review of the Town's age profile reveals a young community with 63.4% of the population under the age of 45 years. While the Town's population over the age of 65 (10.1%) was lower than the Region (10.3%) and the provincial average (13.6%), this cohort has been growing the past 15 years. The age profile of the local population speaks to the challenge in providing the services, amenities and quality of life experiences that will be in demand by residents.

- Richmond Hill's immigrant population has experienced a progressive increase from 1996 to 2006 and continues to be a significant contributor of growth of the Town's overall population. The strong growth of persons of Chinese origin has contributed to the larger share of overall growth among the different mix of ethnic origins.

- As of 2006, a large percentage of Richmond Hill's population (49.7%) held a university certificate, diploma or degree as compared to 40.0% of York Region's population and 30.7% of the provincial population. This high percentage of skilled workers has contributed to the attraction of the knowledge base businesses to the Town.

- A historical review of private household incomes reveals the Town has also experienced a significant increase in the number of high income households in the community. Higher household incomes suggest stronger purchasing power and should translate into greater demand for a range of retail, dining and entertainment and recreation experiences in the Town.

- Just as the Town has experienced strong population growth, the Town's labour force has also experienced strong levels of growth between 2001 and 2006. In 2006 the town's labour force comprised 88,840 people, which is a significant increase of 23.8% from 2001 levels. Much of the Town's labour force is concentrated in business services, such as professional, scientific and technical services and finance and insurance indicating a high proportion of creative class workers in the community.

- Despite the Town's strong growth, there is atill a high percentage of workers that commute to employment in other parts of the GTA. At the present time the highest levels of net export of labour are occurring in the Finance and Insurance sector (4,755), followed by Professional, Scientific and Technical services (4,065) and Construction (3,230). With Richmond Hill's proximity to the City of Toronto, a high rate of commuting is likely to remain a challenge unless the Town can attract or develop an employment base with these sectors.

- Nearly 50.0% of the Town's labour force is employed in creative class occupations. Further analysis into Richmond Hill's creative occupations, suggest that the greatest concentration of workers are in professional occupations in natural and applied sciences (18.7%), followed by business and finance (10.9%) and specialist managers (10.8%). Richmond Hill's strength in the creative occupations has positive implications for the Town's economy, given the generally higher wages, specialized skills, and innovative capacities of these individuals.

- The greatest share of Richmond Hill's creative businesses is in the web & software industry, which in 2008 had a total of 653 firms, an increase of 131 firms from 2003 levels. This growth and concentration suggests a unique opportunity to raise the profile and reputation of the community as a 'high-tech' community.

- While much of the labour force is concentrated in the area of business, finance and administration occupation, sales and service occupations, management occupations and to a lesser extent natural and applied sciences and related occupations, the diversity of occupational concentration suggests that Richmond Hill has a workforce that is closely linked to the knowledge base economy.

- An industry based analysis of Richmond Hill suggests the following sectors (and subsectors) have demonstrated the greatest potential for economic growth in the community. These include:

    - **Finance & Insurance**
        - Credit intermediation and related activities
        - Financial investment and related activities
        - Insurance carriers
    - **Professional, Scientific and Technical Services**
        - Computer Systems Design
        - Administrative Management and General Management Consulting Services
        - Engineering Services
    - **Information and Cultural Industries**
        - Internet Publishing + Broadcasting
        - Computer Systems Design + Related Services
        - Internet Service Providers
    - **Health Industries**
        - Pharmaceutical and Medicine Manufacturing//Medical Equipment and Supply Manufacturing

- Pharmaceutical and Toiletries, Cosmetics Wholesale and Distribution
- Scientific Research and Development Services

- Richmond Hill`s current physical infrastructure supports the attraction of a broad range of business and enterprises. The Town has the presence of major telecommunications providers (Bell, Rogers, Atria, Telus, and Primus) and a strong base of technology companies that operate within the existing infrastructure. While Richmond Hill's commercial servicing costs are slightly higher than other York Region or GTA communities, it remains 'mid' category in terms of cost relative to all Ontario municipalities. Overall, the Town's ability to accommodate new employment and residential growth will be reliant on the intensification of existing and established office nodes and the delivery of the improvement to existing and planned regional transportation and transit.

Summary of Findings – SWOT Assessment

An important component in the advancement of an economic development strategy for the Town of Richmond Hill has been the opinions and thoughts of those business and industry leaders that already operate within the Town. Area businesses and community leaders can provide an excellent source of up-to-date information or perceptions, as it relates to an area's strengths and weaknesses as well as the opportunities and threats that may be confronting industry groups or a region as a whole in its efforts to attract and retain business investment. An extensive consultation exercise involving one on one interviews, focus groups and an online survey was conducted. This consultation provided a comprehensive picture Richmond Hill and its strengths, weaknesses, opportunities and threats.

Combining this information with the economic analysis a SWOT Assessment (Strengths, Weaknesses, Opportunities and Threats) was undertaken to examine Richmond Hill's ability to support the attraction, retention and expansion of business and industrial investment, the town's capacity to deliver on economic development activities and programming and the overall direction of the strategy and the sustainability of the community over the longer term. These findings include:

Strengths

- **Excellent Transportation Infrastructure**
- **Strategic Central Location**
- **Highly Skilled and Educated Population**
- **Quality of Place**
- **Ethnic Diversity**
- **Strong Corporate Support from the Town of Richmond Hill**
- **Growth of the Richmond Hill Economy**

Weaknesses

- **Availability of Employment Land**
- **High Levels of Out-commuting**
- **Lack of Public Transit and Regional Transportation Connections**
- **Lack of Affordable Housing**
- **Lack of Strong Branding of the Town**

Opportunities

- **Enhanced Business Retention and Expansion Program**

- **Focus on the Creative Economy**
- **Support Business Incubation**
- **Heighten Marketing Efforts**
- **Leverage the Town's Diverse Community**
- **Further Revitalization of Downtown**
- **Greater engagement with post secondary institutions**
- **Ensure the Delivery of Adequate Public Transport**
- **Identify Targets Sector for Growth**

Threats

- **Decline in Manufacturing**
- **Difficulty Distinguishing Richmond Hill from Neighbouring Communities**
- **Public Transit Plans not Carried Through**
- **Depleted Greenfield Land Inventory**

Framing the Economic Development Strategy

Any economic development strategy, to be successful, must focus on exploiting the competitive strengths and advantages of a community and address the perceived gaps that may be impacting business growth and investment. Based on the findings from the economic base analysis, the results of the community consultation process and an understanding of the existing policy environment in the Town of Richmond Hill, several key themes emerged around which to frame an economic development strategy.

These key themes include:

1. **Greater Support for the Entrepreneurial Economy**
    - The importance of the SME's in the provincial economy means that municipalities must consider providing a broader range of sophisticated tools and programming to support the growth of small business and entrepreneurs, innovative start-ups firms as well as existing businesses with high growth potential.

2. **Build the Creative Economy**
    - The high rate of growth associated with creative occupations and business and enterprises in the GTA places a greater emphasis on creating a community that not only appeals to and attracts both workers and investment but also capitalizes on the talent of its residents.

3. **Target Key Existing and Emerging Industry Sectors**
    - Richmond Hill's central location within the GTA coupled with the talent of its workforce positions it as an obvious hub for attracting investment and economic growth in a number of key existing and emerging industry clusters sectors within the broader region economy.

4. **Enhance the Economic Development Function**
    - The Town of Richmond Hill must be equipped to deliver the range of programming and services required to effectively take advantage of the community's business and investment growth potential and its competitive position in the GTA.

These themes are presented in order of priority. However, a focus on enhancing existing economic development programming and activities is a necessary first step to delivering on the promise of future economic growth in the Town of Richmond Hill and lays the foundation for greater support to the entrepreneurial and creative economies. It also ensures that the Town and by extension Economic Development has the necessary tools and resources in place to support the development of key target sectors within Richmond Hill.

The Vision, Goals and Actions

The vision for Richmond Hill's economic development strategy that emerges is one of sustained economic growth built on innovation, investment, entrepreneurship, creativity and quality of place. The Town must work to achieve this vision for sustainable economic growth and long term prosperity by using its strengths to its advantage: excellent transportation infrastructure; a strategic central location; a highly skilled and highly educated population; ethnic diversity; strong corporate support from the Town of Richmond Hill; strong economic growth , and quality of life-quality of place. The Town must also respond to the opportunities it has to fulfill its potential as an economic centre while addressing areas that need attention.

To support the vision contained in the economic development strategy, four broad goals have been developed together with associated actions that set out to achieve each goal. In addition, the role of the Town's economic development staff in the implementation of the actions is also identified.

The four goals for the Town of Richmond Hill's Economic Development Strategy are:

1. **Be a regional centre for small business support and innovation which drives SME growth and entrepreneurship in the community**

2. **Establish Richmond Hill as the "Creative Centre" of York Region by providing a business environment and a quality of place experience that distinguishes it as the GTA's most liveable community.**

3. **Attract business and industry that will sustain and grow our local economy by focusing on creative and technology based business and industry.**

4. **Deliver a best in class approach to economic development that is based on engagement with our business leaders and a brand which identifies Richmond Hill as a premier business location in the Greater Toronto Area.**

A more detailed description of the actions required to achieve each of these goals is outlined in Section 6 of the report.

While these goals and their associated actions set the foundation for achieving Richmond Hill's long term vision of its community, to capitalize on these opportunities requires that the community see the strategy as a series of inter-connected steps, each with a key role to play in shaping the future of the Town. It is also important to recognize that the implementation of this strategy does not happen in isolation of other strategic initiatives undertaken by the Town or other key community stakeholders.

1 Introduction

The Canadian economy is experiencing rapid and far-reaching structural changes, and many communities are struggling to understand how best to position themselves for success in the emerging economic environment. The Town of Richmond Hill has chosen this time to proactively examine its current and future economic opportunities and positioning, and to develop an action-oriented approach to building an economic development strategy that is tangible, practical and sustainable. At the same time, the fundamental changes occurring in the local, national and global economies demand that the approaches taken in developing any new strategy be different from those of the past; they must position Richmond Hill at the leading edge of the 21st Century economy, and prepare the community for tomorrow's opportunities rather than yesterday's.

This economic development strategy makes a strong statement on the direction for the town, setting out a plan for the strategic and sustainable growth of Richmond Hill's economy to 2020. While the Town has a central role in facilitating its implementation, the strategy relies on a mixture of public and private sector resources, active partnerships with the business community, public institutions, and all levels of government. Given the significant changes that the region has and continues to experience in terms of economic growth, global influence and global and community challenges, the successful implementation of this strategy will also be about adapting, learning from success and failure, and refining the approach over time to adapt more quickly to changes in the environment.

1.1 The Role of the Richmond Hill Economic Development Strategy

Creating a strong local economy which provides jobs for residents and allows for sustainable economic growth is a central function of municipal governments. Achieving this, however, is not easily done and requires a carefully planned approach to delivering economic growth.

An economic development strategy is one of the most important tools that municipal governments can use for effective economic development. It allows them to establish and maintain effective programs based on a current assessment of the economic opportunities, constraints and needs of the community. An economic development strategy also allows a community to understand their current situation and to shape their future by identifying their long-term economic development goals and putting in place the steps needed to achieve this. An effective strategy is built on broad consultation and consensus among public and private sector stakeholders and identifies the resources needed from across the community, to implement realistic actions and plans. An effective economic development strategy will help steer a community's economic development activities to realize their long-term economic development goals.

The primary objective for this project was to prepare a comprehensive Economic Development Strategy that is consistent with the overall direction stated in the Richmond Hill Strategic Plan and that provides both short-term (5-year) and long-term (10-year) directions and action plans for the Town. From this perspective, the new Economic Development Strategy provides Richmond Hill and the Town's economic development staff with:

- A strategy that helps to achieve the vision and goals of the Town's Strategic Plan

- Recognizes the Town's role in economic development and the framework within which it operates
- A solid and factual base of data and information, including the Town's current economic base, on which to base future judgments and strategic directions;
- Clear, concise and practical recommendations for diversifying, strengthening and enhancing the competitiveness of the local economy;
- A detailed SWOT assessment that speaks to key competitive advantages and disadvantages and serves to differentiate the Town's economic development positioning;
- Specific and productive target sectors for future economic development efforts, and positioning statements that reflect Richmond Hill's value proposition to these target sectors; and
- Progressive actions, projects and program concepts that are firmly rooted in community consensus, existing and emerging community priorities, oriented to achieving tangible success in the target areas.

This is a strategy for the entire community of stakeholders. The successful achievement of the economic development vision and goals that have been developed with input from the community will require the support of organizations, companies, entities and individuals with an interest in the growth potential of Richmond Hill's economy. Implementation will need to be a collective endeavour. There is significant need for participation, and more importantly partnership, to deliver on the goals, objectives and actions within.

This strategy is a starting point – not an end point – of a process that should yield prosperity in the community and position the team more effectively in the broader regional and global economy. The Town's economic development staff will be the primary vehicle for creating more specific implementation plans for these goals in partnership with the private, public and non-profit sectors.

This report provides a summary of findings derived from an extensive review of relevant base line data for the Town of Richmond coupled with the observations and insight received during the strategy's consultation process. These findings in turn provide the framework for determining the strategic direction of economic development in Richmond Hill both in terms of activities and programming but also the overarching objectives that will support the strengths of the Town's current economic base and incorporate new opportunities for economic growth.

1.2 Richmond Hill Context

The Town of Richmond Hill's recent economic development activity has been a relative success story. The Town has emerged as a primary urban growth centre in the Greater Toronto Area (GTA) and a focus for investment, high-density major employment centres and transit infrastructure with the Richmond Hill/Langstaff Gateway Urban Growth Centre, one of four such centres in the Region of York. The Town has seen rapid economic growth, driven in part because of the broader economic growth that has occurred in the GTA but also because of its proximity to the City of Toronto and its location within a key Greater Toronto Area and Hamilton office node that is focused on Highways 404 and 407. Economic diversity and quality of life have also been major keystones for population and employment growth and have greatly contributed to the popularity of the community for both residents and visitors. In fact, people from around the world have chosen to make Richmond Hill home contributing to a growing mix of cultures, languages and faiths. This attractiveness as a place to live and work for skilled workers and mobile populations has been recognized in a recent report by the Conference Board of Canada '*Ciy Magnets II: Benchmarking the Attractiveness of 50 Canadian Cities*'. Richmond Hill was one of only 6 cities to receive an 'A' grade and was both the only suburban municipality and only GTA municipality to receive this grade.

Over the next 10-15 years however, the Town is expected to become a much more urban community as vacant development areas are built out and more emphasis is place on redevelopment and the intensification in the Town's urban core. This shift will also impact the way the community will experience business investment and employment growth. "In order to accommodate future employment, new development will increasingly need to be accommodated through intensification and redevelopment in higher density forms".[1] The Economic Policy Review also recommended: encouraging structured parking to encourage more intensive forms; encouraging economic activity into the centres and corridors in addition to the employment areas; encouraging home occupations; and a range of other economic development related initiatives.

Coupled with these facts however, is the reality that both the global and provincial economies are changing - rapidly and irreversibly. The decline of manufacturing in leading industrialized economies, the aging of the baby boom generation, the dramatic increase in immigration and its implications for Canada's workforce, the rise of a highly mobile knowledge-based workforce and the increasing importance of small business – all of these new realities hold the potential to shape and challenge Richmond Hill's opportunities for growth in the future.

Embarking on an economic development strategy at this time should serve the Town well but given the anticipated future of the Town the strategy will require a fresh approach. While the traditional models of investment attraction remain viable, the town is also well positioned to take a page from the approach of larger jurisdictions and better capitalize on the strengths and talent of its workforce and the unique assets that contribute to its quality of life. As part of this effort, the town will be able to capitalize on emerging trends in the market, identify suitable measures that will enhance the effectiveness of the Town's economic development programming and attract the types of business and employment that the Town needs to sustain strong economic growth in the future.

1.3 Richmond Hill Economic Development Framework

1.3.1 Current Policies and Initiatives

There are a number of Town and York Region policies and initiatives that also help to shape the development of the Economic Development Strategy:

- Richmond Hill Socio-Economic Study (2008)
- Richmond Hill Strategic Plan (2009)
- Richmond Hill Official Plan Review - Economic Policy Review Discussion Paper (2009)
- Richmond Hill Official Plan Review – Urban Structures Report (2009)
- Richmond Hill Official Plan Review – Major Policy Directions Report (2009)
- York Region Economic Strategy (2005)
- York Region Long Term Tourism Destination Development Strategy –Draft (2009)

Given the long term perspective that emerges with much of this work, many of the findings and direction provided by these studies are important to consider in the development of a new economic development strategy for the Town of Richmond Hill and are consistent with the priorities identified during the project's consultation process. Of particular importance are the Town's Strategic Plan and the Economic Policy Review Discussion Paper.

[1] Hemson Consulting Ltd., Economic Policy Review: Stage 1 Background Research + Policy Report, March 2009.

1.3.2 Richmond Hill Strategic Plan

The 2009 Richmond Hill Strategic Plan establishes a long term vision for the Town over the next 25 years and sets out goals to be accomplished in the near term to achieve the vision. The vision, 'Richmond Hill, where people come together to build our community', is supported by four goals that are powerful guiding principles and a public consensus of what is important to Richmond Hill now and in years to come. These goals are:

1. **Stronger Connections in Richmond Hill**
   - Planning for a connected community
   - Opportunities and places for people to connect and get involved
   - Physical connections in the community
   - Improving connections in our environment
2. **Better Choice in Richmond Hill**
   - Better options to move around
   - Better options for working and doing business
   - Better options for where to live
   - Better options for being active and involved
3. **A More Vibrant Richmond Hill**
   - Respecting the Past
   - A sense of identity and place
   - Looking to the future
4. **Wise Management of Resources in Richmond Hill**
   - Less Waste
   - Being Responsible

Of particular relevance to the creation of an economic development strategy is the identification of outcomes and strategies for better options for working and doing business in the Town. In particular, the Strategic Plan calls for the economic development strategy to more effectively market the community, confirms the desire to attract more wealth creating jobs in the Town's prime employment corridor between Leslie Street and Highway 404, as well as the need to better understand and support the needs and requirements of local business. Not surprisingly, these same themes emerged during the course of the consultation for the economic development strategy.

The economic development strategy for the Town includes recommendations that are consistent with and help to achieve the Strategic Plan vision and goals.

1.3.3 Official Plan Review Economic Policy Discussion Paper

The Economic Policy Review undertaken as part of the development of a new Official Plan for the Town is also important to consider in the development of the Economic Development Strategy. Hemson Consulting was retained by the Town in 2008 to develop economic land use policies for inclusion in the Town of Richmond Hill's new Official Plan and to provide input to the Town's Economic Development Strategy. The overall intent of the policies is the promotion of long-term economic prosperity and to ensure that the Town remains competitive in its efforts to attract future economic growth.

While there is a prevailing need to update the Town's current official plan policies, which date in part to 1981, the Official Plan must also reflect the Province's Growth Plan for the Greater Golden Horseshoe which seeks to achieve "economic vitality, a more compact urban form, a good balance of jobs and housing within communities; and the direction of growth to built-up areas to minimize the amount of new greenfield development that occurs over the planning period 2031".[2] This requirement has direct implications on the type of employment activity that needs to be attracted to the Town, and the options to accommodate needed employment growth.

The report also acknowledges that new policies are required to address and capitalize on emerging trends in economic development and reflect the current and future employment growth opportunities in Richmond Hill.

In particular the report states that in attracting a more intensive pattern of development the Town may need to consider:

- Planning for economic opportunities over the long term
- Continuing to protect employment areas over the long term
- Providing a balanced and diverse range of economic opportunities
- Supporting economic vitality through the provision of targets, incentives and infrastructure

The report also suggests that the Town will need to expand its economic development and strategic planning initiatives to the Town's broader competitive environment which means a greater focus on actions that will maintain and enhance the overall attractiveness of the investment environment. This would include continued investment in local infrastructure, incentives to encourage employment intensification and enhance the prospects for attracting business investment to the town's older industrial areas, continued efforts to attract specific economic sectors that reflect the changing nature of the Town's employment areas including major institutional uses, and continued pressure on the province and others for the extension of the Yonge subway and ongoing improvements the region's the public transit system.

Consideration has been given to both of these strategic planning initiatives over the course of developing the Town's economic development strategy.

1.3.4 Existing Economic Development Function and Activities

The economic development function within the Town is located in the Strategic Initiatives Division of the Chief Administrator's Office. The Strategic Initiatives Division supports the Chief Administrative Officer in directing and championing the Town's long-term strategic planning, developing corporate policy; economic development; corporate performance monitoring; organizational reviews; service improvement initiatives; and corporate communications. Staff in this division also take a lead role in special projects as directed by the CAO and Council and are responsible for identifying opportunities and priority areas for fundraising and for Gas Tax spending. Fundraising focuses both on grant programs with established application processes, as well as accessing funds outside of formal grant programs.

The economic development function is supported by one permanent full-time and two contract full-time staff, plus the assistance of two other staff in Strategic Initiatives on a part-time basis. The Director of Strategic Initiatives is responsible for the economic development function as part of the larger strategic initiatives portfolio. The three staff dedicated to economic development are a Coordinator, Economic Development Programs, a Small Business Consultant, responsible for the Small Business Enterprise Centre (SBEC), and a Program Assistant also in the SBEC. While not dedicated full-time to economic development, the Researcher position in Strategic Initiatives also provides support to economic development initiatives.

[2] Hemson Consulting Ltd., Economic Policy Review: Stage 1 Background Research + Policy Report, March 2009.

The Town of Richmond Hill currently undertakes a broad range of economic development and business support activities. The mandate of the staff in Economic Development and some of the 2009 activities are discussed below.

Retain and Help Develop Existing Businesses. Maintain a stable, long-term business base by supporting existing businesses in Richmond Hill. Cultivate relationships, assist in problem-solving, assist with formation of strategic alliances, advice and information on government and other business assistance programs for the business community. 2009 activities included the following:

- Met with 30 companies as part of the corporate calling program
- Responded to inquiries from existing businesses
- Advised business community of funding and other opportunities for the following sectors: IT/Pharma, plastics, environment, food, health, security
- Worked with expanding and new businesses including Ash City, Trimark, Dye and Durham, Crocs Canada, LY & C Enterprises, SunEdison, Protenergy, Dytronix.com
- Worked with Richmond Hill Chamber of Commerce (member of Advocacy Committee and act as Judge for Business Achievement Awards)
- Published first edition of the Business Connections newsletter

Attract Business to Richmond Hill. Provide decision makers or those with influence with the information they need to have businesses locate in Richmond Hill. 2009 activities included the following:

- Responded to weekly inquiries from potential business, commercial realtors, regarding vacant land and space, zoning and partnership opportunities
- Assisted the realtor community and companies looking to relocate
- Created marketing materials and promoted the Town at the York Technology Branham 300 Event, 2010 EDCO Directory, Globe and Mail Perspective Insert, GTMA's Vantage Magazine, Invest in Ontario website
- Hosted delegations from China, Australia and Russia
- Organize Town's participation in 2010 Trade Mission to China working with Richmond Hill Markham Chinese Business Association
- Worked with Region on international marketing efforts
- Updated vacant land inventory
- Updated the Town's economic development website
- Organized, partnered and promoted several events including the January 2009 Business Budget Breakfast, 'Alternate Sources of Labour' seminar, Green IT Workshop, Food and Beverage Manufacturing seminar
- Managed the Village core Façade Assistance Program
- Participated in the GTA Economic Summit to highlight issues of concern to Richmond Hill businesses

Support Small Business Entrepreneurs. Provide resources and advice to Town residents who want to start their own business or improve their small business operations.

In partnership with the Ministry of Economic Development and Trade, the Town operates the Small Business Enterprise Centre (SBEC), part of a network of 50 small business centers across the Province. The SBEC provides a one-stop source of services and programs for Richmond Hill entrepreneurs and small businesses. 2009 activities included the following:

- Provided business consultations to approximately 300 individuals
- Reviewed and assisted with development of client business plans

- Organized and hosted 15 seminars
- Implemented BizPal, a government on-line licensing and information system
- Planned, hosted or co-hosted events including E-Commerce (with Vaughan) and Bridges to Better Business Forum
- Managed Summer Company youth entrepreneurship program with 8 youth and 3 mentors
- Responded to approximately 9,000 inquiries

Promote Richmond Hill as a Location for Filming. Promote Richmond Hill as a filming location to film and television companies. In 2009, the economic development webpage was updated to provide current information and links to the Ontario Media Development Corporation.

Promote Richmond Hill as a Tourism and Conference Destination. This is a collaborative effort between local municipalities such as Richmond Hill and the Region of York Economic Development staff, who are the lead on tourism promotion in the Region. 2009 joint activities included a number of major tourism marketing initiatives such as:

- Preparing an advertisement for the York Region Discovery guide that highlighted Richmond Hill
- Contributing photos and a detailed inventory of facilities for promotion of Richmond Hill sites and events sport tourism

In support of the economic development mandate, staff also:

- Provided support to Mayor and members of Council in the form of speaking notes, issues notes and other information
- Tracked demographic and economic indicators
- Participated in Economic Policy Review as part of development of new Official Plan
- Participated as member of staff team developing a branding strategy for the Town of Richmond Hill
- Advanced the economic development strategy by preparing a request for proposal, hiring consultant and overseeing project
- Worked with economic development partners at the Federal and Provincial governments both locally and internationally, the Region of York and the Greater Toronto Marketing Alliance

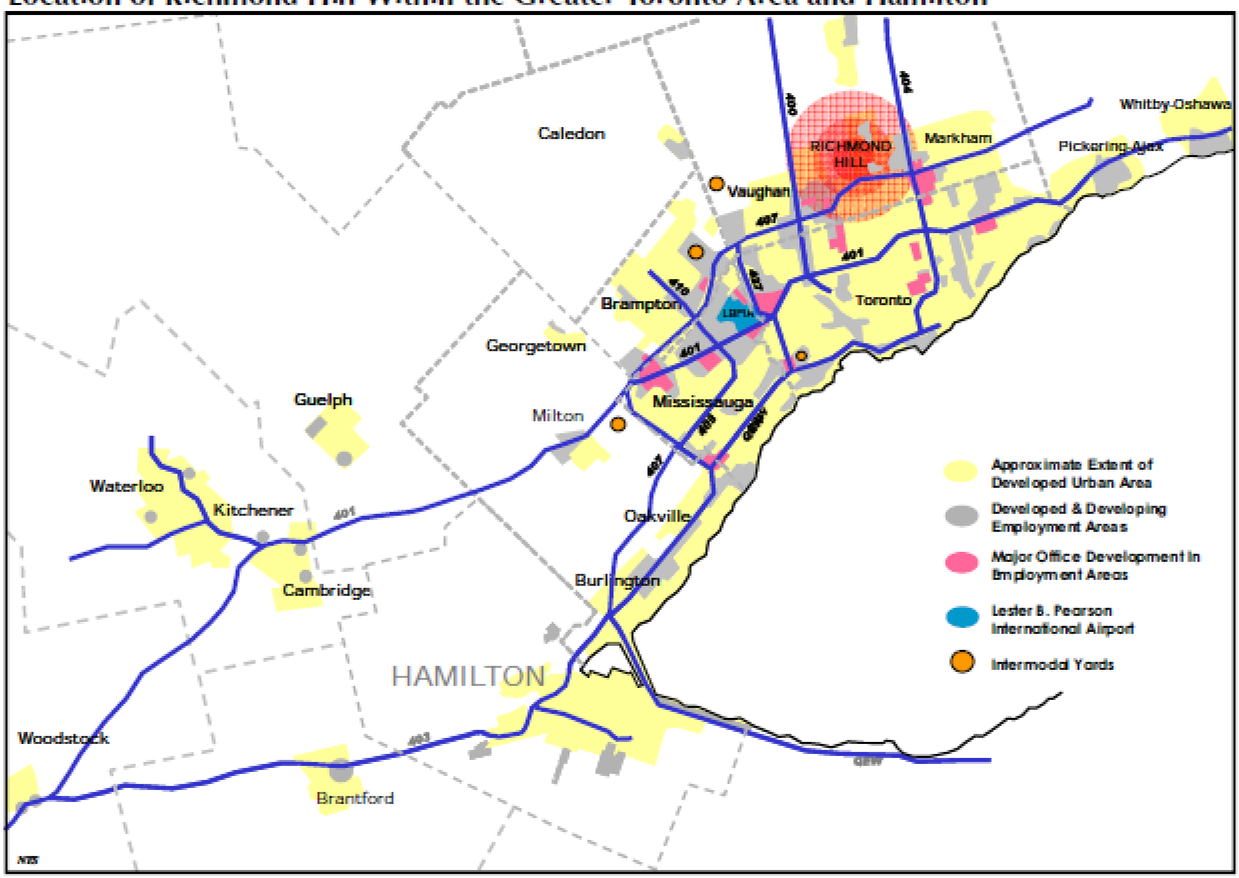
In creating an economic development strategy for the Town, consideration will be given to how best to balance the need to better position the Town to compete with the GTA market with the Town's existing economic development mandate and resources. In the discussion that follows, the report looks at the more significant shifts in the local and regional economy and the implications for the Town of Richmond Hill.

2 Base Analysis

While Richmond Hill's strategic location in the GTA is a competitive advantage for the community, this is a fact shared with many communities across the GTA. To fully understand the strengths that will distinguish one community over another requires an understanding of the economic and demographic performance of that community.

Figure 1 – Location Map

Location of Richmond Hill Within the Greater Toronto Area and Hamilton



Source: Hemson Consulting Ltd.

The economic base analysis that follows is divided into three primary parts: firstly, consideration is given to the demographic characteristics of the town including population trends, educational attainment levels and household income values as compared to the Region and as appropriate, the Province of Ontario. The second portion of the discussion provides a current labour force profile and discusses the emergence of the creative economy as a factor for economic growth, while the final element is comprised of detailed industry sector analysis and target sector identification.

In completing this report, Millier Dickinson Blais has made use of available 2001 and 2006 population Census information for the Town of Richmond Hill, York Region and the Province of Ontario, as well as 2003 and 2008 business pattern data obtained from Statistics Canada. As appropriate, this information has been supplemented with data purchased from Manifold Data Mining. This predictive data allows for more current understanding of how employment and industry data may have changed since 2006. Where possible the report has included data that was previously obtained and analysed by the consulting firms SHS Consulting[3] in partnership with C4SE in their completion of a 2008[4] socio-economic study for the Town.

2.1 Demographic Characteristics

2.1.1 Population Change

The demographic makeup of a particular community can be a good indicator of that community's long term sustainability and viability. In the case of Richmond Hill, there has been strong rate of population growth over the last 10 years. Figure 2 demonstrates the magnitude of this growth in both absolute numbers and percentage change. In 2006, Richmond Hill had a population of 162,704, an increase of 23.2% from 2001 levels. Between 1996 and 2006 the Town experienced a growth rate of 59.9% or a gain of 60, 979 residents.

When the Town's population growth is measured against that of York Region or the Province as a whole over the 10 year time period from 1996 to 2006, Richmond Hill shows a stronger rate of growth than either the Region or the Province.

Reviewing the 2008 Socio-Economic Study completed by SHS Consulting reveals a number of interesting observations in terms of the Town's historical population growth. From 1986 to 2006, the Town grew by 115,938 or 247.9%, further supporting the argument that Richmond Hill is one of Canada's fastest growing communities.

Figure 2 - Population Growth, Richmond Hill 1996 - 2006

Population Growth 1996 - 2006

Population	1996	2001	2006	2001 -2006 % Change	(5 Years) Net Increase	1996 - 2006 % Change	(10 Years) Net Increase
Richmond Hill	101,725	132,030	162,704	23.2%	30,674	59.9%	60,979
Region of York	592,445	729,254	892,712	22.4%	163,458	50.7%	300,267
Ontario	10,753,573	11,410,046	12,160,282	6.6%	750,236	13.1%	1,406,709

Source: Statistics Canada, Census of Population: 1996, 2001, 2006

Data provided by York Region Planning Department suggests that the Town is expected to continue to exhibit a strong rate of growth over the next 25 years. Recent population projections (figure 3) suggest that Richmond Hill will grow by 43.2% from its 2006 levels reaching a population of 242,800 by 2031. While this growth rate is significant, it lags behind the expected growth rate for the Region, which is expected to grow by 62.1% from 2006 levels to over 1.5 million residents by 2031. Richmond Hill's

[3] Work was completed in partnership with C4SE

[4] The original socio-economic study was released in 2007 and was updated in December 2008 with recently released Statistics Canada census information

performance in this regard can be attributed in part to the fact that the community is reaching a mature state with limited options for further greenfield development.

Such high levels of growth however, have tremendous implications for the long-term planning and the sustainability of the Town's labour force, the demand for community infrastructure and overall quality of life experience in the community. In this respect there are a number of initiatives underway that are intended to respond to the Region's rate of growth including the Planning for Tomorrow initiative introduced by York Region in 2005 and currently in its final stages of review by stakeholders and the public. Planning for Tomorrow is a growth management initiative, which combines the Regional master plans for pedestrian and cycling, transportation and transit and water and wastewater while responding to the intensification requirements of the Province's Places to Grow legislation. The initiative is designed to aid in the management of growth by accommodating significant population and employment growth while maintaining a vibrant economy and attracting employment.

Figure 3 – Population Projections, Richmond Hill, York Region 2006 - 2031[5]

York Region Population Forecast by Local Municipality

	2006	2011	2016	2021	2026	2031
Richmond Hill	169,500	195,000	216,900	231,500	239,400	242,800
Region of York	929,900	1,071,100	1,200,100	1,314,700	1,415,200	1,507,400

Source: 2006 population based on Statistics Canada, Census of Population 2006

2.1.2 Population by Age

When consideration is given to the age profile of the community there are only marginal differences between the Town, the Region and that of the Province, although there is a slightly higher proportion of individuals under the age of 20 in the Region (figure 4). The population of Richmond Hill is primarily concentrated in the working age population of 20 - 44 years (36.5%), which is similar to the results for the Region and the Province at 35.6% and 34.9%, respectively.

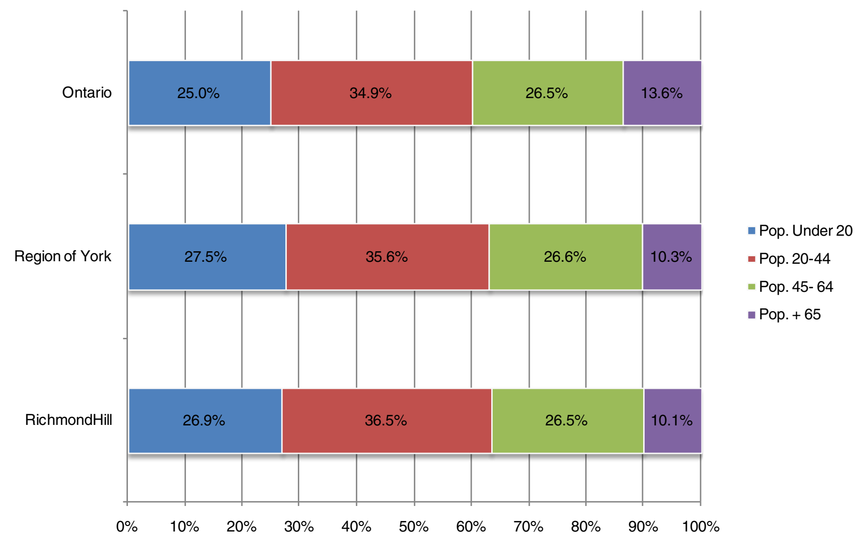
While the Town's population of individuals over the age of 65 (10.1%) was lower than the Region (10.3%) and the provincial average (13.6%), historically speaking this cohort has been growing in the Town over the past 15 years. The Town's 2008 Socio-Economic Study provides an in-depth look into the proportion of the population aged 65+ and reports that while the Town has a lower proportion of individuals aged 65+ when compared to the Toronto CMA (11.9%), the Province (13.6%) and a range of comparator GTA communities, research also reveals that the share of Richmond Hill's population over the age of 65 grew from 7.5% of the population in 1991 to 10.1% of the population in 2006.[6] During this same time period, the population aged 40 to 64 grew by 7.9%, while the population aged 20 to 29 decreased by -8.1%. Over the longer term this trend represents a growing issue for many communities – an aging population and a shrinking workforce which in turn heightens the competition to attract a skilled and educated workforce and puts pressure on a community to provide for services, amenities and programming that will appeal to this aspect of its population.

In 2008, as part of People Plan Richmond Hill consultation process for the Strategic and Official Plan, a roundtable discussion was held to enable the Richmond Hill community to have input on the future needs and services of the community. During a brainstorming session, the public was asked the following

[5] Note: Figures may differ from those in this report due to rounding, *2011 to 2031 forecasts provided by York Region Planning and Development Services Department, 2008.
[6] SHS Consulting in partnership with C4SE, Socio-Economic Study for the Town of Richmond Hill, page 7

question, “What is a Complete Community?” and a discussion ensued around the need to support an aging population by providing opportunities to both live and work in the community. It was also suggested that the Town review examples of how this could be done seamlessly by reviewing the efforts of communities abroad.[7]

Figure 4 - Population by Age, 2006



Source: Statistics Canada, Census of Population: 2006

2.1.3 Growth in Immigrant Population

For several decades, immigrants have played an increasing role in both population and labour force growth across Canada. The 2006 Census demonstrates the importance of the immigrant population as a key driver in Canada’s population growth. In that year, the proportion of Canada’s foreign born population reached its highest level in 75 years, where one in five (19.8%) of the overall population is foreign born. With an increasing proportion of immigrants comprising the country’s overall population growth, it stands to reason that these new Canadians also represent the growth of the country’s workforce. Immigrants who arrived in Canada during the 1990’s now account for about 70 percent of net labour force growth between 1991 and 2001 – it is expected that over the next decade 100% of Canada population growth will come from immigration.

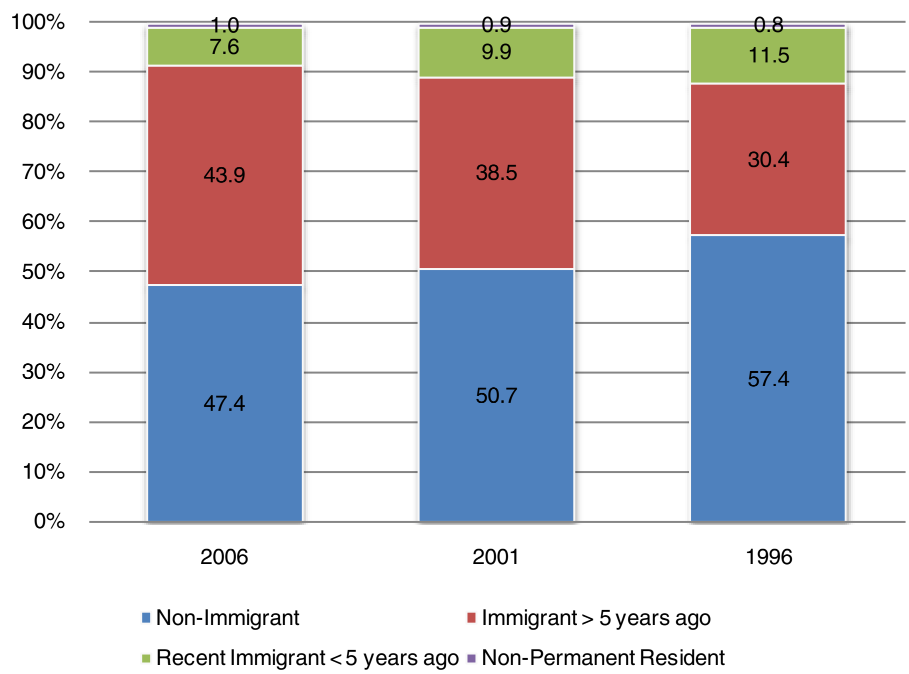
Richmond Hill’s population of ‘new Canadians’ has steadily increased to the point where they have become a significant contributor to the growth of the Town’s overall population. As illustrated in figure 5 below, the percentage of immigrants (those who immigrated more than five years ago) that migrated to Richmond Hill has increased from 30.4% in 1996 to 43.9% in 2006.

A more in-depth examination of the Town’s immigrant population reveals that in 2006 immigrants comprised a larger share of residents in Richmond Hill (51.5%) than in the entire York Region (42.8%).[8] The Conference Board of Canada’s recently released “City Magnets II: Benchmarking the Attractiveness of 50 Canadian Cities” ranks Richmond Hill as the 4th most attractive city in Canada for new immigrants. Though this report is helpful it would be beneficial to conduct further research into the reason why immigrants choose Richmond Hill over other comparable communities. This will be of use in developing

[7] People Plan Richmond Hill, http://www.richmondhill.ca/documents/complete_communities_round_summary.pdf, page6
[8] SHS Consulting, Socio Economic Study for the Town of Richmond Hill, December 2008.

the Town's future marketing and attraction efforts and represent a significant competitive advantage to the community in the future. For instance, the Canadian Federation of Municipalities along with the efforts of several academic scholars suggests the major influence of the migration selection process for newly arrived immigrants is linked to the presence of social networks and previously established ethnic groups, often referred to as chain migration. Richmond Hill's large and diverse immigrant community will continue to influence the destination choice of future immigrants and may also assist in marketing efforts to attract new Canadians to Richmond Hill. The growth of immigration also has implications for the range of services and support needed to enable a faster, successful integration into the community. This may represent an opportunity for the Town to better engage with community leaders, to ensure they are also forming the connections necessary to advance employment and business interests.

Figure 5 – Immigration Status, Richmond Hill: 1996 -2006



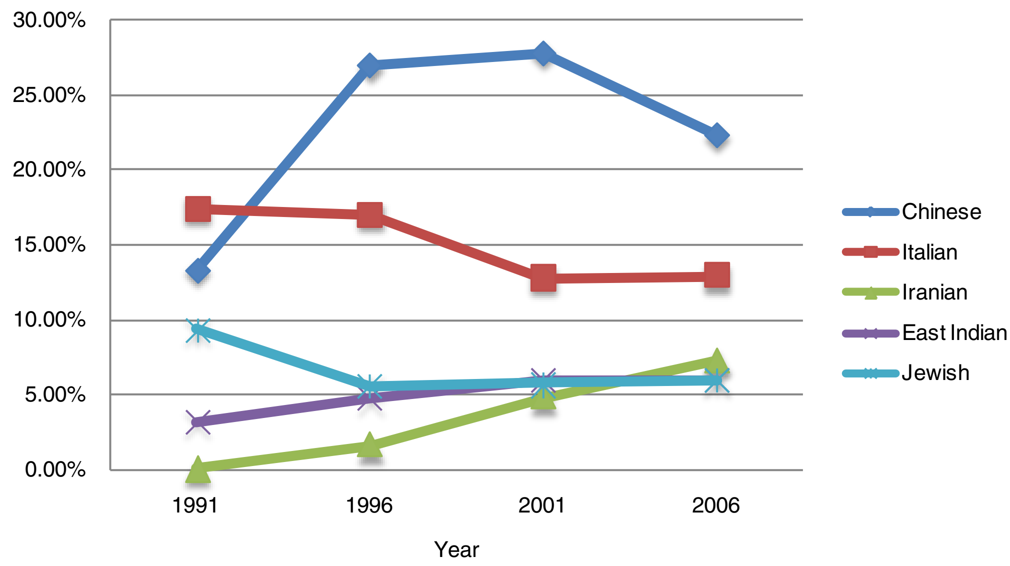
Source: Statistics Canada, Census of Population: 1996 – 2006

2.1.4 Ethnic Diversity

The Socio-Economic Study also points to the fact that there has been shift in the cultural background of town residents over the past fifteen years. From 1991 to 2006, the Town experienced a cultural transformation with persons of Chinese, East Indian, Iranian and Russian origins comprising an increasingly larger share of the community's population. The report also suggests that during the same time period residents of Italian and English origin decreased in proportion to other cultural groups.

More specifically, the study identified persons of Chinese origin as comprising the greatest share of Richmond Hill's population (22.3% as of 2006) as compared to the Toronto CMA (10.6%) and the Province as a whole (5.4%). Other ethnic origins that comprise a large share of the Town's local population include: Italian, Iranian, East Indian and Jewish. The most significant change occurred in the share of residents with Iranian origins. From 1991 to 2006, this ethnic group grew from 0.0% to 7.3% of the Town's population.

Figure 6 – Population by Ethnic Origin, Richmond Hill, 1991 - 2006



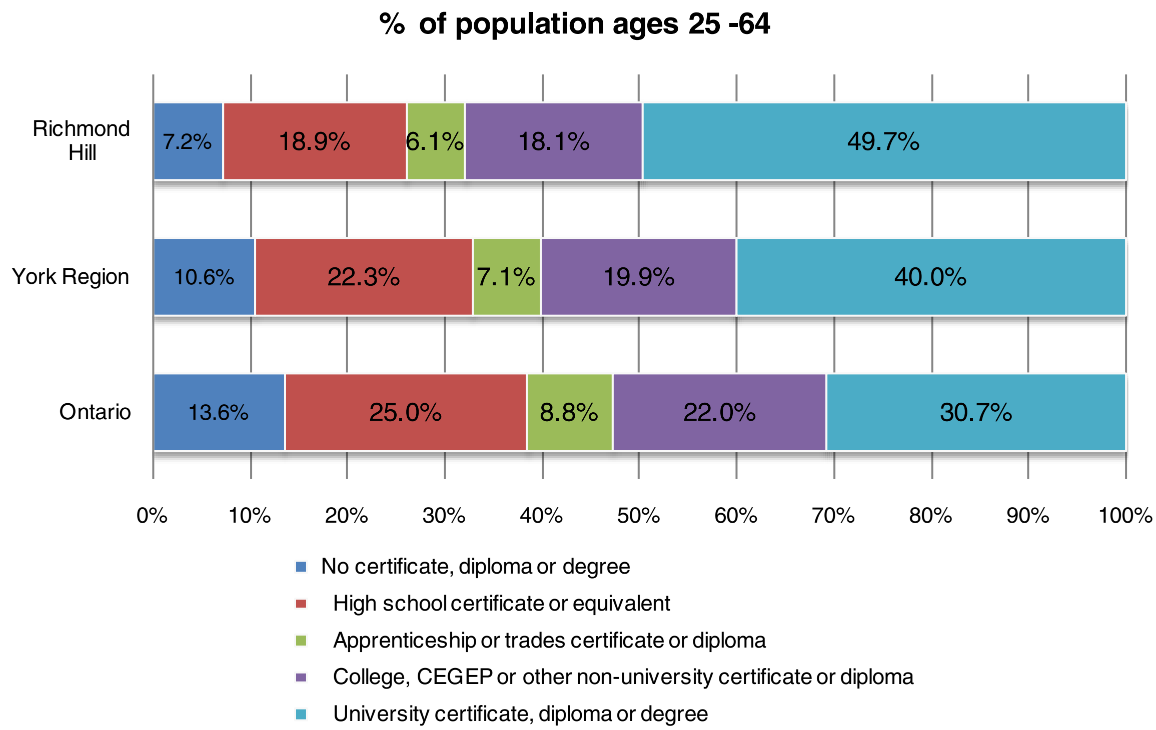
Source: SHS Consulting in partnership with C4SE: Statistics Canada, Census of Population: 1991 – 2006

2.1.5 Educational Attainment and Field of Study

The level of educational attainment in a municipality can be used as a general indicator of the capacity for innovation of the local population. Generally speaking, educational attainment is often seen as a contributing factor to the quality of the "human capital" of a municipality, or the accumulation of skills and talents which manifests itself in the educated and skilled workforce of the region (Mathur, 1999).

Figure 7 illustrates the current educational attainment profile for the working age population in Richmond Hill as compared to the Region of York and the Province. In 2006, nearly half of the Town's population (49.7%) held a university certificate, diploma or degree, as compared to 40.0% of York Region's population and 30.7% of the provincial population. The Town's high percentage of residents with a university certificate, diploma or degree should factor heavily in the Town's efforts to attract businesses and support entrepreneurial growth in the community. This highly educated "human capital" is significant competitive advantage for the Town in attracting and growing businesses and will also be important to attracting a post-secondary educational institution to the community.

Figure 7 – Educational Attainment, Richmond Hill, York Region, Ontario: 2006



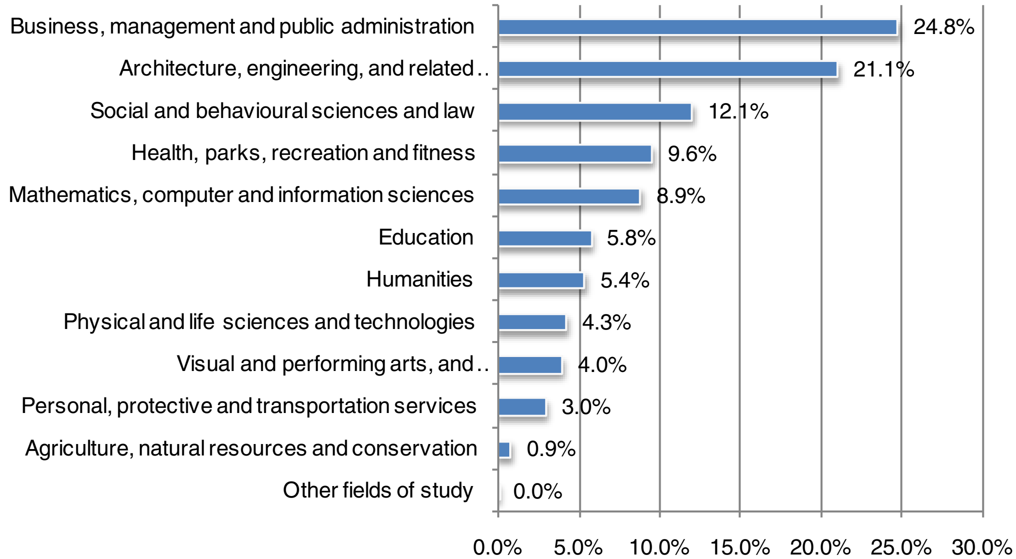
Source: Statistics Canada, Census of Population: 2006

The following figure provides a post secondary education profile for the Town of Richmond Hill by major field of study. Based on 2006 results, the fields of study with the highest concentration of graduates in the Town include:

- Business, management and public administration (24.8%)
- Architecture, engineering, and related technologies (21.1%)
- Social and behavioural sciences and law (12.1%)

A concentration of graduates in these fields also provides insight into the types of skills and occupational focus of the local labour force, which is discussed in a later section of the report. This information can also be seen as an indicator of the types of businesses that may be located in the community, thus the type of services and location requirements that may need to be addressed as part of the positioning of the Town's employment lands, and in particular the centres and corridors. These centres and corridors have significant development and redevelopment potential that can provide opportunities for the types of occupations and skill found in the local labour force.

Figure 8 – Major Field of Study, Richmond Hill: 2006



Source: Statistics Canada, Census of Population: 2006

2.1.6 Household & Personal Income

Figures 9 and 10 provide an understanding of the current personal and household income levels in the Town. As these results suggest, there is a higher proportion of individuals (21.9%) who earn an annual income of greater than $60,000 and over, when compared to the Region's at 21.3% and the province at 17.3%. These results may also suggest an opportunity to drive a higher level of consumer spending in the community in the form of higher end retailing and entertainment opportunities and may also support further investment in the Town's downtown as a higher end destination retail experience.

Figure 9 reveals the average private household incomes in 2005 for the Town as compared to the Region and the Province. York Region records a higher average household income of $103,420 when compared to the Town average of $97,577 and the provincial average of $77,967.

Figure 9 – Personal Income, Richmond Hill, Region of York, Ontario: 2005

	Richmond Hill		York		Ontario	
Total income in 2005 of population 15 years and over	130,240		709,550		9,819,420	
With income	122,880		671,930		9,340,020	
Under $1,000	7,680	6.3%	36,185	5.4%	405,540	4.3%
$1,000 to $2,999	5,470	4.5%	27,585	4.1%	332,410	3.6%
$3,000 to $4,999	4,860	4.0%	24,680	3.7%	310,580	3.3%
$5,000 to $6,999	4,850	3.9%	24,900	3.7%	332,820	3.6%
$7,000 to $9,999	6,960	5.7%	36,995	5.5%	536,680	5.7%
$10,000 to $11,999	5,060	4.1%	26,540	3.9%	387,130	4.1%
$12,000 to $14,999	7,195	5.9%	37,290	5.5%	558,640	6.0%
$15,000 to $19,999	9,135	7.4%	50,410	7.5%	832,550	8.9%
$20,000 to $24,999	7,290	5.9%	42,785	6.4%	684,095	7.3%
$25,000 to $29,999	6,275	5.1%	36,520	5.4%	613,670	6.6%
$30,000 to $34,999	6,640	5.4%	39,355	5.9%	618,315	6.6%
$35,000 to $39,999	5,755	4.7%	35,800	5.3%	559,150	6.0%
$40,000 to $44,999	5,470	4.5%	33,015	4.9%	490,075	5.2%
$45,000 to $49,999	4,945	4.0%	29,000	4.3%	412,215	4.4%
$50,000 to $59,999	8,365	6.8%	47,610	7.1%	649,410	7.0%
$60,000 and over	26,925	21.9%	143,260	21.3%	1,616,730	17.3%
Median income $	27,038		28,829		27,258	
Average income $	40,522		42,463		38,099	

Source: Statistics Canada, Census of Population: 2006

A historical review of private household income levels also suggests that the Town is experiencing an increase in the number of high income households in the community. In 2005, the number of private households earning in excess of $100,000 comprised 38.1% of all households, an increase of 6.6 % from 2000 levels.

Figure 10 – Household Income [private households] Richmond Hill, Region of York, Ontario: 2005

	Richmond Hill		York		Ontario	
Household income in 2005 of private households	51,000		275,680		4,555,025	
Under $10,000	2,115	4.1%	8,705	3.2%	198,235	4.4%
$10,000 to $19,999	2,790	5.5%	12,865	4.7%	398,830	8.8%
$20,000 to $29,999	3,445	6.8%	16,355	5.9%	408,130	9.0%
$30,000 to $39,999	3,670	7.2%	19,470	7.1%	447,475	9.8%
$40,000 to $49,999	3,660	7.2%	19,430	7.0%	419,525	9.2%
$50,000 to $59,999	3,485	6.8%	19,025	6.9%	385,555	8.5%
$60,000 to $69,999	3,410	6.7%	18,930	6.9%	356,990	7.8%
$70,000 to $79,999	3,165	6.2%	19,200	7.0%	324,835	7.1%
$80,000 to $89,999	3,115	6.1%	18,830	6.8%	282,910	6.2%
$90,000 to $99,999	2,705	5.3%	16,565	6.0%	238,720	5.2%
$100,000 and over	19,435	38.1%	106,295	38.6%	1,093,810	24.0%
Median household income $	78,976		81,928		60,455	
Average household income $	97,577		103,420		77,967	

Source: Statistics Canada, Census of Population: 2006

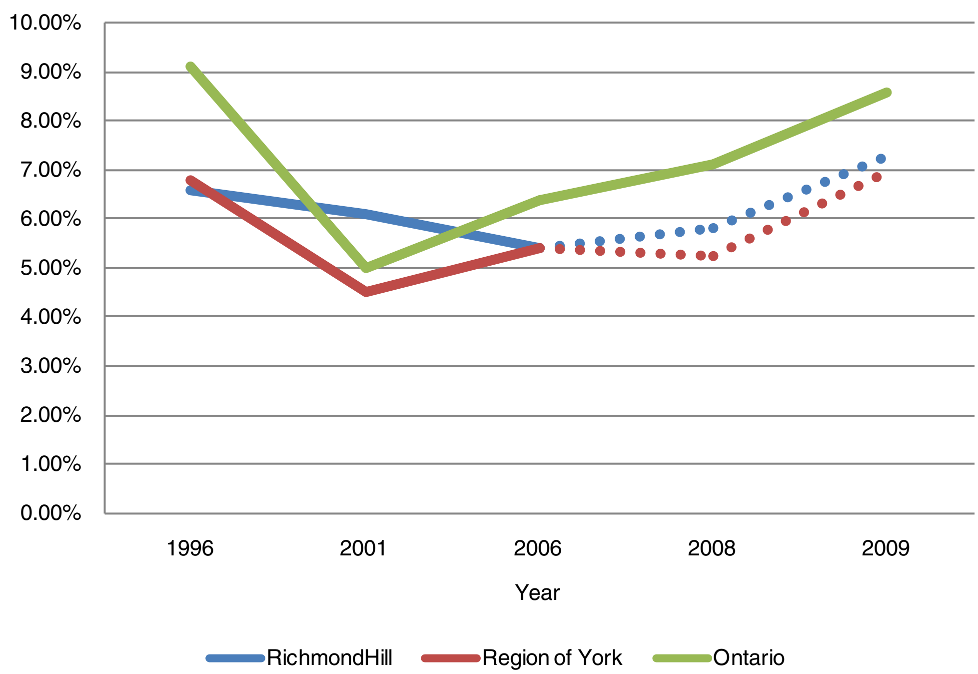
2.2 Labour Force Profile

Another indicator of a community's economic health is labour force performance. This can mean labour force growth and industry concentration as well as unemployment levels and occupational characteristics.

From 2001 to 2006 the size of the resident or total labour force in Richmond Hill increased by 23.8% to 88,840 persons, which would suggest a strong local economy. Both the Town and the Region recorded an average unemployment rate of 5.4% in 2006, compared to the provincial average of 6.4%. Unemployment figures obtained from Manifold Data Mining suggests that as of November 2009, the Town's unemployment rate had risen to 7.3 percent. Unemployment levels have also increased across the Region but to a lesser degree than Richmond Hill. The higher rate of unemployment may be attributed to the downturn in the global economy and related impact this has had on service industries such as finance and insurance and business sectors.

Prior to the global downturn, the Town's unemployment rate had been decreasing steadily since 1991 which suggests that the Town was at or approaching full employment. While the increase in the unemployment rate in the past year is a concern, this may provide some relief to local and regional employers who have experienced a tight labour pool market in recent years.

Figure 11 – Labour Force 15 years and over, Unemployment Rates, Richmond Hill, York Region and Ontario: 1996 -2006



Source: Statistics Canada, Census of Population: 2006
Note: Predicted Figures for Richmond Hill and York Region were obtained for 2008, 2009 from Manifold Data Mining
Note: Provincial Unemployment Rates were obtained from Statistics Canada Labour Force Survey, November 2008, 2009

2.2.1 Labour Force by Industry

As noted previously, in 2006, the Town's labour force was comprised of 88,840 people, an increase of 23.8% over 2001 levels. Based on information obtained from Manifold Data Mining, the Town has experienced a further increase of 11.6% between 2006 and 2009 bringing its total labour force to 99,141.

Based on 2006 data, Richmond Hill's labour force comprised 18.0% of York Region's total labour force. The 2008 Socio-Economic Study reports that the largest growth in employment from 1991 to 2006 occurred in business services[9] (226.0% growth), accommodation, food and beverage services (180.6% growth), finance and insurance (157.0% growth).

It should be noted that the labour force by industry data is intended to convey the capacity and diversity of the local workforce. In this context, consideration is given to the total workforce by sector, regardless of whether or not the individual is employed or working within the Town of Richmond Hill. The impact of resident employment (jobs in Richmond Hill) and labour flows – the in and out migration of workers to and from other jurisdictions is discussed in detail in other sections of the report. However, York Region's Employment and Industry 2008 report suggests that between 1998 and 2008, local employment levels in Richmond Hill increased by a third, resulting in a 2.9% average annual growth rate over this 10 year period. As of mid-year 2008, the report concludes that there were an estimated 55,200 jobs in the Town, the majority of which (86.0%) are in service-oriented industries, with concentrations in the personal service industries (17.1%), retail (16.7%) and business services (14.9%).

Figure 12 - Labour Force by Industry, Richmond Hill, York Region, Ontario: 2006

	Richmond Hill				York Region		Ontario	
	2009		2006		2006		2006	
All industries	99,141	100%	88,840	100%	492,525	100%	6,473,735	100%
11 Agriculture, forestry, fishing and hunting	74	0.1%	145	0.2%	2,330	0.5%	114,345	1.8%
21 Mining and oil and gas extraction	125	0.1%	170	0.2%	770	0.2%	25,445	0.4%
22 Utilities	752	0.8%	620	0.7%	3,255	0.7%	50,215	0.8%
23 Construction	5,882	5.9%	5,010	5.6%	32,680	6.6%	384,780	5.9%
31-33 Manufacturing	9,236	9.3%	9,450	10.6%	65,310	13.3%	899,670	13.9%
41 Wholesale trade	6,468	6.5%	5,995	6.7%	33,220	6.7%	307,465	4.7%
44-45 Retail trade	11,425	11.5%	10,325	11.6%	56,940	11.6%	720,230	11.1%
48-49 Transportation and warehousing	2,743	2.8%	2,540	2.9%	16,910	3.4%	307,480	4.7%
51 Information and cultural industries	3,593	3.6%	3,220	3.6%	15,060	3.1%	172,795	2.7%
52 Finance and insurance	9,061	9.1%	7,710	8.7%	35,360	7.2%	316,170	4.9%
53 Real estate and rental and leasing	3,598	3.6%	2,910	3.3%	12,370	2.5%	126,440	2.0%
54 Professional, scientific and technical services	13,108	13.2%	11,200	12.6%	50,085	10.2%	471,620	7.3%
55 Management of companies and enterprises	168	0.2%	205	0.2%	1,085	0.2%	8,440	0.1%
56 Administrative and support, waste management & remediation services	3,419	3.4%	3,330	3.7%	20,815	4.2%	314,005	4.9%
61 Educational services	6,771	6.8%	5,900	6.6%	33,540	6.8%	433,485	6.7%
62 Health care and social assistance	8,533	8.6%	6,800	7.7%	37,090	7.5%	611,740	9.4%
71 Arts, entertainment and recreation	1,810	1.8%	1,650	1.9%	10,475	2.1%	140,830	2.2%
72 Accommodation and food services	4,589	4.6%	4,405	5.0%	25,745	5.2%	414,970	6.4%
81 Other services (except public administration)	4,706	4.7%	4,200	4.7%	22,750	4.6%	303,515	4.7%
91 Public administration	3,082	3.1%	3,045	3.4%	16,730	3.4%	350,075	5.4%

Source: Statistics Canada, Census of Population: 2006

The dominance of service sector employment, particularly personal services and retail, in the Town may be a cause for some concern as often this type of employment is characterized as low-paying and low-skilled. This is in contrast to the overall incomes levels observed in the community and the characterization of occupations held by the majority of Richmond Hill residents as discussed in the next section.

2.2.2 Labour Force by Occupation

Figure 13 provides a profile of the concentration of the labour force by occupation[10] for the Town of Richmond Hill, the Region and the Province for 2006. These results demonstrate the diversity of the local labour force with occupations closely mirroring the results associated with the major field of study. While much of the labour force is concentrated in the area of business, finance and administration occupations (22.6%), there are also complimentary levels of concentration in the field of study of business and management and public administration (24.8%). Other areas of high labour force concentration by

[9] Business Service figures include Professional, Scientific, and Technical Services, Management of Companies and Administrative Support

[10] National Occupation Codes (NOCs) are defined in Appendix II

occupation include sales and service occupations (20.9%), management occupations (15.6%) and natural and applied sciences and related occupations (12.3%). The strong percentage of occupations related to the natural and applied sciences field may be attributed to one of the Town's largest employers, Apotex with an employee count of 800.

The concentration of occupations in the broader Region of York resembles the Town's profile, with major concentrations in: business, management and public administration (21.8%), sales and service occupations (21.7%) and management occupations (14.2%). While the Province's share of occupations is similar, we also see a much higher percentage of people in trades, transport and equipment operator occupations reflecting the historic importance of the province's manufacturing sector, in particular the automotive sector.

Using information provided by Manifold Data Mining, figure 13 also provides an understanding of the shifts in the labour force occupations since 2006 and the relative positioning of these skills in the local economy.

The 2009 data shows occupations in trades, transport and equipment operation, occupations unique to primary industry and natural and applied science occupations as decreasing slightly or losing ground to other sectors of the economy.

Figure 13 – Labour Force by Occupation, Richmond Hill, York Region, Ontario: 2006/2009 Predictive

	2009		2006					
	Richmond Hill		Richmond Hill		Region of York		Ontario	
All occupations	99,057		88,840		492,525		6,473,735	
A Management occupations	15,478	15.6%	13,830	15.6%	69,720	14.2%	666,485	10.3%
B Business, finance and administration occupations	22,659	22.9%	20,105	22.6%	107,515	21.8%	1,204,490	18.6%
C Natural and applied sciences and related occupations	11,900	12.0%	10,950	12.3%	45,075	9.2%	451,930	7.0%
D Health occupations	4,572	4.6%	4,130	4.6%	20,980	4.3%	340,685	5.3%
E Occupations in social science, education, government service and religion	8,188	8.3%	7,380	8.3%	40,555	8.2%	546,390	8.4%
F Occupations in art, culture, recreation and sport	3,170	3.2%	2,795	3.1%	14,565	3.0%	200,980	3.1%
G Sales and service occupations	20,988	21.2%	18,555	20.9%	106,925	21.7%	1,522,820	23.5%
H Trades, transport and equipment operators and related occupations	8,433	8.5%	7,605	8.6%	53,685	10.9%	911,250	14.1%
I Occupations unique to primary industry	708	0.7%	755	0.8%	6,780	1.4%	165,085	2.6%
J Occupations unique to processing, manufacturing and utilities	2,960	3.0%	2,725	3.1%	26,730	5.4%	463,610	7.2%

Source: Statistics Canada, Census of Population: 2006

2.2.3 Growth in the Creative Class

An essential component to determining a community's level of innovation or creativity is an understanding of the degree to which a workforce is skilled or specialized. These types of occupations are often referred to as the creative occupations or the 'creative class' of workers.

In the book The Rise of the Creative Class, Professor Richard Florida details the significant societal and economic impact that the creative class of worker is having on both local and international economies and the shifts being made to attract and retain this type of workforce, as more and more economic developers realize the importance of this aspect of a workforce. He defines the creative class as including people in:

- **science and engineering,**
- **architecture and design,**
- **education,**
- **arts, music and entertainment**

He also includes the broader group of creative professionals in:

- **business and finance,**

- **law, and**
- **health care and related fields.**

In the 2009 report, *Ontario in the Creative Age*, Florida pushes this concept further by positioning creative occupations in the context of four additional broad kinds of work.

- ***Creative occupations*** – the growing number of workers who are paid to think. These include scientists and technologists, artists and entertainers, and managers and analysts.
- ***Routine-service occupations*** - where the work involves little autonomy occupations and is focused on the delivery of services, for example, food-service workers, janitors and clerks;
- ***Routine-physical occupations*** - consisting of people who use physical skills and carry out repetitive tasks (for example, tradespersons, mechanics, crane operators and assembly line workers);
- **Routine-resource occupations** - including mining and forestry.

What is apparent from the creative occupational categories is their ability to cut across industry sector lines in a way that can impact both traditional and emerging industries and the degree to which these occupations translate to a well paid and highly skilled workforce. This is particularly true if one considers the skills needed for creative occupations are more heavily weighted towards **analytical**[11] **and social intelligence**[12] skills, both of which play a significant role in a knowledge driven economy.

Richard Florida famously coined the 'Three-T's' of Technology, Talent and Tolerance to define the conditions for success in the creative economy. Recently he added a fourth T - Territory to reflect the critical role that *quality of place* plays to driving a successful creative economy. His research demonstrates that *where* people choose to live is as important a decision to them as their job, personal finances and choice of spouse or partner. Creative people are highly mobile and able to make these kinds of choices and that quality of life questions including cost of living, access to cultural amenities and entertainment options, natural beauty and others are magnets that attract creative people to a town, city or region.

Paradoxically, in a global world, place has become more not less important. People want to live in distinctive places with unique characters and identities. In this context, Richmond Hill should be seen as a community with great history, an emerging cultural scene, with rich landscapes and natural assets, providing easy commutes to the larger urban downtown of Toronto and as well as other suburban communities of the GTA.

As previously indicated, the Town of Richmond Hill has a high concentration (22.9%) of labour in business, finance and administration. However, if consideration is given to the broader 'creative economy' occupations, 48.4% of the Town's labour force is in fact employed in creative class occupations. This compares to 41.8% at the regional level and 34.7% at the provincial level (figure 14).

Given the generally higher wages, specialized skills, and innovative capacities of these individuals, the growth and presence of this class of worker has substantial implications for the city's economic development strategy in terms of the way the Town should be marketing and promoting the Town, target industry opportunities, and the quality of place experiences that are needed to attract and retain these workers.

[11] Examples of occupations that require the highest level of **analytical thinking skills** include surgeons, biomedical engineers, dentists, accountants, plumber, art directors etc.
[12] Examples of occupations that require the highest level of **social intelligence skills** include psychiatrists, chief executives, marketing managers, lawyers, sports coach, film directors etc.

Figure 14 – Labour Force by Occupational Category, 2006

Source: Statistics Canada, Census of Population: 2006

Figure 15 illustrates the breakdown of creative occupations within the Town's broader creative economy. These results suggest that the greatest concentration of workers are employed in professional occupations in natural and applied sciences (18.7%), followed by business and finance (10.9%) and specialist managers (10.8%).

Figure 15 – Creative Occupations by Sub-Occupation, Richmond Hill, Region of York and Ontario, 2006

Creative Occupations

	Richmond Hill		York		Ontario	
Total	43,030	100%	205,910	100%	2,246,475	100%
A0 Senior management occupations	1,770	4.1%	10,335	5.0%	82,475	3.7%
A1 Specialist managers	4,665	10.8%	22,915	11.1%	193,350	8.6%
A2 Managers in retail trade, food and accommodation services	3,395	7.9%	16,295	7.9%	182,695	8.1%
A3 Other managers, n.e.c.	3,995	9.3%	20,175	9.8%	207,965	9.3%
B0 Professional occupations in business and finance	4,690	10.9%	21,125	10.3%	182,195	8.1%
B1 Finance and insurance administration occupations	1,705	4.0%	8,040	3.9%	82,185	3.7%
C0 Professional occupations in natural and applied sciences	8,060	18.7%	30,415	14.8%	266,690	11.9%
C1 Technical occupations related to natural and applied sciences	2,895	6.7%	14,655	7.1%	185,240	8.2%
D0 Professional occupations in health	1,425	3.3%	6,195	3.0%	71,645	3.2%
D1 Nurse supervisors and registered nurses	1,025	2.4%	5,620	2.7%	102,330	4.6%
D2 Technical and related occupations in health	895	2.1%	4,870	2.4%	76,580	3.4%
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	2,090	4.9%	10,840	5.3%	151,710	6.8%
E1 Teachers and professors	3,625	8.4%	19,870	9.6%	260,435	11.6%
F0 Professional occupations in art and culture	965	2.2%	4,945	2.4%	88,355	3.9%
F1 Technical occupations in art, culture, recreation and sport	1,830	4.3%	9,615	4.7%	112,625	5.0%

Source: Statistics Canada, Census of Population 2006

One of the concerns however, with using only occupational data to assess the impact of the creative economy, is that while the individual attached to that job may reside in a select community, they may not work in that community. This is particularly relevant when consideration is given to the degree to which workers in the Town of Richmond Hill commute to other locations in the region, in particular Toronto. Simply put that while the Town provides a lifestyle choice for workers, the City of Toronto often provides the employment opportunity. However, the rise in importance of the creative economy both in terms of business development and occupational growth made provide an opportunity to re-capture some portion of these workers. This will require in part an effort on the part of Richmond Hill to ensure that it is providing a community – housing, amenities, recreation, entertainment, shopping – that will appeal to this type of worker. The recent opening of the Richmond Hill Centre for the Performing Arts provides the town with a great opportunity to better leverage local assets in the attraction of the creative class of worker.

To effectively gauge the scale and impact of the creative economy, consideration must be given to both **occupational data** and **business establishments** at a local or even a regional level. A further distinction can then be made between creative economy elements and the broader economy as a method to demonstrate both scale and impact. This in turn will allow for a better understanding on the part of economic development professionals and local decision makers as to the opportunities and challenges facing this aspect of their business community.

Relying on our related work with the creative economy and a review of secondary sources, we can define creative businesses and enterprises as including:

Advertising	**Marketing**
Architecture	**Museums**
Artists	**Music**
Business Consulting	**Performing Arts**
Design	**Photographic Services**
Education	**Public Relations**
Engineering	**Publishing**
Film	**Radio + Television**
Games	**Web + Software**
Heritage	

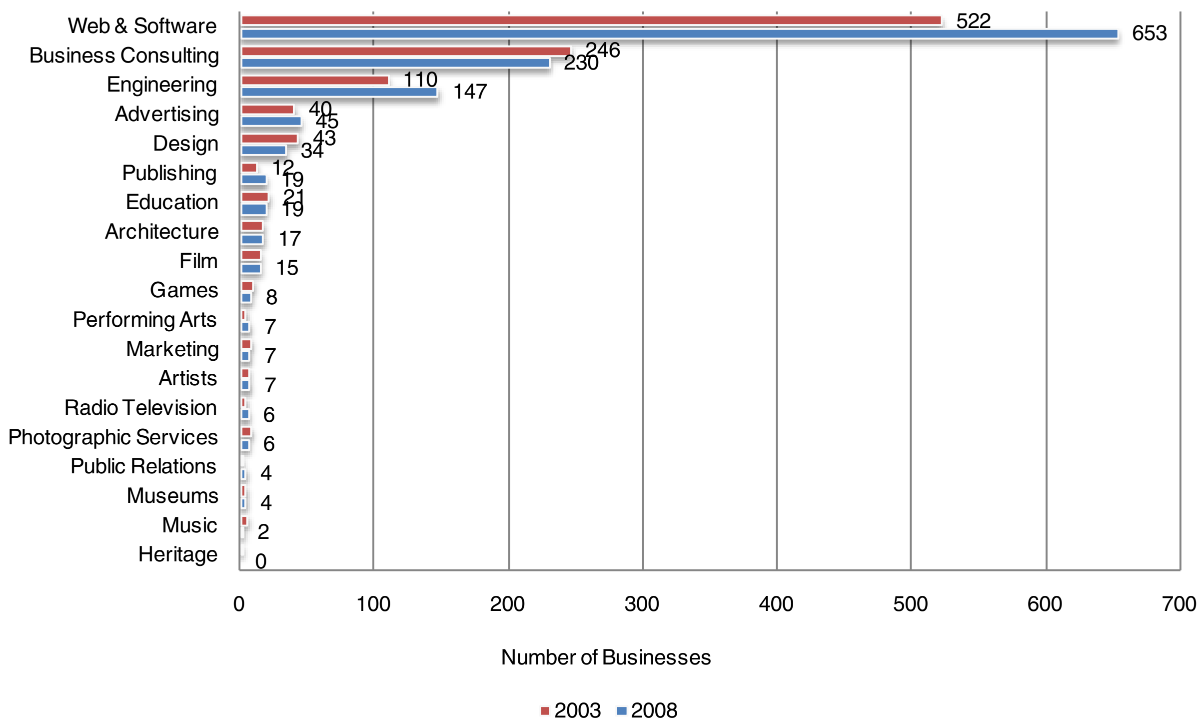
Based on this definition, there are approximately 1,000 creative business establishments in the Town with 53.1% of those firms concentrated in web and software development followed by engineering.

Figure 16 illustrates the pattern of creative industry business growth for Richmond Hill between 2003 and 2008. The greatest gain in the number of creative businesses in Richmond Hill occurred in the web & software sector, with a net gain of 131 businesses over the five year span. Figure 17 that follows displays the concentration of creative business establishments in the Town of Richmond Hill as compared to the Region as a whole. The data suggests Richmond Hill has a higher share of businesses in web & software (53.1%) as compared to the Region (44.2%). The Town has only a slightly lower concentration of firms in business consulting (18.7%) as compared to the Region (21.3%), but an identical concentration of engineering firms (12.0%) to the Region.

These results suggest an opportunity for the Town to promote the community as a growing creative cluster for IT operations but also more generally as it relates to a broad range of arts, cultural and professional service firms e.g.:

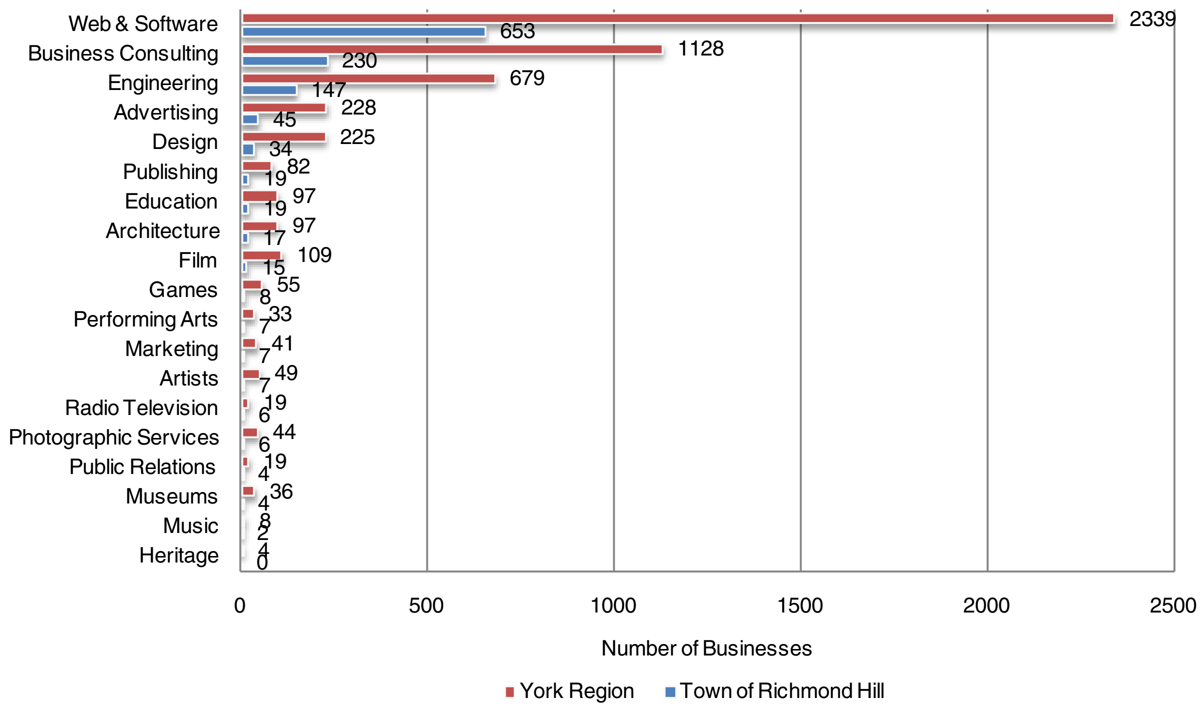
- engineering, architecture and business consulting,
- advertising, marketing, publishing; and
- performing arts, music, artists, film

Figure 16 – Number of Creative Industries, Town of Richmond Hill (2003 & 2008)



Source: Statistics Canada, Canadian Business Patterns Data, 2003 & 2008

Figure 17 – Number of Creative Industries, Town of Richmond Hill & York Region (2008)



Source: Statistics Canada, Canadian Business Patterns Data, 2008

2.2.4 Labour Force Work Flow Patterns

The need to balance both population and employment growth is identified as a cornerstone of the Town's economic policies. In addition, the need for compliance between the Town, Region and Provincial planning objectives makes the provision of live-work opportunities in the Town an imperative for future economic sustainability. This has been recognized by the Town, with live-work opportunities being sought outside of existing employment lands.

However, the challenges facing the community in the attraction of high value employment is not without its challenges. The findings presented in the Economic Policy Review: Stage 1 Background Research and Policy Report suggests the Town is a net exporter of labour, as there are more employed residents within the community than there are jobs. While this is not surprising given the Town's proximity to the City of Toronto, the net number of Richmond Hill residents that commute daily to employment opportunities outside of the community is significant at 24,300 jobs.[13]

The greatest amount of labour exported on a daily basis to other communities is in the Finance and Insurance sector (4,755), followed by Professional, Scientific and Technical services (4,065) and Construction (3,230). This represents not only Richmond Hill's creative economy employment but also its high value employment.

[13] This number is calculated by the difference between the number of resident employed, which is approximately 85,400 jobs and the total place of work employment at 61,000 jobs.

Within the Finance and Insurance sector, the most significant net exporter of labour was in the subsector of Credit intermediation and related activities[14], where exported labour accounts for 2,790 employees, or 58.7% of the employed Finance and Insurance labour force. The significant loss of labour to establishments outside of the Town may be attributed in part, to the presence of companies such as American Express (AMEX Canada Inc.) and TD Waterhouse Inc. in nearby Markham, as well as the significant concentration of financial services operations in the City of Toronto. However, Markham's ability to attract this form of investment, as compared to Richmond Hill has likely contributed in part to the increase in workers in this sector (Finance, Insurance and Real Estate) in Richmond Hill which jumped 48.3% between 2007 and 2008.[15]

The Professional, Scientific and Technical services sector exports 4,065 workers. This may be attributed in part due to the strong presence of two large advertising firms in Vaughan and Markham, Showbiz Marketing and The Linkage Group, which together employ 1,500 workers. .

Exported employment in the Construction sector was most prevalent in the speciality trade contractor subsector, where exported labour accounted for 2,620 employees. This trend can be attributed to the strong residential housing market throughout the Region of York and the broader Greater Toronto Area and is consistent with the experience in communities across the GTA.

While the Town exports a significant share of its labour force across a broad range of industry sectors, there are in fact a number of opportunities to re-capture this employment in the local community. The Economic Policy Review report, suggests that the Town's central location should position it to attract a higher percentage business and related[16] services, where a significant amount of leakage of labour to other communities is occurring. Opportunities to expand the Town's retail service base in order to service the needs of the Town's local population are also available, as spending levels of Richmond Hill residents exceeds the sales of local businesses. It is anticipated that this expansion will be focued on centres and corridors and not in the existing employment lands.

This is particularly relevant as the town undertakes its revitalization efforts in the downtown. The recent Downtown Design and Land Use Strategy proposes building on the area's inherent characteristics and strengths "to be a pedestrian-oriented compact and mixed use centre that is enhanced by a high quality public realm, vibrant and animated urban environments and the highest quality of building design"[17]. Trends observed in other communities, suggests the opportunity to have the downtown become more of a destination for residents and visitors by attracting higher quality boutique style shopping, home furnishing stores, restaurants, wine bars, jazz clubs etc. However, more analysis is required to fully understand how best to approach the merchandising and attraction of business investment in the downtown.

[14] This subsector comprises establishments primarily engaged in lending funds raised from depositors or by issuing debt, and establishments that facilitate the lending of funds or issuance of credit by engaging in such activities as mortgage and loan brokerage, clearinghouse and reserve services, and cheque-cashing services.
[15] York Region Employment & Industry, 2008
[16] Business Services: Professional, Scientific & Technical Services and Management, Administration and Other Support Services
[17] Town of Richmond Hill , Recommendations Report, Richmond Hill Design & Land Use Strategy, November 2006

Figure 18 – Labour Flow Analysis, Labour Force 15 Years and Over by Industry, Town of Richmond Hill, 2006

	Labour Force	Jobs	Net exp(-)/imp(+) of labour
11 Agriculture, forestry, fishing and hunting	135	70	-65
21 Mining and oil and gas extraction	165	85	-80
22 Utilities	605	95	-510
23 Construction	4,860	1,630	-3,230
31-33 Manufacturing	9,145	6,525	-2,620
41 Wholesale trade	5,800	4,990	-810
44-45 Retail trade	9,725	7,180	-2,545
48-49 Transportation and warehousing	2,495	1,180	-1,315
51 Information and cultural industries	3,090	2,230	-860
52 Finance and insurance	7,505	2,750	-4,755
53 Real estate and rental and leasing	2,860	1,660	-1,200
54 Professional, scientific and technical services	10,815	6,750	-4,065
55 Management of companies and enterprises	205	115	-90
56 Administrative and support, waste management and remediation services	3,100	1,655	-1,445
61 Educational services	5,685	3,730	-1,955
62 Health care and social assistance	5,995	4,635	-1,360
71 Arts, entertainment and recreation	1,545	1,090	-455
72 Accommodation and food services	4,095	3,470	-625
81 Other services (except public administration)	4,030	2,710	-1,320
91 Public administration	2,910	1,355	-1,555

* Labour force data by industry from REDDI refers to 'employed' labour force, where labour force by industry from Statistics Canada census data refers to both employed workers and unemployed workers who were employed in the industry after January 1, 2005

Source: Statistics Canada: REDDI, 2001 and 2006

2.2.5 Labour Force by Place of Work

Having considered the range of employment that is exported or leaving Richmond Hill daily, it is also important to understand the pattern of commuting that is impacting the Town. Figure 19 illustrates the commuting patterns, both in and out of the community, of the employed resident population greater than 15 years of age. In total Richmond Hill experiences a net outflow of 22,010 workers, while there are 14,895 residents who live and work in the Town, representing 21.7% of the Town's workforce.

Most significant is the proportion of residents (41.8%) that commute to Toronto on a daily basis for employment, while a further 28.8% of the workforce commutes within York Region, with the remaining 4.3% commuting to Mississauga and Brampton. There is also significant number of people (31,670) that commute into Richmond Hill to work, with the largest portion of these coming from Toronto (22.5%), Markham (13.4%) and Vaughan (13.4%).

Figure 19 - Commuting Flows of Employed Labour Force, Town of Richmond Hill, 2006

Outflow (Place of Residence - Richmond Hill	Total	% of Commuting Workforce
Place of Work	68,575	100.0%
Toronto	28,695	41.8%
Richmond Hill	14,895	21.7%
Markham	8,775	12.8%
Vaughan	7,735	11.3%
Mississauga	2,645	3.9%
Aurora	1,355	2.0%
Newmarket	1,275	1.9%
Brampton	835	1.2%
Whitchurch-Stouffville	385	0.6%
King	245	0.4%
Pickering	215	0.3%
Ajax	165	0.2%
Caledon	115	0.2%
East Gwillimbury	115	0.2%
New Tecumseth	90	0.1%
Whitby	85	0.1%
Hamilton	80	0.1%
Oakville	80	0.1%
Waterloo	75	0.1%
Burlington	75	0.1%
Bradford West Gwillimbury	70	0.1%
Oshawa (CY)	65	0.1%
Georgina (T)	60	0.1%
Barrie (CY)	55	0.1%
Ottawa (C)	50	0.1%
Montréal (V)	50	0.1%
Peterborough (CY)	50	0.1%
London (CY)	40	0.1%
Guelph (CY)	35	0.1%
Uxbridge (TP)	35	0.1%
Cambridge (CY)	25	0.0%
Clarington (MU)	25	0.0%
Milton (T)	20	0.0%
Innisfil (T)	20	0.0%
Orangeville (T)	20	0.0%
Greater Sudbury / Grand Sudbury (C)	20	0.0%

Source: Statistics Canada, Census of Population: 2006

Inflow (Place of Work - Richmond Hill)	Total	% of Commuting Workforce
Place of Residence	46,565	100.0%
Richmond Hill	14,895	32.0%
Toronto	10,500	22.5%
Markham	6,255	13.4%
Vaughan	3,475	7.5%
Newmarket	1,865	4.0%
Aurora	1,655	3.6%
Georgina	810	1.7%
Mississauga	695	1.5%
Brampton	600	1.3%
Whitchurch-Stouffville (T)	580	1.2%
Whitby	540	1.2%
Pickering	485	1.0%
King	480	1.0%
Barrie	435	0.9%
East Gwillimbury	415	0.9%
Uxbridge	360	0.8%
Oshawa	325	0.7%
Ajax	315	0.7%
Bradford West Gwillimbury	290	0.6%
Caledon	195	0.4%
Innisfil	190	0.4%
Scugog	140	0.3%
New Tecumseth	125	0.3%
Clarington	120	0.3%
Milton	105	0.2%
Kawartha Lakes	100	0.2%
Oakville	90	0.2%
Brock	85	0.2%
Hamilton	80	0.2%
Halton Hills	75	0.2%
Burlington	70	0.2%
Oro-Medonte	60	0.1%
Adjala-Tosorontio	50	0.1%
Waterloo	40	0.1%
Essa	35	0.1%
Severn	30	0.1%
Springwater	25	0.1%
Prince Edward	20	0.0%
Orillia	20	0.0%
Guelph	20	0.0%
Collingwood	20	0.0%
Cambridge	20	0.0%

Source: Statistics Canada, Census of Population: 2006

Source: Statistics Canada, Census of Population: 2006

Reflecting on the results provided in figure 18 together with figure 19 suggests that a significant portion of out-flow of employment will be difficult to re-capture. For instance, almost 5,000 employees leave the community daily for work in the finance and insurance sector. Knowing that the City of Toronto functions as a major hub for financial and insurance sector explains the degree of outflow in that sector. This is further substantiated by the high proportion of people who commute to Toronto for employment.

The same scenario emerges for professional, scientific and technical services. There are a high proportion of workers that commute out of the community daily. Many of these workers are employed in professional and technical occupations associated with finance and insurance and applied research and technical support. The large university presence in the city of Toronto coupled with the bio-medical and biotechnology strengths in the city with the large medical community will be difficult to replicate in Richmond Hill.

In a roundtable discussion associated with the development of the new Official Plan, residents of the Town see the benefit of being able to work and live in Richmond Hill. They also believe that there is considerable opportunity to attract business and investment that can better capitalize on the skills and talent that resides in the community thus enabling the Town to reduce the degree to which residents need to out-commute for employment.

2.3 Industry Sector Analysis

2.3.1 Location Quotients Analysis

In order to determine the degree of business and industrial specialization, thus the economic diversity that may be developing in the Town of Richmond Hill, location quotients ("LQ's") have been calculated to identify and measure the concentration of industry/business activity by major sector and sub-sector.

Location Quotients are a commonly used tool in local/regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purposes of this study we have calculated location quotients that compare the Town of Richmond Hill industry sector concentration relative to the Province of Ontario. The province is used in this comparison, rather that the region, because the regional economy is relatively similar and may not result in identifiable comparative advantages.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region, the Province of Ontario, which may equate to a competitive advantage. Location Quotients equal to 1.0 for a given sector suggest that the Town of Richmond Hill has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 indicates a concentration of economic activity that is less than the overarching region and may point to a gap or disadvantage in attracting this form of business or industry.

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

Definitions for individual sectors are based on the North American Industrial Classification System (NAICS) and are provided in Appendix I to this report.

Based on the 2006 census data, the industry concentration in Richmond Hill relative to the Province of Ontario reveals the highest concentration of labour in the following sectors:

- Finance and Insurance - **LQ 1.78** (2009 LQ = 1.25)[18]
- Professional, Scientific and Technical Services – **LQ 1.73** (2009 LQ = 1.32)
- Wholesale Trade – **LQ 1.42** (2009 LQ = .92)
- Information and Cultural Industries – **LQ 1.36** (2009 LQ = 1.08)

[18] Note - 2009 LQ results are derived from data provide d by Manifold Data Mining

For the purposes of this analysis, 2009 Manifold Data Mining information is also reported. These results suggest that Richmond Hill has lost ground against the Province since 2006. As these results are based on a predictive model rather than actual results, the performance of these sectors bear close attention by the Town as it may represent a loss of employment as well as a loss of business investment.

Figure 20 - Resident Labour Force by Industry, Location Quotients, Richmond Hill: 2001, 2006 & 2009

All industries	2009 LQ * Predictive	2006 LQ	2001 LQ	Labour Force Level * Based on 2006 LQ Values
53 Real estate and rental and leasing	1.51	1.68	1.53	High
54 Professional, scientific and technical services	1.32	1.73	1.78	High
52 Finance and insurance	1.25	1.78	1.71	High
21 Mining and oil and gas extraction	1.23	0.49	0.32	Low
62 Health care and social assistance	1.19	0.81	0.83	Medium
81 Other services (except public administration)	1.13	1.01	0.86	Medium
51 Information and cultural industries	1.08	1.36	1.23	High
61 Educational services	1.07	0.99	1.05	Medium
22 Utilities	1.01	0.90	1.02	Medium
55 Management of companies and enterprises	0.99	1.77	2.49	High
72 Accommodation and food services	0.97	0.77	0.75	Medium
44-45 Retail trade	0.94	1.04	1.07	Medium
71 Arts, entertainment and recreation	0.94	0.85	0.89	Medium
23 Construction	0.93	0.95	0.96	Medium
91 Public administration	0.93	0.63	0.62	Low
41 Wholesale trade	0.92	1.42	1.61	High
56 Administrative and support, waste management and remediation services	0.83	0.77	0.91	Medium
48-49 Transportation and warehousing	0.81	0.60	0.66	Low
31-33 Manufacturing	0.65	0.77	0.71	Medium
11 Agriculture, forestry, fishing and hunting	0.14	0.09	0.11	Low

Source: Statistics Canada, Census of Population: 2006

Note: 2009 Predictive LQs were obtained through the use of Manifold Data Mining Services

Note: LQ Values are defined as: Very High if over 5.0, High if between 1.25 and 5.0, Medium if 0.75 to 1.25 and Low if less than 0.75

The industry location analysis presented in the Town's Economic Policy Review discussion paper, suggests the Town has outperformed the broader (Greater Toronto Area and Hamilton) region in terms of concentration of employment, in wholesale trade, business and related services and most notably professional, scientific and technical services. When compared to York Region, the Town has a higher concentration of its labour force in information and cultural industries and health care than the Region as a whole.

The results of the location quotient analysis suggests that Richmond Hill's labour force is highly skilled and concentrated in industry sectors that will continue to grow across the Region and the GTA. For this reason, Richmond Hill's workforce will be in high demand making it a challenge to recruit and retain the workforce in the community with the attraction of business and industry to hire this workforce. The discussion that follows profiles the Town's business base providing better understanding of the types of business and industry the Town is attracting.

2.3.2 Business Pattern Assessment

Statistics Canada's Canadian Business Patterns Data provides a record of business establishments by industry and size. Sources of information are updates from the Statistics Canada survey program and the Business Number registration source collected from the Canada Revenue Agency (CRA). The business data collected for the Town of Richmond Hill includes all local business which meets at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of $30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by “Total”, “Indeterminate” and “Subtotal” categories. The establishments in the “Indeterminate” 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 patterns Data uses CRA as a primary resource in establishments counts; therefore, businesses without a Business Number or indicating annual sales less than $30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.[19]

A detailed review of the business patterns data for the period between 2003 and 2008 for the Town of Richmond Hill provides an understanding of the growth or decline of businesses in the Town over the last 5 years and the key characteristics that define Richmond Hill’s business community. When combined with the broader industry analysis, the Business Patterns information will assist in refining sector opportunities for the Town of Richmond Hill and provide an indication of where the priorities of the town should lie, especially with regards to program development and delivery, and strategic planning.

In contrast to the labour force discussion, business growth in a community is also a better measure for determining the capacity of a community to support and sustain a business operation either by the availability of a needed workforce, accessibility to market, or the ability to move goods and people as part of day to day operations.

Based on information provided by Richmond Hill there is a strong pattern of business growth over the 2003-2008 period. Figure 21 provides an understanding of the total number of local business establishments (6,632) based on the number of employees and the change that has occurred over this 5 year period.

Figure 21 - Business Formation, by size of employment, Richmond Hill & York Region: 2003 - 2008

	Richmond Hill				York Region			
	2008	2003	Net Change	(Percentage Change 03 - 08)	2008	2003	Net Change	(Percentage Change 03 - 08)
Subtotal	6,632	5,323	1,309	24.6%	37,583	31,318	6,265	20.0%
1-4	4,434	3,009	1,425	47.4%	22,585	16,301	6,284	38.5%
5-9	1,045	895	150	16.8%	6,575	5,509	1,066	19.4%
10-19	574	652	(78)	-12.0%	4,045	4,134	(89)	-2.2%
20-49	359	503	(144)	-28.6%	2,634	3,264	(630)	-19.3%
50-99	142	166	(24)	-14.5%	983	1,243	(260)	-20.9%
100-199	50	68	(18)	-26.5%	465	563	(98)	-17.4%
200-499	23	26	(3)	-11.5%	226	244	(18)	-7.4%
500 +	5	4	1	25.0%	70	60	10	16.7%

Source: Statistics Canada, Canadian Business Patterns Data: 2003 & 2008

[19] It should also be noted that expanded abilities to identify ‘inactive’ business units since June 2008 have resulted in a greater number of establishments removed from June to December 2008. This may also affect the establishment counts from 2003 to 2008.

The number of business establishments in the Town increased by 24.6% (1,309 business establishments), while the Region experienced a 20.0%[20] increase. However, much of this growth is concentrated in small business operations (the percentage increase in establishments with 1-4 employees) which increased 47.4% (1,425 business establishments) over 2003 levels.

Business establishments in Richmond Hill are also dominated by companies and enterprises that employ less than 5 people with 82.6% of all business in Town having less than 10 employees. By employment size, the most notable increases between 2003 and 2008 have come from establishments employing 1-4 people, which grew from 3,009 firms to 4,434 firms, over the five year period. These results have significant implications for the economic development, particularly as it relates to ensuring the availability and suitability of available building or rental options for these businesses.

In supporting future growth and investment in the city, it is essential to understand and support the business needs of small and medium sized businesses in the local economy. This is particularly relevant in light of research and documentation that suggests that an overwhelming percentage of new investment is derived from companies already located in a community.

Equally important is what appears to be the loss of small and medium sized businesses over this five year period with the most notable drop having impacted businesses in the 20-49 employee range followed closely by businesses in the 100-199 employee range. This same trend however, is being experienced at the regional level particularly as it relates to businesses in the 20-49 employee range. The Region's Employment and Industry Review 2008 suggests that while the Town's business mobility level[21] was moderate, a large ratio of small businesses were reporting to be closing/and or relocating.

Based on 2008 Canadian Business Pattern data, the following sectors comprise the largest proportion of businesses in Richmond Hill (excluding the self employed).

- **Professional, Scientific and Technical Services (21.4% of businesses)**
- **Other Services[22] (14.2% of businesses)**
- **Retail Trade (9.5% of businesses)**
- **Wholesale Trade (8.9% of businesses)**
- **Construction (8.5% of businesses)**

It should be noted that high concentration of businesses in other services, retail trade and construction sector growth can largely be attributed to population growth in the town and surrounding region. Growth in professional scientific and technical services speaks more to a locational advantage for locating in Richmond Hill.

The following sectors experienced the highest rate of growth in the Town of Richmond Hill between 2003 and 2008:

- **Other Services (190.8% increase)**
- **Transportation and Warehousing (70.8% increase)**
- **Mining and Oil and Gas (66.7% increase)**

[20] While this is a net number, we can calculate the total number of businesses in 2008 by subtracting the total number of businesses in 2003.
[21] The rate at which businesses have closed or relocated outside of the survey area as a percentage of total firms
[22] Other Services: This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services etc...

- **Construction (50.0% increase)**
- **Health Care and Social Assistance (29.1% increase)**

As with the results above, growth in other services, construction, and to a lesser degree health care and social services can be attributed to the town's recent population growth. In addition to these results it is worth noting that Finance and Insurance operations increased by 22.8% while Professional, Scientific and Technical service firms increased by 19.6%. This suggests that a better balance is emerging between demands in the local economy and opportunities to attract investment based on strategic location and overall economic growth.

Figure 22 - Business Formation Summary, Richmond Hill & York Region – 2 Digit NAICs: 2003 - 2008

	Richmond Hill				York Region			
	2008	2003	Net Change	(Percentage Change 03 - 08)	2008	2003	Net Change	(Percentage Change 03 - 08)
Total	6,632	5,323	1,309	24.6%	37,583	31,318	6,265	20.0%
11 Agriculture, forestry, fishing and hunting	9	14	(5)	-35.7%	233	261	(28)	-10.7%
21 Mining and oil and gas extraction	5	3	2	66.7%	41	28	13	46.4%
22 Utilities	3	2	1	50.0%	26	28	(2)	-7.1%
23 Construction	567	541	26	4.8%	4,139	4,097	42	1.0%
31-33 Manufacturing	316	324	(8)	-2.5%	2,788	2,871	(83)	-2.9%
41 Wholesale trade	591	567	24	4.2%	3,493	3,294	199	6.0%
44-45 Retail trade	632	552	80	14.5%	3,815	3,359	456	13.6%
48-49 Transportation and warehousing	111	65	46	70.8%	943	632	311	49.2%
51 Information and cultural industries	100	91	9	9.9%	436	391	45	11.5%
52 Finance and insurance	280	228	52	22.8%	1,317	1,190	127	10.7%
53 Real estate and rental and leasing	236	212	24	11.3%	1,419	1,258	161	12.8%
54 Professional, scientific and technical services	1,418	1,186	232	19.6%	6,126	5,194	932	17.9%
55 Management of companies and enterprises	69	93	(24)	-25.8%	601	660	(59)	-8.9%
56 Administrative and support, waste management and remediation services	302	264	38	14.4%	1,876	1,602	274	17.1%
61 Educational services	79	65	14	21.5%	433	299	134	44.8%
62 Health care and social assistance	489	379	110	29.0%	2,280	1,783	497	27.9%
71 Arts, entertainment and recreation	62	58	4	6.9%	390	387	3	0.8%
72 Accommodation and food services	417	353	64	18.1%	2,079	1,726	353	20.5%
81 Other services (except public administration)	945	325	620	190.8%	5,129	2,243	2,886	128.7%
91 Public administration	1	1	-	0.0%	19	15	4	26.7%

Source: Statistics Canada, Canadian Business Patterns Data: 2003 & 2008

2.4 Target Sector Assessment

Using information provided by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) REDDI database, together with the results of the detailed location quotient analysis, labour flow analysis and business patterns data the following sectors (and subsectors) have demonstrated the greatest potential for economic growth in the community. These include:

- **Finance & Insurance**
  - Credit intermediation and related activities
  - Financial investment and related activities
  - Insurance carriers
- **Professional, Scientific and Technical Services**
  - Computer Systems Design
  - Administrative Management and General Management Consulting Services
  - Engineering Services
- **Information and Cultural Industries**
  - Internet Publishing + Broadcasting
  - Computer Systems Design + Related Services

  - Internet Service Providers
- **Health Industries**
  - Pharmaceutical and Medicine Manufacturing//Medical Equipment and Supply Manufacturing
  - Pharmaceutical and Toiletries, Cosmetics Wholesale and Distribution
  - Scientific Research and Development Services

An important consideration in determining the Town's target sector opportunities is the associated growth of these sectors at both the provincial and local level, as well as the emerging trends that will shape these industries in the future. A further consideration is the need to identify where economic development activities should involve investment attraction, workforce attraction, or retention and expansion efforts to ensure their long term sustainability and viability in the community.

The discussion that follows provides a high level understanding of the trends that are impacting the growth of these four sectors.

2.4.1 Finance and Insurance Sector

The finance and insurance sector generally includes industries that are engaged in, or facilitate, financial transactions. Financial transactions include the creation, liquidation, or change in ownership of financial assets. There are four major components to the industry:

- financial intermediation;
- underwriting of annuities and insurance;
- specialized services that facilitate or support financial intermediation, insurance, or employee benefits programs; and
- monetary authorities.

The collapse of the US sub-prime mortgage market in 2007 has had global implications on the finance and insurance industries. The resulting economic turmoil and the 'credit crunch' produced a global contraction of economic activity that is only now beginning to subside, while governments around the world have had to take almost unprecedented actions to rescue failing institutions. While Canada has remained comparatively stable through the recession the global financial sector remains somewhat volatile and the Canadian finance and insurance sector continues to be affected. For example, potential losses in subsets such as consumer and business loans activity present an ongoing risk. Insurance (especially life insurance) industries also remain exposed to the volatile market through their investment portfolios. Though Canada may be in a strong competitive position, global volatility could potentially hamper domestic growth in finance and insurance in the short term as evidenced by announcements of layoffs in the industry.

Ontario, and in particular the Greater Toronto Area has become one of North America's top four financial services hubs. In 2008, the Finance, Insurance and Real Estate sectors accounted for 23% of Ontario's GDP[23]. Preceding the economic downturn, the sector grew notably leading up to 2009, with GDP increasing by 10% from 2005 to 2008[24]. Even through the recession, sector GDP has remained relatively stable, increasing by 1.4% from Q4-2008 to Q2-2009[25]. Industry employment however, has followed a different trend. Though provincial employment in finance and insurance has increased 9.9% from August 2005 to August 2009, sector employment has remained volatile over 2008 and into the first three quarters

[23] Ontario Ministry of Finance, Ontario Economic Accounts, Second Quarter of 2009
[24] Ibid.
[25] ibid

of 2009. From August 2008 to August 2009, the sector shed 6,600 jobs in Ontario[26]. While the finance and insurance sector remains comparatively strong, however, recent volatility in employment due to the credit crunch may limit short term growth.

In 2006, the finance and insurance sector labour force in the Toronto Region was 235,935, 82% of which was within the Toronto CMA[27]. Not surprisingly, the Toronto CMA accounted for 61% of the labour force in finance and insurance across the province in 2006. As the largest city in the country, the City of Toronto functions as the magnet for financial industries and headquarters. The Toronto CMA was home to 7,049 finance and insurance establishments in 2008, or 51% of the total finance and insurance establishments in the Province. The strength of the Toronto CMA and surrounding region is also illustrated in the range of institutions that are headquartered or present there:

- Headquarters for the five largest domestic banks (RBC, TD Canada Trust, Bank of Nova Scotia, BMO, CIBC);
- Headquarters for six top insurance companies, including two among the global top 10;
- 41 foreign banks subsidiaries and branches;
- 119 securities firms; and
- 58 pension fund managers, including five of Canada's largest public pension plans.

Richmond Hill's resident labour force is strong in activities related to credit intermediation (mortgages, central credit unions, financial transaction processing), insurance brokerages, and financial investments (venture capital, portfolio management, and investment advice). Key local employers include the head offices of Insurer's Financial Group and Global Insurance Solutions. These industries service both the general population and the business market so the population and establishment growth in York Region suggests opportunities to expand existing operations into more regional operations. Based on existing labour strengths, there may also be investment attraction opportunities for specific types of financial services or insurance industries. This includes non-banking/financial operations that major institutions could be looking to move out of downtown Toronto or other areas of the GTA. Potential targets could be personal insurance operations of major firms, venture capital groups or divisions, or mortgage activities. In addition, there may be some potential regional or back-office attraction opportunities outside of the 'big five' Canadian banks and major credit unions, as Richmond Hill still provides access to a broad personal and commercial market.

2.4.2 Professional, Scientific and Technical Services

Professional, scientific, and technical services industries are characteristic of the emerging knowledge-based economy. Contrary to Canada's history as a resource-based and manufacturing economy, professional, scientific and technical services industries use human capital as the major input. Industries provide the knowledge and skills of their employees, who in almost all cases have some post-secondary education. Therefore the successes of industries within this sector are almost wholly dependent on the expertise of their workers, not resources, equipment or materials.

The main components of the sector include legal services; accounting; architectural services; engineering services; geophysical surveying and mapping; specialized design services; management, scientific, and technical consulting; scientific research and development; and advertising services.

[26] Statistics Canada, Employment, Earnings, and Hours, 2009
[27] Statistics Canada, 2006 Census of Population

For communities that can attract the highest skilled workers, there is an inherent advantage with regards to the attraction of industries within this sector. Like many of the professional services industries, investment targeting activities are increasingly shifting towards quality of place factors, or providing the right type of environment to attract and retain skilled workers.

In Ontario, the professional and administrative services sector (a combination of NAICS industries 54 and 56) accounted for 8.5% of the province's GDP in 2008, with the GDP expanding by 7.4% from 2005 to 2008[28]. The sector has faced a year-over decline of 2.5% in GDP from Q2-2008 to Q2-2009, but this contraction is moderate compared to goods-producing industries[29]. In terms of employment growth, the provincial professional, scientific, and technical services sector increased by 6.9% to 301,200 from August 2005 to August 2009[30]. As noted however, there has been some contraction of the industry since the on-set of the recession, with a decrease of 3.8% in the provincial workforce from January to August 2009[31].

In July 2009, the Conference Board of Canada forecasted a strong recovery in the sector, but more likely over the longer-term based on decreased demand for services. An immediate factor in this recovery, however, was the spill-over effect of the government's economic stimulus funding, especially in engineering services[32]. Other growth sectors included consulting services focused on cost-cutting or management strategies, as well as external firms that offer very specialized services to business and industry. It is also worth noting that decline is not uniform across the sector, with engineering, advertising, and computer services experiencing output gains over Q4-2008, while legal and accounting industries declined over the same time period.

In 2006, the professional, scientific, and technical services workforce in the Toronto Region was 320,280, with the Toronto CMA having a labour force of 267,625[33]. Overall the Toronto CMA accounted for almost 57% of the total provincial professional, scientific, and technical services labour force. This labour force supported 20,000 establishments in the Toronto CMA including 50 firms with over 500 employees[34]. Many of the largest companies in the world have a presence in the Toronto CMA: SNC-Lavalin, IBM Canada, CGI Group, Deloitte and Touche LLP, Hatch Ltd., PricewaterhouseCoopers LLP, and KPMG LLP. The majority of the larger operations are centrally located in Toronto, but a growing number of firms have established regional offices in order to provide better access to the Ontario market.

Professional, scientific, and technical services industries represent both a retention and expansion target for the Town, and an investment attraction opportunity. From 2001 to 2006, local employment in the sector increased by 10%, slightly outpacing the provincial growth of 9% over the same time frame. Strong growth was experienced within the accounting, architectural/engineering, and specialized design services subsectors. The largest subsector, computer systems design, experienced moderate employment growth. Only management, scientific, and technical consulting; and scientific research and development lost employment between 2001 and 2006.

The high employment concentration in many of the subsectors suggests that there is a competitive advantage for professional, scientific, and technical services companies in Richmond Hill, especially in computer systems design, architectural/engineering design, specialized design, and accounting

[28] Ontario Ministry of Finance, Ontario Economic Accounts, Second Quarter of 2009
[29] ibid
[30] Statistics Canada, Employment, Earnings, and Hours, 2009
[31] ibid
[32] Conference Board of Canada, Canada's Professional Services Industry, July 2009
[33] Statistics Canada, 2006 Census of Population
[34] Toronto Region Research Alliance, 2008

industries. Some of Richmond Hill's main employers include, Compugen, Open Text, PCI Geomatics, Storage Appliance Corporation, and HDR- iTrans Consulting. Presumably, their location in Richmond Hill is due in part to the quality of local and regional labour force, but also quick access to the largest market in Canada. Richmond Hill's success in this regard may also be a function of unique quality of life factors that have attracted workers to the community which in turn has attracted business investment.

Overall, data suggests that Richmond Hill's position in the sector is strong for technical industries with a creative component. For example, engineering/architecture and specialized design industries both require workers with strong technical skills, but also the creative capacity to develop innovative or unique products. The Town is well positioned for the attraction of domestic or international head office operations in this sector and to further support the expansion of smaller local operations. As local capacity grows, there may be an opportunity to attract exported labour back to the Town as well. These workers are likely less tied to the Toronto market than the exported labour in financial and insurance industries.

2.4.3 Information and Cultural Industries

The information and cultural industries sector is composed of businesses or establishments that produce or distribute information or cultural products, including print media, software, motion pictures, video, and sound/music. Also included are industries that provide the means to transmit or distribute these products as well as provide access to equipment and expertise for processing data, including television, internet publishing, and telecommunications.

The value of these industries is the unique processes that separate them from goods or service-producing industries, in that the creation of information, educational, cultural or entertainment content requires a significant amount of creative intellectual capital. These industries and the occupations within are characteristic of the 'creative class' concepts developed by Richard Florida. These high-value industries and workers generate wealth based on intellectual capacity rather than natural resources or physical labour; a trait that serves them well in the emerging knowledge-based economy. Success in attracting these industries to a community will depend in part, on that area's ability to attract and retain the needed workers by providing quality of place factors that will appeal to this portion of a workforce including the presence of cultural facilities, a vibrant arts community, a diverse range of recreational opportunities, a vibrant downtown, and a lively community that caters to a diverse range of ages, cultures and lifestyles.

In Ontario, Information and Cultural industries accounted for 4.1% of the province's gross domestic product in 2008; a share that has been increasing slowly over the past several years[35]. Similarly, employment has generally grown as well. The provincial labour force in Information and Cultural industries was 129,800 in August 2005, increasing 11% to 143,500 by August 2009[36]. However, this is down from a five-year high of 151,300 workers in December 2008, presumably due to widespread job losses that have plagued all industries across the country[37]. Overall, Ontario accounted for 45% of the national employment in the sector in August 2009[38].

In 2006, the Toronto Census Metropolitan Area Information and Cultural industries sector comprised 101,850 workers representing almost 76% of the provincial employment in this sector. The strong technical workforce of the Greater Toronto Area is supported by over 13,000 business establishments, ranging from head office operations in television broadcasting, newspapers, periodicals, software, and telecommunications, as well as a strong network of small businesses and entrepreneurs focused on film,

[35] Ontario Ministry of Finance, Ontario Economic Accounts, Second Quarter of 2009
[36] Statistics Canada, Employment, Earnings, and Hours, 2009
[37] ibid
[38] ibid

music, theatre, web development, digital and print media, and a range of other arts and industries. Underlying this is a network of large and internationally recognized arts and cultural institutions that are concentrated in the City of Toronto, such as the Art Gallery of Ontario, the Royal Ontario Museum, and Roy Thompson Hall, with smaller institutions across the Region.

As the country's largest city, Toronto is seen as a natural incubator for many of the businesses and industries that comprise this sector. The growth in this sector has also produced considerable spinoff or spill over affects for many GTA communities. For example, Markham has emerged as a high-technology centre, focused among other things on software and web development, cornerstones of the information and cultural industries. Hamilton has developed as a lower-cost centre for film and television as a result of the production capacities available in the City of Toronto. Smaller clusters of information and culture span the geography of the GTA based on demographic diversity, varied urban areas, and differing quality of life factors.

Information and cultural industries represent an investment retention and expansion target based on existing industries and excellent positioning within the Greater Toronto Area. From 2001 to 2006, local publishing industry employment grew by 138% to over 1,000 jobs. Strong growth was also experienced by smaller subsectors like radio and television broadcasting, and data processing. All three of these subsectors also had job concentrations above that of the province. Of note should be the decline in motion picture and video industries and sound recording industries. This is an issue for most communities just outside of Toronto because there are additional tax credits available for productions that film outside of the GTA. Based on the critical mass of these industries already in Toronto, and the threats associated with tax incentives, growth within the film and television sectors may be limited in the GTA in the future.

However, proximity to Toronto and the availability of a highly skilled regional workforce positions Richmond Hill well in terms of investment and workforce attraction. Some of the key businesses in this sector that have already chosen Richmond Hill include Rogers, Group of Goldline, and Firefly Books While Richmond Hill may not have all of the resources or amenities required to become a 'hub' for creative information or cultural industries, the Town has the potential to position itself as a 'spoke' running out from the cultural hub that is Toronto. The key is to understand what subsectors of the industry offer the best potential for growth; the strong performance within publishing, software, and data processing services for example suggests the type of industries the Town is well positioned to support.

This knowledge based sector is highly reliant on access to post secondary institutions in order to access talent, research capability and training opportunities. While Richmond Hill benefits from its close proximity to York University and Seneca College a lack of a post secondary institution in the Town may hinder long-term growth in this sector. The Town should be ensuring that they are engaging with these institutions to discuss how their programming can support the Town's efforts to drive further investment and expansion of this sector. Organizations like the York Technology Association offer further opportunity for external collaboration, providing the Town and its businesses access to the wider base of resources throughout the GTA.

2.4.4 Health Industries

The health industries sector is generally comprised of establishments that provide health care by diagnosis and treatment, as well as providing residential care for medical reasons. In addition, the sector has a manufacturing and wholesaling component as well. There are three major components to the health care delivery portion of the sector, including: Ambulatory health care services; Hospitals; and Nursing and Residential care facilities. While health care is most commonly associated with hospitals, as well as offices of physicians, dentists, chiropractors, and physiotherapists, it is important to note that non-traditional professions like naturopaths, holistic medical practitioners, nutritionists, massage therapists, and dieticians (included within ‘other health care practitioners’) have emerged as an important part of the supply chain that is driving growth in this sector of the economy.

The manufacturing component includes establishments engaged in pharmaceutical or medicine manufacturing, as well as medical equipment manufacturing. Related industry groups include navigational, measuring, medical and control instruments and semiconductor and other electronic component manufacturing, each of which have an influence on the development of laboratory testing equipment and medical diagnostic equipment used in health industries, as well as some electro-medical devices like hearing aids or x-ray apparatus.

In Ontario, the health care and social assistance sector represented $31 billion in industry output in 2008, accounting for 6.2% of the province’s GDP[39]. Based on the strong presence of public sector investment within health industries, GDP has remained relatively stable over the past year, increasing by 1.4% from Q2-2008 to Q2-2009[40]. Employment has increased 12.9% from August 2005 to August 2009[41]. The period between July and August of 2009 was the only period to experience a decline in employment leading up to and through the recession[42].

For pharmaceuticals and medical equipment manufacturers, the environment has been slightly less stable. Pharmaceuticals manufacturing is heavily dependent on access to capital for research and development, and the lack of these financial resources triggered by the recession and credit market turmoil, has become a challenge[43]. However, strong industry convergence between devices and drugs has offered new avenues for the growth of both industry groups; for example the development of device-drug products like a glucose monitor with an insulin pump[44]. Despite recent pressures from the global recession, the Ontario life sciences cluster remains the third largest cluster in North America, with exports in pharmaceuticals and medical manufacturing totalling more than $5 billion in 2008[45].

In 2006, the health industries sector labour force in the Toronto Region was 306,895, with 72% of the labour force located in the Toronto CMA. Much of this employment is concentrated within large hospitals in the Toronto Region, including the University Health Network, located in the City of Toronto. However, the GTA has demonstrated strengths in the pharmaceuticals and medical devices subsectors, which is concentrated to the west in Mississauga and Oakville, but also in the Northern GTA. The Toronto Region Research Alliance reports that there were 209 pharmaceuticals or medical devices and instruments manufacturers in the Toronto Region in 2008, 166 of which were located within the Toronto CMA. The Greater Toronto Area is home to global giants in the sector, including Life Labs (formerly MDS Diagnostics), Patheon Inc., AstraZeneca, GlaxoSmithKline (GSK), Johnson & Johnson, Eli Lilly, and Abbott Health Industries.

Between 2001 and 2006 the health industries sector in Richmond Hill grew across all subsectors, with jobs increasing by 37% over the five year period. The greatest growth came from nursing and residential care facilities, medical diagnostic labs, and other ambulatory health care services in the health care delivery area. Despite growth in other sector, the hospital remains the Town’s largest employer, and is expected to drive continued investment in medical services within the Town and the downtown in particular. The Town also has a concentration of pharmaceuticals and medicine manufacturing, with

[39] Ontario Ministry of Finance, Ontario Economic Accounts, Second Quarter of 2009
[40] ibid
[41] Statistics Canada, Employment, Earnings, and Hours, 2009
[42] ibid
[43] PricewaterhouseCoopers, Canadian Life Sciences industry Forecast, 2009
[44] Deloitte, Diagnosis: Transformation, 2007
[45] Ministry of Economic Development and Trade, Life Sciences in Ontario, 2009

employment increasing 82% from 2001 to 2006, while medical equipment manufacturing employment grew by almost 250% over the same time period. The key employers in these sub-sectors include; Apotex, GeneNews, MDS Laboratory Services, Swiss Herbal Remedies, Platinum Naturals. Both health care delivery and product development components of local health industries exhibit employment concentrations above the provincial average, with product development subsectors exhibiting concentrations well above provincial levels.

Strong population growth in the Greater Toronto Area is creating a demand for health care practitioners across the sector. Institutions like the Southlake Regional Health Centre in Newmarket are becoming regional facilities for healthcare, especially with recent expansions like the Stronach Regional Cancer Centre. Despite the recently completed expansion and planned phase II expansions of York Central Hospital in Richmond Hill, further institutional expansions are not likely to occur in the Town, as evidenced by the expansion of York Central Hospital at the New Health Care Centre in Vaughan. This is a missed opportunity for the Town, as it could have contributed to the growth of high value employment and related spinoffs in the community. However, with the planned intensification and expansion of Richmond Hill's downtown there may be an opportunity to attract a broader range of health care related investment in the form of office development, laboratory space etc. based on the proximity to the York Central Hospital site.

Based on relative employment concentration, there is a notable strength in pharmaceutical and medical equipment manufacturing in Richmond Hill. The two largest employers in these subsectors include Apotex and Amico Corporation. Though Apotex focuses on generic pharmaceutical manufacturing rather than new product innovations, research and development expenditures for the company reached $181 million in 2007, which placed it among the top 10 for pharmaceutical companies in Canada[46]. Activity in the subsector though is limited to smaller companies beyond Apotex. The same is the case for medical equipment manufacturing. What is missing in the local economy is a critical mass or 'clustering' of these companies that exists in different regions. Much of the pharmaceuticals manufacturing in the GTA is concentrated to the West, while medical device manufacturing is concentrated elsewhere in Toronto and in Ottawa. Further expansion of the medical device manufacturing sector and related research and development may favour areas with strong technology bases, or those with available greenfield development opportunity.

Notwithstanding the concerns raised above, the health industries sector in Richmond Hill still represents a significant target for retention and expansion. Richmond Hill has the advantage of being positioned roughly at the centre of one of North America's largest health industries clusters. The existing assets are large enough to play a role in a more regional health industries sector, especially considering the collaborative opportunities provided through the York Biotech structure. While the Town may not be an appropriate centre for wider biotech or medical research, there is certainly opportunity to build on existing assets by focusing on partnerships within the larger industry. This will require a more thorough understanding of how Richmond Hill fits into the broader Greater Toronto Area health sector.

Richmond Hill has an inherent advantage with regards to the attraction of foreign-trained professionals in the diverse population that exists in the Town and in adjacent municipalities. This will become more prevalent as emphasis shifts towards foreign-trained workers to meet demand gaps in all sectors of the economy. In the health industries, this means the attraction of skilled workers spanning the entire sector, including research and development, health care delivery, and manufacturing.

The results of this assessment confirm the appropriateness of these target sectors for the Town of Richmond Hill.

[46] Apotex, 2009

2.5 Physical Infrastructure Assessment

In order to determine the suitability of Richmond Hill to meet the needs of existing and potential businesses, the project team undertook a review and assessment of general infrastructure, quality of place, and employment lands in the Town, in order to identify any potential constraints.

2.5.1 Utilities and Servicing (Hydro, Water, Wastewater)

With the exception of the rural areas of the Town that are currently un-serviced, water is supplied to Richmond Hill by the York Water System, an extension of the Lake Ontario based system servicing the City of Toronto and Peel Region. Water and servicing extension agreements are negotiated between the three municipalities.

The Region of York provides wastewater services to the Town through an agreement with the Region of Durham. Wastewater is collected through the York-Durham Sewer System (YDSS) and treated at the jointly-owned Duffin Creek Water Pollution Control Plant (WPCP) in Pickering. In order to ensure capacity for the expected growth of York Region and Durham Region, the wastewater capital strategy identifies both 'twinning' of the sewers and pumping stations in the Region, as well as expansions to the WPCP. In August 2009, the Federal and Provincial governments announced a $93 million contribution to the approximately $500 million in planned WPCP upgrades. Without these upgrades, the WPCP is projected to exceed current capacity by 2010, so there will be further collaboration between all levels of government to complete expansions.

The 2008 BMA Consulting Municipal Study provides comparative data on water and sewer costs for Ontario municipalities. The table below illustrates Richmond Hill's position amongst comparator communities in the Greater Golden Horseshoe (sorted by commercial servicing cost). Richmond Hill's commercial servicing costs are slightly higher than other York Region or GTA communities, but remain in the 'mid' category in terms of cost relative to all Ontario municipalities. The case is similar for industrial developments, while Residential servicing costs occupy a 'low' cost relative to other municipalities in Ontario.

Figure 23 - Comparison of Water/Sewer Costs, 2008

Land Use	Residential		Commercial		Industrial		Industrial	
Volume	250 m3		10,000 m3		30,000 m3		500,000 m3	
Mississauga	291	Low	12,554	Low	37,661	Low	627,685	Low
Brampton	291	Low	12,554	Low	37,661	Low	627,685	Low
Vaughan	459	Low	15,513	Low	44,783	Mid	634,669	Low
London	655	Mid	16,369	Low	38,514	Low	615,273	Low
Toronto	434	Low	17,352	Low	41,643	Low	694,050	Low
Markham	442	Low	17,671	Mid	53,013	Mid	883,550	Mid
Guelph	562	Low	18,238	Mid	53,549	Mid	858,438	Mid
Richmond Hill	463	Low	18,518	Mid	55,554	Mid	925,900	Mid
Oakville	638	Mid	19,745	Mid	54,117	Mid	827,870	Mid
Burlington	638	Mid	19,745	Mid	54,117	Mid	827,870	Mid
Hamilton	549	Low	20,718	Mid	61,354	Mid	998,337	Mid
Cambridge	637	Mid	21,396	High	64,009	High	1,062,323	High
Kitchener	667	Mid	26,694	High	80,082	High	1,334,700	High

Source: BMA Consulting, 2008

2.5.2 Telecommunications and IT Infrastructure

The Town of Richmond Hill is positioned well with regards to telecommunications and IT infrastructure. State-of-the art digitally switched high-speed fibre and high-speed business and home ADSL services currently exist throughout the industrial, commercial, and residential areas of the town. In addition, advanced digital cellular and wireless network coverage from some of the Country's largest telecommunications firms is available to business and residential customers in the Town. Richmond Hill was also home to one of the first totally wired subdivisions in Canada.

Concerns were raised through the consultation phase of the project with regards to some IT infrastructure. These concerns were related to both access to IT infrastructure and investments. Participants were concerned about the Town keeping abreast of the latest technology, or whether the Town is prepared to invest in it. One issue is the lack of municipally-owned WiFi networks. Some municipalities already provide WiFi access at strategic locations (the Fred-eZone in Fredericton New Brunswick). Various other municipalities in Ontario and Canada are currently running pilot programs to investigate the use of these networks. For example, the City of Hamilton is running a pilot program in the Downtown area, offering free wireless access to residents and businesses at strategic locations. The intent is to investigate the integration of this system with Smart Meter utility technology, as well as support municipal workers that are out of their offices along with business and residents in the downtown area. A municipal venture like this would further the status of the Town gained by being a first mover in wired subdivisions, but also work against perceptions that the Town is either not prepared to invest in new technologies, or not knowledgeable about the rapidly changing technology environment.

Beyond the listed concerns, there does not appear to be any reason to believe that Richmond Hill is not, positioned as well as its comparator communities. The Town has the presence of major telecommunications providers (Bell, Rogers, Atria, Telus, and Primus) and a strong base of technology companies that operate within the existing infrastructure.

2.5.3 Transportation Links - Roads and Highways

One of Richmond Hill's strongest assets is the central location with regards to the provincial highway and Regional road network. The Town has direct access to several major North-South corridors, including Highway 404, Yonge Street, Bayview Avenue and Bathurst Street and major East-West corridors including Highway 407 and Highway 7. This strong network of roadways converging in the Town provides further access to other major Highways, including Highways 401 and 400. An additional interchange at Leslie Street, would further strengthen the attractiveness of the Barker and Headford Business Parks.

For air transportation, the Town has the advantage of being within a very short drive (approximately 25 km) to Pearson International Airport, offering cargo and passenger services to major international destinations. While at a much smaller scale, Richmond Hill also has the advantage of being adjacent to Buttonville Airport, which provides residents and areas businesses with personal and charter air services.

Also notable is Richmond Hill's access to both inter and intra-regional transit services. Positioned at Yonge Street and Highway 7, Richmond Hill Centre Terminal provides access to major York Region Transit routes, as well as VIVA rapid transit routes. These services also offer connections into TTC routes and GO Transit bus and rail services located at Langstaff and Richmond Hill GO Stations. Richmond Hill has been identified as a 'node' within the Region's planning structure and a subway extension to the Town along the TTC's Yonge Subway Line has been identified as a priority in the Metrolinx Regional Transit Plan. There is also capital investment planned for pedestrian and cycling networks, and the development of a multi-modal transit hub that will connect the subway, VIVA and GO transit. A notable shortcoming is the lack of connections to regional transit outside of peak AM/PM times, limiting the abilities of businesses to access people outside of the Town, and residents to access businesses outside of the Town.

Further, as a result of the rapid growth of the Town and the adjacent areas in York Region traffic congestion is a major impediment. With projected growth of the population to approximately 1.5 million in 2031, congestion will likely become more of a problem if left unaddressed. The Smart Commute 404-7 initiative looks to alleviate these problems by promoting alternate modes of travel to the automobile. The intent is to leverage the strong presence of transit services noted above, to address the lost time, lower productivity, and higher transportation costs of congestion to York businesses, and the negative effects of congestion to employee quality of life.

2.5.4 Quality of Place (Parks, Green spaces)

Historically, site selectors and business owners would consider a community's 'quality of place only after considering such factors as labour force costs, business costs and the overall business environment in a community. However, as the economy transitions from one based on goods production to a more serviced oriented knowledge-based environment, quality of place factors have become much more prevalent from the perspective of talent attraction and retention for businesses of all sizes. Communities with a high quality of place are attracting the type of high-value entrepreneurial talent that is also driving employment growth in the larger economy. The result is that communities of all shapes and sizes are claiming a high quality of life as a means to attract business investment. Across the GTA, this is no exception as communities aim to capitalize on the wide range of natural heritage amenities that span the Province, including the Niagara Escarpment, the Oak Ridges Moraine, the Holland Marsh, and shorelines of the Great Lakes, among other assorted lakes, rivers, and natural features. In addition, most municipalities can claim a diverse range of recreational opportunities and athletic facilities, unique cultural facilities and festivals, vibrant nightlife and healthy downtowns. With these factors representing the new norm or 'baseline', Richmond Hill must ensure that they not only measure up to the competition but also look for unique and authentic ways to differentiate itself within the GTA.

Many municipalities can claim natural beauty as an asset, but the urban-rural character of Richmond Hill coupled with its historical roots provides a unique opportunity for further public sector investment, as well as the marketing and promotion of the Town. Contrasting the office developments along the highway corridors, the Town currently has over 160 Parks and 600 hectares of open space (much of that owed to the Oak Ridges Moraine). Perhaps most unique is the presence of five lakes within the Town limits. While the areas around these lakes were originally developed as 'cottage country', these lakes have become integrated into the community's urban form, offering unique lakeside development in proximity to major urban areas. 'Protected countryside' designations further the protection of this existing rural lifestyle beyond what is currently developed in some areas. The lakes themselves offer recreational opportunities from fishing to boating. Also noted by the town is an extensive bike path system through the Oak Ridges Moraine.

Downtown Richmond Hill offers a village-like atmosphere owing to the historic architecture and the width of the street north of Major Mackenzie Blvd. However, like most municipalities in Ontario, Richmond Hill struggles with the conflict between the downtown area and commercial facilities that have developed in periphery areas. Downtown revitalization continues to be a priority consideration for the community and this was reaffirmed through this study's consultation process. More consideration and attention needs to be given to creating an environment that will attract residents, visitors and business investment. In this respect, the opening of the Richmond Hill Centre for the Performing Arts represents a positive step forward for the downtown as it establishes a defined arts and cultural presence in the downtown that can be leveraged to attract further investment. The Downtown Land Use and Design Strategy completed in June of 2009 provide further direction on downtown revitalization.

These unique assets enable the Town to create an authentic message about quality of life and quality of place experience offered to residents, visitors and business in the community and may position it well within the GTA with regards to the attraction of skilled workers and entrepreneurs that value quality of life above other location factors.

2.5.5 Employment Lands

The availability of serviced land is essential to the attraction and expansion of business in any community. Historically, Richmond Hill's location at the junction of Highways 404 and 7 (and later Highway 407) made it an excellent location for business park development, and the Town has been successful in attracting prestige and other high value employment uses to these lands. The highway 404/407 junction has slowly evolved into one of only three major office concentrations outside of the City of Toronto; the others being the Airport Corporate Centre in Mississauga, and the QEW corridor through Burlington and Oakville[47]. The Town has four major business parks, as noted below.

Figure 24 - Major Business Park Developments in Richmond Hill, 2009

Business Park	Total Size		Available Lands (2009)	
	Acres	Hectares	Acres	Hectares
Beaver Creek Business Park	614.0	248.5	38.4	15.6
Headford Business Park	433.3	175.4	248.4	100.5
Barker Business Park	253.0	102.4	171.3	69.3
Newkirk Business Park	313.4	126.8	2.3	0.9
Total	1,613.8	653.1	460.3	186.3

Source: Town of Richmond Hill Vacant Employment Land Inventory, 2009

One of the key elements that contributed to the Town's economic development success was a readily available supply of employment lands with excellent transportation access. The current supply and quality of employment land places the Town in an enviable position compared to many GTA municipalities to the South, including Toronto. Considering municipalities further afield though, the limited land supply does not compare as well. Based on current growth projections the remaining supply of employment lands is expected to be depleted within the next 10-15 years[48]. Even those sites that are currently fractured or less desirable for office development are expected to be absorbed within that time frame. Further expansions to accommodate business park (or any) uses will be limited based on the 'Protected Countryside' designations of some of the Town's undeveloped areas and agricultural lands under the *Greenbelt Act*, and the *Oak Ridges Moraine Conservation Plan*. Future accommodation of employment uses will likely be different from historical business park development, most notably taking the form of infill development and intensification. This suggests that the Town will have to become more restrictive as to the type of development it will permit in its business parks in the future.

As noted previously, provincial legislation has a direct impact on the development of employment uses in the Town of Richmond Hill. The Oak Ridges Moraine and the Greenbelt have placed firm boundaries on the Town, limiting the potential for expansion into greenfield areas. Adding to that pressure, the Region of York has allocated 100,700 new jobs to the Town of Richmond Hill by 2031 under the *Places to Grow*

[47] Hemson Consulting, Economic Policy review, Stage 1 Background Research and Policy Paper, 2009
[48] Ibid.

legislation. Approximately 36% of this employment will be employment land employment[49], with 16% of the employment being major office employment[50]. Based on slowing population growth over that time frame, local population-related employment[51] will also slow, reducing the pressure for conversion of the lands, providing greater opportunity for further employment land employment or major office use development.

Overall, the Town will take on a more ‘urban’ than ‘suburban’ identity, as employment (and residential) uses take on a higher density to accommodate demand. The Town will be poised to take on more ‘central place’ functions, including higher than average concentrations in education, government, health, and producer services. Richmond Hill is well positioned to accommodate employment growth in new forms, as an existing and established office node in York Region, with excellent access to existing and planned regional transportation and transit. In the interim however, the Town needs to develop a strategy to attract this type of new development and use, and protect its competitive position for employment lands and major offices, in order to develop an economic base that can support and encourage development at higher densities.

2.6 Summary of Findings – Economic Base Analysis

A review of the Town’s demographic and economic performance suggests Richmond Hill has benefited from a strong rate of population and employment growth that has contributed to a strong local economy. Despite this, the Town is not yet capitalizing on the potential associated with a highly skilled workforce and the attraction of businesses and enterprises in key growth sectors of the provincial economy. Based on the broad review of Richmond Hills’s economic growth, including the community’s recent industry and labour force performance, the following findings are considered relevant to the development of the Town of Richmond Hill’s Economic Development Strategy.

- The current population of Richmond Hill has increased 23.2% since 2001, which is similar to the Regional growth rate and well above the provincial average growth rate of 6.6% for the same time period. In order to prepare for continued growth into the future, the Region is in the final stages of adopting Planning for Tomorrow, a growth management initiative. This document will help aid the Town in embracing high levels of growth, while preparing for the future. The Town is also engaged in an Official Plan review.

- A review of the Town’s age profile reveals a young community with 63.4% under the age of 45 years. While the Town’s population over the age of 65 (10.1%) was lower than the Region (10.3%) and the provincial average (13.6%), this cohort has been growing increasingly within the Town over the past 15 years. The age of the local population speaks to the challenge in providing the services, amenities and quality of life experience that will be in demand by residents.

- Richmond Hill’s immigrant population has experienced a progressive increase from 1996 to 2006 and continues to be a significant contributor of growth of the Town’s overall population. The strong growth of persons of Chinese origin has contributed to the larger share of overall growth among the different mix of ethnic origins.

- As of 2006, a large percentage of Richmond Hill’s population (49.7%) held a university certificate, diploma or degree as compared to 40.0% of York Region’s population and 30.7% of the provincial

[49] The range of employment uses in industrial-type buildings, typically concentrated in business parks and other designated employment areas. Typically single-storey industrial ‘boxes’ or industrial multiples

[50] Employment in free-standing office buildings of 20,000 sq.ft. or greater.

[51] Employment providing services to a resident population including retail and institutional uses, and those that work from home.

population. The high percentage of skilled workers has contributed to the attraction of the knowledge base businesses.

- A historical review of private household incomes reveals the Town has also experienced a significant increase in the number of high income households in the community. Higher household incomes suggest the increased capacity of local residents to have stronger purchasing power and may translate into the demand for a greater range of retail, dining and entertainment and recreation experiences in the Town.

- Just as the Town has experienced strong population growth, the Town's labour force has also experienced strong levels of growth between 2001 and 2006. The Town's labour force as of 2006 comprised of 88,840 people, which is a significant increase of 23.8% from 2001 levels. Much of the Town's labour force is concentrated in business services, such as professional, scientific and technical services and finance and insurance suggesting a high proportion of creative class workers in the community.

- Despite the strong growth, the Town has a high percentage of workers that commute to employment in other parts of the GTA. At the present time the highest levels of net export of labour are occurring in the Finance and Insurance sector (4,755), followed by Professional, Scientific and Technical services (4,065) and Construction (3,230). The town's proximity to the City of Toronto means that it will always be challenged to create a community that is more than just an affordable option to living in the City.

- Nearly 50.0% of the Town's labour force is employed in creative class occupations. Further analysis into Richmond Hill's creative occupations, suggest that the greatest concentration of workers are employed in professional occupations in natural and applied sciences (18.7%), followed by business and finance (10.9%) and specialist managers (10.8%). Richmond Hill's strength in the creative occupations provides positive implications for the Town's local economy, given the generally higher wages, specialized skills, and innovative capacities of these individuals.

- The greatest share of Richmond Hill's creative businesses is in the web & software industry, with a total of 653 firms an increase of 131 firms from 2003 levels. This suggests a unique opportunity to raise the profile and reputation of the community as a 'high-tech' community.

- While much of the labour force is concentrated in the area of business, finance and administration occupation, sales and service occupations, management occupations and to a lesser extent natural and applied sciences and related occupations, the diversity of occupational concentration suggests that Richmond Hill has a workforce that is closely linked to the knowledge base economy.

- A target sector assessment suggests the following sectors (and subsectors) have demonstrated the greatest potential for economic growth in the community. These include:
    - **Finance & Insurance**
        - Credit intermediation and related activities
        - Financial investment and related activities
        - Insurance carriers
    - **Professional, Scientific and Technical Services**

        - Computer Systems Design
        - Administrative Management and General Management Consulting Services
        - Engineering Services
    - **Information and Cultural Industries**
        - Internet Publishing + Broadcasting
        - Computer Systems Design + Related Services
        - Internet Service Providers
    - **Health Industries**
        - Pharmaceutical and Medicine Manufacturing//Medical Equipment and Supply Manufacturing
        - Pharmaceutical and Toiletries, Cosmetics Wholesale and Distribution
        - Scientific Research and Development Services

- Richmond Hill`s current physical infrastructure supports the attraction of a broad range of business and enterprises. The Town has the presence of major telecommunications providers (Bell, Rogers, Atria, Telus, and Primus) and a strong base of technology companies that operate within the existing infrastructure. While Richmond Hill's commercial servicing costs are slightly higher than other York Region or GTA communities, it remains 'mid' category in terms of cost relative to all Ontario municipalities. Overall, the Town's ability to accommodate new employment and residential growth will be reliant on the intensification of existing and established office nodes and the delivery of the improvement to existing and planned regional transportation and transit.

3 SWOT Assessment

An important component in the advancement of an economic development strategy for the Town of Richmond Hill is the opinions and thoughts of those business and industry leaders that already operate within a select jurisdiction. Area businesses and community leaders can provide an excellent source of up-to-date information or perceptions, as it relates to an area's strengths and weaknesses as well as the opportunities and threats that may be confronting industry groups or a region as a whole in its efforts to attract and retain business investment.

In this context a SWOT Assessment (Strengths, Weaknesses, Opportunities and Threats) was undertaken to examine Richmond Hill's ability to support the attraction, retention and expansion of business and industrial investment, the town's capacity to deliver on economic development activities and programming and the overall direction of the strategy and the sustainability of the community over the longer term.

This effort was accomplished through a background and literature review and discussions with business and community leaders in Richmond Hill and elsewhere. In October and November 2009, approximately 35 individuals participated in the strategy's consultation process which included focus group sessions, as well as telephone and face to face interviews. This included representatives from government, health and education, arts and culture and the business community. The intent was to elicit more detailed input on the issues and challenges facing the municipality as it advances its economic development interests and discern the range of opportunities and strategies that would advance local economic growth. A further 59 participants from across all business sectors participated in an on-line survey that was hosted by the town, which gathered additional information from the business community and public at-large.

The analysis provides further insight into the perceived gaps and opportunities for the Town of Richmond Hill in its efforts to advance economic growth and serves to further inform the discussion as to the Town's competitive position and the direction of the Economic Development Strategy.

The key findings of the SWOT Assessment are summarized below.

3.1 Strengths

Excellent Transportation Infrastructure – Richmond Hill's proximity to the 400 series of highway was identified as a significant advantage. In particular Highway 404 and 407 were seen as being a significant asset in the attraction of business investment. For those companies with international markets, the relative proximity to Toronto International Airport was also considered a benefit.

Strategic Central Location – Richmond Hill's central location within the Greater Toronto Area was a considerable asset, both in terms of accessing a large metropolitan market and supply network, but also in terms of accessing a highly skilled regional workforce. Downtown Toronto was also seen to be easily accessible from Richmond Hill from the perspective amenities such as shopping, dining, arts and culture and recreation.

Highly Skilled and Educated Population – Richmond Hill has a very highly educated resident population with over 73% of the population holding a post-secondary qualification (compared to the regional and provincial averages of 67% and 61.5% respectively), and almost 50% holding a university degree (compared to 40% regionally and 30.7% provincially). In addition 48.4% of the labour force works in the knowledge-driven creative industries. Both of these have translated into a high level of household incomes in Richmond Hill, with over 38% of households having incomes levels over $100,000.

Quality of Place – Richmond Hill has a very high quality of life and quality of place as reported in the *City Magnets II Report* produced by the Conference Board of Canada. This report finds that the Town offers a strong economy with a diverse and educated workforce along with low crime rates and the presence of other quality of life factors. The significant improvements targeted at the downtown and public transit suggest that the Town will continue to rate highly in terms of its attractiveness to new migrants and others looking for a high quality suburban location in the GTA.

Ethnic Diversity – Richmond Hill has one of the fastest growing immigrant populations in the region, with immigrants representing over 51% of the population of the town (compared to 42.8% in the region). This has resulted in an ethnically diverse population, with those from Chinese, East Indian, Iranian and Russian origins comprising the largest share of the Town's immigrant population. In particular the Chinese population makes up 22.3% of the town's population and has been identified by many during the consultation as a significant opportunity to drive further business investment in Richmond Hill.

Strong Corporate Support from the Town of Richmond Hill – A considerable number of respondents indicated that the Town of Richmond Hill has been very supportive and responsive to the needs of business. In particular the Mayor was seen as having a good relationship with business and was interested in engaging with them. In addition, local taxes in Richmond Hill were seen as being competitive.

Growth of the Richmond Hill Economy – The local economy has shown a strong rate of growth in both workforce and business investment. The labour force has increased by 23.8% since 2001, outperforming the Region and Province. In addition there has been a 24.6% increase in the number of local businesses between 2003 and 2008, with an increasing number of these being small businesses with fewer than 5 employees.

3.2 Weaknesses

Availability of Employment Land – The Economic Policy Review undertaken by Hemson Consulting, indicates that Richmond Hill has only 550 net hectares of employment land and that approximately 180 net hectares are vacant. Projections have indicated that the Town's supply of greenfield employment land will be depleted in the next 10-15 years, requiring new ways to accommodate growth in the future. Future economic development will need to be more employment intensive likely in the form of multi storey office development rather than single storey manufacturing or warehousing and distribution facilities.

High Levels of Out-commuting – Richmond Hill currently has a net out-commuting flow of 22,010 residents, with a large number of professionals (finance, scientific and technical occupations) commuting to Toronto and the surrounding communities. This results in over 78.3% of Richmond Hill's labour force leaving the community on a daily basis to seek employment elsewhere. There is also a substantial inflow of workers into the Town, primarily from Toronto, Markham, Vaughan and other communities in York Region. The Town needs to create an environment to attract more companies that could provide the type of employment to match the skills of local residents.

Lack of Public Transit During Off-Peak Hours and Regional Transportation Connections – Public transit was identified by some of the respondents as a significant barrier, particularly for those that rely on an unskilled workforce that did not live in the Town, or by those companies located in newer business parts. They observed that only minimum service was available outside of the morning and evening rush period and there was very little connectivity to other GTA-wide transit operators, such as GO and TTC.

Lack of Affordable Housing – The cost of housing in Richmond Hill was seen as a problem by some employers, particularly those who employed low skilled workers. Many of their workers cannot afford to live in Richmond Hill and must commute in from other communities where there is a greater mix of affordable housing.

Lack of Strong Branding of the Town – The Town needs to create and market a Richmond Hill brand that focuses on the suitability of the community for business and a skilled workforce. As part of this effort, the Town must adopt a targeted and focused effort to market and promote the community to the right group of influencers and interests.

3.3 Opportunities

Enhanced Business Retention and Expansion Program – In order to further engage and understand the needs of the existing business community, the Town needs to enhance the current business retention and expansion program. Better tracking of business intelligence and service delivery management through an electronic database and reporting system will enable staff to expand business retention and expansion efforts.

Focus on the Creative Economy – Richmond Hill has a very highly skilled and highly educated workforce, with a concentration in the Creative Classes, though most of these professionals leave the town for employment in other communities. With the creative industries in Ontario expected to grow by 42% by 2016, there is a significant opportunity for Richmond Hill to better capitalize on their creative workforce and businesses to generate additional growth in the community.

Support Business Incubation – There are a significant number of small business entrepreneurs in the community who need assistance in running and growing their businesses. The Town has an opportunity to lead in assisting these businesses through the development of an incubation program that assists entrepreneurs to develop and commercialize new innovative ideas. This will be particularly important for those in the creative classes who may be looking to establish a new business.

Heighten Marketing Efforts – With the recent completion of the Town's Strategic Plan coupled with the launch of an Economic Development Strategy, there is an opportunity to develop a creative and innovative marketing strategy that will create a new image of the Town and to better position it in the minds of business executives, entrepreneurs and future residents.

Leverage the Town's Diverse Community – The Town's ethnic population is a significant asset for the community and more needs to be done to engage with and capitalize on the economic potential of this portion of the Richmond Hill community. This should include seeking the assistance and advice from community leaders on international marketing and investment attraction for their particular group as well as ensuring that these groups are made aware of the business assistance programs that are available.

Further Revitalization of Downtown - There has been significant investment by the Town in downtown, including the creation of the Richmond Hill Centre for Performing Arts, the existence of a Façade Improvement Grant, the development of a Downtown Land Use and Design Strategy, improvements to sidewalks, lighting and plantings, as well as interest by the local businesses as expressed by the formation of a Business Improvement Area (BIA). In addition, the new mixed-use building by Tridel in the downtown has brought investment and population into the area. This investment should act as a catalyst for further revitalization in the downtown.

Greater Engagement with Post-secondary Institutions – The town has an opportunity to better utilize the capabilities and expertise of both Seneca College and York University to build a better knowledge infrastructure in the community. This should include ensuring that the companies in the community are more closely engaged with both of these institutions in terms of access to students and graduates, training, research capability etc.

Ensure the Delivery of Adequate Public Transport – As the community continues to grow there will be an increasing need for greater public transport which is linked more closely to the Town's employment lands. Delivery and development of innovative public transport linked to further growth and development of employment will be a significant asset to the community in the future.

Identify Targets Sector for Growth – Chasing any and all investment is unmanageable and the Town must focus on identifying a few key sectors in which they have substantial competitive advantages to focus their efforts to attract investment.

3.4 Threats

Decline in Manufacturing – Manufacturing accounts for 6,525 jobs, or 12.4% of jobs in Richmond Hill, and as such still represents an important part of the local economy. It is however a sector which has been declining in importance in Ontario due to competition from other low cost global locations and the advancement of process improvements that require fewer people operationally. This decline is a threat to local jobs and business and may require assistance to ensure that they remaining competitive and that the Town is retaining these jobs.

Difficulty Distinguishing Richmond Hill from Neighbouring Communities – There are considerable similarities between Richmond Hill and the major urban communities surrounding. The labour forces of these communities are highly fluid and communities have much more to gain by working collectively to grow and develop their economies Since most municipalities in the GTA have similar assets, not being able to distinguish Richmond Hill from the others could put the Town at a disadvantage in attracting business.

Public Transit Plans not Carried Through –There are significant plans for future improvements to the local and regional transit system, including the extension of the subway to Richmond Hill and the development of a GO Transit Hub. It is important that there is continued commitment to these public transit investments so that the community grows and develops in a sustainable manner.

Depleted Greenfield Land Inventory – Richmond Hill is a relatively small community and is constrained in terms of available greenfield land for future development. Despite its historical appeal to a broad range of industries, the lack of future employment land will impact its ability to attract businesses and industries in the future. The result will mean a focus on business and industry that is employment intensive.

4 Framing the Economic Development Strategy

Richmond Hill, with its central location in the GTA has become one of the fastest growing and most highly desirable communities in Ontario. With a young, affluent and highly skilled workforce the Town has also benefitted from a growing ethnic diversity, which has contributed to a mosaic of cultures, languages and traditions. The local economy, while historically based on traditional industries such has manufacturing is increasingly characterized by small and medium enterprises in knowledge intensive, creative industries. Strong economic growth in the past, however, is no guarantee of success in the future.

Global, national and provincial economies are changing rapidly and irreversibly. The decline of manufacturing in leading industrialized economies, advances in communications and technology, the importance of the environment and growing concerns around sustainable growth, the rising importance of the highly mobile knowledge-based workforce, and the dramatic increase in immigration and its implications for Canada's workforce – all of these new realities have the potential to shape and change Richmond Hill's economic future. At the same time competition for investment and growth opportunities are increasing. Around the world, countries, regions and cities are striving to identify their competitive advantages and to better understand how to utilize these factors to position their communities for sustainable and high value economic growth.

These new economic realities suggest that it is time for Richmond Hill to take a new approach to economic development, one which capitalizes on the strengths and talents of its residents and workforce, as well as the town's position within the GTA and its unique quality of life. The Economic Development Strategy that follows reflects this approach.

Any economic development strategy, to be successful, must focus on exploiting the competitive strengths and advantages of a community and address the perceived gaps that may be impacting business growth and investment. Based on the findings from the economic base analysis, the results of the community consultation process and an understanding of the existing policy environment in the Town of Richmond Hill, several key themes emerged around which to frame an economic development strategy.

These key themes include:

5. **Greater Support for the Entrepreneurial Economy**
    - The importance of the SME's in the provincial economy means that municipalities must consider providing a broader range of sophisticated tools and programming to support the growth of small business and entrepreneurs, innovative start-ups firms as well as existing businesses with high growth potential.

2. **Build the Creative Economy**
   - The high rate of growth associated with creative occupations and business and enterprises in the GTA places a greater emphasis on creating a community that not only appeals to and attracts both workers and investment but also capitalizes on the talent of its residents.

3. **Target Key Existing and Emerging Industry Sectors**
   - Richmond Hill's central location within the GTA coupled with the talent of its workforce positions it as an obvious hub for attracting investment and economic growth in a number of key existing and emerging industry clusters sectors within the broader region economy.

4. **Enhance the Economic Development Function**
   - The Town of Richmond Hill must be equipped to deliver the range of programming and services required to effectively take advantage of the community's business and investment growth potential and its competitive position in the GTA.

These themes are presented in order of priority. However, a focus on enhancing existing economic development programming and activities is a necessary first step to delivering on the promise of future economic growth in the Town of Richmond Hill and lays the foundation for greater support to the entrepreneurial and creative economies. It also ensures that the Town and by extension Economic Development has the need of tools and resources in place to support the further development of key target sectors within Richmond Hill.

Further justification for each of these themes and the resulting overarching goal for the economic development strategy are presented below.

4.1 Four Major Themes

- **Greater Support for the Entrepreneurial Economy**

Small and medium sized enterprises have emerged as the engine of Canada's recent economic growth, with over 55% of the workforce employed in these sizes of firms. They have played an integral part in the local and national economy and offer many communities the greatest opportunity for future economic growth.

This trend is also in evidence in Richmond Hill with more than 1,300 new businesses being established between 2003 and 2008, a 24.6% increase. The number of small businesses, those with less than 10 employees increased by 47.4% and now comprises 82.6% percent of all businesses in the community. Over one fifth of the small businesses in Richmond Hill were in the Professional, Scientific and Technical services sector, an essential component in the knowledge based economy; with other significant industries including Personal Services (14.2%), Retail Trade (9.5%) and Wholesale Trade (8.9%). This high level of growth in small businesses is evidence of the strong entrepreneurial spirit within Richmond Hill and needs to be nurtured and supported.

Though Richmond Hill already has a Small Business Enterprise Centre, the large number of small businesses in the Town suggests that there may be a need to provide greater support to develop this aspect of the local economy. This view was echoed throughout the consultation process, with many suggesting a need for enhanced support for small developing businesses with innovative products and ideas and assistance that would help to increase the productivity levels within existing small and medium sized business. The consultation process highlighted a number of challenges facing small businesses in Richmond Hill including the lack of small high quality office space for new start-ups; the lack of peer to peer networking opportunities and business mentoring; and access to financing. There was also a need for assistance in identifying and navigating government programs and government funding.

With over 43% of Richmond Hill's population consisting of new Canadians, there is an even greater need to provide support to small business in order to better leverage the community's economic diversity in the creation of new businesses.

Given the predominance of small and medium sized businesses in the community and the importance of these businesses to future economic growth, it is essential that the Town identify new and innovative ways to support the growth of entrepreneurs and small business owners.

- **Build the Creative Economy**

Richard Florida has identified the significant societal and economic impact that the creative class of worker is having on both local and international economies. The rise of the knowledge-based or 'creative' economy has radically altered the ways that communities and regions establish and maintain their competitive edge. Knowledge and innovation has replaced natural resources and physical labour as the major sources of personal wealth creation and economic growth. In this new era, a community's ability to attract and retain the highly educated workers needed for sustained growth has become central to long term economic success.

Florida has projected that creative industries with their higher income opportunities, skilled workforce and higher rates of education will grow by 42% by 2016 providing greater economic stability for communities overall. Richmond Hill, with an estimated 48.4% of its labour force employed in creative occupations and 49.7% of the resident population having some form of post secondary education, has a significant concentration of this critical segment of the economy. However, this class of worker is also notoriously "footloose", being able to work where they please and placing a high value on quality of life characteristics in the communities in which they live and work.

Richmond Hill needs to ensure that it is protecting and increasing its concentration of creative workers and enterprises by developing or enhancing those attributes that will attract investment and employment opportunities and by providing a commitment to a quality of life and quality of place environment that will appeal to these workers. The presence of post secondary opportunities in particular, is an important element for many of these industries, as they provide a source of new talent and act as a sort of ground zero for new ideas and collaboration. The presence of suitable work space is also important particularly space that allows for co-working, networking and the sharing of ideas. As with the development of the Town's small business community, supporting the development of the creative industries should also include opportunities for business mentoring and peer to peer networking.

The creative economy offers Richmond Hill an opportunity to showcase its current talent but there is also an opportunity to lead the discussion on how the impact of this shift in business and workforce is changing economies in York Region.

☐ Target Existing and Emerging Sectors

The Richmond Hill economy has four key sectors where there is a high labour force or business concentration; suggesting a local competitive advantage around which investment and economic growth may be focused. These sectors likely share some common basis for their location in Richmond Hill, such as the Town's highly skilled labour force. By engaging companies in these sectors the Town may better understand how to assist them to expand and remain in Richmond Hill. It will also allow the town to better understand how to enhance its attractiveness to business in these sectors, as well as providing opportunities to develop the sector supply chains which can help inform investment attraction efforts.

The health industries have shown significant job growth across a wide range of industries, with significant growth in areas of health care delivery (i.e. nursing and residential care, medical diagnostic labs, and ambulatory health care services) and product development (pharmaceutical and medicine manufacturing, and medical equipment manufacturing). The growth in medical equipment manufacturing has been particularly substantial with a 250% increase in employment between 2001 and 2006. The health industries sector in Richmond Hill also benefits from its proximity to other significant health industry clusters and assets such as 'Pill Hill' in Mississauga, York University, Southlake Regional Health Centre in Newmarket, and the proposed NRC facility in Markham. Richmond Hill's central location to all of these assets and its own concentration of health industries will form a significant value proposition for continued investment and development of this sector.

Richmond Hill also has a significant concentration of business in Information and Cultural industries, in particular internet publishing, telecommunications and internet service providers. Though the city of Toronto will undoubtedly remain the provincial hub of activity within this sector in the GTA, the Town has the potential to position itself as a spoke running out from this cultural hub. The Town's proximity to other technology centres can also be a benefit in the attraction of small and medium sized businesses that want to be close to the high profile and leading companies within this sector. The potential limitation for the Town is its lack of post secondary institutions within its boundaries, which highlights the importance of developing partnership opportunities with area institutions that will advance the growth of this sector locally.

While the Finance and Insurance sector is estimated to provide direct employment for over 2,750 in Richmond Hill, there are a higher percentage of workers (7,500 workers in 2006) in the community that commute to employment in other jurisdictions – primarily the City of Toronto. While growth in this sector has been limited in the town, there has been significant growth within sub-sectors, such as insurance brokerage and other financial investment activities. However, it is the town's concentration of professionals in this sector that poses the greatest opportunity for growth. Though the Town is unlikely to draw core functions away from Toronto's financial core, there are opportunities to attract back office functions and potentially head office functions to the community. The ready source of available labour will be a significant factor in attracting these types of firms.

The Professional, Scientific and Technical Services sector is the largest industry sector in Richmond Hill, accounting for an estimated 13.2% of the total labour force in 2009. The sector has also shown significant growth, with employment increasing by 10% between 2001 and 2006 outpacing the provincial growth in the sector. Within the sector there was strong growth in accounting, architectural/engineering and specialized design services, while the largest sub-sector, computer systems design, experienced more moderate growth. Like the financial services, the high concentration of professional, scientific and technical workers in the town is a significant factor in attracting more business investment to the town. This factor is attractive proposition for attracting both head office and back office functions of large organizations, but perhaps the greatest potential comes in attracting or growing smaller businesses that have the potential to expand their base of operations.

The Town needs to have a greater understanding of these key sectors and the strengths and weaknesses of Richmond Hill as an investment location; much of this can come from more effective engagement with the Town's existing businesses. In addition the Town should be developing an understanding of the supply chains considerations that will further assist with the development of the target sectors.

Business investment and attraction also requires greater collaboration between senior government, business, entrepreneurs, post secondary institutions and relevant local and regional industry associations. It will be important for the town to continue to engage with other local municipalities, as well as regional, and provincial government to ensure that these sectors remain competitive and continue to drive the local and regional economy.

- **Enhance the Economic Development Function**

Throughout the consultation process there was a clear message that the Town and by extension Economic Development needs to expand its engagement with the existing business community and focus and expand its overall marketing efforts. The existing economic development function, while performing well, does not have the capacity to operate at the level of many of other comparable communities in the GTA. This is because there are fewer resources dedicated to Economic Development than found in other comparable communities. If the organization wants to increases its overall impact and visibility both within and outside the community, the issue of resources must be addressed.

The community has indicated that they wish to see the economic development staff engage the local business community using different forums. This engagement will allow Economic Development to better understand Richmond Hill's strengths and weaknesses, and enable the early identification of partnership or investment opportunities. With increasing global competition it is also essential that Economic Development staff continue to remain close to the town's existing businesses to ensure they are remaining competitive, providing assistance on an as required basis as issues arise. A closer relationship with local businesses will also assist in the identification of policy issues or decisions that the town may need to address to better support their local employers.

Closer engagement with local businesses will also provide Economic Development with a better understanding of how to market the community to business. Throughout the consultation there was a concern with respect to the external lack of awareness of Richmond Hill and considerable support for Economic Development to be more aggressive in promoting the Town. Many of the businesses contacted believed that Richmond Hill does not have a strong brand presence in the GTA, which has meant that for many businesses and investors the town is simply not on the radar when making investment and location decisions. A clear and distinctive identity, coupled with a proactive marketing effort is essential in the attraction of investment to a city, especially in today's highly competitive environment. A more effective branding and marketing strategy that considers is a priority for the Town.

The key themes identified – greater support for the entrepreneurial economy, build the creative economy, target key existing and emerging sectors and enhance the economic development function – recognize both the Town's current economic development activities as well as new directions for expanding economic development activity. These themes also provide direction for the vision, goals and actions for the Richmond Hill economic development strategy, discussed in the next chapter of this report.

5 Vision, Goals and Actions

Richmond Hill's Strategic Plan, A Plan for People, A Plan for Change, sets out a vision for the Town of becoming a place 'where people come together to build our community'. Building the community, now and in the future, requires a strong economy and the economic development strategy is the plan that will help the Town strengthen its economic base.

The vision for Richmond Hill's economic development strategy that emerged from the four key themes identified in Chapter 4 is 'sustained economic growth built on innovation, investment, entrepreneurship, creativity and quality of place'. The Town must work to achieve its vision for sustainable economic growth and long term prosperity by using its strengths to its advantage: excellent transportation infrastructure; a strategic central location; a highly skilled and highly educated population; ethnic diversity; strong corporate support from the Town of Richmond Hill; growth of the local economy, and quality of life-quality of place. The Town must also respond to the opportunities it has to fulfill its potential as an economic centre while addressing areas that need attention.

To support Richmond Hill's economic vision, four broad goals have been developed. Each goal has a number of recommended actions along with the role of the Town's economic development staff and a rating as to its priority. Those that are rated 'High' should be a priority for the Economic Development Office over the next 2 years, while those that are rated 'Medium' and 'Low' should be initiated in the subsequent 3 to 5 years, or over the term of the strategy.

It should be noted that that prioritization of the recommendations is intended to reflect a logical sequence of activities, with each action in the strategy contributing to a greater level of success as it relates to economic development and investment in the community. A more detailed implementation plan will also be needed to address the budget, resources and more detailed timing of each action.

The four goals for the Town of Richmond Hill's Economic Development Strategy are:

1. **Be a regional centre for small business support and innovation which drives SME growth and entrepreneurship in the community**

2. **Establish Richmond Hill as the "Creative Centre" of York Region by providing a business environment and a quality of place experience that distinguishes it as the GTA's most liveable community.**

3. **Attract business and industry that will sustain and grow our local economy by focusing on creative and technology based business and industry.**

4. **Deliver a best in class approach to economic development that is based on engagement with our business leaders and a brand which identifies Richmond Hill as a premier business location in the Greater Toronto Area.**

Taking action

Goal 1:

Be a regional centre for small business support and innovation which drives SME growth and entrepreneurship in the community.

Small businesses have been and will continue to be the foundation of Richmond Hill's economy. Providing greater support to entrepreneurs and leveraging the town's ethnic diversity to encourage new business development will be an important part of the community's future. This will be achieved through the following actions:

1. Link more effectively with immigrant communities and associations to attract and retain entrepreneurial residents.

   New Canadians have significant potential to create and attract businesses investment to a community. The Town needs to ensure that its business support services are accessible to all members of Richmond Hill, including the broad range of ethnic communities to better assist entrepreneurs in starting and developing their businesses e.g. seminars and training, access to government programs, mentoring and networking opportunities. As part of this effort the Town must also understand the investment potential in overseas markets and to utilize these networks to reach potential investors.

   Role: lead and partner

   Priority: High

2. Ensure adequate supply of small, high-quality space for start-ups.

   One of the greatest challenges for new businesses is finding suitable and affordable space in which to start up and run their businesses. The Town needs to ensure that its planning policy documents reflects and enables the growth of small business as part of its commitment to providing an adequate future supply of employment land. In addition the Economic Development staff should work with landowners and the development community to promote and deliver more small scale office accommodation and innovative space options for small business. The Town should also investigate opportunities to develop co-working and full-service business space options as a way to support the development of entrepreneurs.

   Role: facilitate

   Priority: High

3. Develop virtual incubation programs.

   Supporting new businesses, in particular those that are technology and innovation based, has a measureable impact on their success and future growth. The growth of technology based companies in the 1990's saw may communities turn to business incubators as a means of supporting and facilitating the growth of these businesses. This model combined physical space in which the company could locate with advice, guidance and support to assist the entrepreneur with developing their business. Central to this model was the requirement of a new venture to set up shop at the incubator site. Increasingly however incubators are becoming virtual, allowing a company to garner the advice and guidance of an incubator without actually being located at the incubator site. Typically these incubators provide entrepreneurs and innovators with services such as coaching and mentoring, peer to peer networking, seminars and workshops, and access to research. There are many advantages to a virtual incubation program but its main benefit is to increase reach and efficiencies while reducing the costs of interactions, while still providing assistance that leads to the development and commercialization of new ideas and businesses.

   Initially, the Town should consider improving its online resource tools to better enable start ups / small business to access all major resources available to business, such as where to receive training, how to prepare a business plan, advice and technical and financial assistance etc. (e.g. www.gpaedc.ca). In the longer term, consideration should be given to the development of a virtual incubation program that includes access to business advisors and mentors, access to networks of lenders, participation in workshops and seminars, and a range of administrative support services for home-based businesses. In developing a virtual incubation program the Town should initiate talks with organizations that have a track record of developing and delivering successful programming for businesses.

   Role: partner

   Priority: Medium

4. Create networking, mentoring, financing opportunities for start-ups.

   Though there are already enterprise support services available in Richmond Hill these need to be broadened to include more intensive hands on support. This should include facilitating the establishment of peer to peer networks for entrepreneurs and small businesses (regardless of sector) to share ideas and experiences; a mentoring program that matches local business with entrepreneurs, particularly those from the Town's ethnic communities. There are also an abundance of regional networks, such as York Biotech; York Technologies Association; Toronto Region Research Alliance which the Town should be connecting local start-ups to. The Town should also consider developing a local business angels networks which brings together ambitious companies seeking equity finance to grow their business with private investors who are looking for investment opportunities that can demonstrate the potential for significant growth.

   Role: partner

   Priority: Medium

5. Better leverage existing local and regional business support structure.

   Business support structures already present in Richmond Hill and the wider York Region need to be better leveraged in a way that contributes to the growth and development of local business, particularly as it relates the town's target sectors. For example the Small Business Enterprise Centre is providing business information services but needs to be better able to refer those that have the greatest employment potential on to more intensive support services. The ISCM, though not located in Richmond Hill, is still available to companies in the town and their services need to be better promoted and utilized by entrepreneurs and companies in the town. Seneca College too offers a broad range of programming and services for small business which need to be more effectively integrated into local economic development programming.

   Role: partner

   Priority: High

Goal 2:

Richmond Hill will be the "Creative Centre" of York Region by providing a business environment and a quality of place experience that distinguishes it as the GTA's most liveable community.

The work of Richard Florida demonstrates the importance of the creative economy and the impact it can have on both a provincial and local economy, as a result of its highly skilled workforce, income levels and cross sectoral presence. Richmond Hill's concentration of creative economy workers and businesses, combined with a high quality of life provides the community with an opportunity to put the potential of the creative economy at the centre of its economic development effort. The following actions will support this goal:

1. Attract a post-secondary institution presence and better leverage programming from York University and Seneca College

   Education and access to creative and skilled labour is critical to the creative economy and though Richmond Hill has significant post secondary institutions in the region, there is none in the community itself. Communities with post secondary institutions have benefitted from significant economic impact and spinoff effects particularly as it relates to the creative economy. While a post secondary presence may not be possible in the short term, the town should engage both Seneca College and York University to ensure a greater physical presence in the area of York Region and the delivering of programming that helps to advance the development of town's target sectors.

   Role: lead and facilitate

   Priority: High

2. Link arts & culture sector to economic opportunities.

   The arts and cultural sector, is an often overlooked yet important part of the creative economy that offers many communities growth potential. With the opening of the Richmond Hill Centre for the Performing Arts the Town has made considerable progress to establishing an arts and cultural presence in the community, but continued commitment is required to developing and grow this sector further. The Town should explore opportunities to leverage the Centre for Performing Arts in a way that enables the development and attraction of more arts programming in the downtown. This could include a more effective marketing and promotional effort as well as a broader range of indoor and outdoor festivals and events. It should also include opportunities for continuing education that links the arts and cultural community to the broader range of creative professionals in the Town - web and software development, advertising and design etc.

Role: lead and facilitate

Priority: Medium

3. Develop the downtown as a creative hub for the community.

   A healthy and vibrant downtown not only attracts business investment and visitors to the core, thus adding to a municipality's tax base, it is also a consideration in the attraction of workers to the Town and business investment more broadly. The Town has made considerable progress in its revitalization efforts of the downtown, but more effort is required to create a downtown that provides the visitor with a destination experience. While consideration should be given to how best to merchandize and promote the downtown for investment, consideration should also be given to facilitating a range of housing types in the downtown including rental and owner options, mid-rise and high rise, small studios, larger loft style flats and townhouses. The Town should consider bringing WiFi service to the downtown as way to attract more peer to peer activity and entrepreneurial activity in the core. As part of the marketing and promotional effort for the downtown, consideration should be given to attracting software and start-up companies and positioning the town centre as a new kind of start-up campus with rich amenities and resources for entrepreneurs.

   Role: lead and facilitate

   Priority: Medium

4. Develop a strategy for the re-development of the Newkirk Business Park that better positions the employment area for small business and creative industries. (See www.thecreativespace.com).

   Newkirk Business Park is the town`s oldest industrial park and remains a primarily location for small and medium scale manufacturing operations. The Park's proximity to residential neighbourhoods and its strategic location close to the town centre coupled with the need to drive greater employment density suggest that this area of the town is extremely well positioned to also accommodate both office uses and technology based companies with some production element or lab requirement. In order to see the effective repositioning of this business park the Town will need to consider the introduction of incentive such as TIFF arrangements or grants program similar to those in the City of Toronto`s that support new building construction and/or building expansion in targeted sectors and areas across the City. In addition, the town should consider opportunities to develop co-working and full serviced business office space which offer flexible terms and space for businesses that want the proximity to other creative and small businesses.

These decisions should be delivered as part of an overall business park strategy for the area that can be promoted and marketed to the business community.

Role: facilitate

Priority: Medium

5. Develop a talent retention/recruitment strategy that promotes the authentic Richmond Hill – urban and rural lifestyle, arts and culture, neighbourhoods and community.

   Richmond Hill's quality of life is unique in the Greater Toronto Area, combining an urban and rural lifestyle, with strong neighbourhoods and ethnic communities, and arts and cultural facilities. This quality of life is an important locational factor for the creative classes and should be used as the basis for a talent recruitment and retention strategy that promotes Richmond Hill's unique qualities to these classes.

   Role: lead

   Priority: Low

6. Host a creative industries symposium in Richmond Hill to galvanize support for creative entrepreneurs and enterprises. (See www.artoftransition.ca).

   The Town of Richmond Hill has an opportunity to demonstrate its leadership in developing the creative industries by developing and hosting a creative industries symposium. This symposium would bring together creative industries and innovators from across the Region to explore the unique advantages of the Region and to identify strategies for growing and evolving local economies. The outcome of this symposium would be to open dialogue and create networks to develop new ideas, partnerships and opportunities that will drive the regional creative economy.

   Role: lead and partner

   Priority: High

Goal 3:

Attract business and industry that will sustain and grow our local economy by focusing on creative and technology based business and industry.

A review of the strengths of the local economy reveal competitive advantages in four distinct industry segments both in terms of employment and business concentration. While these opportunities must be seen in a regional context, there is considerable opportunity to position Richmond Hill at the centre of a high growth economy. To ensure the growth of these sectors in the future, the Town must act strategically in the attraction of business investment and employment growth given the constraints facing the community in terms of available employment lands.

1. Build value propositions focused on existing and emerging sectors: Finance + Insurance, Professional, Scientific and Technical Services, Information and Cultural Industries and Health Industries – build on a hub and spoke model to demonstrate Richmond Hill's central position in broader economy.

   Richmond Hill has competitive advantages in four key sectors with the town's central position within the Greater Toronto Area being an important consideration in the development and expansion of these sectors. The Town needs to understand their competitive advantages in each sector and to build value propositions based on these advantages. From this understanding the Town should be developing marketing strategies and material to promote the growth and development of these sectors.

   Comprehensive Industry Sector profiles should clearly illustrate the Town's competitive advantages and value proposition for business investment in each of its target sectors. This should include a well developed understanding of key firms in the region, the global reach and influence of these companies, the level of innovation and commercialization efforts that is occurring, and the extent of and investment in Research and Development that is being lead or developed by the town's business community, the extent and type of collaborative and partnerships efforts that are being supported and the development and deployment of new technologies, and the level of supporting infrastructure in the community. This information should form the basis of Richmond Hill's competitive advantage (or business case for investment) and the key messaging presented in marketing and promotion brochures. Ensure the profiles include a talent-focused branding component and convey a sense of authenticity and credibility that comes from having local businesses and entrepreneurs tell their 'stories'.

   Role: lead

   Priority: Medium

2. Develop marketing materials for each of the target sectors.

   Though Richmond Hill has significant strengths in the four target sectors, the competition for investment in these sectors is global. In a globally competitive environment cities must be able to identify and communicate what makes their community a successful place to operate a business. The Town needs to create a bold new image of itself as a place for successful businesses that will draw the attention of investors. This will need to be based on the specific competitive advantages that the town has to offer the key target sectors and will include specific marketing and promotional material for each target.

   Role: lead

   Priority: Low

3. Hold annual networking and brainstorming sessions with members of Town Council, the proposed business leadership council and industry leaders within each sector.

The pace of change within industry is increasing and businesses needs to stay abreast of changes that are impacting their profitability and success. Similarly, towns and cities need to keep abreast of the changes that are occurring within the economy and how these changes are impacting local business. Richmond Hill should hold annual networking or brainstorming sessions with its key target sectors and other community leaders within the community, to gain a greater understanding of the opportunities and issues affecting the key sectors, and to identify the ways to grow these industries and their economy.

Role: lead and partner

Timing: High

4. Develop a sector-focused strategy for prioritizing uses on remaining industrial lands.

   The limited supply of industrial land has been identified as one of the potential constraints within the Town. The Town needs to gain a greater understanding of the requirements for employment lands on a sector basis and develop a sector-focused strategy for the remaining industrial lands in the community. This should result in a prioritization of the remaining industrial lands and the identification of redevelopment opportunities on existing industrial land.

   Role: lead and facilitate

   Priority: Medium

Goal 4:

Deliver a best in class approach to economic development that is based on engagement with our business leaders and a brand which identifies Richmond Hill as a premier business location in the Greater Toronto Area.

In today`s globally competitive investment market, the delivery of economic development programming requires a deeper understanding of business needs and the use of a more sophisticated marketing and communications toolkit to build a strong community brand. The effective implementation of Richmond Hill`s Economic Development Strategy will need an enhancement of current programming and activities to be both regional and globally competitive. To achieve this, the following actions will be undertaken:

1. Enhance the Town's Business Retention & Expansion function through a formalized, software-based corporate calling program.

   An expanded corporate calling program will allow the economic development department to establish structured and long term relationships with the key businesses in the town. This will ensure that the Town is informed of the key issues and concerns of businesses, and are working to support the growth and development of key sectors. It will also provide the town with a detailed understanding of the strengths around which to build an effective and recognizable brand for the town.

   Role: lead

Priority: High

2. Establish a Richmond Hill Business Leadership Council to provide insight/advice to Economic Development Staff and Council.

   As part of the greater engagement with existing businesses the Town should establish a "Business Leadership Council" which can provide input on the effective implementation of the economic development strategy and, if necessary, to advise on new directions. This group will also be able to inform Economic Development on a new approach to marketing and branding the Town. The Town could also create sector based advisory committees to provide guidance and support on initiatives that are necessary to promote the Town's target sectors.

   Role: lead and partner

   Priority: High

3. Initiate the development and implementation of a comprehensive economic development marketing strategy that includes an internet strategy and audience focus and tactics for engaging business in the Town's target sectors.

   Effective communication with the Town's business and community stakeholders and greater external marketing of the town to potential new businesses is an important element of any economic development strategy. Communications with the existing business community should focus on methods for informing and engaging the local business community as to the activities of Economic Development , while external marketing efforts will be focused on creating a 'brand' and raising the profile and impact of the community both regionally and internationally. An inspiring, shared message as to the type of community that Richmond Hill represents will also mobilize business and people to work collaboratively and proactively to create a strong local economy.

   Role: lead

   Priority: High

4. Develop Web 2.0 Tools in support of the Town's economic development initiatives and marketing efforts

   As with many industries, the internet is having a profound impact on how economic development organizations reach customers and clients. Effective economic development marketing is becoming more complex and governments and companies are using new ways of researching and identifying potential investment locations. Of increasing importance is Web 2.0, which is comprised of web based tools that allow for interactive information sharing and collaboration. These tools include social networking sites, video sharing sites, wikis, blogs, as well as hosted services. This could also include the use of splash pages on the Town's website that help connect people intuitively to major websites in Town that highlight activities, events and resources in the community. Greater integration of these tools on the part of the Town is required in the attraction and retention of business and industry investment, the attraction of new residents, effective marketing and promotion, and as a way to better inform the public of the town's economic development efforts.

Role: lead

Priority: High

Appendix I

Industry by National Occupational Codes (NOCS)

Figure 25 – Detailed Occupational Structure by Industry Sector, Richmond Hill, 2006

	11 Agriculture, forestry, fishing and hunting	21 Mining and oil and gas extraction	22 Utilities	23 Construction	31-33 Manufacturing	41 Wholesale trade	44-45 Retail trade	48-49 Transportation and warehousing	51 Information and cultural industries	52 Finance and insurance	53 Real estate and rental and leasing	Professional, scientific and technical services	55 Management of companies and enterprises	56 Administrative and support, waste management and remediation services	61 Educational services	62 Health care and social assistance	71 Arts, entertainment and recreation	Accommodation and food services	81 Other services	91 Public administration
A0 Senior management occupations	0.0%	9.1%	1.6%	2.9%	2.1%	5.3%	1.0%	1.6%	3.6%	1.9%	2.7%	2.8%	12.2%	1.1%	0.7%	0.8%	0.6%	0.3%	1.2%	2.5%
A1 Specialist managers	0.0%	6.1%	6.4%	1.9%	6.5%	17.8%	1.9%	4.3%	12.2%	6.5%	4.1%	7.0%	9.8%	5.9%	1.2%	1.3%	1.2%	1.7%	3.3%	4.3%
A2 Managers in retail trade, food and accommodation services	0.0%	0.0%	0.0%	0.2%	1.1%	2.7%	17.2%	0.6%	0.6%	0.3%	5.2%	0.3%	0.0%	2.0%	0.0%	0.0%	0.6%	20.3%	2.9%	0.0%
A3 Other managers, n.e.c.	0.0%	6.1%	4.8%	14.9%	7.6%	2.1%	0.3%	4.5%	5.4%	10.8%	6.0%	1.5%	12.2%	2.4%	4.7%	2.6%	2.7%	0.2%	3.8%	2.5%
B0 Professional occupations in business and finance	0.0%	33.3%	4.8%	1.6%	2.8%	2.9%	1.2%	2.4%	3.3%	21.6%	2.4%	12.8%	22.0%	3.0%	1.1%	0.7%	0.6%	0.2%	1.5%	9.5%
B1 Finance and insurance administrative occupations	0.0%	0.0%	1.6%	2.4%	1.2%	1.8%	0.7%	1.0%	0.0%	8.8%	1.5%	2.9%	7.3%	1.1%	0.2%	0.7%	1.2%	0.2%	1.2%	0.5%
B2 Secretaries	0.0%	0.0%	0.0%	1.1%	0.8%	2.8%	1.1%	2.4%	0.0%	0.8%	2.4%	2.6%	0.0%	0.9%	2.2%	3.9%	0.9%	0.7%	1.3%	1.5%
B3 Administrative and regulatory occupations	6.9%	0.0%	1.6%	2.9%	2.1%	2.3%	0.9%	1.0%	1.9%	2.6%	8.9%	2.4%	9.8%	5.3%	2.1%	3.2%	2.4%	0.3%	2.0%	6.9%
B4 Clerical supervisors	0.0%	0.0%	0.0%	0.2%	0.4%	0.8%	0.0%	1.4%	0.6%	1.8%	0.0%	0.5%	0.0%	0.5%	0.0%	0.2%	0.6%	0.0%	0.2%	1.1%
B5 Clerical occupations	10.3%	0.0%	12.8%	4.5%	10.2%	16.7%	6.6%	18.9%	17.5%	20.0%	10.0%	10.0%	7.3%	16.8%	4.3%	9.3%	7.3%	2.5%	7.5%	15.9%
C0 Professional occupations in natural and applied sciences	0.0%	24.2%	28.8%	2.1%	14.1%	8.7%	1.9%	2.6%	16.7%	13.7%	1.5%	29.1%	4.9%	5.0%	1.4%	1.2%	1.5%	0.3%	0.7%	10.2%
C1 Technical occupations related to natural and applied sciences	6.9%	0.0%	11.2%	3.9%	6.1%	3.8%	0.7%	2.2%	5.4%	1.8%	1.7%	6.7%	0.0%	3.3%	1.7%	0.4%	1.2%	0.2%	2.9%	5.4%
D0 Professional occupations in health	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	2.9%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.3%	15.7%	0.0%	0.0%	0.0%	0.3%
D1 Nurse supervisors and registered nurses	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	13.8%	0.0%	0.0%	0.7%	0.8%
D2 Technical and related occupations in health	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	9.6%	0.0%	0.0%	0.2%	0.0%
D3 Assisting occupations in support of health services	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	1.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.8%	0.0%	0.0%	0.2%	0.0%
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	0.0%	0.0%	1.6%	0.0%	0.7%	1.3%	0.2%	0.0%	1.9%	0.9%	0.3%	6.9%	0.0%	0.8%	1.1%	5.8%	0.9%	0.2%	5.1%	8.4%
E1 Teachers and professors	6.9%	0.0%	0.0%	0.0%	0.2%	0.3%	0.1%	0.0%	0.3%	0.3%	0.0%	0.3%	0.0%	0.0%	58.7%	0.3%	0.0%	0.0%	0.0%	0.7%
E2 Paralegals, social services workers and occupations in education and religion, n.e.c.	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	2.6%	0.0%	0.8%	5.2%	12.7%	0.0%	0.0%	1.8%	2.1%
F0 Professional occupations in art and culture	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	7.6%	0.2%	0.0%	1.0%	0.0%	0.0%	3.6%	0.6%	11.6%	0.0%	1.2%	1.6%
F1 Technical occupations in art, culture, recreation and sport	0.0%	0.0%	0.0%	0.8%	2.2%	0.6%	0.8%	0.0%	7.3%	0.1%	0.9%	4.1%	0.0%	0.6%	2.2%	0.3%	27.1%	0.6%	0.4%	2.8%
G0 Sales and service supervisors	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	2.6%	0.4%	0.0%	0.1%	0.3%	0.1%	0.0%	0.5%	0.2%	0.1%	3.0%	3.7%	0.2%	0.0%
G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers	0.0%	0.0%	1.6%	0.2%	2.6%	17.5%	1.5%	1.4%	2.8%	7.1%	34.7%	2.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
G2 Retail salespersons and sales clerks	10.3%	0.0%	2.4%	1.0%	1.9%	1.3%	32.1%	0.6%	3.6%	0.0%	7.4%	1.0%	0.0%	1.5%	0.0%	0.3%	3.6%	0.9%	1.3%	0.0%
G3 Cashiers	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	8.8%	0.0%	0.6%	0.0%	0.5%	0.0%	0.0%	0.0%	0.2%	0.0%	3.3%	7.7%	0.4%	0.0%
G4 Chefs and cooks	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.4%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	12.5%	0.0%	0.0%
G5 Occupations in food and beverage service	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.9%	19.5%	0.0%	0.0%
G6 Occupations in protective services	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.1%	0.4%	0.3%	0.1%	0.0%	0.0%	0.0%	6.6%	0.3%	0.0%	0.6%	0.0%	0.2%	15.3%
G7 Occupations in travel and accommodation, including attendants in recreation and sport	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.1%	0.0%	0.0%	0.5%	0.0%	0.0%	6.3%	0.0%	0.1%	7.9%	1.2%	0.0%	0.5%
G8 Childcare and home support workers	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	4.1%	0.0%	0.0%	12.2%	0.0%
G9 Sales and service occupations, n.e.c.	0.0%	0.0%	0.0%	1.2%	0.9%	0.8%	9.1%	1.0%	0.6%	0.2%	6.9%	0.4%	0.0%	14.9%	2.0%	2.5%	10.6%	24.8%	29.6%	0.3%
H0 Contractors and supervisors in trades and transportation	0.0%	0.0%	0.0%	9.5%	1.1%	0.0%	0.0%	2.0%	0.3%	0.0%	0.3%	0.1%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.2%	0.5%
H1 Construction trades	6.9%	0.0%	1.6%	24.0%	1.3%	0.0%	0.1%	0.4%	0.0%	0.0%	0.0%	0.2%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	0.0%	0.3%
H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations	0.0%	0.0%	5.6%	5.1%	0.8%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	0.1%	0.0%	0.0%	0.2%	0.1%	0.0%	0.0%	0.0%	0.7%
H3 Machinists, metal forming, shaping and erecting occupations	0.0%	0.0%	0.0%	1.4%	3.9%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	0.7%	0.0%
H4 Mechanics	0.0%	6.1%	0.0%	2.9%	2.0%	1.3%	1.9%	4.3%	0.0%	0.0%	0.0%	0.1%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	12.1%	0.3%
H5 Other trades, n.e.c.	6.9%	0.0%	1.6%	3.4%	2.0%	0.6%	0.8%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.5%	0.0%	0.0%	0.6%	0.0%	1.5%	0.0%
H6 Heavy equipment and crane operators, including drillers	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.3%
H7 Transportation equipment operators and related workers, excluding labourers	13.8%	0.0%	0.0%	1.0%	0.6%	2.7%	0.5%	35.7%	0.3%	0.0%	1.0%	0.0%	0.0%	0.5%	0.0%	0.1%	0.0%	1.0%	0.2%	0.0%
H8 Trades helpers, construction, and transportation labourers and related occupations	0.0%	0.0%	3.2%	8.6%	1.1%	2.6%	0.8%	5.1%	0.3%	0.0%	0.0%	0.4%	0.0%	1.2%	0.0%	0.0%	0.6%	0.0%	0.2%	1.8%
I0 Occupations unique to agriculture, excluding labourers	24.1%	0.0%	0.0%	0.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.2%	0.0%	0.0%	2.4%	0.0%	0.0%	0.0%
I1 Occupations unique to forestry operations, mining, oil and gas extraction, and fishing, excluding labourers	6.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
I2 Primary production labourers	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	6.7%	0.0%	0.2%	2.6%
J0 Supervisors in manufacturing	0.0%	0.0%	4.0%	0.0%	3.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
J1 Machine operators in manufacturing	0.0%	0.0%	0.0%	0.3%	8.7%	0.5%	0.3%	0.0%	0.0%	0.0%	0.3%	0.5%	0.0%	0.3%	0.2%	0.0%	0.0%	0.0%	1.1%	0.0%
J2 Assemblers in manufacturing	0.0%	0.0%	0.0%	0.0%	7.6%	0.8%	0.1%	0.0%	0.3%	0.0%	0.0%	0.1%	0.0%	2.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%
J3 Labourers in processing, manufacturing and utilities	0.0%	0.0%	1.6%	0.0%	3.2%	0.7%	0.4%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Source: Statistics Canada, 2006 Census of Population, Statistics Canada catalogue no. 97-559-XCB2006024.

Appendix II

National American Industry Classification System (NAICS) Definitions

North American Industrial Classification System (NAICS)

Sector Definitions

Agriculture, Forestry (NAICS 11)

This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.

Establishments primarily engaged in agricultural research or that supply veterinary services are not included in this sector.

Mining and Oil and Gas Extraction (NAICS 21)

This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids, such as coal and ores; liquids, such as crude petroleum; and gases, such as natural gas.

The term *mining* is used in the broad sense to include quarrying, well operations, milling (for example, crushing, screening, washing, or flotation) and other preparation customarily done at the mine site, or as a part of mining activity.

Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included in this sector. Establishments performing similar activities, on a contract or fee basis, are also included.

Construction (NAICS 23)

This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

Manufacturing (NAICS 31-33)

This sector comprises establishments primarily engaged in the physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories or mills. Manufacturing establishments may own the materials which they transform or they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools.

Wholesale Trade (NAICS 41)

This sector comprises establishments primarily engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are therefore organized to sell merchandise in large quantities to retailers, and business and institutional clients. However, some wholesalers, in particular those that supply non-consumer capital goods, sell merchandise in single units to final users.

This sector recognizes two main types of wholesalers, that is, wholesale merchants and wholesale agents and brokers.

Retail Trade (NAICS 44-45)

The retail trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are therefore organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, that is, store and non-store retailers.

Information and Cultural Industries (NAICS 51)

This sector comprises establishments primarily engaged in creating and disseminating (except by wholesale and retail methods) information and cultural products, such as written works, musical works or recorded performances, recorded dramatic performances, software and information databases, or providing the means to disseminate them. Establishments that provide access to equipment and expertise to process information are also included.

The main components of this sector are the publishing industries (except exclusively on Internet), including software publishing, the motion picture and sound recording industries, the broadcasting industries (except exclusively on Internet), the internet publishing and broadcasting industries, the telecommunications industries, the internet service providers, web search portals, data processing industries, and the other information services industries.

Finance and Insurance (NAICS 52)

This sector comprises establishments primarily engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions. Included are:

- Establishments that are primarily engaged in financial intermediation. They raise funds by taking deposits and/or issuing securities, and, in the process, incur liabilities, which they use to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale and risk.

- Establishments that are primarily engaged in the pooling of risk by underwriting annuities and insurance. They collect fees (insurance premiums or annuity considerations), build up reserves, invest those reserves and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.

- Establishments that are primarily engaged in providing specialized services that facilitate or support financial intermediation, insurance and employee benefit programs.

In addition, establishments charged with monetary control - the monetary authorities - are included in this sector.

Real Estate and Rental Leasing (NAICS 53)

This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets.

Establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate, are also included

Professional, Scientific and Technical Services (NAICS 54)

This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

The main components of this sector are:

- legal services industries;

- accounting and related services industries;

- architectural, engineering and related services industries;

- surveying and mapping services industries;

- design services industries;

- management, scientific and technical consulting services industries;

- scientific research and development services industries;
- advertising services industries.

The distinguishing feature of this sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance. Thus, the establishments classified in this sector sell expertise.

Management of Companies and Enterprises (NAICS 55)

This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

They may undertake the function of management, or they may entrust the function of financial management to portfolio managers

Educational Services (NAICS 61)

This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

Health Care and Social Assistance (NAICS 62)

This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

Arts, Entertainment and Recreation (NAICS 71)

This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce, promote or participate in live performances, events or exhibits intended for public viewing; provide the artistic, creative and technical skills necessary for the production of artistic products and live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and operate facilities or provide services that enable patrons to participate in sports or recreational activities of pursue amusement, hobbies and leisure-time interests.

Accommodation and Food Services (NAICS 72)

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps.

This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises

Public Administration (NAICS 91)

This sector comprises establishments primarily engaged in activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

Appendix III

Detailed Industry Profiles

Industry Profile – Finance and Insurance

- Change in Location Quotient Values by Resident Labour Force, Finance & Insurance, Richmond Hill, 2001 -2006

Industry (NAICS)	Labour Force - LQ 2006	Labour Force - LQ 2001	Labour Force - LQ (Net Change)	Labour Force - LQ (Percentage Change)
~521 Monetary authorities - Central bank	0.71	1.37	-0.66	-48.2%
~522 Credit intermediation and related activities	1.81	1.73	0.08	4.6%
~523 Securities, commodity contracts, and other financial investment and related activities	2.05	1.84	0.21	11.4%
~524 Insurance carriers and related activities	1.51	1.56	-0.05	-3.2%
~526 Funds and other financial vehicles	1.42	1.56	-0.14	-9.0%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

Labour Force - number of local residents employed in the sector, whether or not they work in the municipality.

- Change in Location Quotient Values by Local Employment, Finance & Insurance, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs - LQ 2006	Jobs -LQ 2001	Jobs - LQ (Net Change)	Jobs - LQ (Percentage Change)
~521 Monetary Authorities - Central Bank	0	0	0	n/a
~522 Credit Intermediation and Related Activities	0.68	0.84	-0.16	-19.0%
~523 Securities, Commodity Contracts, and Other Financial Investment and Related Activities	1.27	1.56	-0.29	-18.6%
~524 Insurance Carriers and Related Activities	1.12	1.12	0	0.0%
~526 Funds and Other Financial Vehicles	1.33	1.52	-0.19	-12.5%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

millierdickinsonblais inc.

- Change in Employment by Jobs Finance & Insurance, Richmond Hill, 2001 - 2006

Industry (NAICS)	Jobs -2006	Jobs -2001	Jobs (Net Change)	Jobs (Percentage Change)
~521 Monetary authorities - Central bank	0	0	0	n/a
~522 Credit intermediation and related activities	985	990	-5	-0.5%
~523 Securities, commodity contracts, and other financial investment and related activities	760	865	-105	-12.1%
~524 Insurance carriers and related activities	975	850	125	14.7%
~526 Funds and other financial vehicles	30	35	-5	-14.3%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

Jobs - number of people employed by local industries; workers may or may not be residents of the municipality.

- Finance & Insurance Industry, Number of Businesses, by subsector, 2008

EMPLOYEE SIZE RANGE	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
NATIONAL INDUSTRIES											
Total	19,188	12,556	6,632	4,434	1,045	574	359	142	50	23	5
52 Finance and insurance	1,149	869	280	198	41	15	24	2	-	-	-
522111 - Personal and Commercial Banking Industry	21	-	21	1	5	-	15	-	-	-	-
522190 - Other Depository Credit Intermediation	1	-	1	1	-	-	-	-	-	-	-
522210 - Credit Card Issuing	1	1	-	-	-	-	-	-	-	-	-
522220 - Sales Financing	8	7	1	-	1	-	-	-	-	-	-
522291 - Consumer Lending	2	-	2	1	1	-	-	-	-	-	-
522299 - All Other Non-Depository Credit Intermediation	82	75	7	3	4	-	-	-	-	-	-
522310 - Mortgage and Non-mortgage Loan Brokers	30	15	15	12	2	-	1	-	-	-	-
522329 - Other Financial Transactions Processing and Clearing House Act	1	-	1	-	-	-	1	-	-	-	-
522390 - Other Activities Related to Credit Intermediation	9	4	5	5	-	-	-	-	-	-	-
523110 - Investment Banking and Securities Dealing	23	17	6	4	-	2	-	-	-	-	-
523120 - Securities Brokerage	16	14	2	1	-	-	1	-	-	-	-
523130 - Commodity Contracts Dealing	12	6	6	6	-	-	-	-	-	-	-
523140 - Commodity Contracts Brokerage	2	1	1	1	-	-	-	-	-	-	-
523210 - Securities and Commodity Exchanges	1	1	-	-	-	-	-	-	-	-	-
523910 - Miscellaneous Intermediation	327	293	34	32	2	-	-	-	-	-	-
523920 - Portfolio Management	247	212	35	30	3	1	-	1	-	-	-
523930 - Investment Advice	60	35	25	22	1	2	-	-	-	-	-
523990 - All Other Financial Investment Activities	131	119	12	11	1	-	-	-	-	-	-
524111 - Direct Individual Life, Health and Medical Insurance Carriers	2	-	2	1	-	-	1	-	-	-	-
524121 - Direct General Property and Casualty Insurance Carriers	1	-	1	1	-	-	-	-	-	-	-
524129 - Other Direct Insurance (except Life, Health and Medical) Carriers	3	1	2	1	-	-	1	-	-	-	-
524210 - Insurance Agencies and Brokerages	128	47	81	51	16	10	3	1	-	-	-
524291 - Claims Adjusters	6	4	2	2	-	-	-	-	-	-	-
524299 - All Other Insurance Related Activities	23	8	15	9	5	-	1	-	-	-	-
526913 - Mortgage Funds	1	-	1	1	-	-	-	-	-	-	-
526989 - All Other Miscellaneous Funds and Financial Vehicles	11	9	2	2	-	-	-	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2008

- Finance & Insurance Industry, Number of Businesses, by subsector, 2003

EMPLOYEE SIZE RANGE	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
NATIONAL INDUSTRIES											
Total	14,179	8,856	5,323	3,009	895	652	503	166	68	26	4
52 Finance and insurance	852	624	228	125	39	27	30	6	1	-	-
522111 - Personal and Commercial Banking Industry	18	-	18	1	5	-	12	-	-	-	-
522130 - Local Credit Unions	1	1	-	-	-	-	-	-	-	-	-
522220 - Sales Financing	3	2	1	1	-	-	-	-	-	-	-
522291 - Consumer Lending	1	-	1	1	-	-	-	-	-	-	-
522299 - All Other Non-Depository Credit Intermediation	111	100	11	8	2	-	-	1	-	-	-
522310 - Mortgage and Non-mortgage Loan Brokers	8	5	3	2	-	1	-	-	-	-	-
523110 - Investment Banking and Securities Dealing	13	6	7	3	1	2	1	-	-	-	-
523120 - Securities Brokerage	13	9	4	4	-	-	-	-	-	-	-
523130 - Commodity Contracts Dealing	12	8	4	4	-	-	-	-	-	-	-
523140 - Commodity Contracts Brokerage	2	1	1	1	-	-	-	-	-	-	-
523210 - Securities and Commodity Exchanges	2	1	1	-	-	1	-	-	-	-	-
523910 - Miscellaneous Intermediation	6	4	2	1	-	1	-	-	-	-	-
523920 - Portfolio Management	460	406	54	28	9	8	6	2	1	-	-
523930 - Investment Advice	23	9	14	12	2	-	-	-	-	-	-
523990 - All Other Financial Investment Activities	30	21	9	3	3	1	2	-	-	-	-
524111 - Direct Individual Life, Health and Medical Insurance Carriers	2	-	2	1	-	-	1	-	-	-	-
524121 - Direct General Property and Casualty Insurance Carriers	2	1	1	-	-	-	1	-	-	-	-
524129 - Other Direct Insurance (except Life, Health and Medical) Carriers	1	-	1	1	-	-	-	-	-	-	-
524210 - Insurance Agencies and Brokerages	99	17	82	47	15	11	6	3	-	-	-
524291 - Claims Adjusters	2	2	-	-	-	-	-	-	-	-	-
524299 - All Other Insurance Related Activities	9	3	6	4	1	-	1	-	-	-	-
526920 - Mortgage Investment Funds	34	28	6	3	1	2	-	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2003

- Occupations Related to Finance and Insurance, Richmond Hill, 2006

	Number of Occupations	Percentage of Occupations
A Management occupations - Total	**13,830**	**100%**
A0 Senior management occupations	1,770	12.8%
A1 Specialist managers	4,665	33.7%
A2 Managers in retail trade, food and accommodation services	3,395	24.5%
A3 Other managers, n.e.c.	3,995	28.9%
B Business, finance and administration occupations - Total	**20,105**	**100%**
B0 Professional occupations in business and finance	4,690	23.3%
B1 Finance and insurance administration occupations	1,705	8.5%
B2 Secretaries	1,495	7.4%
B3 Administrative and regulatory occupations	2,305	11.5%
B4 Clerical supervisors	430	2.1%
B5 Clerical occupations	9,475	47.1%

Source: Statistics Canada, Census of Population, 2006

Industry Profile – Professional, Scientific and Technical Services

- Change in Location Quotient Values by Resident Labour Force, Professional Scientific and Technical Services, Richmond Hill, 2001 - 2006

Industry (NAICS)	Labour Force - LQ 2006	Labour Force - LQ 2001	Labour Force - LQ (Net Change)	Labour Force - LQ (Percentage Change)
~541 Professional, scientific and technical services	1.72	1.77	-0.05	-2.8%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

Labour Force - number of local residents employed in the sector, whether or not they work in the municipality.

- Change in Employment by Resident Labour Force, Professional Scientific and Technical Services, Richmond Hill, 2001 -2006

Industry (NAICS)	Labour Force - Resident Labour Force 2006	Labour Force - Resident Labour Force 2001	Labour Force - Resident Labour Force (Net Change)	Labour Force - Resident Labour Force (Percentage Change)
~541 Professional, scientific and technical services	10815	8780	2035	23.2%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Change in Location Quotient Values by Jobs, Professional Scientific and Technical Services, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs - LQ 2006	Jobs -LQ 2001	Jobs - LQ (Net Change)	Jobs - LQ (Percentage Change)
~541 Professional, scientific and technical services	1.65	1.78	-0.13	-7.3%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Change in Employment by Jobs, Professional Scientific and Technical Services, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs -2006	Jobs -2001	Jobs (Net Change)	Jobs (Percentage Change)
~541 Professional, scientific and technical services	6750	6135	615	10.0%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

Jobs - number of people employed by local industries; workers may or may not be residents of the municipality.

- Professional Scientific and Technical Services Industry, Number of Businesses, by subsector, 2008

EMPLOYEE SIZE RANGE NATIONAL INDUSTRIES	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	19,188	12,556	6,632	4,434	1,045	574	359	142	50	23	5
54 Professional, scientific and technical services	4,448	3,030	1,418	1,169	128	67	40	9	4	-	1
541110 - Offices of Lawyers	123	56	67	49	8	8	2	-	-	-	-
541190 - Other Legal Services	57	50	7	7	-	-	-	-	-	-	-
541212 - Offices of Accountants	249	140	109	86	15	6	2	-	-	-	-
541213 - Tax Preparation Services	26	17	9	8	1	-	-	-	-	-	-
541215 - Bookkeeping, Payroll and Related Services	122	77	45	36	3	4	1	1	-	-	-
541310 - Architectural Services	36	24	12	8	2	1	1	-	-	-	-
541320 - Landscape Architectural Services	9	4	5	4	1	-	-	-	-	-	-
541330 - Engineering Services	256	165	91	64	12	8	5	1	1	-	-
541340 - Drafting Services	14	13	1	1	-	-	-	-	-	-	-
541350 - Building Inspection Services	24	17	7	4	1	-	2	-	-	-	-
541360 - Geophysical Surveying and Mapping Services	2	1	1	-	1	-	-	-	-	-	-
541370 - Surveying and Mapping (except Geophysical) Services	7	2	5	-	1	3	1	-	-	-	-
541380 - Testing Laboratories	11	8	3	1	2	-	-	-	-	-	-
541410 - Interior Design Services	67	55	12	10	1	1	-	-	-	-	-
541420 - Industrial Design Services	26	21	5	4	1	-	-	-	-	-	-
541430 - Graphic Design Services	88	78	10	7	2	1	-	-	-	-	-
541490 - Other Specialized Design Services	26	19	7	6	1	-	-	-	-	-	-
541510 - Computer Systems Design and Related Services	1,744	1,132	612	540	34	15	17	4	1	-	1
541611 - Administrative Management and General Management Consulting Services	680	514	166	143	13	6	2	1	1	-	-
541612 - Human Resources Consulting Services	43	30	13	12	-	-	-	1	-	-	-
541619 - Other Management Consulting Services	200	149	51	43	5	2	1	-	-	-	-
541620 - Environmental Consulting Services	12	8	4	2	1	-	1	-	-	-	-
541690 - Other Scientific and Technical Consulting Services	138	99	39	35	2	1	-	-	1	-	-
541710 - Research and Development in the Physical, Engineering and Life Sciences	35	22	13	3	7	2	-	1	-	-	-
541720 - Research and Development in the Social Sciences and Humanities	4	4	-	-	-	-	-	-	-	-	-
541810 - Advertising Agencies	91	56	35	30	3	2	-	-	-	-	-
541820 - Public Relations Services	13	9	4	3	1	-	-	-	-	-	-
541830 - Media Buying Agencies	4	3	1	1	-	-	-	-	-	-	-
541840 - Media Representatives	2	-	2	2	-	-	-	-	-	-	-
541850 - Display Advertising	10	9	1	1	-	-	-	-	-	-	-
541860 - Direct Mail Advertising	5	3	2	1	-	1	-	-	-	-	-
541870 - Advertising Material Distribution Services	3	3	-	-	-	-	-	-	-	-	-
541891 - Specialty Advertising Distributors	17	9	8	3	3	-	2	-	-	-	-
541899 - All Other Services Related to Advertising	25	21	4	4	-	-	-	-	-	-	-
541910 - Marketing Research and Public Opinion Polling	15	8	7	2	2	2	1	-	-	-	-
541920 - Photographic Services	28	22	6	6	-	-	-	-	-	-	-
541930 - Translation and Interpretation Services	12	10	2	2	-	-	-	-	-	-	-
541940 - Veterinary Services	17	8	9	1	5	2	1	-	-	-	-
541990 - All Other Professional, Scientific and Technical Services	207	164	43	40	-	2	1	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2008

- Professional Scientific and Technical Services Industry, Number of Businesses, by subsector, 2003

EMPLOYEE SIZE RANGE NATIONAL INDUSTRIES	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	14,179	8,856	5,323	3,009	895	652	503	166	68	26	4
54 Professional, scientific and technical services	3298	2112	1186	820	174	102	68	17	4	1	0
541110 - Offices of Lawyers	109	56	53	42	6	2	3	-	-	-	-
541190 - Other Legal Services	20	13	7	7	-	-	-	-	-	-	-
541212 - Offices of Accountants	182	102	80	63	7	7	3	-	-	-	-
541213 - Tax Preparation Services	11	5	6	5	1	-	-	-	-	-	-
541215 - Bookkeeping, Payroll and Related Services	93	67	26	22	3	-	-	1	-	-	-
541310 - Architectural Services	46	33	13	7	3	1	1	1	-	-	-
541320 - Landscape Architectural Services	6	2	4	3	1	-	-	-	-	-	-
541330 - Engineering Services	179	117	62	35	16	3	6	2	-	-	-
541340 - Drafting Services	13	12	1	1	-	-	-	-	-	-	-
541350 - Building Inspection Services	13	10	3	2	-	1	-	-	-	-	-
541360 - Geophysical Surveying and Mapping Services	2	-	2	2	-	-	-	-	-	-	-
541370 - Surveying and Mapping (except Geophysical) Services	6	3	3	-	1	1	1	-	-	-	-
541380 - Testing Laboratories	20	17	3	1	1	-	1	-	-	-	-
541410 - Interior Design Services	48	32	16	13	1	1	1	-	-	-	-
541420 - Industrial Design Services	8	5	3	2	1	-	-	-	-	-	-
541430 - Graphic Design Services	74	55	19	15	3	-	1	-	-	-	-
541490 - Other Specialized Design Services	14	9	5	3	1	-	1	-	-	-	-
541510 - Computer Systems Design and Related Services	1,259	767	492	346	64	50	21	8	2	1	-
541611 - Administrative Management and General Management Consulting Services	669	465	204	142	34	15	11	-	2	-	-
541612 - Human Resource and Executive Search Consulting Services	30	21	9	7	1	1	-	-	-	-	-
541619 - Other Management Consulting Services	119	86	33	21	6	3	2	1	-	-	-
541620 - Environmental Consulting Services	9	4	5	1	2	1	1	-	-	-	-
541690 - Other Scientific and Technical Consulting Services	82	55	27	19	3	4	1	-	-	-	-
541710 - Research and Development in the Physical, Engineering and Life Sciences	24	10	14	3	2	4	3	2	-	-	-
541720 - Research and Development in the Social Sciences and Humanities	5	3	2	1	-	-	1	-	-	-	-
541810 - Advertising Agencies	84	53	31	23	5	2	1	-	-	-	-
541820 - Public Relations Services	5	4	1	-	1	-	-	-	-	-	-
541830 - Media Buying Agencies	3	3	-	-	-	-	-	-	-	-	-
541840 - Media Representatives	3	2	1	1	-	-	-	-	-	-	-
541850 - Display Advertising	6	3	3	2	-	1	-	-	-	-	-
541860 - Direct Mail Advertising	3	2	1	-	-	-	-	1	-	-	-
541870 - Advertising Material Distribution Services	1	1	-	-	-	-	-	-	-	-	-
541891 - Specialty Advertising Distributors	10	5	5	2	2	-	1	-	-	-	-
541899 - All Other Services Related to Advertising	33	29	4	-	4	-	-	-	-	-	-
541910 - Marketing Research and Public Opinion Polling	14	6	8	2	1	2	2	1	-	-	-
541920 - Photographic Services	33	25	8	7	-	1	-	-	-	-	-
541930 - Translation and Interpretation Services	6	3	3	2	-	-	1	-	-	-	-
541940 - Veterinary Services	21	9	12	7	4	1	-	-	-	-	-
541990 - All Other Professional, Scientific and Technical Services	35	18	17	11	-	1	5	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2003

- Occupations Related to Professional Scientific and Technical Services Industry, Richmond Hill, 2006

Total of Professional, Scientific and Technical Services Occupations	34,520	100%
A0 Senior management occupations	1,770	5.1%
A1 Specialist managers	4,665	13.5%
A2 Managers in retail trade, food and accommodation services	3,395	9.8%
A3 Other managers, n.e.c.	3,995	11.6%
B0 Professional occupations in business and finance	4,690	13.6%
B1 Finance and insurance administration occupations	1,705	4.9%
C0 Professional occupations in natural and applied sciences	8,060	23.3%
C1 Technical occupations related to natural and applied sciences	2,895	8.4%
D0 Professional occupations in health	1,425	4.1%
D1 Nurse supervisors and registered nurses	1,025	3.0%
D2 Technical and related occupations in health	895	2.6%

Source: Statistics Canada, Census of Population, 2006

Industry Profile – Health Industries

- Change in Location Quotient Values by Resident Labour Force, Health Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	LQ - Labour Force	LQ - Labour Force	Labour Force - LQ (Net Change)	Labour Force - LQ (Percentage Change)
3254 Pharmaceutical and medicine manufacturing	2.06	1.88	0.18	9.6%
3391 Medical equipment and supplies manufacturing	1.37	1.21	0.16	13.2%
4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors	1.7	1.99	-0.29	-14.6%
5417 Scientific research and development services	1.35	1.24	0.11	8.9%
~621 Ambulatory health care services	1.18	1.09	0.09	8.3%
~622 Hospitals	0.68	0.81	-0.13	-16.0%
~623 Nursing and Residential Care Facilities	0.41	0.38	0.03	7.9%
~624 Social assistance	0.79	0.82	-0.03	-3.7%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Change in Employment by Resident Labour Force, Health Industries, Richmond Hill, 2001 - 2006

Industry (NAICS)	Labour Force - Resident Labour Force 2006	Labour Force - Resident Labour Force 2001	Labour Force - Resident Labour Force (Net Change)	Labour Force - Resident Labour Force (Percentage Change)
3254 Pharmaceutical and medicine manufacturing	405	280	125	44.6%
3391 Medical equipment and supplies manufacturing	155	110	45	40.9%
4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors	375	305	70	23.0%
5417 Scientific research and development services	440	275	165	60.0%
~621 Ambulatory health care services	2940	2145	795	37.1%
~622 Hospitals	1745	1560	185	11.9%
~623 Nursing and Residential Care Facilities	635	415	220	53.0%
~624 Social assistance	1310	1045	265	25.4%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Change in Location Quotient Values by Jobs, Health Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs - LQ 2006	Jobs -LQ 2001	Jobs - LQ (Net Change)	Jobs - LQ (Percentage Change)
3254 Pharmaceutical and medicine manufacturing	4.53	3.13	140.0%	0.447284345
3391 Medical equipment and supplies manufacturing	4.18	1.44	2.74	190.3%
4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors	2.42	2.81	-0.39	-13.9%
5417 Scientific research and development services	0.51	1.5	-0.99	-66.0%
~621 Ambulatory health care services	1.3	1.09	0.21	19.3%
~622 Hospitals	0.85	1.04	-0.19	-18.3%
~623 Nursing and residential care facilities	0.76	0.43	0.33	76.7%
~624 Social assistance	0.94	0.78	0.16	20.5%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Change in Employment by Jobs, Health Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs -2006	Jobs -2001	Jobs (Net Change)	Jobs (Percentage Change)
~~3254 Pharmaceutical and medicine manufacturing	600	330	270	81.8%
~~3391 Medical equipment and supplies manufacturing	325	95	230	242.1%
~~4145 Pharmaceuticals, toiletries, cosmetics and sundries wholesaler-distributors	330	275	55	20.0%
~~5417 Scientific research and development services	115	245	-130	-53.1%
~621 Ambulatory Health Care Services	2085	1445	640	44.3%
~622 Hospitals	1510	1475	35	2.4%
~623 Nursing and Residential Care Facilities	800	340	460	135.3%
~624 Social Assistance	1040	705	335	47.5%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

- Health Industries, Number of Businesses, by subsector, 2008

EMPLOYEE SIZE RANGE NATIONAL INDUSTRIES	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	19,188	12,556	6,632	4,434	1,045	574	359	142	50	23	5
Health/ Life Sciences	**740**	**209**	**531**	**318**	**123**	**40**	**33**	**11**	**1**	**4**	**1**
325410 - Pharmaceutical and Medicine Manufacturing	2	1	1	0	0	0	0	0	0	1	0
339110 - Medical Equipment and Supplies Manufacturing	30	13	17	5	6	3	1	1	0	1	0
414510 - Pharmaceuticals and Pharmacy Supplies Wholesaler-Distributors	19	8	11	5	0	1	2	2	1	0	0
541710 - Research and Development in the Physical, Engineering and Life Sciences	35	22	13	3	7	2	0	1	0	0	0
621 Ambulatory health care services	546	139	407	277	97	17	14	1	0	1	0
622 Hospitals	2	1	1	0	0	0	0	0	0	0	1
623 Nursing and Residential Care Facilities	24	3	21	6	1	4	6	3	0	1	0
624 Social assistance	82	22	60	22	12	13	10	3	0	0	0

Source: Statistics Canada, Canadian Business Patterns Data: 2008

- Health Industries, Number of Businesses, by subsector, 2003

EMPLOYEE SIZE RANGE NATIONAL INDUSTRIES	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	14,179	8,856	5,323	3,009	895	652	503	166	68	26	4
Health/ Life Sciences	**1014**	**229**	**785**	**501**	**135**	**68**	**54**	**16**	**4**	**5**	**2**
325410 - Pharmaceutical and Medicine Manufacturing	2	0	2	1	0	0	0	0	0	1	0
339110 - Medical Equipment and Supplies Manufacturing	23	9	14	6	3	5	0	0	0	0	0
414510 - Pharmaceuticals and Pharmacy Supplies Wholesaler-Distributor	27	14	13	6	2	4	1	0	0	0	0
541710 - Research and Development in the Physical, Engineering and Lif	14	9	5	3	1	0	1	0	0	0	0
621 Ambulatory health care services	862	175	687	456	126	50	36	12	3	3	1
622 Hospitals	45	15	30	23	2	2	3	0	0	0	1
623 Nursing and Residential Care Facilities	22	5	17	3	0	2	7	2	1	1	0
624 Social assistance	19	2	17	3	1	5	6	2	0	0	0

Source: Statistics Canada, Canadian Business Patterns Data: 2003

- Occupations Related to Health Industries, Richmond Hill, 2006

	Number of Occupations	Percentage of Occupations
D Health occupations	**4,130**	**100%**
D0 Professional occupations in health	1,425	34.5%
D1 Nurse supervisors and registered nurses	1,025	24.8%
D2 Technical and related occupations in health	895	21.7%
D3 Assisting occupations in support of health services	780	18.9%
C Natural and applied sciences and related occupations	**10,950**	**100%**
C0 Professional occupations in natural and applied sciences	8,060	73.6%
C1 Technical occupations related to natural and applied sciences	2,895	26.4%

Source: Statistics Canada, Census of Population 2006

Industry Profile – Information and Cultural Industries

- Change in Location Quotient Values by Resident Labour Force, Information and Cultural Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	**Labour Force - LQ 2006**	**Labour Force - LQ 2001**	**Labour Force - LQ (Net Change)**	**Labour Force - LQ (Percentage Change)**
~511 Publishing industries (except Internet)	1.47	0.96	0.51	53.1%
~512 Motion picture and sound recording industries	0.87	1.28	-0.41	-32.0%
~515 Broadcasting (except Internet)	1.22	1.29	-0.07	-5.4%
~516 Internet publishing and broadcasting	3.51	1.27	2.24	176.4%
~517 Telecommunications	1.52	0	1.52	n/a
~518 Internet service providers, web search portals, and data processing services	1.94	0	1.94	n/a
~519 Other information services	0.99	0	0.99	n/a
~323 Printing and related support activities	1.46	1.09	0.37	33.9%
~334 Computer and electronic product manufacturing	1.91	1.4	0.51	36.4%
~~5415 Computer systems design and related services	2.43	2.48	-0.05	-2.0%
~~5418 Advertising and related services	1.24	1.76	-0.52	-29.5%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

* Due to a change in NAICs classifications from 2003 to 2008, it may appear there has been significant loss in certain subsectors. These losses are most likely captured under the new NAICs codes of 517,518 and 519

- Change in Employment by Resident Labour Force, Information and Cultural Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	Labour Force - Resident Labour Force 2006	Labour Force - Resident Labour Force 2001	Labour Force - Resident Labour Force (Net Change)	Labour Force - Resident Labour Force (Percentage Change)
~511 Publishing industries (except Internet)	930	510	420	82.4%
~512 Motion picture and sound recording industries	290	360	-70	-19.4%
~515 Broadcasting (except Internet)	305	1110	-805	-72.5%
~516 Internet publishing and broadcasting	35	385	-350	-90.9%
~517 Telecommunications	1075	0	1075	n/a
~518 Internet service providers, web search portals, and data processing services	235	0	235	n/a
~519 Other information services	220	0	220	n/a
~323 Printing and related support activities	755	525	230	43.8%
~334 Computer and electronic product manufacturing	1260	1055	205	19.4%
~~5415 Computer systems design and related services	3510	3075	435	14.1%
~~5418 Advertising and related services	555	585	-30	-5.1%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

* Due to a change in NAICs classifications from 2003 to 2008, it may appear there has been significant loss in certain subsectors. These losses are most likely captured under the new NAICs codes of 517,518 and 519

- Change in Location Quotient Values by Jobs, Information and Cultural Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs - LQ 2006	Jobs -LQ 2001	Jobs - LQ (Net Change)	Jobs - LQ (Percentage Change)
~511 Publishing industries (except Internet)	2.19	0.81	1.38	170.4%
~512 Motion picture and sound recording industries	0.92	1.64	-0.72	-43.9%
~515 Broadcasting (except Internet)	1.22	1.4	-0.18	-12.9%
~516 Internet publishing and broadcasting	3.06	0.94	2.12	225.5%
~517 Telecommunications	1.22	0	1.22	n/a
~518 Internet service providers, web search portals, and data	2.47	0	2.47	n/a
~519 Other information services	0.85	0	0.85	n/a
~323 Printing and Related Support Activities	2.47	2.19	0.28	12.8%
~334 Computer and Electronic Product Manufacturing	0.79	1.61	-0.82	-50.9%
~~5415 Computer systems design and related services	2.76	2.9	-0.14	-4.8%
~~5418 Advertising and related services	1.28	1.33	-0.05	-3.8%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

* Due to a change in NAICs classifications from 2003 to 2008, it may appear there has been significant loss in certain subsectors. These losses are most likely captured under the new NAICs codes of 517,518 and 519

- Change in Employment by Jobs, Information and Cultural Industries, Richmond Hill, 2001 -2006

Industry (NAICS)	Jobs -2006	Jobs -2001	Jobs (Net Change)	Jobs (Percentage Change)
~511 Publishing industries (except Internet)	920	305	615	201.6%
~512 Motion picture and sound recording industries	180	285	-105	-36.8%
~515 Broadcasting (except Internet)	210	855	-645	-75.4%
~516 Internet publishing and broadcasting	20	205	-185	-90.2%
~517 Telecommunications	565	0	565	n/a
~518 Internet service providers, web search portals, and data	205	0	205	n/a
~519 Other information services	130	0	130	n/a
~323 Printing and Related Support Activities	895	775	120	15.5%
~334 Computer and Electronic Product Manufacturing	360	900	-540	-60.0%
~~5415 Computer systems design and related services	2535	2445	90	3.7%
~~5418 Advertising and related services	370	305	65	21.3%

Source: Statistics Canada: REDDI Tool: Labour Flow Analysis 2001 & 2006

* Due to a change in NAICs classifications from 2003 to 2008, it may appear there has been significant loss in certain subsectors. These losses are most likely captured under the new NAICs codes of 517,518 and 519

- Information and Cultural Industries, Number of Businesses, by subsector, 2008

EMPLOYEE SIZE RANGE	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
NATIONAL INDUSTRIES											
Total	19,188	12,556	6,632	4,434	1,045	574	359	142	50	23	5
Information & Cultural/Technology Sector	2,315	1,473	842	664	75	34	39	19	6	4	-
323113 - Commercial Screen Printing	5	2	3	1	-	2	-	-	-	-	-
323114 - Quick Printing	5	3	2	2	-	-	-	-	-	-	-
323115 - Digital Printing	11	5	6	2	2	-	1	1	-	-	-
323116 - Manifold Business Forms Printing	4	2	2	2	-	-	-	-	-	-	-
323119 - Other Printing	64	33	31	15	8	2	4	1	-	1	-
323120 - Support Activities for Printing	12	7	5	3	1	1	-	-	-	-	-
334110 - Computer and Peripheral Equipment Manufacturing	9	5	4	3	-	-	1	-	-	-	-
334210 - Telephone Apparatus Manufacturing	2	1	1	1	-	-	-	-	-	-	-
334220 - Radio and Television Broadcasting and Wireless Communications Equ	2	1	1	1	-	-	-	-	-	-	-
334290 - Other Communications Equipment Manufacturing	1	1	-	-	-	-	-	-	-	-	-
334310 - Audio and Video Equipment Manufacturing	5	4	1	1	-	-	-	-	-	-	-
334410 - Semiconductor and Other Electronic Component Manufacturing	6	1	5	2	2	-	-	1	-	-	-
334511 - Navigational and Guidance Instruments Manufacturing	1	1	-	-	-	-	-	-	-	-	-
334512 - Measuring, Medical and Controlling Devices Manufacturing	14	4	10	2	3	1	2	1	1	-	-
334610 - Manufacturing and Reproducing Magnetic and Optical Media	5	3	2	-	1	1	-	-	-	-	-
511110 - Newspaper Publishers	7	4	3	2	-	-	-	1	-	-	-
511120 - Periodical Publishers	20	11	9	2	4	-	3	-	-	-	-
511130 - Book Publishers	10	4	6	3	1	1	-	-	1	-	-
511140 - Directory and Mailing List Publishers	2	2	-	-	-	-	-	-	-	-	-
511190 - Other Publishers	3	2	1	-	-	-	-	1	-	-	-
511210 - Software Publishers	52	24	28	12	5	3	1	4	-	3	-
512110 - Motion Picture and Video Production	47	37	10	9	1	-	-	-	-	-	-
512120 - Motion Picture and Video Distribution	2	2	-	-	-	-	-	-	-	-	-
512130 - Motion Picture and Video Exhibition	4	-	4	-	1	-	3	-	-	-	-
512190 - Post-Production and Other Motion Picture and Video Industries	7	6	1	-	-	1	-	-	-	-	-
512210 - Record Production	2	2	-	-	-	-	-	-	-	-	-
512220 - Integrated Record Production/Distribution	5	5	-	-	-	-	-	-	-	-	-
512230 - Music Publishers	4	4	-	-	-	-	-	-	-	-	-
512240 - Sound Recording Studios	4	4	-	-	-	-	-	-	-	-	-
512290 - Other Sound Recording Industries	2	-	2	1	-	-	1	-	-	-	-
515110 - Radio Broadcasting	8	4	4	2	-	1	-	1	-	-	-
515120 - Television Broadcasting	3	1	2	-	-	1	-	-	1	-	-
515210 - Pay and Specialty Television	1	1	-	-	-	-	-	-	-	-	-
517111 - Wired Telecommunications Carriers (except Cable)	6	3	3	1	-	-	1	1	-	-	-
517112 - Cable and Other Program Distribution	3	1	2	1	-	-	-	-	1	-	-
517210 - Wireless Telecommunications Carriers (except Satellite)	3	2	1	-	-	-	-	1	-	-	-
517410 - Satellite Telecommunications	2	1	1	1	-	-	-	-	-	-	-
517910 - Other Telecommunications	20	10	10	5	1	-	3	-	1	-	-
518210 - Data Processing, Hosting and Related Services	24	18	6	2	2	1	-	1	-	-	-
519121 - Libraries	1	-	1	-	-	-	-	1	-	-	-
519130 - Internet Publishing and Broadcasting and Web Search Portals	9	5	4	1	2	1	-	-	-	-	-
519190 - All Other Information Services	4	2	2	2	-	-	-	-	-	-	-
541510 - Computer Systems Design and Related Services	1,744	1,132	612	540	34	15	17	4	1	-	
541810 - Advertising Agencies	91	56	35	30	3	2	-	-	-	-	-
541820 - Public Relations Services	13	9	4	3	1	-	-	-	-	-	-
541830 - Media Buying Agencies	4	3	1	1	-	-	-	-	-	-	-
541840 - Media Representatives	2	-	2	2	-	-	-	-	-	-	-
541850 - Display Advertising	10	9	1	1	-	-	-	-	-	-	-
541860 - Direct Mail Advertising	5	3	2	1	-	1	-	-	-	-	-
541870 - Advertising Material Distribution Services	3	3	-	-	-	-	-	-	-	-	-
541891 - Specialty Advertising Distributors	17	9	8	3	3	-	2	-	-	-	-
541899 - All Other Services Related to Advertising	25	21	4	4	-	-	-	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2008

- Information and Cultural Industries, Number of Businesses, by subsector, 2003

EMPLOYEE SIZE RANGE	Total	Indeterminate	Subtotal	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
NATIONAL INDUSTRIES											
Total	14,179	8,856	5,323	3,009	895	652	503	166	68	26	4
Information & Cultural/Technology Sector	1,769	1,059	710	443	102	84	49	19	8	5	-
323113 - Commercial Screen Printing	6	2	4	1	2	1	-	-	-	-	-
323114 - Quick Printing	3	2	1	1	-	-	-	-	-	-	-
323115 - Digital Printing	5	1	4	3	-	-	-	1	-	-	-
323116 - Manifold Business Forms Printing	7	4	3	2	-	1	-	-	-	-	-
323119 - Other Printing	77	37	40	20	5	10	3	1	-	1	-
323120 - Support Activities for Printing	19	11	8	2	1	4	1	-	-	-	-
334110 - Computer and Peripheral Equipment Manufacturing	8	5	3	2	-	-	1	-	-	-	-
334210 - Telephone Apparatus Manufacturing	2	-	2	-	-	2	-	-	-	-	-
334220 - Radio and Television Broadcasting and Wireless Communications Equ	1	1	-	-	-	-	-	-	-	-	-
334290 - Other Communications Equipment Manufacturing	1	1	-	-	-	-	-	-	-	-	-
334310 - Audio and Video Equipment Manufacturing	3	3	-	-	-	-	-	-	-	-	-
334410 - Semiconductor and Other Electronic Component Manufacturing	6	2	4	1	2	1	-	-	-	-	-
334512 - Measuring, Medical and Controlling Devices Manufacturing	14	5	9	3	2	2	1	-	1	-	-
334610 - Manufacturing and Reproducing Magnetic and Optical Media	5	2	3	2	-	1	-	-	-	-	-
511110 - Newspaper Publishers	1	-	1	-	-	-	-	1	-	-	-
511120 - Periodical Publishers	20	13	7	3	1	3	-	-	-	-	-
511130 - Book Publishers	7	5	2	1	-	-	-	1	-	-	-
511140 - Directory and Mailing List Publishers	1	-	1	-	-	-	1	-	-	-	-
511190 - Other Publishers	3	2	1	-	-	-	1	-	-	-	-
511210 - Software Publishers	29	10	19	4	2	-	6	2	2	3	-
512110 - Motion Picture and Video Production	30	23	7	4	2	1	-	-	-	-	-
512120 - Motion Picture and Video Distribution	4	3	1	-	-	-	1	-	-	-	-
512130 - Motion Picture and Video Exhibition	3	-	3	-	-	-	3	-	-	-	-
512190 - Post-Production and Other Motion Picture and Video Industries	12	8	4	1	1	1	-	-	1	-	-
512210 - Record Production	1	1	-	-	-	-	-	-	-	-	-
512220 - Integrated Record Production/Distribution	1	1	-	-	-	-	-	-	-	-	-
512230 - Music Publishers	1	1	-	-	-	-	-	-	-	-	-
512240 - Sound Recording Studios	7	4	3	3	-	-	-	-	-	-	-
512290 - Other Sound Recording Industries	3	1	2	1	-	1	-	-	-	-	-
515110 - Radio Broadcasting	8	6	2	2	-	-	-	-	-	-	-
515120 - Television Broadcasting	3	1	2	-	1	-	-	-	1	-	-
515210 - Pay and Specialty Television	1	1	-	-	-	-	-	-	-	-	-
517110 - Wired Telecommunications Carriers	9	5	4	1	-	-	1	2	-	-	-
517210 - Wireless Telecommunications Carriers (exept Satellite)	2	-	2	1	-	-	1	-	-	-	-
517310 - Telemmunications Resellers	11	5	6	3	1	-	2	-	-	-	-
517410 - Satellite Telecommunications	2	1	1	-	1	-	-	-	-	-	-
517510 - Cable and Other Program Distribution	6	2	4	1	1	-	1	-	1	-	-
518111 - Internet Service Providers	16	9	7	2	3	1	1	-	-	-	-
518210 - Data Processing, Hosting and Related Services	18	9	9	4	-	2	2	1	-	-	-
519121 - Libraries	2	-	2	1	-	-	-	1	-	-	-
519190 - All Other Information Services	4	3	1	-	1	-	-	-	-	-	-
541510 - Computer Systems Design and Related Services	1,259	767	492	346	64	50	21	8	2	1	-
541810 - Advertising Agencies	84	53	31	23	5	2	1	-	-	-	-
541820 - Public Relations Services	5	4	1	-	1	-	-	-	-	-	-
541830 - Media Buying Agencies	3	3	-	-	-	-	-	-	-	-	-
541840 - Media Representatives	3	2	1	1	0	0	0	0	0	0	0
541850 - Display Advertising	6	3	3	2	-	1	-	-	-	-	-
541860 - Direct Mail Advertising	3	2	1	-	-	-	-	1	-	-	-
541870 - Advertising Material Distribution Services	1	1	-	-	-	-	-	-	-	-	-
541891 - Specialty Advertising Distributors	10	5	5	2	2	-	1	-	-	-	-
541899 - All Other Services Related to Advertising	33	29	4	-	4	-	-	-	-	-	-

Source: Statistics Canada, Canadian Business Patterns Data, 2003

Appendix IV

National Occupation Classification (NOC) Definitions

National Occupation Classification (NOC) Definitions

Management Occupations

Occupations in this broad occupational category are primarily concerned with carrying out the functions of management by planning, organizing, coordinating, directing, controlling, staffing, and formulating, implementing or enforcing policy, either directly or through other levels of management. Supervising is not considered to be a management function.

Business, Finance and Administrative Occupations

Occupations in this broad occupational category are primarily concerned with providing financial and business services, administrative and regulatory services and clerical support services.

Natural and Applied Sciences and Related Occupations

Occupations in this broad occupational category are primarily concerned with conducting theoretical and applied research and providing technical support in natural and applied sciences.

Health Occupations

Occupations in this broad occupational category are primarily concerned with providing health care services directly to patients and providing support to health care delivery.

Occupations in Social Science, Education, Government Service and Religion

Occupations in this broad occupational category are primarily concerned with law, teaching, counselling, conducting social science research, providing religious services, and developing and administering government policies and programs.

Occupations in Art, Culture, Recreation and Sport

Occupations in this broad occupational category are primarily concerned with providing artistic and cultural services and providing direct support to the service providers.

Sales and Service Occupations

Occupations in this broad occupational category are primarily concerned with selling goods and services and providing personal, protective, and household, tourism and hospitality services.

Trades, Transport and Equipment Operators and Related Occupations

Occupations in this broad occupational category are primarily concerned with contracting, supervising and doing trades work; and supervising and operating transportation and heavy equipment.

Occupations Unique to Primary Industry

Occupations in this broad occupational category are primarily concerned with operating farms and supervising or doing farm work; operating fishing vessels and doing specialized fishing work; and in doing supervision and production work in oil and gas production and forestry and logging.

Appendix V

Richmond Hill Focus Group Results

TOWN OF RICHMOND HILL

ECONOMIC DEVELOPMENT
FOCUS GROUP HIGHLIGHTS
OCTOBER 15-16, 2009
REVISION 0

Participants:
See participant list
In Association with:
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Table of Contents

Executive Summary

Attached are meeting proceedings from the Town of Richmond Hill focus groups held on October 15-16, 2009. The purpose of the sessions was to solicit input and advice from the broader community on economic development The group explored the following questions:

1. What opportunities are there to stimulate new economic growth, investment and interest in Richmond Hill?
2. Implementation: How do we make this happen? Suggest 1-2 things that in the short term could be done for each opportunity? What role can the Town play?
3. What are the key barriers to economic development and growth in Richmond Hill? What is constraining change?

Below is an aggregated summary of the findings from the three focus groups.

Top ten **key priority areas** where the Town can play a lead role include:

1. **Sell, sell, sell.** Economic marketing program (including branding strategy and promotions campaign);
2. **Help the little guy.** Support for small developing manufacturers with innovative products and ideas who want to bring these products to market;
3. **Go green.** Investment in Green Technology (environmental, cleantech etc);
4. **Money talks**. Financial incentives to attract businesses and provide incentives for skills development;
5. **The right info at the right time.** Develop efficient and effective ways of communicating with businesses (effective messaging, town website, coordinated & cohesive message w/ other groups);
6. **Oh what a terrible tangled web:** Navigating the government funding maze. Town could add a resource specifically to corporate clients for the procurement process of accessing gov't funding;
7. **Revitalize downtown.** Need to give people a reason to go downtown e.g. leverage our theatre, arts and culture attractions;
8. **Celebrate our best.** Promote our business successes and achievements (media linkages, business achievement awards etc.);
9. **No gridlock on the info highway.** Improve business infrastructure/bandwidth - Information and communication technologies, such as telecommunications, network;
10. **People movers.** Improve public transportation.

Related "process" suggestions:

1. **Partnerships.** The Town can't go it alone. Need to build linkages with Seneca, York, economic development organizations, neighbouring Towns etc.;
2. **Need a champion.** Need the leaders of businesses and community organizations to get involved, engaged and take ownership;
3. **Communicate wisely.** Need to get the right information to the right people at the right time without overloading and alienating our target audiences.

Q2. Ideas for immediate implementation (not ranked)

Please see section 2 for action items.

Q3. Barriers to growth (not ranked)

- Time, money, budget & staff resources
- Need to define common vision -- no focus, priority, goal
- No clear Town identity and no differentiation between being on east or west of 404
- Need a trigger to give people a reason to collaborate -- Willingness to collaborate but need to bring many different partners together - COC, Town, YTA etc.
- Lack of champion/leader to drive change
- Lack of consistent and clear information flowing to the business community
- Reluctance to grow ...strong presence in population that does not want change
- Regional fragmentation: Competition from surrounding municipalities in GTA e.g. cost of employment lands

<u>Editor's Notes:</u>

a. The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
b. The symbol // indicates that two similar ideas have been merged together.
c. This document contains the meeting proceedings and is not intended as a "Final Report"

1.0 – Opportunities

Step 1: Brainstorm. What opportunities are there to stimulate new economic growth, investment and interest in Richmond Hill?
Step 2: Prioritize. What are the best opportunities in terms of:
Impact and Feasibility

1.1 – Group 1

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)
Number of ballot items: 18
Total number of voters (N): 5

Total

4 1. Investment in Green Technology (environmental, cleantech etc)
- Add parking garages - manufacturing and implementing green technology locally

4 2. Support for small developing manufacturers with innovative products and ideas who want to bring these products to market

4 3. Town could add a resource specifically to corporate clients for the procurement process of accessing gov't funding

3 4. Force builders to build using green concepts ...implement a green building code to stimulate local green manufacturers

3 5. Financial incentives to attract businesses
- bring more federal dollars for business to build in city (similar RED)... but $ for non-rural econ development

2 6. Increase public transportation

2 7. Incentives for setting up incubators in specific sectors (IT, knowledge based etc.)

2 8. Economic marketing program
- Branding: create a strategy spelling out our unique identity and who we want to appeal to
- Promote Richmond Hill as a Town where it is easy to grow a business, with minimal Red Tape.
- Identify the town as a specific location for an identifiable "zone" somewhat like the way that Silicon Valley identified itself as the location for high tech computer industry

2 9. Offer some form of subsidy to businesses towards the costs of training of new employees

1 10. Continue to build relationships and share information with business community

1 11. Lower taxes

1 12. Leverage off Automotive tier 2 and or tier 3 manufacturing opportunities re Honda Head office re-location

1 13. Work to build interest from international investors

0 15. Continue to build on the existing initiatives like the management of employment lands to entice larger employers into the town

0 16. Continue to strengthen the involvement of the business community in taking ownership of the various initiatives within the town -- figure out what role the business community can play -> ownership & engagement

0 17. Develop more space for people to gather to eat and play

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in *non-bold* ***are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.***

18. Articulate the uniqueness of Richmond Hill - it is not a City, not a village but something in between... what exactly are we? and what are the benefits to locating here? great location, self sufficient, hospital, downtown, skills, accessibility, bigger than a village

Note: facilitator notes from discussion (participant initials):

Why we came here?

- MG: proximity to workforce... location (business park)... transportation/access to major arteries ... high end builder ... City Hall supportive
- MR: location
- BL: some red tape,

1.2 – Group 2

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)
Number of ballot items: 25
Total number of voters (N): 5

Total

5 1. Promote our successes... Provide linkages to local media to increase awareness of business achievements ...Sponsor a business achievement award - business likes to be where business succeeds

3 2. Develop efficient and effective ways of communicating with businesses ...Work with Chamber of Commerce to get important messages out to business community ...Ensure a social media presence for the Eco Dev Dept (web2.0, facebook, twitter etc.) ... Improve Town website...coordinate cohesive message w/ other groups ... Clearly articulate the intended audience and communicate in a personal way... Team of people with a sector email distribution list ... Create a lead contact in each industry

3 3. Branding RH: define key strengths and "brand" Richmond Hill for these for broader national/international recognition

2 4. Investment in Green Technology (environmental, cleantech, green energy, energy saving technologies etc ..create green projects within Richmond Hill for both commercial, industrial and residential applications

2 5. Develop or support a regular think tank type session for business leaders and government representatives so that we all work together for the benefit of all.

2 6. Encourage more young professionals to locate in the Town -> "creative economy" ...Create an environment that attracts creative thinkers

2 7. Improve business infrastructure/bandwidth - Information and communication technologies, such as telecommunications, network

2 8. Be sponsors of high profile business communities that leverage the location attractiveness (Chamber, YTA, culture groups etc.)

2 9. Financial incentives to attract businesses ...provide economic incentives for skills development within the region

2 10. Actively promote living close to workplace as social and environmental benefit ...e.g. Link local businesses together to provide complementary services to each other

2 11. Attract foreign investments in high growth industries, such as green energy, environment technologies, ICT, health and medical applications

1 12. Increase public transportation ...improve transportation efficiencies to support commuters either living or working here

1 13. Look & feel: offer tax rebates to local business to "freshen up" their store frontage .... Redevelop old Richmond Hill Village for tourism

1 14. Town could add a resource specifically to corporate clients for the procurement process of accessing gov't funding

1 15. Encourage export outside North American markets

1 16. Build strong relationship with York Innovation and research

1 17. Ensure our learning institutions are offering curriculum in the creative economy --More Brain than Brawn, More Ideas than Capital, More human creativity than natural resources

0 19. Force builders to build using green concepts ...implement a green building code to stimulate local green manufacturers (green roof etc.)

0 20. Ensure adequate supply of class A office space
0 21. Create off street parking on Yonge Street and have no parking on Yonge street allowing better traffic flow and people would be less likely to avoid Yonge Street
0 22. Life and health science, e.g. Medical equipment, research, pharmaceutical, new drug R&D
0 23. Stop duplication of efforts on training for businesses and coordinate instead
0 24. Support location of national research centre in Region - if it is good for the Region it is good for the Town ....support a regional tech incubation centre and locate in Leslie/16th ave area
0 25. More arts & culture events/activities that attract people to RH downtown in evenings and promote it! (e.g. Tuesday night jazz)

1.3 – Group 3

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)
Number of ballot items: 24
Total number of voters (N): 9

Total

6 1. Brand RH: discover the Richmond Hill USP -- the secret sauce that sets this community apart from others
- pleasant town in the GTA (safe, reasonable size, easy place to get around)
- promote "live and work locally"
- Market town as central hub of York Region. Easy connections to Toronto and surrounding Regions.

5 2. Revitalize downtown Richmond Hill ...arts and culture - leverage attractions e.g. theatre, library etc.
- Showcase talent in Richmond Hill - Arts and Culture (new theatre for the performing Arts).

5 3. Support Business in any capacity possible //Be more involved with the business community.
- help local business focus on innovation and commercialization and competitive advantage issues
- support small business and entrepreneurs with funding and how-to programs
- Support mom and pop shops -> seem to be a growing niche and these are the true job creation engines

5 4. Capitalize on / Take ownership of Seneca and York U. and build a knowledge infrastructure ...access to Seneca, York U, IRAP programs

4 5. identify only a few priorities and put great effort behind them ...do a couple things well

4 6. informal leadership coming from CEOs of the various firms (Town can't do it all!!)

3 7. focus on building knowledge economy

3 8. develop cluster-specific areas of expertise, e.g. green/clean tech or ICT

3 9. build linkages with other communities - the GTA is porous //think beyond municipal boundaries - Greater Toronto Regional Economic Summit

3 10. access to YORKbiotech, ISCM to assist with business solutions ... Study the ISCM model, and see how Rich Hill could work together with them to do some missing activities.

2 11. Use the stimulus/action plan money to directly fund companies to improve competitiveness like more efficient operations.

2 12. within a cluster of high tech companies in the GTA - think beyond RH boundaries ...Take a team York region approach

2 13. located along two corridors -- Hwy 404/Don Valley and Hwy 407

2 14. New partnerships: Strengthen and develop community partnerships
- enhance linkages between industry and the universities and colleges

2 15. Promote RH as an alternative to Markham for immigrant settlement
- Helping newcomer professionals in upgrading their employability skills so that they can integrate faster into the Canadian workforce by working closely with community organizations and institutions that serve newcomers and as well as employers
- Educating employers who operate within the region to hire newcomer professionals

2 16. Multiculturalism - exchange of ideas & experiences... how can we leverage the knowledge & expertise of newcomers? e.g. trade partnerships? international linkages... can Town provide counselling & support, business mentors?

1 17. Business centres - clustering of cos for scale economies (customers, operations, environmental etc)

1 18. Financial incentives to attract businesses
- Use the stimulus/action plan money to directly fund companies to set up new operation in Rich Hill.

1 19. Take advantage of the large, older area between Yonge, Bayview, Major Mac and Elgin Mills to attract new manufacturing businesses into existing, ready to go facilities.

1 20. Challenge companies to limit parking. Give incentives to employees who go green and use transit and other smart commuting options (will encourage living and working locally)

1 21. Strengthen the focus of tourism within RH

0 23. improve cross-regional public transportation ...access to the transportation infrastructure -- airport, highways

0 24. senior and health support programs

2.0 – Action Plans

After brainstorming, individuals were asked to identify the key actions that the Town should take on in the next 2-3 years?
Criteria: High Impact and Realistic
The ideas were not merged before voting, so there are some redundancies.

2.1 - Group 1

The group brainstormed ideas (see Appendix A) then selected the top ideas within each of the top 6 priority areas as follows:

SME: Support for small developing manufacturers with innovative products and ideas who want to bring these products to market
GOVT: Town could add a resource specifically to corporate clients for the procurement process of accessing gov't funding
BUILD: Force builders to build using green concepts ...implement a green building code to stimulate local green manufacturers
INCENT: Financial incentives to attract businesses
GREEN: Investment in Green Technology (environmental, cleantech etc)
INCUB: Incentives for setting up incubators in specific sectors (IT, software, knowledge based etc.)
TRANSP: Public transportation... regional linkages

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)
Number of ballot items: 27
Total number of voters (N): 5

Total

2 1. SME Support: continue to build relationships and share information with business community
e.g. call program to visit manufacturers... work with industry orgs (e.g. EMC)... share challenges & best practices... don't duplicate existing initiatives or overload/bombard us with info... business registry (for involvement 1-2/year)... can u help untangle the massively complex mess of govt programs? ... send concise email and if u want more info, please let us know... phone call: personal touch is better

2 2. GOVT$: could be set up as a profit center for the city ... can u help untangle the massively complex mess of govt programs? (e.g. help us with SRED program application) //GOVT$: Promote this as a service provided by the town in conjunction possibly with a chamber of commerce as a non profit initiative to help promote and build the business community

2 3. BUILD Green: change building codes in city to follow a green program //BUILD Green: Implement changes to zoning by-laws or OP that would require certain green building standards on all new buildings or retrofits of existing buildings

2 4. BUILD Green: offer incentives to individual home/commercial/industrial owners to deploy green in the form of reducing property taxes

2 5. INCENT: Offer some form of subsidy to businesses towards the costs of training of new employees
2 6. INCENT: re-energize the co-op movement for the 21st century whereby capital is supporting local green initiatives in concert with incentives from federal/provincial support re special status and exemptions in order to stimulate local technology and wealth creation.
2 7. GREEN Tech: favour locally manufactured and implemented green tech in municipal spending, become an early adopter.
2 8. GREEN Tech: support a private/public centre of excellence with local manufacturer demonstrating leading edge technology in applying Canadian technology to existing technologies and becoming an have the town become an early adopter of these technologies.
2 9. TRANSP: Bring TTC into the city major streets/business parks
1 10. SME Support: Continue to build on the existing initiatives like the management of employment lands to entice larger employers into the town
1 11. SME Support: Foster and develop networking between small and developing manufacturers with other manufacturers in peer related activities within the Community
1 12. GOVT$: Have avenue (i.e. information on Town Website) for business to learn about funding programs
1 13. GOVT$: Town to establish a department (maybe only one person) to act as a liaison between business and higher levels of government to present a case to government for funding of business initiatives
1 14. GOVT$: have role of individual structured on a performance based approach whereby measurement of success is tied to specific funding results. Responsible performance based reality is the new world order.
1 15. BUILD Green: Perhaps have a building area designated specifically for green buildings
1 16. INCENT: Lower development charges!! need to make it more attractive for new cos
1 17. GREEN Tech: Add parking garages - manufacturing and implementing green technology locally
1 18. INCUB: Provide an opportunity for manufacturers to develop and nurture an idea through support (i.e. financial/mentorship/trial equipment/marketing efforts)
1 19. INCUB: Provide a "help desk" for new businesses to advise them and provide a level of experience in legal, financial and marketing aspects, so that they can avoid some of the mistakes that all small start-up companies, with good ideas and little business experience fall into.
1 20. TRANSP: Subway extension must happen
0 21. BUILD Green: Offer briefings that raise awareness of building green
0 22. INCENT: Bring more federal dollars for business to build in city (similar RED)... but $ for non-rural econ development
0 23. INCENT: offer incentives to local banks/credit unions that support local businesses
0 24. GREEN Tech: Town to work with Region/Province to provide incentives to companies who implement green technology
0 25. INCUB: Have the Town provide incubation space at a reduced rate.
0 26. TRANSP: Support two-way all day GO service to and from Richmond Hill
0 27. TRANSP: Build upon Yonge St. & HWY 7 as a transportation hub - locate business there

2.2 – Group 2

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)
Number of ballot items: 31
Total number of voters (N): 6

The group brainstormed ideas (see Appendix A) then selected the top ideas within each of the top 6 priority areas (plus one "wildcard") as follows:

PROMOTE: Promote our successes... provide linkages to local media to increase awareness of business achievements

COMMUN: Develop efficient and effective ways of communicating with businesses ...Work with Chamber of Commerce to get important messages out to business community .

BRAND: Branding RH: define key strengths and "brand" Richmond Hill for these for broader national/international recognition

GREEN: Investment in Green Technology (environmental, cleantech, green energy, energy saving technologies etc ..create green projects within Richmond Hill for both commercial, industrial and residential applications

Live&Work: Encourage more young professionals to locate in the Town -> "creative economy" ...Create an environment that attracts creative thinkers ...Actively promote living close to workplace as social and environmental benefit ...e.g. link local businesses together to provide complementary services to each other

Bwidth: Improve business infrastructure/bandwidth - Information and communication technologies, such as telecommunications, network

Total

4 1. Bwidth: promote investment in the infrastructure, through role on board of powerstream and through direct dialogue with major utility developers

4 2. GREEN: invest and encourage on Green projects and attract investment in green for companies to establish manufacturing, R&D facilities // provide financial incentives to adopt green technologies and remove/dispose of less energy efficient technologies

3 3. PROMOTE: In collaboration, RHCOC, YTA and other organizations/associations in Richmond Hill, promote the annual awards similar to RHCOC annual events and make it well known to GTA.

3 4. LIVE&WORK: create environment for people to want to stay here instead in traveling downtown...create the why
- e.g. modify zoning/planning to limit "concrete jungles" and intersperse green space, walking paths and local services/restaurants amongst industrial areas

2 5. PROMOTE: initiate world leaders forum - provide and promote speakers series featuring creative skill companies and individuals from the region, within the region ...Work with local business groups to implement this

2 6. PROMOTE: use print, radio and TV media to get the message across... everyone has seen those Michigan commercials

2 7. COMMUNICATE: Once communication message is developed work with area business groups to get the consistent message out ...team of people with a sector email distribution list ..

2 8. COMMUNICATE: using Eco Dev Dept of Richmond Hill as platform to communicate with Economic Development stakeholders of the province, federal, region, local and RHCOC, YTA and the business community regarding various resources, services, programs and supports for businesses in Richmond Hill

2 9. COMMUNICATE: appoint person to track all government-related funding sources and organize for business sectors, then send relevant information to relevant businesses

2 10. BRAND: Focus on high growth sectors/industries and encourage and drive business initiatives to achieve the goal - make it a city of .....which Richmond Hill is good at, famous etc.

1 11. GREEN: make it easy for the province to provide focus on Town successes in this area

1 12. PROMOTE: advertise in national publications on behalf of local business

1 13. PROMOTE: assign sector specialists and develop contact list with businesses within the sector to keep them informed and to effect introductions

1 14. COMMUNICATE: put priority on communication with young professionals - ask them what they want

1 15. COMMUNICATE: Be focused and selective in message and medium - no such thing as mass market anymore

1 16. LIVE&WORK: attract companies, education institutions and high educated workers to RH

1 17. LIVE&WORK: identify the priorities the creative businesses and workers seek in determining location

1 18. BRAND: Get the differentiating data and make it known to the businesses in the Town

1 19. BRAND: Decide what town want to be. i.e. there are people as always who do not want change who are opposed to the ones who do want change. Look at People Plan suggestions for direction

0 20. Bwidth: invest on the networks potentially with support from other governments

0 21. Bwidth: This technology is changing so fast - keep up with the newest opportunities and do it in our town first. i.e. do we have "Hot Spots" in town?

0 22. Bwidth: create a simple zoning process to assist businesses in developing in new areas of the town

0 23. GREEN: partner with power company to demonstrate cash savings to companies of data centres, off-peak use, etc

0 24. PROMOTE: Sponsor a business achievement award - business likes to be where business succeeds

0 25. BRAND: market this town as a vibrant and multicural community that it is

0 26. LIVE&WORK: Ensure that there are a wide variety of residential choices - i.e. not enough rental accommodation in town for young people or not affordable

0 27. COMMUNICATE: Use the technology to connect - Richmond hill is home to technology that can drop a personal voice message in a million voicemails overnight.

0 28. COMMUNICATE: improve Town website... Ensure a social media presence for the Eco Dev Dept (web2.0, facebook, twitter etc.)

0 29. COMMUNICATE: Develop or support a regular think tank type session for business leaders and government representatives so that we all work together for the benefit of all.

0 30. PROMOTE: Feature successful businesses on Eco Dev Website - i.e. article on what led to success

0 31. PROMOTE: provide basic media/skills training to facilitate publication/promotion of successes/products

2.3 – Group 3

After brainstorming, individuals were asked to identify the strategic initiatives that the Town should take on in the next 2-3 years?
Criteria: High Impact and Strategic
Note: The group got a "preliminary agreement" on the priority activities.
The ideas were not merged before voting, so there are some redundancies.

PRIORITY: Brand RH: discover the Richmond Hill USP -- the secret sauce that sets this community apart from others
- pleasant town in the GTA (safe, reasonable size, easy place to get around)
- promote "live and work locally"
- Market town as central hub of York Region. Easy connections to Toronto and surrounding Regions.

Big strategic, high impact initiatives
1. Market business clusters in a unique way. Create buzz around the different areas. Get residents and companies interested.
2. Highly educated work force and infrastructure available in Richmond Hill ... Work with employers on potential skills

Tactical, beyond 24 months or already covered above
3. Richmond Hill as people place
4. Create a brand/slogan e.g. The Town above Toronto to set RH apart
5. Focus on lifestyle - family, community "Pleasantville"
6. Build "Knowledge City" into branding
7. Promote partnerships in branding
8. Centrally locate within GTA
9. Talk about how RH is great because it is part of York Region
10. Get local celebrities to help advertise/showcase how they chose RH as their place to live/work/play
11. Consider a strategic amalgamation - perhaps with Markham

PRIORITY: Revitalize downtown Richmond Hill ...arts and culture - leverage attractions e.g. theatre, library etc.

Big strategic, high impact initiatives
1. Building intensification to enlarge population for vitality and transportation
2. Fix the traffic/parking on Yonge St. The constant bottleneck causes a negative opinion of the town, and the perception that the town can't make a tough decision. I recommend banning parking on Yonge St., and adding more parking behind, even if it means tearing down some properties.
3. Downtown master plan - identify major pillars (see 2009 downtown urban design plan)

Tactical, beyond 24 months or already covered above
4. ?? Make intentional use of empty buildings
5. Incentive for facade improvements

6. Relocate Town Hall back to downtown
7. Put out request for proposals/ideas and get private sector and other partners to come forward with plans to join the Town in investing - build it and they will come
8. Make use of one-way streets in the core
9. Showcase talent in Richmond Hill - Arts and Culture (new theatre for the performing Arts).
10. More events to attract people to the downtown core (e.g. Richmond Hill Heritage Village Day - allows people to see what's 'in their backyard' and creates a greater sense of community.
11. Create a hub for exchange of ideas and for mingling -- a sense of community
12. Allow mullti-use of the downtown buildings (mix commercial and residential usage)
13. Brand downtown as arts and culture centre of Richmond Hill
14. Create more opportunities to showcase the arts and culture of Richmond Hill. Use local talent to revitalize downtown. Utilize current school and community art programs, business programs. Opportunity to build stages of the revitalization into curriculum.
15. Create RH festivals/events to attract people to the area
16. Expand business networking

PRIORITY: Capitalize on / Take ownership of Seneca and York U. and build a knowledge infrastructure ...access to Seneca, York U, IRAP programs

<u>Big strategic, high impact initiatives</u>

1. Create partnerships for specific training or research projects of significance to the Town (clarify the niche that RH needs)

<u>Tactical, beyond 24 months or already covered above</u>

2. Meet with institutions, ask each other how we can work together. Pick 3 things the partners can do and do them.
3. Simple things. Does Richmond Hill use York/Seneca to train their employees? Can student use the Town for CO-OP terms?
4. Draw individuals who live in RH and work in Univ or college on to Town advisory committees to make direct connections
5. Lead by example - do something that makes you uncomfortable or is outside of the traditional role of the municipality
6. Highlight successful collaborations between business and academic institutions
7. Identify research strengths of educational institutes

PRIORITY: Support Business in any capacity possible //Be more involved with the business community. ... help local business focus on innovation and commercialization and competitive advantage issues

<u>Big strategic, high impact initiatives</u>

1. Develop training programs for settlement, ESL, business development, with partners York/Seneca .. Town as liaison

<u>Tactical, beyond 24 months or already covered above</u>

2. Expand business networking
3. Build relationships, support through community events
4. Support mom and pop shops -> seem to be a growing niche and these are the true job creation engines
5. Support small business and entrepreneurs with funding and how-to programs
6. There are some great resources that the Town already offers but how can we market our business assistance in a more effective way

7. Separate the building permit department for residential and industrial, and speed up industrial building permit applications.
8. Include opportunities for local small businesses in Town procurement practices
9. Make a policy decision on the desirability of "dirty" businesses like manufacturing, as opposed to being only interested in high tech ITC companies. If there is a real commitment to manufacturing, then remove the barriers that are placed on them by the town's beauraucracy.
10. Reduce red tapes for new business to locate in Richmond Hill
11. Encourage local business to use local trainers - York and Seneca
12. Commit and provide support to small business and the local resources already in place
13. Promoting the idea of mentoring between small business owners and newcomer investors

PRIORITY: develop cluster-specific areas of expertise, e.g. green/clean tech or ICT

Big strategic, high impact initiatives

1. Produce asset map to show cluster/concentrations of key industry sectors
2. Test appetite for clustering among those businesses.
3. Identify success stories of businesses in key sectors; testimonials, etc
4. Use focus groups or surveys to identify high priority engagements necessary for growth
5. Be business-friendly to sectors you wish to court and attract
6. Use the niche for branding purposes
7. Consider strategic amalgamation with Markham

Tactical, beyond 24 months or already covered above

8. None

PRIORITY: Engage business community: informal leadership coming from CEOs of the various firms (Town can't do it all!!)

Big strategic, high impact initiatives

1. Set up a committee with short-term, results oriented criteria for an action plan. Monitor and report. Build a joint plan, make it public and be accountable for success/failure
2. Create a Mayor's Blue Ribbon Panel to advise on new directions for economy, quality of life, innovation

Tactical, beyond 24 months or already covered above

3. Always ask - Have we consulted our partners? When designing programs and initiatives.
4. Have leaders park their egos at the door - join together for the real good of the community
5. Get involved with existing organizations like TECH, that already have ceos organized into groups.
6. Host regular workshops on the changing landscape to gather public opinion
7. Make bold gestures. Have a council meeting at Seneca's Campus to draw attention to Richmond Hill's College.

2.4 – Group 3 (Low Hanging Fruit)

The group was asked to select the top 3 quick wins (or low hanging fruit) that could be implemented without too much pain in the next 1-2 years
Note: the intent of this process was to identify some quick wins.
The ideas picked twice are listed first (the similar ideas were not combined so there is some redundancy).

Two votes

1. Get local celebrities to help advertise/showcase how they chose RH as their place to live/work/play
2. Produce asset map to show cluster/concentrations of key industry sectors
3. There are some great resources that the Town already offers but how can we market our business assistance in a more effective way

One vote

4. Be business-friendly to sectors you wish to court and attract
5. Brand downtown as arts and culture centre of Richmond Hill
6. Create a hub for exchange of ideas and for mingling -- a sense of community
7. Create more opportunities to showcase the arts and culture of Richmond Hill. Use local talent to revitalize downtown. Utilize current school and community art programs, business programs. Opportunity to build stages of the revitalization into curriculum.
8. Get involved with existing organizations like TECH, that already have ceos organized into groups.
9. Include opportunities for local small businesses in Town procurement practices
10. Make a policy decision on the desirability of "dirty" businesses like manufacturing, as opposed to being only interested in high tech ITC companies. If there is a real commitment to manufacturing, then remove the barriers that are placed on them by the town's beauraucracy.
11. Meet with institutions, ask each other how we can work together. Pick 3 things the partners can do and do them.
12. Promote partnerships in branding
13. Relocate Town Hall back to downtown

3.0 – Barriers to Growth

What are the obstacles or barriers to economic development and growth in Richmond Hill?
Note: the group brainstormed, merged and discussed. These are not ranked

3.1 - Group 1

1. Time and money ...budget & staff resources … Cash
2. The fact that Richmond Hill has a somewhat constrained budget because of its relatively small tax base
3. Competition from surrounding municipalities in GTA .... Cost of employment lands
4. My time allocation, my available resources. The required ability to properly mobilize a group effort.
5. Clear goals (5-10 year plan with clear objectives)
6. The fact that Richmond Hill cannot do anything in true isolation, we are part of a greater REGION and have no doubt quite significant constraints

3.2 – Group 2

1. $$$$
2. Communication ...lack of communications and/or information ...Clutter and overuse of email
3. No burning platform - what is the compelling reason to change?
4. Reluctance to grow ...strong presence in population that does not want change
5. Need a trigger to give people a reason to collaborate -- Willingness to collaborate but need to bring many different partners together - COC, Town, YTA etc.
6. Need to define common vision -- no focus, priority, goal ...realistically, can only execute on a few key objectives....what are they?
7. Lack of champion/leader to drive change ...need to appoint/recognize a leader to spearhead effort

3.3 – Group 3

What are the obstacles or barriers to economic development and growth in Richmond Hill?
XXX = within the Town's control

1. XXX Communication & Lack of information - engaging everyone with a clear, consistent message
2. XXX lack of vision --- inability to focus and stay the course
3. XXX misguided councilors

4. XXX Successful growing businesses need to be able to expand quickly, and not have the building dept hold them up.
5. $$ budget ...lack of support, staff and resources
6. Small thinking -- behaving like a small fish in a large pond ..reality - maybe this is as good as it gets?
7. Municipal boundaries - meaningless & arbitrary ...Businesses don't really see any real advantage to being on the east or west side of the 404. There's no real differentiation between Markham and Richmond Hill .. A natural concern about municipal boundaries
8. Regional fragmentation, competitiveness // competition ahead of cooperation with neighbouring municipalities
9. No clear town identity ...trying to be all things to all people
10. Inability to partner successfully

Appendices

A – Action Plans (Group 1 Brainstorm)

Note: The group brainstormed ideas (strategies, actions, initiatives etc) for each of the top priorities. The #s in parentheses are system-generated "chronologically-sequenced" by time of entry.

PRIORITY: Support for small developing manufacturers with innovative products and ideas who want to bring these products to market

2. SME Support: continue to build relationships and share information with business community E.g. Call program to visit manufacturers... Work with industry orgs (e.g. EMC)... Share challenges & best practices... Don't duplicate existing initiatives or overload/bombard us with info... Business registry (for involvement 1-2/year)... Can u help untangle the massively complex mess of govt programs? ... Send concise email and if u want more info, please let us know... Phone call: personal touch is better
3. SME Support: Continue to build on the existing initiatives like the management of employment lands to entice larger employers into the town
4. SME Support: Foster and develop networking between small and developing manufacturers with other manufacturers in peer related activities within the Community

PRIORITY: Town could add a resource specifically to corporate clients for the procurement process of accessing gov't funding

2. GOVT$: Have avenue (i.e. Information on Town Website) for business to learn about funding programs
3. GOVT$: could be set up as a profit center for the city ... Can u help untangle the massively complex mess of govt programs? (e.g. Help us with SRED program application) //GOVT$: Promote this as a service provided by the town in conjunction possibly with a chamber of commerce as a non profit initiative to help promote and build the business community
4. GOVT$: Town to establish a department (maybe only one person) to act as a liaison between business and higher levels of government to present a case to government for funding of business initiatives
5. GOVT$: have role of individual structured on a performance based approach whereby measurement of success is tied to specific funding results. Responsible performance based reality is the new world order.

PRIORITY: Force builders to build using green concepts ...implement a green building code to stimulate local green manufacturers

2. BUILD Green: change building codes in city to follow a green program //BUILD Green: Implement changes to zoning by-laws or OP that would require certain green building standards on all new buildings or retrofits of existing buildings
3. BUILD Green: Perhaps have a building area designated specifically for green buildings
4. BUILD Green: Offer briefings that raise awareness of building green
5. BUILD Green: offer incentives to individual home/commercial/industrial owners to deploy green in the form of reducing property taxes

PRIORITY: Financial incentives to attract businesses

2. INCENT: Bring more federal dollars for business to build in city (similar RED)... But $ for non-rural econ development
3. INCENT: Lower development charges!! Need to make it more attractive for new cos
4. INCENT: Offer some form of subsidy to businesses towards the costs of training of new employees
5. INCENT: re-energize the co-op movement for the 21st century whereby capital is supporting local green initiatives in concert with incentives from federal/provincial support re special status and exemptions in order to stimulate local technology and wealth creation.
    INCENT: Create local financial cooperative/credit union in the community

6. INCENT: offer incentives to local banks/credit unions that support local businesses

PRIORITY: Investment in Green Technology (environmental, cleantech etc)

2. GREEN Tech: Add parking garages - manufacturing and implementing green technology locally
3. GREEN Tech: favour locally manufactured and implemented green tech in municipal spending, become an early adopter.
4. GREEN Tech: support a private/public centre of excellence with local manufacturer demonstrating leading edge technology in applying Canadian technology to existing technologies and becoming an have the town become an early adopter of these technologies.
5. GREEN Tech: Town to work with Region/Province to provide incentives to companies who implement green technology

PRIORITY: Incentives for setting up incubators in specific sectors (IT, software, knowledge based etc.)

2. INCUB: Have the Town provide incubation space at a reduced rate.
3. INCUB: Provide an opportunity for manufacturers to develop and nurture an idea through support (i.e. Financial/mentorship/trial equipment/marketing efforts)
4. INCUB: Provide a "help desk" for new businesses to advise them and provide a level of experience in legal, financial and marketing aspects, so that they can avoid some of the mistakes that all small start-up companies, with good ideas and little business experience fall into.

PRIORITY: Public transportation... Regional linkages

2. TRANSP: Subway extension must happen
3. TRANSP: Support two-way all day GO service to and from Richmond Hill
4. TRANSP: Bring TTC into the city major streets/business parks
5. TRANSP: Build upon Yonge St. & HWY 7 as a transportation hub - locate business there

B – Action Plans (Group 2 Brainstorm)

PRIORITY: Promote our successes... provide linkages to local media to increase awareness of business achievements

2. PROMOTE: Sponsor a business achievement award - business likes to be where business succeeds
3. PROMOTE: advertise in national publications on behalf of local business
4. PROMOTE: assign sector specialists and develop contact list with businesses within the sector to keep them informed and to effect introductions
5. PROMOTE: In collaboration, RHCOC, YTA and other organizations/associations in Richmond Hill, promote the annual awards similar to RHCOC annual events and make it well known to GTA.
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7. PROMOTE: Feature successful businesses on Eco Dev Website - i.e. article on what led to success
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9. PROMOTE: use print, radio and TV media to get the message across... everyone has seen those Michigan commercials

PRIORITY: Develop efficient and effective ways of communicating with businesses ...Work with Chamber of Commerce to get important messages out to business community ...... coordinate cohesive message w/ other groups ... clearly articulate the intended audience and communicate in a personal way...

2. COMMUNICATE: Develop or support a regular think tank type session for business leaders and government representatives so that we all work together for the benefit of all.
3. COMMUNICATE: improve Town website... Ensure a social media presence for the Eco Dev Dept (web2.0, facebook, twitter etc.)
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7. COMMUNICATE: Be focused and selective in message and medium - no such thing as mass market anymore
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2. BRAND: market this town as a vibrant and multicural community that it is
3. BRAND: Decide what town want to be. i.e. there are people as always who do not want change who are opposed to the ones who do want change. Look at People Plan suggestions for direction
4. BRAND: Focus on high growth sectors/industries and encourage and drive business initiatives to achieve the goal - make it a city of .....which Richmond Hill is good at, famous etc.
5. BRAND: Get the differentiating data and make it known to the businesses in the Town

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PRIORITY: Encourage more young professionals to locate in the Town -> "creative economy" ...Create an environment that attracts creative thinkers ...Actively promote living close to workplace as social and environmental benefit ...e.g. link local businesses together to provide complementary services to each other

2. LIVE&WORK: identify the priorities the creative businesses and workers seek in determining location
3. LIVE&WORK: create environment for people to want to stay here instead in traveling downtown...create the why
- e.g. modify zoning/planning to limit "concrete jungles" and intersperse green space, walking paths and local services/restaurants amongst industrial areas
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5. LIVE&WORK: attract companies, education institutions and high educated workers to RH

PRIORITY: Improve business infrastructure/bandwidth - Information and communication technologies, such as telecommunications, network

2. Bwidth: promote investment in the infrastructure, through role on board of powerstream and through direct dialogue with major utility developers
3. Bwidth: create a simple zoning process to assist businesses in developing in new areas of the town
4. Bwidth: This technology is changing so fast - keep up with the newest opportunities and do it in our town first. i.e. do we have "Hot Spots" in town?
5. Bwidth: invest on the networks potentially with support from other governments

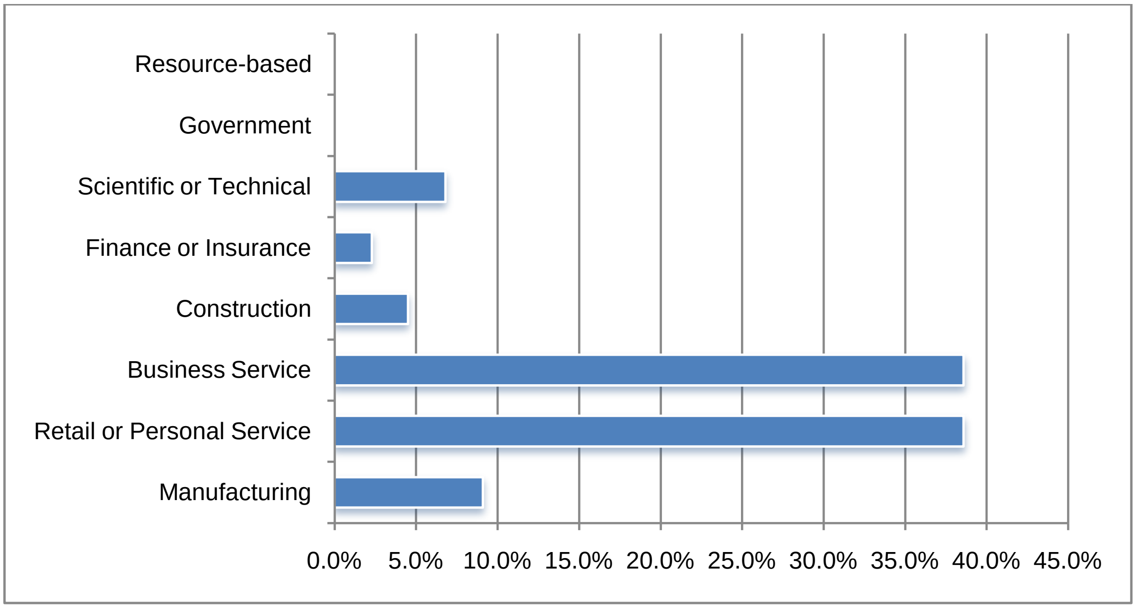
Appendix VI

Richmond Hill Community Survey Results

Town of Richmond Hill Economic Development Strategy

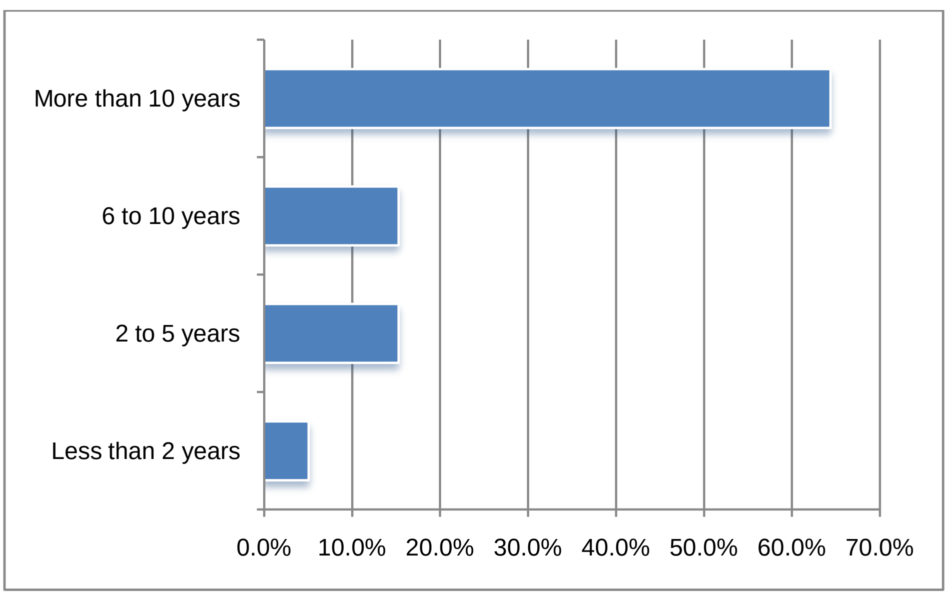
Survey Results

1. What is your primary type of business?

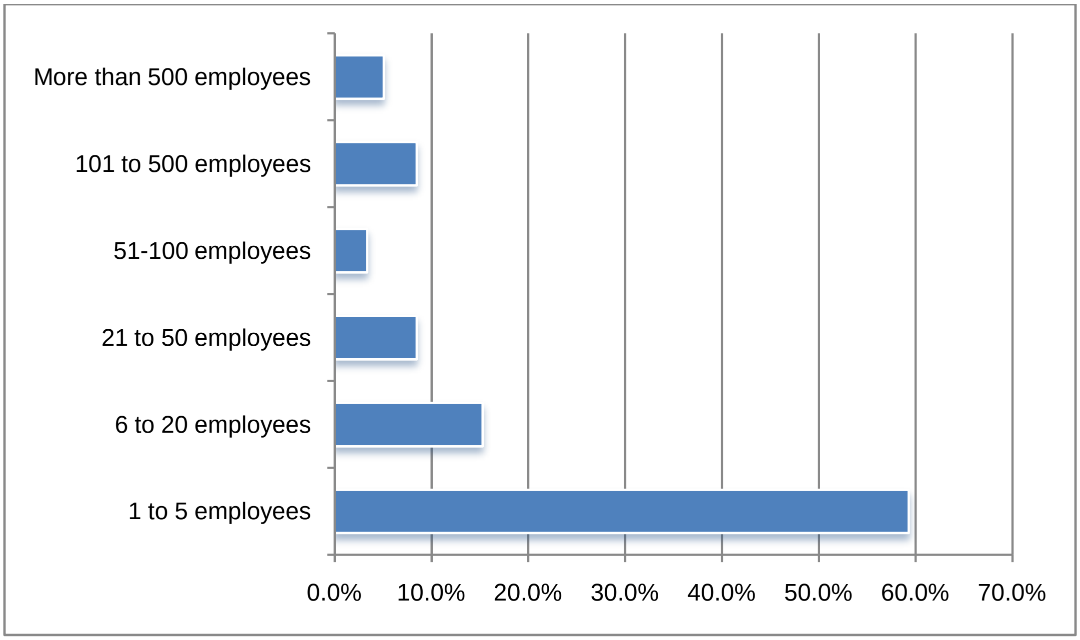


Other Responses: Not for profit organization, e-commerce, health and social services, interior design, recreation, employment services, marketing, security, wholesale, waste, printing, land development

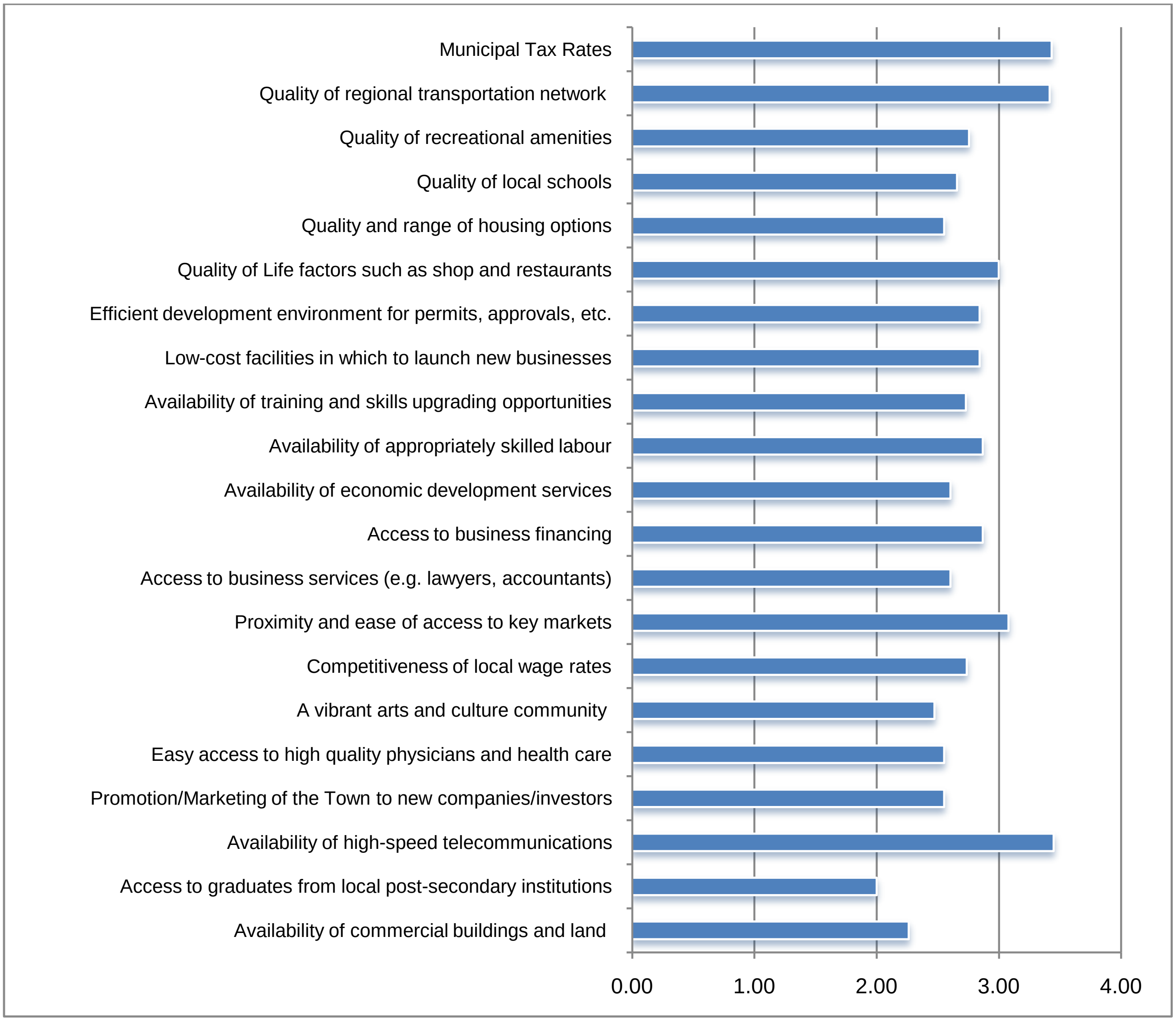
2. How long has the business been in existence?



3. How large is your business?

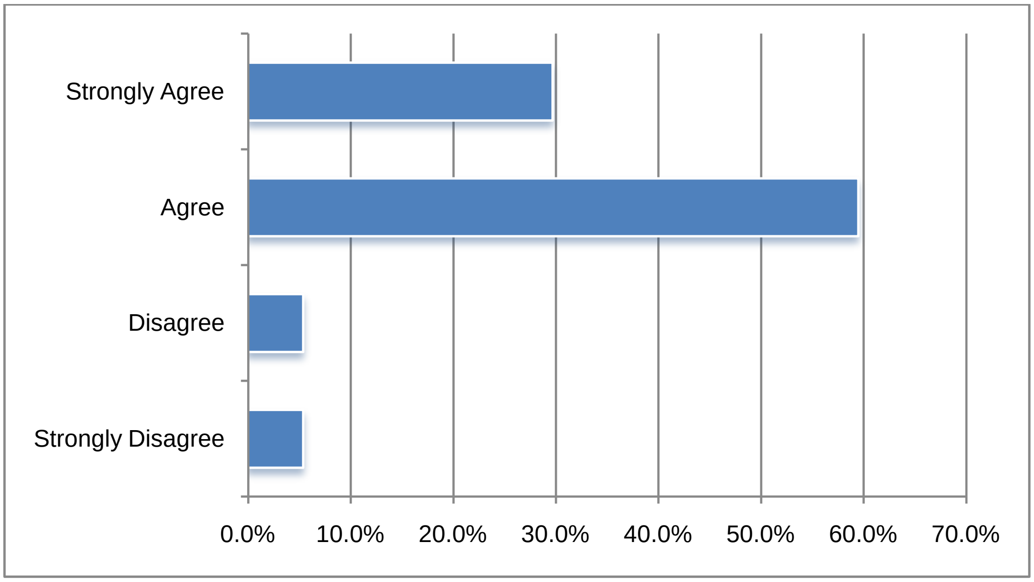


4. **Please rate the following criteria to indicate the level of importance each one has in ensuring the growth of your business (1 = Not Important → 4 = High Importance):**



Other Responses: Proper planning, development and approvals process; traffic and gridlock avoidance; knowledge of Town's continuous business improvement efforts; funding and support for non-profit organizations.

5. **Please indicate if you agree or disagree with the following statement: Richmond Hill is a good place for business to succeed.**



Challenges: Few opportunities for employment outside of retail markets; infrastructure challenges with regards to traffic; lack of vibrant town centre or central district; many new start-ups fail

Strengths: Strategic location re: major traffic arteries, proximity to airports and centrality within Greater Toronto Area; educated, diverse and cosmopolitan workforce; easy access to most amenities and strong business/zoning mix; fair property taxes; quality office space; strong and supportive client base; quality of life

6. **What are the advantages of doing business in Richmond Hill?**

Location: Convenient access to major roads (Highways 404, 407, 7) and travel infrastructure (GO, airports, public transit)

City Services: Better access to 'caring' public officials; easy access to Town offices and facilities; quality of facilities; good online services; responsible and careful management of Town finances; competitive taxation with other jurisdictions (Toronto); free municipal parking

Labour Force: High income families; highly educated workforce; multiculturalism, and new flow of immigrants

Quality of Life: Live/work community; small town atmosphere; sense of community; safety and low criminal activity; relatively low congestion; environmentally friendly; spirit of volunteerism

Other Business Services: Competitive rents and tax rates (re: Toronto); loyal client base; high density of commercial organizations

7. **What are the disadvantages to doing business in Richmond Hill?**

Transportation: Lack of good public transportation outside of core routes; low service outside of rush periods; poor transit connectivity to GTA-wide operators (e.g. GO, TTC); high congestion and gridlock (especially 16th Ave., Yonge St., Hwy. 7)

Business Environment: Too many small companies – need more large businesses; 'bedroom community' phenomenon; fewer business customers than elsewhere; low supply of commercial-zoned areas to meet demand; low-density business community (non-pedestrian); lack of knowledge of Town outside of the GTA; low promotion of businesses in local media

Town Services & Amenities: Convoluted by-laws and ad-hoc enforcement; lack of flexible/low-interest funding for non-profits; more government information and support; limited parking; often need to go to surrounding communities for quality retail/entertainment/services

8. **What industry sectors should the Town of Richmond Hill focus on to attract new economic growth to the community?**

- Large corporation HQs/head offices; Canadian HQs for multinationals
- Knowledge industries; education, finance, pharmaceutical, ICT, green technology, security, communications
- Light manufacturing, trading/warehousing, parts distribution (especially associated with high-tech industries)
- Arts and culture; supports other businesses and helps build town identity
- Investment in transport network
- Post-secondary institution, to keep local students in the Town
- Exhibition/convention centre
- "Anything other than retail and manufacturing"

9. **What economic and community development opportunities or trends is Richmond Hill currently missing out on?**

Business Services: development of prestige business locations and parks; better forward-looking planning and strategy, with incentives for local businesses/employees; better leverage Town's diversity to explore business opportunities (especially with China); business incubation opportunities; promote safety and infrastructure for business attraction

Quality of Life and Amenities: Address worsening congestion problems; expand local rapid transit; dispersed services – need 2 or 3 large mixed-use community centres with community services, shopping, and office space; better plan for natural conservation

Talent and Promotion: Need to better develop and showcase local talent in sports, arts, business etc.; develop centres/destination locations to attract large and international events

10. **Do you have any other thoughts on how the Town of Richmond Hill's economic development department can help support a strong, sustainable and vibrant economy into the future?**

Planning: More coordinated, goal-oriented planning and development; should have a Master Plan/Development Strategy to guide use of funds, especially for large-scale construction and development projects; address traffic issues, especially in downtown and East Beaver Creek areas; more cohesive zoning; attract large companies, but shift focus away from retail and manufacturing; greater focus on accessibility in development

Amenities and Services: Strengthen local transit and establish better linkages with other GTA transit systems; more pedestrian-friendly, entertainment-driven downtown core; more parks and recreational activities

Business Development and Promotion: Work on promoting and enhancing productivity of existing businesses, in addition to attracting to external investment; implement a 'buy local' strategy within the Town itself; better leverage the Town's Asian business community to explore investment opportunities; hold roundtable meetings with local business community, and strengthen local communication networks