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Our Foundation

Infrastructure for Innovation

Economic growth is driven by the creation of innovative products and services. This innovation needs to be supported not just by an entrepreneurial climate but also by physical infrastructure such as that being developed in the West Hamilton Innovation District and at the McMaster Innovation Park (MIP).

Zach Douglas, President & CEO, MIP
INFRASTRUCTURE FOR INNOVATION

Vision

Make Hamilton the most innovative and entrepreneurial city in North America and develop the world class infrastructure to support it.

Introduction

In the New Economy, the ticket to faster and broader income growth is innovation. The New Economy puts a premium on what the Nobel laureate in economics Douglas North calls "adaptive efficiency," which refers to the ability of institutions to innovate, continuously learn, and productively change. As markets fragment, technology accelerates, and competition comes from unexpected places - learning, creativity, and adaptation have become the principal sources of competitive advantage in many industries. Enabling constant innovation needs to become the goal of all organizations committed to prospering. Similarly, the goal for metropolitan areas must be to foster innovation and adaptation - in infrastructure, in institutions both public and private, and on the part of individuals. The consequences for any metro area that does not respond to this challenge are low productivity, stagnant living standards, and reduced opportunity for its citizens.


Innovation and change almost always results in uncertainty and the disruption of standard practices. In economic development terms, it is becoming increasingly clear that dynamism is critical to growth at the local, provincial and national levels. This means that municipalities must promote change and innovation - not retard it, especially, if they intend to grow a prosperous community in today's globally competitive economy.

The establishment of a positive business environment is one of the fundamental conditions required to implement this new "orientation" towards innovation. Hamilton must fully embrace innovation and then establish the priority goal of creating an environment to allow it to flourish. Traditionally, a municipality has had the ability to impact the local business environment through five areas of policy:
- **Taxation**
  Taxation must be competitive, stable, equitable, and efficient. This is absolutely necessary in order to eliminate the burden of taxation currently being shouldered by an increasingly narrow slice of economic activity in the community; namely the non-residential class.

- **Regulation**
  The primary complaint from the Business community in any city has been not the regulations themselves but the way they are administered. A positive business climate must be developed by working directly with Business to establish acceptable standards for regulations and their implementation.

- **Development Incentives**
  There is simply no way to eliminate the use of incentives in economic development especially in a North American context. Therefore, the focus must be to ensure that the incentives used by the City are done so cost effectively and that they achieve the goals for which they were originally established.

- **Physical Infrastructure**
  The City alone is responsible to plan and secure the implementation of new and reconstructed physical infrastructure (i.e. water supply, sewers, roads, public transit, and airports) which is the critical component of development capacity and long-term competitiveness.

- **Customer Service**
  A municipality must be considered “Open for Business” both in perception and reality. Competition for economic development is becoming fierce and with more “players” than at any other time in our history. It is incumbent upon City Councils to entrench this “business friendly attitude” in terms of policy and then provide the direction and resources to corporate staff necessary to implement and deliver it. More on this - later on in this component.

Just as in entrepreneurial companies, the presence of innovation based infrastructure provides a city with the ability to compete. The following focus areas have been targeted to establish an environment that fosters innovation and entrepreneurship at a local level.
Education’s Role in Innovation

“Education in every sense is one of the fundamental factors of development. No city or country can achieve sustainable economic development without substantial investment in human capital. Education enriches people’s understanding of themselves and world. It improves the quality of their lives and leads to broad social benefits to individuals and society. Education raises people’s productivity and creativity and promotes entrepreneurship and technological advances. In addition it plays a very crucial role in securing economic and social progress and improving income distribution.”


Education is indispensable to economic development. No economic development is possible without good education. A balanced education system promotes not only economic development, but productivity, and generates individual income per capita. In this “New Economy”, there is a new paradigm emerging known as a “knowledge first” - where higher education is taking a leading role in areas like; Innovation (developing new technologies, new processes, new products, new ideas); Helping employers (worker training, management counselling, help for start-ups, and other initiatives); Community development (colleges and universities developing and managing property in a variety of roles – such as housing, businesses that serve the college and others, culture and recreation roles) ; and Educated Population (the most fundamental contribution to economic development lies in its traditional role: creating an educated population in the community).

The following sub-sections present the role of Hamilton’s largest post-secondary education institutions in economic development:

McMaster University

It is important to distinguish the three roles that the University plays in regard to innovation in the local, regional and national economies.

1. The education role of the University: relates to educating the knowledge workers and leaders of the future. In this “Age of Human Capital”, the primary determinant of a city or country’s standard of living is how well it succeeds in developing and utilizing skills and knowledge. This links to the role that all educational institutions play in Hamilton (schools and colleges) with regard to economic development and innovation in providing the
human capital required to attract investment. Investment in human capital can have little impact on growth unless people can use education in competitive and open markets. The larger and more competitive these markets are, the greater are the prospects for using education and skills.

2. The research role of the University, relates to the creation of new knowledge and also the access to existing knowledge from all over the world, for the benefit of a local enterprise. In Canada, Industry subcontracts 5% of its R & D work to universities and finances 12% of other university research work. As a result, today Industry, Education and research all remain closely intertwined. Education is an important contributor to economic development by increasing the technological capability and technical change in local and regional companies and thereby increasing their productivity and profitability.

3. Lastly and most significant is the economic development role (some refer to it as the third mandate or service to the community). This is a role that universities throughout the world are expanding; encouraged by governments and business, with the recognition that economic prosperity and the well paying jobs of the future come from and are driven by innovation. McMaster University is the fifth largest employer in the City of Hamilton with more than 7,300 employees (November 2006). More than 60 per cent of McMaster's 19,503 full-time students come from outside the City of Hamilton and bring increased revenue to Hamilton area businesses through consumer spending.

The local (or regional) innovation system has a number of players in business and in the public sector, such as the City, the University, the Colleges (Mohawk and Redeemer), the Schools, and other organizations. Every one of these players does its part, but there are gaps that impede the flow of activities (ideas, new ventures, learning from each other, etc). The creation of the McMaster Innovation Park (MIP) by the University, the West Hamilton Innovation District (WHID) by the City, and the Innovation Factory by the Jobs Prosperity Collaborative is an attempt to close this gap and hopefully eliminate it in Hamilton.

(See also: Local Infrastructure Investment section at the end of this component)

Mohawk College

Mohawk College is the prime job creating engine in Hamilton and throughout the region. Mohawk trains 15,000 full-time students and apprentices annually and has more than 85,000 graduates. With 120 programs and more than 1,000 continuing education courses, Mohawk is building and replenishing the stock of
human capital that helps launch and grow globally competitive companies and industries that in turn create good-paying jobs and sustainable prosperity.

In August 2009, Mohawk broke ground on a $30 million Fennell Campus Renewal Project. The largest renewal project in Mohawk's history features construction of a 3-storey Mohawk Centre for Entrepreneurship, Learning & Innovation set to open in January 2011 and major renovations throughout the campus during the next two years to further enhance the learning and overall college experience for all students. Enrollment will grow at the Fennell Campus from 7,000 to 9,000 full-time students.

In January 2010, Mohawk opened the new Gerald Marshall Centre for Transportation. The Centre will train between 380 and 420 apprentices annually in Truck and Coach Apprentice, Truck and Trailer Apprentice and Pre-Apprentice Truck and Coach Programs. The Centre is part of an overall $27 million transformation of the campus into the Mohawk STARRT Institute for Skilled Trades and Apprenticeship Research, Resources and Training. Mohawk is the largest trainer of apprentices in Ontario.

Mohawk, together with three other Ontario Colleges, is meeting the workforce training and development needs of Hydro One through an award-winning collaboration that is the first of its kind in Ontario. Hydro One is investing $3 million in scholarships, equipment and curriculum development to train the next generation of Hydro One workers. Mohawk students who graduate at the head of their class will be invited to the front of the hiring line by Hydro One. Similarly, Mohawk entered into a partnership arrangement with Horizon Utilities to focus on training and providing a labour supply for the burgeoning Clean-Tech sector.

Mohawk’s spirit of collaboration with McMaster University is unique in the Province. Together, Mohawk and McMaster built the first institute in Canada to bring college and university health science education and research together under one roof. Two teams of students from the collaborative Medical Radiation Sciences Program have had research projects published in an international medical journal and the first team was recognized in October with a major research award. In direct response to industry need, Mohawk and McMaster also launched Canada’s first Bachelor of Technology Program. The program, which has been recognized with a national Yves Landry Award, develops both technical skills and leadership abilities in students and working professionals.

A team of Mohawk students, recent graduates and faculty is working with industry partners at the leading edge of health care and information technology. The Mohawk team is building and testing the first working prototype of a national electronic health system. The system would securely store, share health
information and allow more than 2,000 healthcare transactions to be processed online instead of through a patchwork system that is largely paper based.

Through the Province of Ontario’s Second Careers Program, Mohawk is retraining more than 650 laid-off workers in 2009-10 for highly skilled jobs in growing industries. Innovative bridging programs for foreign trained professionals are also maximizing Hamilton's human capital.

Moving forward, Mohawk will continue to work with more than 1,000 corporate, community, education and government partners in developing the innovation, creativity and entrepreneurial skills of more than 15,000 full-time students and apprentices.
Seamless Customer Service & Shovel Ready Land

i) Seamless Customer Service

It is the responsibility of the City to guarantee that everything from taxes to municipal by-laws and regulations encourages business development. Establishing a positive “Business Environment” in a municipality begins at the steps of City Hall and it starts with the adoption of a “business friendly” attitude.

In the last five years, the City of Hamilton has made tremendous strides in changing the overall “culture” to one that embraces seamless customer service as a corporate philosophy and encompasses everyone from City Council and Senior Management to front-line staff.

Hamilton’s Planning & Economic Development Department is the one area of municipal government that deals most directly with business and has also undergone the greatest change. In 2005, the Planning and Economic Development Departments were integrated with the intent to increase both the efficiencies and effectiveness in the City’s business attraction and business retention & expansion programs. A decision that was later substantiated by an external governance review of the City’s Economic Development operations. Since these functions are now working collaboratively, it has been the business/customer in Hamilton that has benefited the most (see Business Retention & Expansion section of Business Development component).

The Economic Development & Real Estate Division represents frontline staff that is proactively recruiting new business to Hamilton and working on a daily basis to retain and expand existing companies. The number of results and the effectiveness of the division has increased dramatically because companies are no longer being “handed off” to another division/department. Instead there is now a “cradle to grave” approach available to business; Economic Development staff are able to identify and work jointly with Planning staff to solve business’ issues before they become problems; critical decisions can be made and implemented immediately; Business Development issues are a top priority and addressed quickly at the Department Management Team level; and, there is direct input from an economic development perspective into all major initiatives (i.e. employment lands development, development charges, zoning, etc.) that effect growth and business operations in Hamilton.

In June 2010, for the first time since the formation of Regional government in 1974, all Planning and Economic Development functions will be co-located in the newly renovated City Hall. The significance of this move is that it provides the opportunity to offer One-Stop Shopping business model for entrepreneurs, companies and developers. The purpose of “one stop shopping” is simple; by
providing full services in one location, a municipality can offer businesses the convenience of satisfying their concerns/questions in one stop. The first point of contact for “One-Stop Shopping” centre is located on the first floor of City Hall and the description of these services are detailed in the following paragraph. However, the real advantage is that any problem or issue that can not be accommodated on the first floor will be dealt with by either redirecting the customer to the applicable division or summoning the appropriate staff member (from a clerk to the General Manager) within City Hall to immediately resolve the matter.

Directly across from the main entrance on the first floor of City Hall, there are three important services; the **Small Business Enterprise Centre** (SBEC); a Business Facilitation service; and a Business Licensing service. The SBEC’s, described in greater detail later on in this component of the strategy, primary function is to encourage, empower and support new and growing companies during their initial years of development and operation. This joint initiative with the Province of Ontario focuses exclusively on entrepreneurship and the basics of business start-up and business planning. The **Business Facilitation Service** is a function that supports both companies/customers that are expanding their operations and businesses/developers that are establishing or relocating their company to Hamilton. The Business Facilitators that staff this service have an extensive knowledge of all planning and building related requirements and policies. They offer hands-on assistance with the development process for prospective applicants, process planning applications for special projects, ensure planning approvals are obtained in an effective, and timely manner by providing mediation and problem resolution services. The **Business Licensing Service** focuses on all business related functions that are the responsibility of the Parking & By-Law Services Division. The primary services provided here include; applying for or renewing Establishment licenses; Information, applications and fees for establishment, mobile, lottery, and trade licenses; enforcement of commercial private property; the sign by-law; and all issues regarding municipal by-laws and enforcement.

Finally, for all development applications the City of Hamilton offers two very innovative and extremely effective services. The first is a mandatory **Pre-Consultation** meeting that is employed during the Site Plan Control process. This involves a comprehensive meeting between the business/developer and all the key staff members from within the Planning & Economic Development Department that will be involved with the site plan. At this meeting, any and all issues, costs, processes, etc. are identified and solutions and/or options are presented. Also, all municipal and other juridictional requirements are examined and timeframes for processing and approval are set. The benefits are obvious - if these matters are dealt with at the beginning of the development application then
the approvals process can move as quickly as the system allows thereby saving the customer time and money. The second service is the Development Review Committee which is also related to the site plan control process. This Committee comprises of the Director of Development Planning (or his designate) and all key staff from Planning, Building, Traffic, Engineering, etc. within the City as well as outside agencies (i.e. the Conservation Authority) that have a related interest in the application. At this meeting, the final develop submission is reviewed and approved (with or without revisions) and then can be signed off by the City through the delegated authority of the Director of Development Planning. This is another outstanding example of seamless customer service in Hamilton.

**Short Term Deliverables (less than 4 years)**

- Relocation to City Hall of all Planning & Economic Development functions by July 2010
- Increase the extent of E-Government (on-line applications, permitting, licenses, etc.)
- Tracking & monitoring programs to benchmark efficiencies
- Establishment of “Team Hamilton” for major plant locations

**Long Term Deliverables (more than 4 years)**

- EDRMS (Electronic Document Records Management System)
- Satellite “One Stop Shopping” centers or kiosks throughout the City of Hamilton
- Increased delegated authority for routine planning & business matters
ii) Shovel Ready Lands

What Is “Shovel Ready” Employment Land?

The City of Hamilton’s non-residential assessment growth is continuously restrained by a lack of dedicated employment lands. While it may appear that Hamilton has an adequate supply of industrial property waiting to be developed, unfortunately many of these industrial properties are nothing more than uncultivated agricultural land without services or proper zoning.

The process of getting from raw, undeveloped land to a saleable industrial site is a time-consuming and expensive process. In today’s dynamic economy, where concepts like time to market and just-in-time delivery are emphasized, businesses are now looking for sites that are “Shovel Ready”. In the long run, the communities that recognize this growing trend and work on increasing their supply - will reap the economic benefits of growth.

What is a “Shovel Ready” site? Basically, it is a site that already has the necessary designation, zoning, permits, and servicing/utility infrastructure in place. Having a “Shovel Ready” site (or sites) in your community sends a strong message to both prospective businesses and citizens alike. In short, it physically confirms that your community is serious about economic development and is open for business.

It is important to have a number of industrial land options to meet the needs of relocating or expanding businesses in different locations within the City. The following information is divided into Industrial Business Parks and Areas to provide a brief update of where the City is in relation to providing “Shovel Ready” industrial lands across the City. For further convenience, location maps have also been provided for almost all of the project areas being described.

Airport Employment Growth District Study

In July, 2007 after a City issued Request for Proposals, submissions were received, reviewed and interviews conducted with short listed firms in September. The contract was awarded to Dillon Consulting and their study team in late October.

Dillon Consulting along with City staff, were responsible for the development of a secondary plan, master plans and a financing and development phasing plan by providing scoping documents and draft land use concepts as part of phase I of the study process.
This work (phase I) was to be completed by June 2008 with a public information centre being held in late March/early April 2008. The completion of the secondary plan, master plans and the financing and development phasing plan (phase II) was to be completed by September 2009. Additionally, an Airport Employment Growth District Community Liaison Committee was also formed and represents a broad spectrum of the community.

**Airport Industrial Business Park**

The City also works with private land owners to facilitate industrial land development within the industrial park.

*Orlick Aeropark Sub-division* is moving forward with the start of construction anticipated in 2010. This sub-division is identified as “A” on Appendix B to Report PED08028. Net “shovel ready” land available today is 16 acres, with an additional 64 acres when the sub-division is complete. The remainder of the Airport Industrial Business Park will be integrated into the Airport Employment Growth District Study.

**Ancaster Industrial Business Park**

Phase V Subdivision (identified as “B” on Appendix C to Report PED08028), a City owned 42 acre industrial subdivision, was completed by the end of 2009 with approximately 30 acres of “shovel ready” land. By year’s end, the entire subdivision was sold to end-users including 4 acres to abutting property owners along Osprey Drive to facilitate the expansion of their businesses within the Hamilton community.

Land acquisition discussions have since begun with private property owners and engineering designs are being prepared for the Cormorant Road Extension and Storm Pond I design and construction (identified as “A” on Appendix C to Report PED08028). Once complete, an additional 55 acres of “shovel ready” land should be available later in 2008.

Presently, approximately 9.5 acres are “shovel ready” at the west end of Osprey Drive as well as another 22 acres at Garner Road West and Mason Drive and north of Portia Drive. It is estimated that the total “shovel ready” acreage for the Ancaster Industrial Park for 2008 will be approximately 120.5 acres.

**Stoney Creek Industrial Business Park**

Public Works staff with the involvement of the Industrial Parks and Airport Development Division has completed or is in the process of completing the Lewis Road Class Environmental Assessment (CEA), McNeilly Road CEA, Watercourse 5 & 6 CEA and the Arvin Avenue Extension CEA. The culmination
of these studies over the next few years will result in the City’s ability to facilitate the eventual development of approximately 165 acres of privately owned lands to further the City’s “Shovel Ready” initiative in the Stoney Creek Industrial Business Park.

**Red Hill Business Park Phase II (North Glanbrook Industrial Park)**

A number of different City and private initiatives are underway within the park. The North Glanbrook Transportation Master Plan has been completed along with the Dartnall Road Class EA. The Hannon Creek Watershed Class EA is nearing completion as well as the North Glanbrook Industrial Business Park Servicing Strategy.

Difficult property negotiations to acquire lands for the extension of Dartnall Road significantly delayed the construction of the park’s major arterial road... In light of this, staff pursued the reconstruction of Nebo Road, Twenty Road to the Dartnall Road Extension as well as a portion of the Dartnall Road Extension facilitate the servicing of the City-owned property of 55 acres along Nebo Road to Dickenson Road. The sale of City owned land to Canada Bread and the adjacent storm water management ponds has now reduced this parcel to 24 acres.

Presently, there are roughly 73 acres of “Shovel Ready” lands within the park and another 366 acres should come on line before 2012, including the above-noted lands owned by the City south of Twenty Road and east of Nebo, as well as a privately owned industrial sub-division north of Twenty Road and west of Trinity Church Road of approximately 44 acres.

**Red Hill Business Park Phase I (Mountain Industrial Business Park)**

The Trinity Neighbourhood Secondary Plan and the opening of the Red Hill Valley Parkway provides additional opportunity for another 125 acres of industrial business park lands that need to become “shovel-ready”. Anchor Road, Pritchard Road and the proposed Trinity Church Road extensions are all being reviewed for servicing and road construction or re-construction to facilitate more developable industrial business park lands. Presently, there are 82 acres of “shovel ready” lands in this park.

**West Hamilton Innovation District**

The West Hamilton Innovation District Secondary Plan remains before the Ontario Municipal Board and the City’s Planning and Economic Development Department staff continue to negotiate solutions to address appellant concerns. Nonetheless, Public Works staff has initiated a Class EA for extending Frid Street. The City’s Industrial Parks and Airport Development Division will
coordinate the preparation of an implementation and servicing work plan for this District once the OMB hearing is complete.

In November 2009, the City of Hamilton acquired the former CP lands through a Power of Sale process. This $2.1 million property acquisition gives the City a 16.5 acre parcel of employment land immediately to the east of the McMaster Innovation Park and bisected by the Frid Street Extension to Longwood Road.

**Bayfront and East Hamilton Industrial Areas**

These areas provide potential for redevelopment of industrial uses. A Historical Land Use Inventory has been completed which provides the foundation for the identification of redevelopment opportunities and investments in these areas as per the Brownfields Strategy.

**Flamborough Industrial Business Park**

A joint initiative between the City and the Ministry of Transportation (MTO) has been undertaken to ensure that the redevelopment of North Wentworth Arena and any future MTO works in the industrial business park will take into account the goals of the “Shovel Ready” initiative. In particular, the road pattern needed to provide optimal accessibility and opportunity to develop parcels of land. These projects represent significant opportunities that must be acted upon now to provide additional Shovel Ready lands in the Park. There are presently 33 acres of “Shovel Ready” lands available in the Park along Coreslab Drive with another 35 acres which could potentially become available before 2012.

**Short Term Deliverables (less than 4 years)**

**Ancaster Industrial Business Park**

- Facilitate development of one privately owned industrial subdivision (west of Tradewind Drive) by extension of Cormorant westward to Trinity Road and construction of Storm Pond I
- Facilitate planning of another industrial sub-division west of Shaver Road

**Stoney Creek Industrial Business Park**

- Complete all EA studies noted above.
- Land negotiations for stream and road improvements
- Development of a phasing strategy for capital improvements
- Detailed design and tendering of noted works
Red Hill Business Park – Phase II

- Complete required studies/EAs
- Re-construct Nebo Road, Twenty Road (from Nebo east to the new Dartnall Road Extension)
- Complete land negotiation for Dartnall Road Extension from Twenty Road, south to Dickenson Road
- Construct Dartnall Road Extension from Dickenson Road to Rymal Road

Red Hill Business Park – Phase I

- Anchor Road Extension Servicing Study
- Pritchard Road Servicing Study
2008 – 2010 Shovel Ready Lands Summary

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<tr>
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<tbody>
<tr>
<td>Airport IBP</td>
<td>16 acres</td>
<td>64 acres</td>
</tr>
<tr>
<td>Ancaster IBP</td>
<td>31 acres</td>
<td>90 acres</td>
</tr>
<tr>
<td>Flamborough IBP</td>
<td>33 acres</td>
<td>35 acres</td>
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<tr>
<td>Red Hill Phase I IBP</td>
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<td>125 acres</td>
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<tr>
<td>Red Hill Phase II IBP</td>
<td>73 acres</td>
<td>366 acres</td>
</tr>
<tr>
<td>Stoney Creek IBP</td>
<td>50 acres</td>
<td>165 acres</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>285 acres (approx.)</strong></td>
<td><strong>845 acres (approx.)</strong></td>
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Long Term Deliverables (greater than 4 years)

**Airport Employment Growth District**
- Complete Secondary Planning
- Commence Servicing in a Phased Approach

**Bayfront and East Hamilton Industrial Areas**
- Complete Historical Land Use Inventory
- Identify opportunities for redevelopment and development
- Work collaboratively to create a Brownfield Redevelopment Strategy and Implementation Plan

**Flamborough Industrial Business Park**
- Finalize future road pattern with the Ministry of Transportation so that industrial land development needs, as well as the requirements of the public and landowners are met

**West Hamilton Innovation District**
- Await outcome of OMB process
- Complete Frid Street Class EA
- Develop a capital budget project listing and prioritize
Note:
1. West Hamilton Innovation District – pending OMB decision
2. Bayfront and East Hamilton Industrial Area – pending Employment Land Budget.
3. None of the 285 acres are owned by the City of Hamilton. Therefore, it is essential that the City work with private land-owners, developers and industrial realtors to move development projects forward as well as direct potential land purchasers or tenants to them.

City of Hamilton Official Plan & Comprehensive Zoning By-Law

i) COH Official Plan

The new Hamilton Official Plans, which include both Urban and Rural plans, are forward-thinking documents that will support the Economic Development Strategy by facilitating improved economic development and quality of life in Hamilton.

The Plans contain several key policy directions that result in substantial changes in land use planning. Key elements include:

- a focus on place making and improving quality of life in Hamilton through strong policies regarding urban design, cultural heritage, and natural heritage;
- the integration of multiple modes of transportation and goods movement;
- the protection of employment land for clusters such as manufacturing and advanced manufacturing, research and development;
- strong protection of agricultural land and the natural heritage system;
- the support and encouragement of businesses and activities that contribute to a creative city; and,
- enhanced flexibility in the establishment of land use designations bringing businesses, people and their markets closer together.

Quality of Life and Place Making

The Official Plans recognize the critical role that a high quality of life has in attracting and retaining people, business, and investment. Policies create a high quality of life by ensuring the character of Hamilton’s existing neighbourhoods and rural communities are protected; recognizing and protecting the value and integrity of Hamilton’s natural heritage system; and, developing and maintaining vibrant and attractive urban places. The promotion of mixed uses throughout the urban area, a focus on quality urban design, parkland requirements, and strong protection for natural and cultural heritage resources all combined to create a dynamic and exciting City.
Transportation and Goods Movements

An integrated transportation system, including goods movement, is a key component of infrastructure for innovation. The Urban Official Plan recognizes the importance of the relationship between all modes of the transportation network and quality of life and economic development by:

1. promoting Hamilton as a goods movement gateway which takes advantage of Hamilton’s close proximity to a port, airport, rail facilities, and parkways;
2. improving the relationship and interdependence of land use and transportation planning;
3. promoting better access to all modes of transportation, including transit/rapid transit and active transportation (walking, cycling, etc.);
4. improving connectivity between transportation modes; and,
5. addressing the transportation needs of employment areas.

Employment Lands

The Urban Official Plan strongly protects existing and identifies future employment lands (e.g. Airport Employment Growth District) for employment purposes and job creation to ensure Hamilton remains economically competitive. The policies also promote the need to have a sufficient supply of shovel-ready employment land of varying parcel sizes for business retention and attraction.

Agriculture and Rural Hamilton

The policies of the Rural Hamilton Official Plan reinforce and support the significant contribution agriculture makes to the lifestyle, environment and economy of the City by identifying and protecting all rural resources (i.e. agricultural land base, aggregates, natural and cultural heritage), recognizing the importance of Rural Settlement Areas, providing opportunities for resource-based commercial and industrial uses and some resource-based recreational uses. Prime agricultural lands are protected for agriculture and agri-business (including agri-tourism). Severances for non-agricultural uses are severely limited.

Arts, Culture and the Creative Sector

The Urban Official Plan specifically supports arts, culture and the creative sector through many of the policy directions discussed above including provisions for public art, and by recognizing the importance of culture and arts in many facets of communities, promoting a culture of creativity, and promoting the arts and culture sector as a key component of economic health.
Land Use Flexibility

The foundation of the Urban Hamilton Official Plan is greater flexibility within the land use designations. Several commercial mixed use designations permit a broad mix of residential, commercial and institutional uses to create more vibrant and inviting areas. The Plan recognizes that neighbourhoods include more than housing; they encompass local commercial, community facilities/services, and neighbourhood scale institutional uses which are fundamental to complete communities. Accompanying urban design policies and locational criteria ensure compatibility amongst businesses and housing. Other details are left to secondary planning and zoning, reducing the need for official plan amendments (e.g. home-based businesses).

ii) COH Comprehensive Zoning By-Law

With the amalgamation of the City of Hamilton, the City has initiated the creation of a new Comprehensive Zoning By-law for the entire City. The key principles to the development of the new document are to be user-friendly, consistent, less regulatory and remain a dynamic document with continual monitoring of its effectiveness. The City has completed several sections of the new Comprehensive Zoning By-law including Downtown Zones, Parks and Open Space, Institutional and the first Industrial Zone respecting the West Hamilton Innovation District. Major areas currently being developed in the new By-law include Employment Land (Industrial), Commercial/Mixed Use, Rural and Residential.

Through the implementation of the new Zoning By-law, the City is providing clarity in zoning by developing more general definitions, e.g. retail, manufacturing, agriculture, etc. without being specific on the product built, sold or use operating which will remove past obstacles related to past practice of finely defined uses. By pre-zoning all the zones within the City, opportunities will exist for new development with a limited approvals process.

Industrial Zones

For the Employment Lands within the City, zoning is proposed to be simplified to two Zones related to the Older Industrial Areas (light industrial and general industrial) and 3 Zones for the Industrial Business Parks (prestige industrial, general industrial and prestige/support services).

The philosophy is that the exterior of the Employment Areas shall have a higher level of urban design, such as increased landscaping along streets and building design elements, to maintain a professional and attractive front to our Employment Areas without limiting business opportunities.
The proposed zones are less restrictive in regulations while recognizing the importance of providing compatibility with the abutting land uses, including residential which abuts most of our Employment Areas.

**Commercial/Mixed Use Zones**

Through the new Official Plan, focus has been placed on determining the location commercial as well as looking for opportunities for mixed use development to accommodate residential intensification.

Within the 7 new proposed Commercial Zones, opportunities are created for mixed use buildings and mixed use areas. Focus has been placed on creating more generic definitions for retail and personal services, which allow the City to determine the locations for commercial but the market determines what specific uses actually locate on a property. A result of this approach is a broader range of permitted uses.

The new zones being created permit for a range of commercial uses within the Zone and with the exception of Arterial Commercial, all the remaining 6 proposed commercial zones permit residential uses as well, either within a mixed use building or as a stand alone use depending on the specific zone.

The proposed regulations in the zones are more flexible and based on the preferred built form. Where appropriate, buildings are to be brought to the street hiding the parking areas and making more appealing streetscapes. Innovative approaches for parking requirements and leaving the requirements of loading zones to the design stage of the development.

**Arts and Culture**

Significant focus has been placed on the emerging Cultural Industry within the City. The new zoning is creating new opportunities for this cluster depending on its use. Through the new definitions of manufacturing, the production of a product, including the manufacturing of art as an example, is a permitted use within the Employment Areas. This is an important change as many of the older industrial areas have buildings that attract the cultural industry for adaptive reuse. We have developed a use called “studio” which captures uses from dance instruction to artist studios to motion picture, radio or television production. The studio use is proposed for all commercial/mixed use zones. Further through the Home Business regulations, studio is permitted some residential dwellings.

**Rural Zones**

Through the Greenbelt Legislation and the new Rural Official Plan, we are proposing through the new zoning to reinforce the “farming first” philosophy as
the key to the new Rural Zones. As previously mentioned, “Agriculture”, as a use, is defined through a broad definition to encompass all types of agricultural uses. Limitations on new non-farm housing are limited through minimum lot sizes that limit severances thus removing the potential for new incompatible uses. Further, through the zoning we intend to create opportunities for on-farm value-added uses to be permitted to assist the farmers in keeping their farms viable.

**Residential Zones**

The final stage of work will relate to the new Residential Zones. It is proposed that through the direction of the new Urban Official Plan and existing Secondary Plans, all residential lands can be zoned throughout the City. Careful attention will be paid in balancing opportunities for residential intensification as well maintaining the character of existing neighbourhoods.

The development is being undertaken with significant consultation with the public, industry stakeholders and the various commenting agencies to ensure the direction of the new zones represents current development trends as well as being flexible in anticipation of alternative types of new developments.

The key focus of the new zoning is to remove obstacles for new economic development while maintaining compatibility with existing uses; to provide consistency across the City in the zones while recognizing the uniqueness of the individual communities within the City.
Small Business Enterprise Centre (SBEC) and Hamilton Technology Centre (HTC)

i) Small Business Enterprise Centre (SBEC)

Introduction

The Hamilton Small Business Enterprise Centre (SBEC) directly reports to the City of Hamilton's Economic Development and Real Estate Division. The SBEC is funded through a multi-level partnership involving the Province of Ontario (MEDT), the City of Hamilton and private sector businesses.

Since November of 2001, the SBEC was located at 2 King Street West, Unit 234 within Jackson Square. Effective June 7th, 2010 it is housed in City Hall, first floor as part of the “One-Stop Shop” for business and entrepreneurs.

Definition of Small Business

Industry Canada defines small business based on the number of employees; goods-producing firms are considered "small" if they have fewer than 100 employees, whereas for service-producing firms the cut-off point is 50 employees. The smallest of small businesses are called micro-enterprises, most often defined as having fewer than five employees. The term "SME" (for small and medium-sized enterprise) refers to all businesses with fewer than 500 employees, whereas firms with 500 or more employees are classified as "large" businesses.¹

2009 Federal Budget – Economic Action Plan

“Small businesses are dynamic and drive economic growth and job creation”.

The Federal Budget 2009 supports their growth by: reducing federal tax rate, increasing access to credit for small businesses, increasing funding to National Research Council's Industrial Research Assistance Program, Canada Business Network and Canadian Youth Business Foundation.²

¹ Industry Canada, Key Small Business Statistics - January 2009
² Canada's Economic Action Plan – Budget 2009
Small Business in Ontario

Annually up to 130,000 businesses are registered in Ontario. Overall small business accounted for 37 percent of all jobs created, on average, in the private sector.

About 80 percent of Ontario businesses have fewer than 5 workers. Further about:

- 60% of all business establishments have no payroll employees
- 21% have fewer than 4 employees
- 12% have between 5-9 employees
- 4% have 10 – 20 employees
- 3% have 50 – 499 employees
- 0.1% with 500 or more employees.³

Major Trends

The outlook for starting a small business in Ontario reveals that new entrepreneurs and small business owners are:

- Self-employment is rising the fastest amongst young Canadians (15-24) and older Canadians (55 plus)
- “Seniorpreneurs” currently account for a record high 1 in 4 self-employed individuals in Canada and constitute more than 30% of the total workforce over 55
- Small business growth is estimated to increase yearly by 1 – 2%, translating into 150,000 new businesses⁴
- In 2005, Statistics Canada reports state that 47% of all SME’s had some degree of female ownership⁵

Support Services for Small Businesses in Ontario

Small business is the most volatile segment of our economy. Starting a business can be tough, survival takes knowledge, skills and networks. The Ontario government operates a network of Small Business Enterprise Centres (SBECs) in 44 communities across Ontario where their mandate is to:

³ Source: Statistics Canada, Business Register, June 2008; Ontario Data.
⁴ CIBC World markets economic Trends, Sept. 2006
• Assist new entrepreneurs in the evaluation and process of business start-up
• Promote and encourage entrepreneurship as a viable career option - including development of entrepreneurial skills, qualities and opportunities for Ontario’s youth
• Provide stability and early-stage growth support to existing small businesses (less than 5 years in operation and less than 10 employees) and improve the success rate

These offices are supported through partnerships with municipal and federal governments, and in some cases private sector. The network is a critical link for entrepreneurs and the small business community across Ontario.

City of Hamilton’s Small Business Enterprise Centre

The Hamilton Small Business Enterprise Centre (SBEC) responded to 35,000 general inquiries, 842 one-on-one consultations, delivered 78 workshops to 1153 participants and were able to reach an additional 9,600 industry alliances, community partners, professionals through its outreach and networking activities.

SBEC operates as a division of the City of Hamilton’s Economic Development Department and belongs to a network of 56 Enterprise Centres in Ontario partnered with the Ontario Ministry of Economic Development and Trade and Canada Ontario Business Services Centre. The mandate of the Enterprise Centres’ is:

• To encourage, empower and support new and growing companies during their initial years of development and operation.

The Centre is a one-stop-shop providing a wide array of business services essential to aspiring entrepreneurs and the small business regardless of the industry sector or stage of business development; “thinking”, “starting” or “growing”. The services benefit small business operators, especially those with fewer than 5 employees, who tend to have fewer resources and limited or specialized knowledge.

Responding to the needs and requirements of new and growing businesses the SBEC deliverables can be grouped under the following headings:

• **Resource Centre** – continue to provide access to business publications and reference materials and utilize the www.hamiltonsmallbusiness.ca website to provide easy access and links to on-line sources of information for business research, statistical data, industry sector information and incentives, regulatory bodies, government departments...
and business registration services under the guidance of knowledgable staff.

- **Consultation Services** – continue to provide consulting and coaching one-on-one to meet the specific needs of business owners in diverse industry sectors. Facilitate connecting entrepreneurs to industry experts to aid in developing and promoting their products and services in competitive markets. Identify industry specific financial incentives and readiness to access capital and financing for small business owners

- **Mentor Services** – continue to enhance and expand the Access to Professionals mentoring program to guide less experienced business owners to understand the value of acquiring professional business advice at start up enabling the success and survival of the business over the long run

- **Community Outreach** – continue to develop and work with public and private sector community partners, stakeholders, alliances, educators and industry specialists to foster and promote entrepreneurship, innovation for business owners, youth and new Canadians

- **Networking and Events** – continue to work with networks linking new and growing business to environments where they can collaborate and interact effectively

- **Business Skills Development Workshops** – continue to support and improve delivery of educational services through business skills and development workshops assisting new entrepreneurs in start-up and through milestones of growth and development. Include seminars in starting a small business, market research, business planning, marketing, sales, legal and insurance issues, financing and cashflow, small business tax, web and social media marketing, information technology and new importer and exporter and organizational management

- **Youth Programs** – continue to promote and support programs to stimulate youth entrepreneurship such as Summer Company, Secondary School Business Plan Competition and the Canadian Youth Business Foundation

In order ensure the success and survival of new and growing ventures, entrepreneurs need access to information and resources, personalized consulting and coaching, knowledge and skills development, industry experts and assistance when preparing to access financing. The Centre will continue to:
• Provide small business and entrepreneurs with guidance and advice in a collaborative environment encouraging and enabling connectivity, interaction and innovation

• To improve access to information and resources and develop new programs that will focus on individual and sector specific needs to ensure the continued success and diversity of small business in Hamilton

• Develop a strong network of collaborative partnerships to develop, facilitate and promote entrepreneurship and innovation for business owners, youth and new Canadians

• Foster entrepreneurial growth and development in the City of Hamilton attributed to services offered by the SBC.

The most critical component of the Small Business Enterprise Centres’ ability to deliver services is its support from the local community partners. The Hamilton community partners include the following:

• Ministry of Economic Development and Trade (Ontario)
• Canada-Ontario Business Service Centre (Industry Canada)
• RBC, Royal Bank
• Pricewaterhousecoopers LLP
• SimpsonWigle LLP
• Kitestring Creative Marketing
• Business Development Bank of Canada
• Canadian Youth Business Foundation
• Hamilton, Stoney Creek, Ancaster, Flamborough, Dundas, Chambers of Commerce
• Business Improvement Areas
• Revenue Canada
• Canadian Border Services
• Immigrant Settlement Organizations
• Industry Education Council of Hamilton
• McMaster University
• Redeemer University College
• Mohawk College
• Hamilton Secondary and Separate School Boards
Indicators

Encourage new entrepreneurs, start up and growing business in Hamilton

- Services to businesses and individuals
- Change in small business success and survival
- Provide support and business development skills to entrepreneurs
- Number of businesses and individuals assisted
- Number of businesses register and jobs created
- Number of business connected to specialized professionals and industry experts
- Number of businesses attending mentoring programs
- Number of workshops and participants
- Number of youth participating in programs
- Number of businesses remaining in business over the long term

Sector Plan for the City of Hamilton’s Small Business Enterprise Centre

The SBEC program will compliment the City of Hamilton’s ‘Economic Development Strategy’ and support the small businesses of Hamilton by achieving the following short and long-term goals:

Short-Term Deliverables (less than four years)

- Relocation of the SBEC to the newly renovated City Hall as part of Hamilton’s new “Open for Business” initiative;
- Continue to position the SBEC as Hamilton’s ‘one-stop-shop for small business’ linking with the Contact Centres, Canada Ontario Business Service Centre, Community Access Points, Government Information Centres and other community touch points both private and public for referrals and/or their reliance for their clients’ small business needs;
- Continue to develop the ‘kiosk program’ with SBEC program information at various touch points in the community;
- Conduct information seminars and other outreach initiatives throughout the community in an effort to increase awareness; and
- Provide occasional staffing for consultation off-site at each Municipal Service Centre (MSC). Again, the MSC’s are: Dundas, Ancaster, Flamborough, Stoney Creek and Glanbrook as required.
Long-Term Deliverables (greater than four years)

- Hire permanent staff to handle the growing demand for business services
- Continue to grow and develop local partnerships to further support the growing needs of our small business population
- Continue to position the SBEC as Hamilton’s first stop for small business

Conclusion

There are significant opportunities within Hamilton to expand the SBEC program, working with all levels of government and agencies to provide a more enriched program for small business start-ups. Based on the statistics about small business as a major driver of the Canadian economy, there are no drawbacks in providing this type of programming to entrepreneurs.
ii) Hamilton Technology Centre (HTC)

One of the City's earliest investments in innovation and technology was the Hamilton Incubator of Technology (HIT). In 1993 a $4 million municipal investment launched the opening of a modern 40,000 square foot building located in Flamborough at Hwy 5 and 6, and Hwy 403.

**Canadian Association of Business Incubation**

“There are approximately 130 business and technology incubators in Canada. These include both traditional 'bricks and mortar' facilities along with virtual incubators that provide structured programs and services which nurture the growth of new and early-stage businesses. The average survival rate of companies in Canada that go through business incubation has been shown to be higher than 80% after five years.

Over the past 16 years the Hamilton incubator has been home to dozens of early stage technology-based businesses including: advanced manufacturing and materials, biotech, environmental, information and communication and health care or medical devices. These early stage companies employ a high percentage of technicians, engineers or scientists who engage in extensive R&D to produce new products and services and support Hamilton’s broader economic development objectives.

Working collaboratively with private and public sectors partners, educational institutions and all levels of government the incubator setting provides a wide range of support services and environment conducive to innovation and entrepreneurship. Not only does the incubator offer the physical space but having a goal to make companies grow stronger faster owners and staff develop their entrepreneurial and management skills, have access to experts and professional advisors, technical and administrative support, and ultimately the means to secure capital, investors and financing.

In 2009 the City of Hamilton changed the name of the incubator from HIT, to the Hamilton Technology Centre (HTC) assigning programming responsibilities to the Hamilton Small Business Enterprise Centre, a division of Economic Development and Real Estate. The goal of the incubator is to foster a positive business environment for early stage companies to become commercially and financially viable. Success is graduation from the incubator and establishing a new freestanding business venture.
Hamilton Technology Centre’s Core Programs

The goal of the facility is to provide a state of the art facility with critical foundations to assist in the growth and development of start-up businesses in previously identified technology clusters. The core services of the facility are as follows:

**Professional Space** - The Hamilton Technology Centre provides the physical space and administrative support for growing companies. The physical location creates a professional atmosphere and workspace for the companies positioned to attract and meet with investors and partners. It’s close proximity to all major highway routes 401, 403, QEW, 407 and 5 and 6 and within 30 minutes of two international airports provides easy accessibility to global markets. Resident companies share access to a receptionist, meeting rooms, boardrooms, photocopying/fax, mail service, high speed internet, loading docks, and plenty of parking.

**Peer-to-Peer Learning** - Self directed business-to-business peer learning sessions for managers and owners of early stage companies encourages a dynamic environment for sharing knowledge and best practices, competitive intelligence, industry trends and improves leadership abilities and capabilities.

**Business Training** - While emerging technology companies engaged in research, knowledge and science are highly skilled in their area of expertise they face many new challenges of managing and growing the business. The centre delivers a wide range of entrepreneurial development opportunities designed to sharpen the skills and improve the productivity of small firms. Training sessions are facilitated by experts and professionals including topics such as: legal, accounting, tax, insurance, intellectual property, sales, marketing, new media and technology, human resources, import export trade, competing in global markets and government financial incentive programs.

**Mentoring** - The mentoring team is made up of independent senior advisors who have the proven track record with the knowledge and connections to fast-track companies to success, providing guidance in all business areas from product branding, marketing and sales, to planning and operations. They also help companies prepare to present financing and tap into capital resources. Entrepreneurs have access to professionals from legal, accounting, insurance and export services’ firms and organizations to be available for no obligation and sit-down appointments to discuss specific questions.
Resources - Key networks and relationships between the HTC, the public and private sectors including post-secondary educational institutions, professionals, researchers, all levels of government, industry leaders and assistance with access to capital is a critical component to influencing innovation and success.

Prospecting clients for the Hamilton Incubator of Technology

As the community of Hamilton continues to grow, so too does the business sector. HTC has the following requirements for considering applicants suitability for the location. Requirements include:

- Have a start-up business in one of the following technology clusters
  - Advanced manufacturing or materials
  - Bio technology
  - Environmental technology
  - Health care or medical device technology
  - Information or communications technology

In addition clients of HIT must also met the following entry criteria:

- Have an 'innovative' project
- Have an acceptable updated Business Plan
- Have post 'love-money' financing
- Have a good 'fit' with other resident/clients
- Have a willingness to learn

Keys to Success

1. Engaging early stage technology companies in a supportive environment of business mentors, educational sessions and access to resources that address business issues and sharpen management skills, influencing smart growth strategies, reducing failure rate and increasing success and sustainability.

2. Track the progress of Hamilton Technology Centre’s companies from infancy to graduation and beyond. Monitoring growth indicators including: commercialization of products, investment, job creation and leading technology sectors.

3. Promote expansion and retention of technology based companies contributing to Hamilton’s economic development strategy and the wealth of the community.
4. Strengthen the network of support and expertise from public and private sector partnerships

5. Improve physical structure, office equipment to maintain state of the art facility

**Conclusion**

There are significant opportunities within Hamilton to expand the HTC program, working with all levels of government and agencies to provide a more enriched program and support for start-up businesses in the varying technological industries.

**Sector Plan for the City of Hamilton’s Incubator**

The HTC program will compliment the City of Hamilton’s ‘Economic Development Strategy and support the businesses of Hamilton by achieving the following short and long-term goals:

**Short-Term Deliverables (less than 4 years)**

- Foster new business growth within the technology sector with attention to advanced manufacturing, biotechnology, environmental technology, health care or medical device technology, as well as information or communications technology.
- Work closely with the Small Business Enterprise Centre to develop training and workshops, enhancing overall success of incubator clients.
- Reduce the challenges and risk for loss of business through continuing to deliver mentorship, networking and training in addition to professional administrative support assistance.
- Acquire technology and resources to continue to meet the growing demand of clients.

**Long-Term Deliverables (greater than 4 years)**

- Explore the conversion of HTC to a single purpose/industry group incubator (i.e. bio-products or agri-business in association with University of Guelph)
- Partnership with Innovation Factory
- Potential for privatization of the HTC
Regional Innovation Network (The Innovation Factory)

The City’s last two Economic Development strategies focused on the goals of diversification of Hamilton’s economy and making local companies globally competitive. But it is innovation alone that is the real driving force for improved productivity growth and making a company more competitive. In 2008 in a presentation about competitiveness, A.G. Lafley, Chairman and CEO of Proctor & Gamble summed it up - "Innovation and productivity are the only key drivers of profitable organic sales growth."

The City’s Economic Development and Real Estate Division, along with its community partners McMaster University and Mohawk College have endeavoured to provide assistance and deliver services to local entrepreneurial businesses in an effort to make them more competitive and sustainable. Unfortunately, there remains a significant gap in both the available expertise to work exclusively with the entrepreneur, and the existence of a local “environment” for young companies to interact, collaborate and innovate effectively.

“A gap exists in support services for entrepreneurial business in Hamilton and the Golden Horseshoe. There is no organization that takes responsibility for directing entrepreneurial businesses to the appropriate resources and then tracking progress as the entrepreneur moves up the success ladder.”

Source: Building an Entrepreneurial Community, 2009

In 2005, the Golden Horseshoe Innovation Alliance stakeholder group (which included City staff) was formed to examine these “gaps” in fostering innovation and determine how they might be best addressed in the Hamilton region. In early 2008, this group commissioned a study (fully funded by the Ontario Ministry of Research and Innovation) with the purpose of creating a blueprint for a locally based organization that would establish and expand an innovation network to support new and existing enterprises. One of the fundamental criteria of this study was that it must be a “Made in Hamilton” plan of action and it could not expend resources duplicating services that already exist.

The result of this study proposed the creation of a Golden Horseshoe Innovation Centre (GHIC) similar (but not identical) to the Innovation Synergy Centre of Markham (ISCM). The ISCM focuses on the GTA and combines an SBEC (Small Business Enterprise Centre) with an integrator role that coordinates entrepreneurial services from all levels of government and provides
mentoring/expertise to companies that cannot afford to engage commercially available professional assistance.

The Town of Markham, with the support of the Province of Ontario and the Federal Government, established the Innovation Synergy Centre of Markham (ISCM) in 2003. This Centre has worked with approximately 1,000 entrepreneurs over the past 6 years. It is mandated to:

- Help existing companies to grow faster by providing access to business expertise to promote smart growth;
- Assist young technology companies with their early business issues;
- Help them expend their interests on productive efforts; and
- Reduce the rate of company failures, especially those that have managed to operate for a number of years.

The Innovation Factory (aka Golden Horseshoe Innovation Centre) will be funded through a combination of public sector (Province of Ontario MRI and potential City contribution) and private sector contributions will address the following six key areas required to build a strong innovative-based economy:

- **Clustering of business resources**
  Co-located near or with existing government and business support programs and services to concentrate and interconnect these institutions. Clustering of support is increasingly important to economic growth and success because it enhances productivity, fosters innovation and spurs new business formation.

- **Access to university research, colleges and key researchers**
  Works directly with McMaster University and surrounding post-secondary institutions to facilitate access to university expertise and research and development capabilities. It will also establish a mechanism to transfer university-led R&D into commercial success stories.

- **Business infrastructure support to grow businesses**
  The Innovation Factory entrepreneurs will develop linkages to members in the business community and build trust among these participants. Networking events and other special opportunities occur to link various individuals and peers.

- **Access to business mentors**
  The Innovation Factory will establish a network of business mentors and advisors who will provide their specialized expertise to deal with issues small and medium-sized enterprises (“SMEs”) face in growing their businesses. This network will consist of individuals from a variety of experiences and competencies that have hands-on experience at building
and growing companies. The Innovation Factory matches SME’s with these mentors.

- **Assistance with access to capital**  
  Establish an Innovation Factory Investment Network that will function as a deal-facilitation program targeted to increase successful early-stage investments by increasing the number of qualified companies, streamlining company introductions to investors, and providing support during the investment process. The Innovation Factory Investment Network’s will focus on qualified companies with good growth potential and a significant competitive advantage looking for $50,000 to $500,000 in financing.

- **Business centre**  
  Designed for use by a variety of clients, the Innovation Factory will have a business centre, equipped with multi-media broadband tools that is used to facilitate export trade through interactive video links, and provide a meeting space for groups of individuals and companies interested in meeting or communicating by broadband linkages. For example, through the use of this centre, local companies are able to more effectively prequalify potential export customers remotely, and allow target SME’s to widen their marketing and sales efforts around the world. The facility will additionally offer a high speed link to McMaster University and other academic institutions that may wish to offer courses or special seminars. The centre is also able to host events and offer participants the ability to conduct web broadcasts of their business presentations.

This Centre is only a part of the larger solution for making Hamilton an innovative focused and entrepreneurial oriented city. The Innovation Factory is a physical asset and network that can be quickly established but creating an “enterprise” based culture in Hamilton is a considerably more challenging task. However, the reward of creating successful innovative companies is that collectively they can transform an entire community. In addition to this innovation infrastructure, the broader strategy being developed by the Hamilton Jobs Prosperity Collaborative will include both human capital and social capital elements.
Local Infrastructure Investments

As previously mentioned, innovation will be the primary driver productivity growth in the new economy. If municipalities want to boost the incomes of their residents, then embracing technological innovation is the critical path. Cities can do several things to foster technological innovation, including the following:

Support Research Universities

To the extent that major research institutions with good science, engineering, and computer science programs and an entrepreneurial (as opposed to ivory tower) orientation are located in metropolitan areas (and most are), they offer many advantages to local companies. For example, a large number of biotech firms are the result of spin-offs from research-based universities. These firms are likely to stay close to the university in order to have regular contact with faculty (sometimes the faculty members themselves are the entrepreneurs), and to have access to students and nearby clinical trials (a renowned strength of Hamilton). Cambridge, Mass. is a classic example; it is home to one of the largest concentration of biotech firms because of the world-class research universities and hospitals there. It is true that as biotech scales up for production, the manufacturing facilities often locate in suburban industrial/business parks, but much of the industry remains focused on research and development, which needs to be near research institutions. This model applies in varying degrees to many other high-tech industries with research universities not only creating high-tech entrepreneurial spin-offs, but also attracting the research and innovation-based functions of other larger companies. As a result, it is important that municipalities aggressively lobby other levels of government for financial support for research oriented universities and the establishment/relocation of other research institutions. In Hamilton, the federal CANMET metals & minerals laboratory will have a profound effect on the productivity and success of local advanced manufacturing companies.

Support Technology Commercialization Programs

It is not enough to just perform research; that research needs to be commercialized to have the full economic effect. To Hamilton’s benefit, this has been a primary objective for the last several years of McMaster University, Hamilton Health Sciences Corporation and St. Joseph’s Healthcare. In the U.S. many cities/regions have instituted a number of programs to encourage innovation, including technology incubators, early-stage seed funds, research parks, technology-transfer programs, and technology sector networks. For example, the Chicago Technology Park is a 56-acre parcel nestled within the bounds of the Illinois Medical District. The Park is specifically designed to support advanced technology companies in an affordable, resource-rich environment.
This is the same concept used at the Massachusetts Institute of Technology and now in Hamilton with the McMaster Innovation Park (MIP) and the rezoned West Hamilton Innovation District (WHID) that abuts the MIP.

Even more important than "bricks and mortar" buildings and specialized business parks are the people-to-people commercialization programs. Building links between universities and local industry clusters, promoting internships for students and faculty, and creating other linkage programs are also very important actions. Review of related literature suggests that the development of a cluster strategy that has a substantial social networking component, especially promoting contacts among people active in the industry and encouraging the formation of industry associations is very effective in supporting innovation. Locally, the Jobs Prosperity Collaborative (JPC) has begun to generate this kind of interaction through its “Innovation Cafes” that builds relationships between key institutions (university researchers, venture capitalists) and "wannabe" entrepreneurs.

**Encourage a Modern Telecommunications Infrastructure**

Reasonably priced access to high-speed telecommunications is one of the fundamental location criteria for knowledge and innovation-based companies. Site Selection experts agree that municipalities need to promote policies that encourage the provision of high-speed telecommunications access to both business and households. This includes having a zoning that permits the location of "data-hotels" (buildings containing telecommunications equipment); enabling telecommunications providers to lay fibre optic cable with minimum "red tape"; and ensuring that wireless telecommunications receivers can be located where they need to be. Further, local governments need to provide free public internet access at libraries, schools, community centers, etc. to ensure that the youth (and future entrepreneurs) of the municipality understand and appreciate the quality of community in which they reside.

**Encourage Modern Transportation Infrastructure**

Transportation investments can have large long-term economic, social and environmental impacts. Expanding urban highways often tends to stimulate motor vehicle travel and sprawl thereby exacerbating future transport problems and threatening future economic productivity. Whereas, improvements in alternative multi-modal transportation (i.e. public transit service, water, rail) has proven to actually reduce total motor vehicle traffic and their associated costs while also providing additional long-term economic savings and benefits. Increasing the overall efficiency of the local/regional transportation system and providing alternative transportation modes will make companies more competitive.
Our Foundation

Community Development

As a Downtown business owner for over 15 years, I'm excited about the renewal in Hamilton's core. Through aggressive marketing of our cultural events, BIAs and attracting more small business to the City it won’t be difficult to convince the nay-sayers that Hamilton is a great place to live and work.

Tim Potocic, Owner – Sonic Unyon
COMMUNITY DEVELOPMENT

Vision

The primary goal of the Community Development Strategy is to develop Hamilton as an attractive, inviting, and economically successful mixed-use environment that promotes a positive image and identity for the community.

Introduction

Revitalizing our historic hometowns and Main Streets is not about nostalgia. It is about reinvesting in our older and historic neighbourhoods. Community development not only protects our heritage, but also is a viable alternative to sprawl that creates affordable housing, generates jobs, supports independent businesses, increases civic participation, and bolsters a community’s sense of place.

Source: U.S. National Trust for Historic Preservation, 200

Although Heritage preservation is an important part of this Community Development component, the primary objectives remain improving the image of Hamilton, maximizing the utility of existing infrastructure, stimulating investment, increasing residential and non-residential assessment, and creating jobs. Downtowns, Brownfields and Waterfronts have traditionally been the center of community activity, and still present the principal image of a city today to both visitors and residents alike. It is no secret that changing Hamilton’s image is ranked as one of the highest priorities by the City’s businesses, residents and local government. It is for this reason that the delivery and implementation of the strategies contained in this Community Development component are so critical to Hamilton’s economic well being and future prosperity.

Throughout this entire Economic Development Strategy it advocates an approach based on a partnership/collaboration between the public sector, local businesses, residents and the broader community. This relationship is also vitally important to the success of this Community Development component. But it is here that local government must “step up” and assume a leadership role in creating an “environment” through the application of innovative planning practices, investment in physical infrastructure (hard services and facilities), and
establishing special purpose programs/policies that together will encourage redevelopment.

This component of the strategy addresses the many complex issues of Community Redevelopment also known as Urban Redevelopment. There are four primary areas of focus contained within this section, they are:

- Brownfield Redevelopment
- Business Improvement Areas (BIAs)
- Downtown Renewal
- Greening Initiatives
- Waterfront Redevelopment
- Pan / Para Pan Am Games
Overview

What Are Brownfields?

“Brownfields” have previously been defined by the City of Hamilton in both versions of the Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan (2001, and 2005) as abandoned, idled or underused industrial or commercial properties in built-up urban areas where expansion or redevelopment is complicated by real or perceived environmental contamination, building deterioration/obsolescence, and/or inadequate infrastructure. In future version however, a simpler, broader definition may be used that defines Brownfields as undeveloped or previously developed properties that may be contaminated. They are usually, but not exclusively, former industrial or commercial properties that may be underutilized, derelict or vacant. (Provincial Policy Statement, 2005). The term “Brownfield redevelopment” refers to the environmental remediation, rehabilitation and development of Brownfields.

The City of Hamilton is one of the oldest and most heavily industrialized cities in Canada. The physical legacy of this rich industrial heritage includes a large number of Brownfields in Hamilton’s older industrial areas, downtown, and throughout the urbanized area. The redevelopment of Brownfield sites both in Hamilton’s older industrial areas and across the City represents an opportunity to accommodate some of the demand for employment lands as well as residential development and intensification.

Benefits of Brownfield Redevelopment

Brownfield redevelopment results in a myriad of economic, environmental and social benefits. Figure 1 below summarizes the benefits of Brownfield development and the interrelationship between these benefits. For example, the economic benefits resulting from Brownfield development, such as increased incomes and property tax revenues can contribute to social benefits such as neighbourhood stability and quality of life. Therefore, it is important for the City of Hamilton to offer financial incentive programs that result in an increase in Brownfield development as this will translate into economic, environmental and social benefits.
There are a myriad of complex and interconnected reasons for promoting Brownfield development at all levels of government. This includes the significant economic, environmental and social benefits that accrue at all geographic levels, but particularly at the local level. This solid “public good” rationale supports government involvement at all levels in promoting Brownfield development. These public goods include:

- increased tax assessment for the Municipality and the Province;
- creation and retention of employment opportunities;
- utilization of existing infrastructure resulting in a reduction of urban sprawl and its related costs (hard and soft services);
- contribution toward the revitalization of particular areas and neighbourhoods; and,
- Environmental restoration which can remove threats to the health of workers and residents.

**Barriers to Brownfield Redevelopment**

The major barrier to Brownfield redevelopment in Hamilton, and the rest of Ontario is the existing uncertain liability regime. Owners of contaminated sites...
are not prepared to accept the significant liability risks that come with selling their
properties to developers and/or new property owners wishing to redevelop the
site. In turn, many developers find the risks of redeveloping Brownfield sites to be
unacceptable, and therefore focus their efforts on green fields or sites that do not
have environmental issues. In defining liability there are four (4) main areas of
policy concern: Municipal Liability Protection, Regulatory Liability, Joint and
Several Liability and Civil Liability. Whether its municipalities, property owners,
potential property owners or citizens, without additional revisions to legislation
and clear policy direction, Brownfield redevelopment will simply not occur on
many of our Brownfield sites. While certain strides have been made over the last
several years in terms of policy revision (see The Provincial Agenda below),
there continues to be a need for necessary legislative reform.

The second major impediment to Brownfield redevelopment is technical. In
some cases, the Province is imposing standards that are unnecessarily onerous
and, at times, difficult to achieve. The end result is the failure to recognize the
consequences of choosing to impose an unnecessarily strict standard. In an era
of sustainability, it is important that the Province implement legislation and
policies to facilitate the reuse of these Brownfield sites.

The third major impediment is financing. Traditional forms of financing from major
lending institutions are often very difficult to obtain when it comes to remediation
of Brownfield properties. In addition, there are not too many options for financing
outside of traditional lending practices. Required changes include changes to
Income Tax legislation that would permit the expensing, rather than capitalizing
of clean-up costs, and financial assistance from other levels of government for
Brownfield Redevelopment in a manner that directs this assistance to those sites
that offer the greatest benefit to the people of Ontario.

The Provincial Agenda

The Ontario government aims to promote Brownfields redevelopment by
providing a system that will return former industrial, commercial and institutional
lands back into productive use. The government is working with stakeholders to
improve and build upon provisions for cleanup and redevelopment under existing
legislation.

The Ontario Minister of Municipal Affairs and Housing in conjunction with the
Ministry of the Environment has the lead in co-ordinating provincial action on
Brownfields issues. Recently, the Province of Ontario introduced a suite of
legislative reforms to facilitate Brownfield redevelopment. These reforms
received Royal Assent on May 17, 2007 as part of the Budget Measures and
Interim Appropriation Act, 2007 (Bill 187). The proposed legislative
recommendations have focused on closing the gap on environmental liability and
have addressed a number of key issues related to regulatory, civil and Good Samaritan mine rehabilitation liability, and the Record of Site Condition framework. Currently, there have been amendments made to Ontario Regulation 153/04, Brownfields Records of Site Condition (EBR Posting Number 010-4642), among other-things, would update the site condition standards to reflect current science and would introduce streamlined processes to help facilitate the return of Brownfields into productive land uses. These amendments will take effect in July 2010 and include a number of interconnected elements, including:

1. Enhanced Record of Site Condition (RSC) Integrity
2. Liability Protection and Off-Site Migration from the RSC Property
3. A Streamlined Risk Assessment Approach
4. Strengthened Soil and Ground Water Site Condition Standards
5. Complementary Technical Regulatory Amendments

This is felt to be a positive step in addressing some of the barriers and update the science behind Brownfield redevelopment, but does not respond to all barriers as previously outlined and that have been identified by stakeholders. It has been suggested by many Brownfield stakeholders that these legislation changes may induce added financial barriers to redevelopment. Additional revisions to legislation and clear policy direction will be required to promote Brownfield Redevelopment in Ontario.

Supporting policy from the Province with regard to Brownfield redevelopment can be found in the Provincial Policy Statement (2005), Places to Grow Act (2005), and Growth Plan for the Greater Golden Horseshoe (2006). Reclaiming Brownfields is a key theme set out in these policies to achieve the targets set out within them. For instance, the Growth Plan for the Greater Golden Horseshoe (2006) mandates that at least 40% of new residential construction must be accommodated within existing built-up areas beginning in 2015. Reclaiming Brownfield sites to accommodate this in-fill will be a necessity.

The City Agenda

Numerous activities to date has Hamilton as leading the Province in Brownfield redevelopment according to a survey conducted by the Ministry of Municipal Affairs and Housing in 2007 titled “Evaluating the Impact of Municipal Brownfield Incentives”. This should come as no surprise given the history of Hamilton as a heavily industrialized region and the fact that Hamilton was the first municipality in Ontario to implement a Community Improvement Plan designed specifically at Brownfield redevelopment.
The Environmental Remediation and Site Enhancement (ERASE) Community Improvement Plan was implemented in 2001 and was expanded and enhanced in 2005 and 2010. The ERASE CIP contains a set of incentives and programs aimed at turning idled Brownfields back into productive uses throughout the urban area of the City of Hamilton. While the City can do little in the way of softening the uncertain liability and technical barriers, it can help to soften some of the financial barriers. The City of Hamilton’s ERASE program has established and will continue to search for creative financial incentives. Since the Erase CIP (2001) was approved, multiple property owners have received ERASE Environmental Study Grants to conduct Phase II and III Environmental Site Assessment’s (ESA’s). Several of these studies have led to Brownfield sites being redeveloped. Over 20 projects have been approved for Erase Redevelopment Grants and several projects have been approved for a pilot project grant under the Municipal Acquisition and Partnership Program.

The approximately 20 projects have been awarded a total of approximately $9.5 million in ERASE Redevelopment Grant funding. Once these projects are complete, this will result in:

a) total construction expenditures in excess of $244,000,000;
b) remediation and redevelopment of 161 acres of formally vacant and underutilized Brownfields;
c) Construction and refurbishment of over 2 million s.f. of industrial/commercial space;
d) construction of over 100 new residential units;
e) approximately 450 new full time jobs; and,
f) an increase in long-term annual property tax revenues in the tens of millions.

The ERASE CIP was amended for a third time to further expand the scope of the programs. With a focus on community development, the latest version of the ERASE CIP includes a Hamilton Downtown/West Harbour front Remediation Loan Pilot Program. The purpose of the program is to stimulate residential or commercial use development, and/or redevelopment on properties requiring remediation (i.e. Brownfield properties) that are located within the Downtown Hamilton or the West Harbour front. The low interest loan, equal to 75% of the remediation cost to a maximum, is to be a ‘bridge’ until such time as the property owner receives their ERASE Redevelopment Grant which is a back-end, tax increment financing (TIF) program.

In addition to the ERASE program, the City has taken separate initiatives focused on developing a Brownfield redevelopment prioritization strategy and further
enhancing the Brownfield office profile. Furthermore, various other policies are in place throughout the corporation to further the Brownfield agenda and showcase Hamilton as a leader in Brownfield redevelopment. These include the Policy on the Treatment of Properties that Fail Municipal Tax Sale, the Contaminated Sites Management Program and the Historical Land Use Study as outlined below.

**Historic Land Use Study (HLUS)**

The Federation of Canadian Municipalities (FCM) approved cash matching funding for the City to conduct a HLUS. In late 2007, the City of Hamilton retained MMM Group Limited to complete a Historical Land Use Inventory (HLUI). The City identified the need for a comprehensive GIS-based inventory of potentially historically environmentally-impaired properties as resource to the efficient and consistent implementation of the City’s Brownfield redevelopment programs including ERASE, the City’s Contaminated Sites Management Program (CSMP), regulatory services of Water & Wastewater, and Source Water Protection Planning.

The key goals of the HLUI was to: provide key information to the City’s property management database concerning historical environmental conditions that had not been previously available at a central location; serve as a fundamental tool for use by City staff in planning and conducting the everyday aspects of managing properties within the City in a thoughtful and conscientious manner; and ensure that management staff have the information necessary for knowledgeable decisions concerning Brownfield redevelopment planning.

The actual project consisted of reviewing numerous sources of historical environmental information with the intent to identify properties of interest and potential contaminants associated with them. While some data came from primary sources that confirm impairment or remediation of a property (e.g. Phase II Environmental Site Assessment reports or Records of Site Conditions), much of the require data needed to be interpreted from secondary sources (e.g. fire insurance plans, land use designation, etc.) combined with the use of industry-specific environmental databases to infer the potential contaminants that may be associated with historical on-site activities.

The data was documented and transposed into a Historical Environmental Database (HED). In total, the study area encompassed approximately 131,000 individual properties. Of those properties studied throughout the entire urban area of the City, 91 properties were identified as vacant “true” Brownfield sites, mostly in the Older Industrial Area (Area 2). 1386 properties were identified as having a potential for some contamination based on the historical use of the
property spread throughout the Rest of the Urban Area (Area 1). As mentioned this data was to help provide City staff with a tool to help in decisions concerning brownfields. Furthermore, this tool would be a key resource with respect to a Brownfield Redevelopment Prioritization Strategy. Unfortunately, due to issues around the Freedom of Information Act, the HED tool is not yet available for staff usage.

**Short-Term Deliverables (less than 4 years)**

- Review and amend the ERASE 2005 (CIP) in terms of financial incentives and evaluating the ERASE Municipal Acquisition and Partnership Program (MAPP)
- Recommend use of funds with the Brownfield Capital accounts: Brownfield Pilot Project Fund and Hazardous Sites Decommissioning Fund.
- Amend the ERASE 2005 (CIP) to incorporate LEED components as eligible costs under the ERASE Redevelopment Grant Program
- Amend the ERASE 2005 (CIP) to incorporate the Hamilton Downtown/West Harbourfront Remediation Loan Pilot Program
- Develop a comprehensive Brownfield Redevelopment Prioritization Strategy
- Continue dialogue and education with Council and members of the Planning and Economic Development committee
- Liaise with other levels of governments and agencies to help push the Brownfield agenda
- Develop a comprehensive marketing and promotion strategy
- Participation in the City Pan Am Games Working Team with respect to Tiffany Block site
- Consider establishing the following Committees:

  **Brownfields Community Advisory Committee** - Meeting semi-annually, it would provide community input into the Municipal Brownfields Strategy and on Brownfield matters pertaining to the City of Hamilton. The following could participate in the Brownfields Community Advisory Committee:

  - Chamber(s) of Commerce
  - Industry Stakeholders
  - Property Stakeholders
  - Ministry of the Environment
  - Federal Government
- Environmental Engineering and Consulting Firms
- Real Estate Community

Long-Term Deliverables (greater than 4 years)

- Revised Secondary Plan for the Bayfront Industrial Area
- Establish monitoring procedures to evaluate the ERASE Brownfield incentive programs
- Explore potential use of Brownfields for “Greenhouses related to Food Production”

Conclusion

The ERASE CIP and complimentary Brownfield redevelopment initiatives provide an economic tool that will help the City to accomplish its economic, environmental and social goals, across the entire urban area. These goals include:

- providing land to meet demand for employment and residential land;
- increasing tax assessment and revenues in the long-run for the municipality and the Province;
- creating employment opportunities;
- utilizing existing infrastructure, resulting in a reduction of urban sprawl and its related costs;
- contributing toward the revitalization of particular areas and neighbourhoods; and,
- restoring the environment in these neighbourhoods, which will in turn, remove threats to the health of workers and residents.

With the various Brownfield initiatives, Brownfield redevelopment is a potentially powerful external driver that the City can and should use to help accomplish its economic and planning goals including reducing urban sprawl, urban intensification and infilling and reuse of existing infrastructure among many others.
Business Improvement Areas (B.I.A.s)

Introduction

As in the case of Downtown Hamilton the Community Downtowns, which are the cores of the many communities making up the City of Hamilton, need to be maintained and strengthened. The health of these areas injects vitality into the surrounding neighbourhoods. Ultimately these great urban spaces contribute to the diversity of the community.

Community Downtown and B.I.A.s – A Partnership

Over the past few years the City of Hamilton has partnered a number of ways to strengthen the Community Downtowns and B.I.A.s.

1. Commercial Market Analyses and Action Plans
2. Capital Allocations
3. Financial Incentive Programs
4. Contribution to Operating Budgets

1. Commercial Market Analyses and Action Plans

Commercial Market Analyses and Action Plans for nearly all of the B.I.A.s have been developed by a consulting firm retained by the City of Hamilton in an effort to improve the commercial districts and support the City’s strategic goals related to maintaining and enhancing liveable communities and neighbourhoods.

A comprehensive analysis was undertaken to determine each area’s strengths, weaknesses, opportunities and threats including the examination of:

- Customer Profile
- Retailer/Supply Side Profile
- Factors Influencing the Trade Area Delineation
- Accessibility and Visibility
- Relative Location and Strength of Competitive Retail Facilities
- Natural and Man-made Barriers
- Consumer Survey Results
- Consumer Expenditure and Attitude Analysis
- Retail and Commercial Audit Results
- Target Market
- Organizational Capacity
- Public Improvements and Infrastructure

The resultant action plans provide strategic direction for each B.I.A. and establish a unique “brand” for each district including direction for building the brand.

The Commercial Market Analyses and Action Plans are updated and revised every five years. The purpose of the reviews is to:

- identify changes to the commercial mix and market environment
- determine how the changes affect the district’s economic viability
- identify the success of actions and potential impediments for actions that have not been completed
- update the demographic information

2. **Capital Allocations**

Capital allocations are built into the annual budget whereby the City undertakes select capital improvements in Community DOWNTOWNS and B.I.A. environments. Gateways to the business districts designed to build upon each area’s unique brand have been/will be built. Urban parks have been developed/redeveloped and architecturally designed community signage has been implemented, all contributing to the transformation of the urban space. Continuing the momentum of implementing physical improvements in Community DOWNTOWNS and B.I.A.s will create an improved sense of place and stimulate confidence for investment in private property.

3. **Delivery of Financial Assistance Programs**

Currently, the Downtown and Community Renewal Division administers the following programs which target specific needs for the Community DOWNTOWNS and B.I.A.s:

(i) **Commercial Property Improvement Grant Program**
(ii) **Commercial Corridor Housing Loan and Grant Program**
(iii) **Hamilton Heritage Property Grant Program**
For detailed information on the aforementioned programs please revisit the narrative under the Downtown Hamilton Section.

4. Contribution to B.I.A. Operating Budgets

The Downtown and Community Renewal Division through an annual operating budget allocation approved by City Council contributes money to each active B.I.A.’s annual budget to be utilized specifically for improvements on publicly owned property e.g. Christmas decorations affixed to street lights, street furniture and banners. The Division also has a capital account utilized for the maintenance of the B.I.A. banners and for the placement of street furniture for newly designated B.I.A.s.

SWOT Analysis for Community Downtowns and B.I.A.s

Strengths

- Gathering places for the community
- Unique shopping environments
- Unique stores which cater to niche markets
- Settings for community events
- Incubators for family businesses providing the ability to expand to other areas
- Lower cost to establish a business
- Well positioned to meet policy direction relative to intensity

Weaknesses

- Economic strength of area is dependent upon the economic strength of the community
- Disparity among Community Downtowns and B.I.A.s in terms of economic health, organization and marketing efforts
- No comprehensive Marketing Strategy for the BIAs

Opportunities

- Ability to provide services for local populations that are mobility challenged
- Competitive rents that are attractive to start-ups
- Ability to take advantage of the lifestyle trend of young persons/baby boomers wishing to live/work in the same community e.g. green movement
Threats

- Lifestyle providing limited time for individuals to complete tasks if not in “one-stop-shop”
- Competition from Big Box Stores
- Consumer taste for labels and national brands
- Deteriorating physical condition of some of the buildings
- Small business more susceptible to changes in the economic climate
- Inability to accommodate large volumes of traffic
- Perceived lack of parking could deter people from traveling to the area if dependent on a vehicle

Short-Term Deliverables (less than four years)

- Update Commercial Market Analyses and Action Plans for five B.I.A.s (Barton Village, Downtown Hamilton, International Village, Main West Esplanade, Stoney Creek)
- Complete design and construction of Binbrook urban parkette, Ancaster Square Interpretive corner parkette, Barton Village and Westdale gateways, Waterdown public open space landscape redevelopment
- Develop a marketing strategy once the City’s broader Economic Development Marketing Strategy is approved by City Council

Long-Term Deliverables (greater than four years)

- Update Commercial Market Analyses and Action Plans for other B.I.A.s
- Implement the aforementioned marketing strategy
Downtown Hamilton

Introduction

The health of downtown is vitally important to the identity and image of the City as a whole. Enhancing Downtown health identity will serve to create a more vibrant community and ultimately a better downtown for residents, visitors and business. This is true for Hamilton’s downtown core and the Community Downtowns of our City.

Hamilton’s Downtown

From a provincial perspective, Downtown Hamilton has been targeted as an Urban Growth Centre in the Growth Plan for the Great Golden Horseshoe. In that context, Downtown Hamilton is to achieve a minimum density of 200 persons and jobs per hectare. Recently, the City Council adopted a new Urban Official Plan and Hamilton’s Downtown was targeted to have a density of 250 persons and jobs per hectare.

To bring plans to reality there are 4 keys areas Downtown and Community Renewal staff will be focusing on part of this overall City Strategy:

1. Putting People First: Land Use and Transportation Plans
2. Infrastructure and Capital Investments
3. Incentive Programs
4. Creating the Ideal Environment

1. Putting People First: Land Use and Transportation Plans

The Hamilton Downtown Land Use Plan

The Hamilton Downtown Land Use Plan represents a formal plan for the Core, forming part of the Official Plan for the City of Hamilton. Designed to foster a dynamic mix of urban residential, commercial and institutional activities across the Downtown, the Plan is a map to follow in relation to the implementation of a land use vision for the Downtown.

The Land Use Plan has two important functions. First, it presents the community’s vision for the future of the downtown to guide public and private decision-making. Second, the plan indicates what the City’s priorities will be
for publicly funded initiatives within the Downtown. In effect, the Plan serves as a reinvestment strategy that will assist Council and the Administration in preparing annual budgets and improvement programs.

The Land Use Plan represents a departure from a traditional approach to plans. To ensure a consistent approach to Downtown revitalization, the following six principles were established so that initiatives and proposals could be effectively measured:

- Use public realm improvements as the catalyst for revitalization;
- Strengthen the connectivity between neighborhoods, the Waterfront, Escarpment and other surrounding attractions and features;
- Make downtown living attractive;
- Build on existing strengths;
- Recognize the value of modest improvements and changes;
- Pursue a limited number of carefully designed and executed major projects.

Thematically, the Land Use Plan policies are grouped into five areas:

- Respecting design and heritage;
- Carving out a distinct economic role;
- Creating quality residential neighborhoods;
- Enhancing streets and public spaces;
- Establishing a new system for planning approvals.

**The Hamilton Downtown Transportation Master Plan**

The Downtown Transportation Master Plan (TMP) is the companion document to the Downtown Land Use Plan. The TMP is a key piece in the ongoing revitalization of Hamilton’s Downtown, guiding transportation planning over the next twenty years. It recommends various transportation projects and strategies that provide a basis for Downtown capital improvements.

The original TMP (2001) was updated in 2008 through the Municipal Class Environmental Assessment review process. The review found that the potential for rapid transit, including funding opportunities, is more immediate; an increased desire for pedestrian improvements is apparent (e.g. Pedestrian Charter); and, transit ridership and parking occupancy have increased. No
significant change in traffic volumes were observed, such that Downtown streets continue to operate at a high level of service throughout the day.

Projects implemented since 2001 include the two-way conversion of James Street and John Street; streetscaping improvements on Bay Street, Ferguson Avenue, Hughson Street and King William Street; and, design of the new HSR transit terminal at MacNab Street. Additional two-way conversions, cycling improvements to York Boulevard and Hunter Street, and pedestrian streetscape improvements remain recommended for design and implementation as soon as budgets allow. Other recommended projects, including the two-way conversion of King Street, Main Street pedestrian improvements, and Gore Park pedestrianization pilot projects, are dependent on the outcome of ongoing rapid transit analyses and the Gore Master Plan.

2. Prioritizing Infrastructure and Capital Investments in the Downtown

Continuous improvement of existing urban infrastructure, and planning to accommodate future infrastructure must be carried out in concert with the implementation of the Downtown Hamilton Secondary Plan. Major capital investments within the Downtown need to be considered in the context of the Secondary Plan with key consideration levied against issues of timing and community need. To date funding priorities assisted with the reconstruction and pedestrian improvements to Bay Street, Hughson Street and King Street West in the core. Substantial improvements to Downtown Hamilton's iconic Farmer's Market are a hallmark of focused capital investment Downtown.

3. Delivery of Targeted Financial Incentive Programs to Assist Businesses and the Development Industry

Many initiatives contemplated by the implementation of the Secondary Plan target issues relating to the development of additional residential units, opportunities for development of vacant sites within the Downtown, commercial façade improvements and the waiving of development charges as part of the incentive process. Each program targets a specific set of needs.

Currently, the Downtown and Community Renewal Division administers the following programs which target specific needs for the downtown, as well as those Business Improvement Areas in downtown:

(ii) Hamilton Downtown Multi-Residential Property Investment Program

The Hamilton Downtown Multi-Residential Property Investment Program was developed with the intention to provide financial assistance for converting existing commercial space into residential units; renovations to
existing residential units; the creation of new residential units on vacant land; together with uses accessory to the residential development.

Under the terms of the program, loans are interest free for a maximum of five years. Principal is repayable in annual amounts of ten percent (10%), in 12 equal monthly payments, of the original loan amount. Payments will commence one year following final advance, exclusive of any required holdback. The balance outstanding will be paid by a balloon payment at the end of a five year and six month term. The maximum loan amount is 25% of the Cost to Construct Budget for residential and accessory uses.

(ii) **Commercial Property Improvement Grant Program**

The Commercial Property Improvement Grant Program is designed to provide financial assistance to commercial property owners and owner-authorized tenants within active City-wide Business Improvement Areas (B.I.A.s). Currently there are three Business Improvement Areas located within the Downtown - Downtown Hamilton B.I.A., International Village B.I.A. and King Street West B.I.A.

The Program provides financial assistance through grants for enhancing the physical and aesthetic appearance of building facades and entranceways of numerous commercial properties. For properties with a street frontage greater than 25 feet the grant is paid on a matching basis of $400 per linear foot of street frontage up to a maximum of $20,000 ($25,000 for corner properties). For properties with a street frontage 25 feet or less the grant is paid on a matching basis up to a maximum of $10,000 ($12,500 for corner properties).

(iii) **Hamilton Downtown Property Improvement Grant Program**

The intent of the Hamilton Downtown Property Improvement Grant Program is to provide an economic catalyst for developing, redeveloping or renovating residential/commercial lands and buildings located within the Downtown Hamilton Community Improvement Project Area (as such boundaries are presently defined).

This program authorizes for each approved grant application, a five year grant, the amount of which is subject to Council approval, in an amount not exceeding the increase in municipal realty taxes as a direct result of the development/redevelopment of the land and/or building. The grant shall be an amount which does not exceed 100% of the municipal realty tax increase during the first year, 80% in year 2, 60% in year 3, 40% in year 4, and 20% in year 5. The grant would reduce the effect of an increase in municipal (City portion only) realty taxes attributable to the
differential between the pre-renovation assessment and the post-renovation assessment.

(iv) **Commercial Corridor Housing Loan and Grant Program**

The Commercial Corridor Housing Loan and Grant Program is designed to stimulate residential development within Downtown Hamilton, Hamilton’s Community Downtowns, Business Improvement Areas and the City’s traditional retail streets, as identified in the Downtown and Community Renewal Community Improvement Project Area By-law.

The Program is intended to provide financial assistance for converting existing built commercial space into residential units, renovations to existing residential units or construction of new units via building additions. The Program is also intended to provide assistance for the costs of creating new residential units on vacant land. Under the terms of the program, loans are interest free for a maximum of five years. Principal is repayable in annual amounts of ten percent (10%), in 12 equal monthly payments, of the original loan amount. Payments will commence one year following final advance, exclusive of any required holdback. The balance outstanding will be paid by a balloon payment at the end of a five year and six month term. The maximum loan amount per dwelling unit is $10,000. The maximum loan amount per property is $200,000. The Program has a grant portion of $5,000 per application allocated to professional fees.

(v) **Hamilton Heritage Property Grant Program**

The Hamilton Heritage Property Grant Program (HHPGP) is intended to provide financial assistance in the form of a grant for structural/stability work required to conserve and restore heritage features of properties; and, the conservation and restoration of heritage features of properties that are designated under Parts IV or V of the Ontario Heritage Act. Eligible properties must be located within the Downtown Hamilton Community Improvement Project Area or within Business Improvement Areas within the City of Hamilton.

The objective of the Program is to assist in developing and re-using heritage properties. It also funds the work to restore heritage buildings to structural soundness. The grant is based on 25% of the total cost of regeneration of the property to a maximum City grant of $150,000.

(vi) **Waiver of Development Charges**

Development Charges are exempt for development occurring in the Downtown Hamilton Community Improvement Project Area.
4. Creating the Ideal Environment

The major foundation, on which the Downtown Hamilton Secondary Plan was developed, “Putting People First”, embodies many of the issues and concerns which need to be addressed as part of a comprehensive strategy to revitalize the downtown. Economically, socially and perceptually, amenities need to be created to attract, and ultimately maintain interest within the Downtown as a people friendly place.

Enhancing the physical environment can be as easy as implementing streetscape improvements, developing or assisting in the preparation of master planning exercises for specific areas, or assisting the development industry in the preservation of heritage and architectural elements.

The social environment has in the past played a vital role in the success of the Downtown as a place for social gathering. Past programing for events and Downtown related festivals have been well attended and extremely successful. Opportunities to build upon these successes need to be identified if the downtown is to regain its prominence as a place of social gathering. Creating an opportunity to visit the Downtown for an event compliments and supports the initiatives of creating a healthy and economically viable downtown. The imminent removal of buses from the south leg of King Street at Gore Park will create new opportunities to program the space.

On a perceptual level, creating a Downtown which is safe, perceived as safe, and is a comfortable and clean environment is a much more difficult undertaking. The City of Hamilton through the creation of a task force called “the Downtown Cleanliness and Security Task Force” has worked to improve and enhance public safety and the cleanliness (garbage, debris, property standards and graffiti problems) within the Downtown. Identifying factors, which contribute to a sense of safety and a detailed set of actions were identified in a report titled ‘Protecting the Future: A Safety and Security Audit of the Downtown Hamilton Community Improvement Project Area’ prepared by a Security Consultant for the Task Force. These actions need to be implemented. Safety and cleanliness must be addressed because this affects the other issues such as Downtown’s ability to attract new residents, visitors, employers and business.
SWOT Analysis for the Downtown

**Strengths**

- Potential conversion of underutilized buildings into lofts or apartments
- Opportunity to revitalize (and reinvest) in neighbourhoods through street improvements and pedestrian amenities
- Downtown is a place where alternative modes of transportation such as walking, cycling or public transit use are encouraged due to the form of development
- Entertainment complexes that attract world-renowned performers and acts
- Financial incentive programs to encourage the development of underutilized or vacant properties
- Low priced properties coupled with attractive lending options
- McMaster University’s downtown campus that offers continuing education programs
- Proximity to institutions of higher learning
- Growing arts and cultural community
- Unique setting created by Gore Park
- An engaged community with an interest in Downtown

**Weaknesses**

- Perception of crime and uncleanness
- No large anchor stores to help attract people to shop in the Downtown and encourage the development of other retail shops
- Low percentage of available Class A office space and an abundance of Class B, C and D office space
- Shortage of hotels
- Lack of existing green space and community parks

**Opportunities**

- Change the retail appearance of Jackson Square and the City Centre by opening shops onto James Street North
- Slow traffic on downtown streets through traffic calming strategies to make the streets more pedestrian and cycle-friendly as well as conversion of one-way streets to two-way streets
- Sites and access available to new hotel development
- Recent announcement of increased Police presence in Downtown
- Ongoing City Council support for program and policy development within
  the Downtown
- Economic power of the Downtown work force
- Office attraction from external communities due to affordability

**Threats**

- Vacant street frontages along arterial streets (i.e. John Street North)
- Lack of basic services and amenities (i.e. grocery and hardware stores)
- Lengthy list of streets that need improvements which will take a
  substantial period of time to complete

**Short-Term Deliverables (less than four years)**

- Implement Downtown Lighting Study to increase sense of safety downtown and highlight heritage architecture
- Implement Downtown Office Strategy to reduce Downtown office vacancies by 25% by 2011 and create Downtown employment
- Complete Environmental Work and Design for a new park at John and Rebecca Streets
- Implement a new Brownfield Incentive Program designed to offer city loans at the beginning of the cleanup for Downtown and West Harbourfront
- Create a partnership with higher education establishments resulting in new Downtown campuses
- Update commercial market assessment and plans to Downtown B.I.A.s
- Complete Farmers’ Market/Central Library and construct new Downtown Transit Terminal
- Complete and implement the Gore Master Plan
- Review/Update Downtown Secondary Plan and Downtown Community Renewal Plan
- Prepare Downtown Marketing Strategy – identification of target market, audiences and key messages once broader Economic Development Marketing Strategy is approved by City Council

**Long-Term Deliverables (greater than 4 years)**

- Facilitate the development of a new parking structure Downtown
- Create meaningful linkages between Downtown and the Harbourfront
- Create programs to attract recent post secondary graduates to live and work Downtown
- Realize a creative corridor on King William Street through Artwalk
- Build a distinct Downtown park for Downtown residents
- Implement the Marketing Strategy for Downtown Hamilton
“Greening” Initiatives

Environmental & Energy Initiatives

Introduction

Currently, there are a number of initiatives in place in the City of Hamilton both as a municipality and programs aimed at the private sector that would effectively promote environmental responsibility. The City of Hamilton, amongst its various departments such as Public Works, remains committed to implementing leading edge programs and measures that will enhance the quality of life and improve the environmental in the community. Through these measures, the basic objective is to promote the City of Hamilton as a preferred location to live, work, and raise a family – while simultaneously creating economic opportunities.

LEED Certification

Leadership in Energy and Environmental Design (LEED) certification is a system that takes a sustainable development approach to the design, construction and operation of the built environment. The LEED rating system was developed and is administered by the U.S. Green Building Council (USGBC) and aims to significantly minimize the impact of buildings on the environment and on occupants.

LEED certification verifies that a building project meets high performance standards. It is proof that a building is environmentally responsible, profitable, and a healthy place to live and work (USGBC, 2007). The Canada Green Building Council (CaGBC) has modelled its certification rating system after the USGBC and tailored it specifically to Canadian climates, construction practices and regulations (CaGBC, 2003). The standards for the Canadian structure include:

- Sustainable sites
- Water efficiency
- Energy and atmosphere
- Materials and resources
- Indoor environmental quality
- Innovation and design process

Certification is granted by the CaGBC based on a total point score following a review of detailed documentation submitted by the design and construction team. It assesses how well a building satisfies the above standards. The extent to which the project meets the requirements will determine the level of certification.
the building attains. There are four levels of certification – certified, silver, gold and platinum making it possible for buildings with a range of constraints and goals to achieve green building status and be LEED certified.

Hamilton “LEED”ing the Way Community Improvement Plan

The City of Hamilton first introduced the Hamilton LEEDing the Way Community Improvement Plan (CIP) in September of 2008. The initiatives identified in the Community Improvement Plan were intended to stimulate private investment, property maintenance and renewal in the City’s Industrial Business Parks and the Bayfront and East Hamilton Industrial Areas. This plan was designed to improve economic, environmental and social conditions throughout the industrial business parks and industrial areas. The Hamilton LEEDing the Way CIP has since been expanded (March 2010) to be implemented throughout the full limits of the urban area of the City of Hamilton. In expanding the project area to the entire urban area, additional land uses, including mixed-use and multi-unit residential have now been added along with industrial and commercial developments and redevelopments as eligible projects for consideration under the LEED Grant Program.

The LEED (Leadership in Energy and Environmental Design) Grant Program (LGP). The intent of the LEED Grant Program is to provide an economic catalyst for sustainable building and sustainable land development practices.

The purpose of the Grant Program is for the City to share the incremental construction cost, consultation, energy modeling and certification fees with the applicant to achieve LEED certification. Grants are calculated on the basis of the rating of official certification under the LEED rating system by the Canadian Green Building Council (CaGBC).

The Program authorizes for each approved grant application, a five year grant, the amount of which is subject to Council approval, in an amount not exceeding the increase in municipal realty taxes as a direct result of the development/redevelopment of land and/or building. The grant which may be approved by Council shall be an amount which does not exceed 75% of the municipal realty tax increase during the term of the grant. For purposes of determining the eligible amount of the increase in municipal realty taxes, special charges shall be excluded from the calculation. The grant would reduce the effect of an increase in municipal (City portion only) realty taxes attributable to the differential between the pre-development assessment and the post-development assessment.
City of Hamilton’s Corporate Greening Initiatives

The City of Hamilton’s greening initiatives can be categorized under five key areas: Waste Diversion, Energy Conservation, Air Quality, Water Quality, and Cleaner and Greener Spaces. Some of the City’s greening initiatives include, but are not limited to:

Corporate Energy Policy

In November 2007, Hamilton City Council approved the City’s first Corporate Energy Policy. The Energy Policy calls for targeted energy reductions in energy intensity of City-owned facilities and operations of:

- 3.0% by 2009
- 7.5% by 2012
- 20% by 2020

These targets equate to about a 1.5% reduction in energy per year. The report recommends that 2005 be used as the base year for measuring results. To date, the City has exceeded it targeted annual reductions, achieving 3.3% reductions by the end of 2008 through a variety of energy conservation and demand management initiatives.

District Cooling System

Hamilton’s Public Works Department is replacing Hamilton’s aging air conditioning system and associated chillers with a reliable, cost-and-energy-efficient district cooling system. The new system will use 41 per cent less energy per year than the old system, resulting in annual utility savings of $181,000 and a 556-tonne per year reduction in harmful CO₂ emissions. The $8.5 million dollar district cooling system will reduce the number of chillers required by the cooling system. The new district cooling system will help Hamilton reach the objective of its Corporate Energy Policy, which calls for targeted reductions in energy intensity in City-owned facilities and operations of 20 per cent by 2020.

LED Traffic Light Conversion Program

Hamilton has completed a retrofit program which replaced inefficient incandescent traffic signals to environmentally friendly LED traffic signals. Use of the new LED traffic signals will reduce traffic signal energy consumption by 70 per cent.

Aligned with principles of good environmental management and waste reduction, a valuable use has been found for components of the replaced traffic lights. Reusable components of the traffic signals have been donated
to the Lights for Life project for use in N'Djamena, the capital city of the central South African republic of Chad.

**Cycling Enhancements**

As part of an ongoing commitment to promote sustainable transportation options, Hamilton has taken steps to improve the City’s cycling infrastructure and facilities.

The City is in the process of updating its Cycling Master Plan in order to enhance the cycling experience for all riders. Hamilton takes a holistic approach to cycling, and aims to make cycling accessible and attractive to all citizens and tourists of Hamilton. Updates to the Cycling Master Plan will focus on expanding Hamilton’s network of routes, bike safety issues and bicycle parking.

The City also recently opened two secure bicycle parking facilities in the Downtown Core to accommodate commuter cyclists and promote active and sustainable transportation options.

**Green Fleet Plan**

Since the initial Green Fleet Implementation Plan (phase one) was approved by Council in 2005, Hamilton has been recognized as a leader in the use of advanced vehicle technology that reduces fuel consumption and greenhouse gas emissions that cause climate change. It has the second-largest fleet of hybrid and other clean and efficient vehicles in Ontario and actively participates in studying and promoting new technology.

Hamilton’s hybrid fleet has grown to 135 vehicles and has helped to convince vehicle manufacturers that the hybrid market is worth pursuing aggressively. The Central Fleet has reduced greenhouse gas emissions by 546 metric tonnes over the three-year timeframe of Phase One - equivalent to reducing the fleet by 45 vehicles.

Hamilton is currently implementing Phase Two of the Green Fleet Plan which will focus on:

- Reducing emissions of greenhouse gases to meet the targets in the City’s Strategic Plan.
- Reducing fuel use and improving litres/100 km results.
- Maintaining Hamilton’s place as a leading Green Fleet.
Street Tree Planting Program

Trees are one of our most precious natural resources. That's why we've implemented the Street Tree Planting Program to achieve our aggressive goal of sustaining a cleaner, healthier and greener environment. Each year our Forestry and Horticulture staff plant trees at residential, commercial and city-owned properties across Hamilton as part of this Program. This fully funded Program allows for the installation of new trees and replacement trees on the city-owned portion of a property (road allowance).

Red Hill Valley Project

The Red Hill Valley Project is an integrated, environmentally responsible infrastructure project with five parts: 8 km Parkway, 7 km Creek Relocation, 23 Storm Water Management Ponds, 2.8 km Combined Sewer Overflow Pipe, and a Landscape Management Plan.

February 2007 marked the completion of the 7 km realignment of Red Hill Creek. This Creek is now the longest, continuous urban creek restoration project in North America using natural channel design. The realignment of Red Hill Creek will result in the reduction of sediment deposits into Hamilton Harbour and will enhance the fishery in Red Hill Creek through the provision of improved fish habitat and the removal of previously existing barriers.

Glanbrook Landfill Gas to Energy Project

The Project involves the collection of landfill gas, to generate electricity and sell to the Ontario grid. The facility, which has been operating since November 2008, generates 26 million kilowatts-hours of electricity per year, which is equivalent of powering up to 2,100 homes.

This project will not only generate renewable electricity, but will also reduce greenhouse gas emissions and odours. The facility reduces approximately 100,000 tonnes of carbon dioxide equivalent of emissions every year, which would otherwise be released to the atmosphere. The reduction of greenhouse gases is equivalent to removing 18,000 cars off the road or planting 9,200 hectares of trees

Cogeneration Facility – Wastewater Treatment Plant

This 1.6 MW Cogeneration Facility, which opened in September 2006, takes methane gas created by the wastewater treatment process and produces electricity and heat. The cogeneration facility will reduce approximately 6,500 tonnes of greenhouse gas every year and approximately 130,000 tonnes of greenhouse gas over the 20-year contract lifetime of the project.
**East Hamilton Recreational Trail Hub & Waterfront Link**

This provincially-funded initiative includes a pedestrian bridge over the QEW to link to the waterfront, the construction of a Recreational Trail Hub, a connection to the Red Hill Valley trail system and ecological restoration. This exciting project will increase public access to the waterfront and provide numerous environmental, economic and social benefits to Hamilton. Pre-construction work began in fall 2008 with project completion anticipated by fall 2010.

**Short-Term Deliverables**

- Market and promote the expanded LEED Grant Program to investors, realtors, architects, developers and property owners in and outside the City of Hamilton
- Increase the number of applicants to the LEED Grant Program
- Measure and monitor the success of the LEED Grant Program making program adjustments where necessary
- Monitor the success of the Corporate Energy Policy, including the energy reduction targets
- Market and promote (jointly with Public Works) Hamilton’s leading edge environment & energy programs and initiatives
- Through Business Retention & Expansion Program and partnering with local institutions (i.e. Horizon Utilities, Hydro One) to look for opportunities to encourage participation by Hamilton industry and business in energy conservation and related environmental initiatives

**Long-Term Deliverables**

- Expand District Heating/Cooling Network throughout Downtown and into all new public buildings
- Revisit LEED Grant Program in 5 years to determine required revisions, amendments, etc.
- Continue efforts to develop eco-friendly business parks
Hamilton’s Waterfront and Shoreline

Strategic Growth Assets

Introduction

Hamilton’s Waterfront and Shoreline precinct is a critical piece of the City’s Economic Development and wealth creation strategy. This vast land area, from the West Harbour, through our industrial port lands and eastern harbour, all the way to the Lake Ontario shoreline, is a valuable geographic asset, strategically centered, and serviced by a multi-modal transportation network. This area is seen as being able to act as a catalyst for economic development, diversification, and transformation of the local, provincial, and even national economies.

The true potential of Hamilton’s waterfront precinct does not solely lie in the waterfront itself however, the potential is even greater when the investment is broadened and reaches into the geographic areas adjacent to it. The City’s urban downtown core, mere blocks away from the west harbour, can both benefit from and draw investment to a redeveloped waterfront. As investments spur a feeling of a greater quality of life within the area, residential, employment, and commercial investments can have a reciprocal relationship between both the waterfront and the downtown.

The existing neighbourhoods surrounding the waterfront will also benefit directly from the investments made in their neighbourhood, but the neighbourhood itself also provides a wealth of opportunities for residential intensification and commercial development. Neighbourhoods, some of which have suffered from low property values and a lack of commercial activity in the past, may see values increase, leading to new development opportunities.

The industrial Burlington Street corridor can easily see benefits as land uses transform from heavy industry to advanced manufacturing and transportation logistics. Demand and investments made in areas such as short-sea shipping, rail, truck transportation and logistics for example, may lead to a shift in demand for redeveloped properties within this corridor, offering a different streetscape and urban design than its industrial past.

The east harbour and Lake Ontario shoreline, also provides redevelopment and land-use adaptation opportunities. Eastport Drive, with its QEW frontage, offers the potential for value-added land-uses than the ones currently being employed. Confederation Park, like the West Harbour, offers opportunities for additional land uses that would complement its current recreational land designation, while
at the same time add to the amenities and vital non-residential tax assessment for visitors and the surrounding neighbourhoods.

The vision for Hamilton’s waterfront however, entails transforming the waterfront considerably from its current form, function, and importance to Hamilton's economy. Historically, this area has been dominated by heavy industrial land uses which have left a legacy of properties in transition, contaminated Brownfield sites, as well as numerous under-utilized areas.

Research indicates that although waterfront opportunities are generally viewed positively by private sector investors for their end-use value, the inherent complexity of land-use adaptation and compatibility combined with the financial risk involved, act as a significant barrier to large-scale waterfront redevelopment.

Recognizing that the public’s return on investment can be calculated in a much broader fashion than the typical private sector financial statement, the City of Hamilton has over several years launched an aggressive campaign to become a catalyst for the redevelopment of its underutilized urban waterfront, in order to drive capital investment into areas of priority.

While initially taking the form of traditional public sector recreational and parks infrastructure, public investments have also taken the form of tax incremental financing program incentives for the private sector, as well as direct public investments in land acquisition and commercial enterprises.

The City of Hamilton realizes however, that government will not ultimately be the driver on the overall success of these plans. Ultimately, success will come from the ability to convince the business and investment industries of the true development potential and financial value of the waterfront precinct, a potential that is diverse, dynamic, and full of redevelopment potential.

It is with this in mind that recently, City Council approved in-principle the concept of creating a Waterfront Development Corporation. This arms-length entity, modeled after several similar enterprises in Toronto ON, Halifax NS, and Pittsburgh PA, will take on the task of implementing this development vision. The goal of this organization would be to show how the City of Hamilton can partner with the private sector on waterfront transformation, but at the same time ensure that the public good is at the centre of any development plans.

The transformation of Hamilton’s waterfront will be most effective when investments are directly linked and complementary to the overall objectives of the City, other levels of government, and those of the private sector itself. This is the goal of the Waterfront and Shoreline Redevelopment Strategy, and the City of Hamilton is committed to this vision and this goal.
West Harbour Lands

Today, the west harbour is a proven example of how waterfront redevelopment, even in a modest way, can help to revitalize and transform an area. With a strategic vision, the City of Hamilton started to invest in the area, mainly through public investments in both recreational and parks infrastructure. The view was to transform the area into a destination for all Hamiltonians, but at the same time being cognizant of its role as a valuable neighbourhood asset to those who live in the north-end of the city.

The long-term vision for the area was established by way of the “Setting Sail” West Harbour Secondary Plan, which comprises the geographic area from the lands known as the “Barton-Tiffany Area” to the west, through to and including Pier 8 on the waterfront. The vision is to transform this area from a mix of heavy industrial, recreational, and low-rise residential, to a vibrant and dynamic mix of recreational and open-space, but combined with commercial activity along with higher density residential uses. Although this plan has been appealed to the Ontario Municipal Board for review, the City of Hamilton is committed to its intended vision, and is actively seeking a favourable resolution in the short-term.

As part of the implementation strategy, the City, working with the Hamilton Waterfront Trust, as well as many other community stakeholders, is nearing completion of the West Harbour Recreational Master Plan. At its heart, the plan is meant to meet the overall needs of the community, both connecting, and in some cases re-connecting the community to the water’s edge. This Master Plan process seeks to detail the specific land uses and development initiatives envisioned with “Setting Sail”. Parkland, shoreline, walking and biking paths, recreational boating uses, and ancillary commercial developments are just a few of the things that are detailed within the plan. Expected to be passed by City Council in early 2010, this will ensure that all of the planning and approval processes are in place in order to expedite the implementation of development.

It is recognized however, that although this area is a valuable neighbourhood and community recreational asset, the City is also committed to ensuring that this valuable asset is used to serve the city’s economical needs as well. Residential taxpayers cannot be asked to fully shoulder this transformation, and therefore all plans would also contain the ability for the City to partner with the private sector on the proposed waterfront transformation. This would be a balanced approach however; the City will continue to ensure that City’s goals, aspirations, and interests are maintained and remain at the centre of the area’s development plans.
The true economic growth potential of Hamilton’s waterfront precinct does not solely lie in the waterfront itself, for the potential is even greater when the investment is broadened and reaches into the geographic areas adjacent to it.

The City’s urban downtown core, mere blocks away from the west harbour, can both benefit from and draw investment to a redeveloped waterfront. As investments spur a feeling of a greater quality of life within the area, residential, employment, and commercial investments can have a reciprocal relationship between the waterfront and the downtown.

The existing neighbourhoods surrounding the waterfront will also benefit directly from the investments made in their neighbourhood, but the neighbourhood itself also provides greater opportunities for residential intensification and commercial development. Neighbourhoods, some of which have suffered from low property values and a lack of commercial activity in the past, may see values increase, leading to new development opportunities.

**Port Lands – Hamilton Port Authority**

Moving slightly east, it is worth noting that the vast land mass along most of our harbour is in fact owned and operated by our community partner at the Hamilton Port Authority. By nature of the land holdings alone, the City of Hamilton and the independent Port Authority are inextricably connected. But the fact is that the Hamilton Port Authority is on its own and is a key driver of economic activity into the City as a whole, the GTA, and the entire Province.

As the operator of one of the largest marine ports on the Great lakes, the Port is a key element of the City’s transportation network. Complementing the marine transportation system in the area is an extensive network of rail and 400-series highways, making the port lands waterfront area a true multi-modal transportation hub.

As stated earlier, the City of Hamilton does not see the partnership with the Port solely being based on the port activities and marine transportation itself; rather the Hamilton Port Authority is a true partner in our Economic Development Strategy, linking directly with marine transportation, but also to the adaptive re-use and remediation of former industrial land uses. The industrial Burlington Street corridor for example, can easily see benefits as land uses transform from heavy industry to the advanced manufacturing and transportation logistics, which could lead to a different streetscape and urban design than its industrial past.

The transformation along these lands is more than just an economic one, for there is also a transformation of the natural environment. The City of Hamilton with the Port Authority, the Bay Area Restoration Council, and other community
interests, have been instrumental partners in the on-going efforts of the Hamilton Harbour Remedial Action Plan. Their combined efforts on many initiatives include a targeted approach to cleaning the Windermere Basin and Randall’s Reef. This successful action will lead to the cleaning of the Hamilton Harbour and the hope of eventually delisting the harbour as an international area of concern. Initiatives such as these are not only seen as benefits for Hamilton’s environment and quality of life, but a cleaner harbour and environment also lead to a vibrant community for investment.

Eastport Gateway and Lake Ontario Shoreline

On the eastern portion of the port lands is the Eastport Gateway area, directly connected to the western Lake Ontario shoreline area of the city. This area is strategically located with waterfront on both sides, with direct QEW access, and combined with employment and recreational uses. But this area is also problematic in both form and function. The Skyway Bridge for instance, at times is seen as a barrier for our City. Physically, it separates the eastern reaches of the City from the city core and western portions. Psychologically however, the impacts have also been felt as commuter and commercial vehicular traffic, on one of the country’s busiest highways, is greeted by the visual impact of Hamilton’s industry. Industry is important and valuable, not just for Hamilton, but historically has been valuable to both the Ontario and national economies as a whole, but the view from the bridge doesn’t always paint a pretty picture of the diversity Hamilton has to offer.

That is why the City is re-thinking our approach to the land-use opportunities from the bridge and Eastport Drive, to Confederation Park and all the way through to our employment lands along the QEW. This area can become a true Gateway, that will not only be good for investment, but will go a long way to changing the perceptions and image of Hamilton as well.

Hamilton Waterfront Development Corporation

In September 2009, Hamilton City Council endorsed the concept in-principle, of creating a Hamilton Waterfront Development Corporation. The proposed Corporation will be municipally owned, but will operate independently of the municipality through a separate corporate structure. Currently, the City is formulating the specific mandate, governance structure, staffing, and financial funding model for the Hamilton Waterfront Development Corporation, in the hopes of it being operational by 2010 year end.

Although individual plans, programs and incentives to encourage development and redevelopment in the waterfront were already in place throughout the City, there was a clear recognition that the City should look beyond its borders and
explore other possible avenues that would expedite redevelopment within the waterfront areas. Therefore the rationale for this decision was based on significant research from many jurisdictions across Ontario, Canada, as well as Pittsburgh PA. This research clearly indicated that that although waterfront opportunities are generally viewed positively by private sector investors, the inherent complexity and financial risk involved act as a significant barrier to their redevelopment. Many other jurisdictions concluded that government can act as a catalyst for the redevelopment of underutilized urban waterfront communities.

The recognition that the public sector’s return on investment can be calculated in a much broader fashion than the private sector is the basis for the concept of creating a Waterfront Development Corporation. Future revenue streams from property taxes, development fees and adjacent property value increases, for example, can be used to calculate the true public return on investment.

Although the specific mandate is still being formalized, typically they correspond to “being a catalyst for business investment, development and economic growth” or to “develop, promote, encourage, coordinate, assist, and advance the commercial and residential development” within the geographic region or area that is created. As per the recent Canadian Urban Institute study, this is consistent with their recommendation of the creation of a “land development” focused corporation that is not intended to replace the existing municipal economic development function.

Although the status quo has achieved successes over the years, the research of other jurisdictions clearly shows that full coordination is only achieved when the specific mandate is preformed through the creation of a focused entity. It is the belief that this Hamilton Waterfront Corporation model will provide both the structure and the opportunity best suited for implementation immediately to achieve short to medium term development objectives.

**SWOT Analysis for the Hamilton’s Waterfront and Shoreline**

**Strengths**

- There is an inherent value to Waterfront lands offering the potential highest value uplift within the City
- Provides a direct connection to leverage other investments such as Light Rapid Transit, GO train service, Pan-Am Games Stadium
- Hamilton Waterfront Development Corporation offers opportunity to work directly with the private sector for investment opportunities
- Potential conversion of underutilized and contaminated lands and buildings
• Proximity allows for enhanced Downtown Revitalization
• Port offers an opportunity to create a true multi-modal transportation hub
• Opportunity to revitalize (and reinvest) in neighbourhoods
• Investments are being made that link both economic development opportunities with quality of life
• Financial incentive programs to encourage the development of underutilized or vacant properties
• Proximity to the growing arts and cultural community
• Investment in the Eastport Gateway and Lake Ontario Shoreline add employment opportunities but also address concerns of image and perception

Weaknesses

• Relative high upfront investment required, especially on lands requiring significant environmental remediation
• Perceived incompatibility of existing land-uses makes redevelopment to new uses complex
• Difficulty in navigating redevelopment within the existing residential neighbourhoods
• Most of the publicly held land holdings are currently open-space, making redevelopment to other uses more difficult for the community
• With the vast land mass involved, unfocused development may be difficult to achieve full value uplift

Opportunities

• Hamilton Waterfront Development Corporation offers an opportunity to leverage public investment with the private sector
• Waterfront neighbourhoods can be converted to true mixed-use communities, with employment, commercial, residential, and recreational amenities all self-contained
• Waterfront redevelopment offers the opportunity to change the image and perceptions of Hamilton
• Directly connect and link west harbour redevelopment to the Downtown core
• Directly connect and link port lands redevelopment to employment and economic development initiatives
• Directly connect redevelopment in the Eastport Gateway and Lake Ontario Shoreline to the neighbourhoods in east Hamilton
Threats

- Lack of stable financing
- Lack of focused redevelopment
- Will of the City to push for transformative change and mixed-use land use within these established neighbourhoods
- Lack of incentive for current industrial land owners to redevelop underutilized parcels of land
- Planning process through the Ontario Municipal Board creates a lack of certainty for redevelopment

Short Term Deliverables (less than 4 years)

- Implement the Hamilton Waterfront Development Corporation
- Finalize the West Harbour Recreational Master Plan process
- Expedite the Ontario Municipal Board Hearing on the “Setting Sail” West Harbour Secondary Plan
- Begin a Master Plan process for the Confederation Park, Eastport Gateway and Lake Ontario Shoreline area
- Finalize plans for the 2015 Pan Am Games investments of a stadium and velodrome
- Prepare a detailed analysis of key properties that provide for redevelopment potential in the short-term
- Continue with public acquisition of key strategic properties within the waterfront area
- Expedite the transfer of Pier 8 back to the City Hamilton from the Hamilton Port Authority
- Connect Brownfield Incentive Program with plans for the waterfront lands
- Prepare a Waterfront Development Downtown Marketing Strategy – identification of target market, audiences and key messages once broader Economic Development Marketing Strategy is approved by City Council

Long Term Deliverables (greater than 4 years)

- Expedite the implementation of the West Harbour Recreational Master Plan, especially investments that create non-residential and intensified residential tax assessment
- Work with the Hamilton Port Authority and other stakeholders to create a multi-modal transportation hub
- Ensure the financial stability of the Hamilton Waterfront Development Corporation
Create meaningful linkages between downtown and the Harbourfront
Create meaningful linkages between the Waterfront areas and the employment opportunities throughout the City

Conclusion

Hamilton’s Waterfront and Shoreline precinct has always been a critical part of the City’s Economic Development Strategies. From its beginnings as the industrial economic engine to its role in today’s advanced manufacturing and green technologies, this vast and strategically located area can act as a catalyst for economic development, diversification, and transformation of the local, provincial, and even national economy.

There is a quote that says “Innovation is the ability to create and capture economic value from invention”. In the context of the redevelopment of these waterfront lands, being innovative means going beyond itself in order to create something bigger, to derive a greater value. Real transformation will happen when investments in plans and projects are inter-connected with the guiding overall objectives of the City. Investment decisions should be driven by an equation that includes the net community benefit, including the economic impacts of jobs and assessment growth, the impacts of education and skills training, as well as quality of life factors such as open space and clean water.

If done correctly, strategically, with focus, there will certainly be a time when an architect, leaves his waterfront condo in the west harbour, hops on a GO Train in downtown Hamilton for a client meeting in Toronto, and is back in his office in downtown Hamilton for lunch. Or a day when an electric car manufacturing plant ships automotive parts in by short-sea ferries, onto rail cars, for assembly in a plant off the QEW. Or a day when a McMaster University researcher is commercializing a technology to create cleaner water or cleaner energy, hops on the Light Rail Transit in the east, has lunch downtown, en route to the McMaster Innovation Park or the main campus.

Hamilton is on its way to this, but it must be remembered that this journey will take a focused vision, patience, but most importantly it will not only take creativity from the City itself, but also partners.
2015 Pan/Para Pan American Games

Strategic Growth Assets

Introduction

The 2015 Pan / Para Pan American Games will be held in July and August 2015. The City of Toronto won the rights to host the games in November 2009 from the Pan American Sports Organization (PASO). The 2015 Pan American Games is a unique hosting arrangement whereby the City of Toronto is the official host city but events and venues would be distributed throughout the Greater Toronto Area, Golden Horseshoe Area and elsewhere in Southern Ontario. The federal government, provincial government, municipal governments and other partners such as Ontario universities are all signatories to participating in this important event.

The 2015 Pan Am Games will bring over 10,000 athletes and officials from North America, Central America, South America and the Caribbean to Southern Ontario to compete in over 39 different sports. The Pan Am Games are a prestigious international event drawing television audiences and visitors from all of the Americas and is considered a high level athletic sporting event on par with other major international games such as the Commonwealth Games. Athletes participating in the Pan Am Games often also compete in the Olympic Games. In preparation to host the 2015 Pan American Games the Pan Am 2015 Host Corporation, through Infrastructure Ontario is coordinating a major capital build which would include a new athletics stadium, velodrome, aquatics centre, training pools, Canadian Sport Institute Ontario (CSIO), Goldring Centre for High Performance Sport and a BMX course. Many other existing sporting venues will see substantial investment, improvements and renovations to meet international sporting standards. These combined investments would be the single largest investment in sports infrastructure in Ontario’s history, allowing Ontario to reinvent itself as a hub for high performance and amateur sports alike.

Hamilton’s participation in the 2015 Pan Am Games dates from 2008 when City Council approved in principle, support for the City’s participation in the bid. In February 2009, Council finalized Hamilton’s commitment through endorsement of a sport program consisting of a new stadium, new 50m pool, use of Copps Coliseum (court volleyball), new velodrome (track cycling) and use of Ron Joyce Stadium (soccer). Council also approved a $60 million investment toward the new stadium and velodrome.

In February 2010 City Council finalized the West Harbour as the location for the new Pan Am stadium, and velodrome. Since that time, the West Harbour location was rejected by the principal tenant the Hamilton Tiger-Cats. After a
number of other sites were examined in detail, both the City and the Tiger-Cats agreed in October 2010 to focus efforts on the CP Rail Yards located at Longwood Road and Aberdeen Avenue. At this same time, a business plan was presented to Council outlining a framework both for paying for the capital project and the economic benefits of constructing the facilities. The Pan Am Games project is being led by Tourism Hamilton and the City Manager’s Office but with support from all departments of the City of Hamilton, the Hamilton Chamber of Commerce, Jobs Prosperity Collective, Hamilton Community Foundation, Hamilton Roundtable for Poverty Reduction, National Cycling Centre Hamilton, Downtown Hamilton Business Improvement Area, McMaster University, the Hamilton Tiger-Cats and many other government, not-for-profit, amateur and high performance sports groups, and community and advocacy organizations.

Based on such a broad based community support for the Pan Am Games, it is not surprising that the benefits of the Pan Am Games to Hamilton are much broader than simply an estimate of jobs being created or financial expenditures. The Pan Am Games, when properly integrated with the other major aspects of the Community Development component of the Economic Development Strategy creates an opportunity to truly transform the City of Hamilton by being able to link broad community projects together.

**New Capital Facilities**

The City of Hamilton will be receiving the second largest amount of capital investment for the Pan Am Games through a new stadium for soccer, a velodrome, and 50m pool. The 50m pool would replace or rehabilitate an existing pool at McMaster University. The stadium would have a minimum of 15,000 seats (up to 27,000 depending on final design). After the Pan Am Games, the stadium would be used as the new home for the Hamilton Tiger-Cats, to replace Ivor Wynne Stadium, which has served Hamilton since 1930 and is in need of replacement. The stadium would also be designed to accommodate other field sports (rugby and/or lacrosse) in addition to soccer as well as to host other special events and concerts. A bubble over the field during winter is also envisioned to allow year-round use and training. The velodrome would only be the second international standard (250m track) indoor facility in North America (the other being in Los Angeles) and would capitalize on Hamilton’s cycling reputation from hosting the World Road Cycling Championships and other investments in cycling infrastructure and planning. In total, between $150M and $200M of capital investment in new Pan Am facilities in Hamilton will be made.

**Revitalized Ivor Wynne Stadium Precinct**

One of the primary reasons for participation in the 2015 Games is the opportunity the Games would bring to replace Ivor Wynne stadium. It has been determined
that a substantial investment would be required in order to continue to maintain the existing stadium and such investment would only briefly extend the life of the stadium. A major renovation to extend Ivor Wynne Stadium’s life dramatically would generally be cost prohibitive and not result in substantial improvements to visitor enjoyment. Without undertaking a new stadium under the financial cost-sharing arrangement with the federal and provincial governments that the Pan Am Games presents would also mean a greater expense to the City of Hamilton should Hamilton had chosen to replace Ivor Wynne Stadium outside of the Pan Am Games opportunity.

In addition to the tangible benefits of realizing a new stadium, the City of Hamilton sees an opportunity for a major urban redevelopment project of the Ivor Wynne Stadium precinct. This opportunity could extend to include Brian Timmis Stadium, Scott Park, Scott Park Arena, Jimmy Thompson Pool, and even the former Scott Park High School property. This precinct, with frontage onto King Street East would be linked to the proposed B Line Rapid Transit and would be an example of transit-oriented development. It provides the opportunity for new parkland, community uses (senior and/or community centre), revitalized recreational opportunities as well as new residential and commercial opportunities to benefit the neighbourhood and the entire lower city. Residential units and some local commercial uses could be provided in conjunction with substantially improved or enhanced public facilities. This redevelopment has the potential to generate up to $1 Million in annual property tax revenue for the City of Hamilton while providing a range of housing opportunities (tenure, built form and prices) to create a new vibrant community in East Hamilton.

Brownfield Redevelopment

The West Harbour site contains a mix of historic industrial and commercial land uses and is a known Brownfield property. It is also very fragmented through multiple property owners. By creating new public facilities (Velodrome) on these lands, a known brownfield site adjacent to Hamilton Harbour and near downtown can be revitalized. The ERASE program and Setting Sail Secondary Plan would have been used to promote redevelopment of these lands should the Pan Am Games opportunity not been available. However, even with such proactive land-use planning tools and incentive programs it would have been a long-term challenge to develop the lands due to the extent of contamination, fragmented ownership and soil characteristics that combined could have made such redevelopment a financial challenge. The Pan Am Games opportunity leverages senior government support to clean-up the lands, and provides new public facilities to benefit both the local community and the entire City of Hamilton.
Urban Redevelopment and City Building Linkages

One of the overriding opportunities of the Pan Am Games is to link to, leverage and provide incentives and enhancements of many other municipal projects. The geographic location of the West Harbour is another way of linking downtown Hamilton to the waterfront (along with linkages from James Street North to Pier 8). The Pan Am Games facilities will be connected along Bay Street North directly to Copps Coliseum. Other linkages through Central Park will also provide safer, attractive and intriguing ways of accessing the Waterfront. By engaging the Bay Street North street frontages, through enhanced public and private investment in the precinct, through connections with Rapid Transit, Go Transit and Via Rail, and by ensuring that the Pan Am Games are incorporated into other waterfront planning initiatives (Waterfront Recreation Master Plan and Hamilton Waterfront Development Corporation) then the benefits of the Pan Am Games will be felt by the entire city.

Tourism Development

The Pan Am Games can serve to substantially improve tourism development for the City of Hamilton. Even when considering the Pan Am Games as only a single event, approximately 10,000 athletes and officials and 250,000 tourists will attend events associated with the Pan Am Games (source: www.toronto2015.org). Due to Hamilton hosting many of the marquee sports for the Pan Am Games (athletics, track cycling and indoor volleyball), Hamilton stands to attract many of these attendees who will spend money at area hotels, restaurants, attractions and shopping areas. The Pan Am Games will help Hamilton to attract further special events, meetings and conferences and sporting events. The legacy of a new stadium and velodrome would be the ability to host countless regional, provincial, national and international sporting events bringing further investment to the City of Hamilton.

Direct and Indirect Economic Benefits

A business plan for the Pan Am Games stadium was prepared by Deloitte as part of the review of the West Harbour stadium location. In addition, a business plan will be prepared for the velodrome project and a further study to review the spin-off assessment related growth that could be expected as a result of the Pan Am investment. However, it is already known that 1,750 construction related jobs would be created and an economic impact of $7.5M to $9.9M (Deloitte, 2010) annually from the new stadium alone will result. Other economic opportunities will also materialize at the precinct through commercial and/or entertainment related development, possible residential development, and other private investment or reinvestment in the West Harbour precinct, Downtown Hamilton.
and James Street North corridor. Job training programs for disadvantaged people should also be pursued.

Transportation Improvements

The Ontario Government, through Metrolinx has made it clear that Rapid Transit investment in Hamilton is a priority. Both the proposed A and B Line Rapid Transit (with preferred Light Rail option or Bus Rapid Transit option) would provide opportunities to connect to the new Pan Am facilities, Copps Coliseum and McMaster University. The Pan Am Games transportation planning would link to the City Wide Transportation Master Plan, Downtown Transportation Master Plan and other streetscape improvement plans. Perhaps most exciting is the return of Via Rail to LIUNA Station and new all day Go Transit Service from a new station in this same area. This would connect the West Harbour and the Pan Am facilities with the rest of the Greater Toronto and Golden Horseshoe areas which is key for both during the Pan Am Games to move spectators and athletes alike between venues and post Pan Am Games to allow Hamilton Tiger-Cats regional fan base to much more readily access the new stadium.

Image Enhancement

The Pan Am Games, through both the capital investment and ability to attract visitors to the City of Hamilton would help improve Hamilton’s image which in turn aids in attracting economic development as businesses realize the range of opportunities and advantages that Hamilton has. Simply by removing an unsightly brownfield from the waterfront, the visual image of Hamilton from several key vantage points (High Level Bridge, Pier 8 and Bayfront Park, and Aldershot shoreline) would be drastically improved. By attracting people to events at the waterfront, people from around the Region and the Province would be able to view a side of Hamilton that may otherwise not be known. The games will also have a television audience throughout the Americas. When the World Road Cycling Championships were broadcast from Hamilton, many people around the world got to witness first hand the stunning scenery that Hamilton provides. Broadcasting throughout the Americas will also create such an opportunity.

International Investment

The Pan Am Games will also bring many international visitors to Hamilton, which in turn will spark the potential for economic cooperation, investment and partnerships with governments and business communities throughout the Americas. Hamilton’s multicultural fabric is also an advantage and the Pan Am Games presents opportunities for special community cultural festivals and events to take advantage of the excitement generated by hosting the Pan Am Games.
The international connection is also furthered by corporate Canada’s close connections to the Americas and particularly the Caribbean. The Pan Am Games would further foster such a connection for which Hamilton stands to be a key beneficiary. Consequently, the Foreign Direct Investment Strategy that is identified as a deliverable in the Marketing & Outreach component should include the Pan Am Games as an element of this investment strategy.

**Deliverables**

- Finalize the planning and development of the West Harbour velodrome location including a community consultation program for facility design and use;
- Implement the key recommendations of the study to investigate the spin-off and assessment growth potential that would result from the Pan Am Games facilities;
- Initiate a land use planning review of the Ivor Wynne Stadium precinct to determine the best ultimate land use that will contribute to both community improvement and economic development;
- Finalize business planning for the new Pan Am Games velodrome to ensure that the facility will best serve the legacy needs of the City of Hamilton;
- Engage community volunteers, the multi-cultural and ethnic communities and sporting organizations for organizing special community wide festivals and cultural events to lead into and coincide with the Pan Am Games;
- Work with the Federation of Canadian Municipalities Green Municipal Fund Program on grant and loan program opportunities connected with the Pan Am Games;
- Ensure that LIUNA Station or another such site in the immediate area is identified and finalized for all day Go Transit service and VIA Rail service;
- Ensure that the Pan Am Games initiative is encapsulated within other key city-building projects, plans and programs to ensure proper linkages and partnership opportunities.
- Initiate a business development plan to create partnership and investment opportunities between Hamilton and other key countries in the Americas.
- Work with municipal, not-for-profit, and private partners to develop an employment plan for Pan Am related activities to ensure that employment opportunities will be available to a broad spectrum of Hamiltonians.
- Leverage Pan Am Games opportunity to host a major international conference in Hamilton to focus on social inclusion planning for large international sporting events.
Quality of Life considerations are now making the difference in attracting businesses and people to our community. Culture, recreation, housing, education and healthcare are just some of the key features setting Hamilton apart. While a health professional’s first look starts with our reputation in science and medicine, Hamilton very clearly and quickly becomes the best option for a great lifestyle outside of the workplace.

Murray Martin, CEO
Hamilton Health Sciences Corporation
THE QUALITY OF LIFE

Quality of Life is well recognized as an important factor in shaping economic development and must be viewed as a strategic resource by a community. High environmental quality, culturally desirable working and living conditions and convenient local amenities are believed to be among the quality of life factors that are the most vital to retain local business and attract inward investment.

This component examines Quality of Life (Q of L) in detail and in particular, six areas that Hamilton must focus on in order to compete provincially, nationally and globally for business and people in the new economy. Each of these six areas of Quality of Life is presented with a number of recommended strategies for leveraging and further developing their presence in Hamilton. Also included are a number of indicators that can be employed to chart the success of the individual strategies.

Quality of Life Defined

1. Quality of Life and Economic Prosperity

   There is no doubt that quality of life and economic prosperity go hand-in-hand in communities. Each feeds the other. Strong economic performance is a fundamental engine for the factors that make up quality of life; similarly, quality of life is a magnet for business investment, workforce and families. People are attracted to communities that are good places to live, work, learn and play.

   Many researchers stress the creative magnet cities represent. Other theorists, (notably Michael Porter and Jane Jacobs) argue that distinctiveness is crucial and provides a competitive advantage.

   Here in Hamilton, the 2002 document “A Social Vision for the New City of Hamilton” outlined the concepts of magnets and glue that are important in attracting and retaining business to our community, and confirmed the link between quality of life and economic development as it explored the assets and challenges facing Hamilton at that time.¹

   Ontario’s Ministry of Municipal Affairs and Housing summarizes the connection between quality of life and economic prosperity, in today’s economy, this way:

Traditionally, physical proximity to resources and markets were primary determinants for economic success. In today’s fast-paced global economy, however, quality of life is also seen as an essential ingredient for economic growth, competitiveness and prosperity. For example, economic trends suggest a very strong relationship between creativity, talent and knowledge-based businesses.

Municipalities depend on economic development and growth to accomplish their goals. And while municipal goals such as job creation, retaining and attracting businesses, ensuring an adequate range of housing options and building a strong tax base are not new, how they are best achieved is changing. In today’s fluid marketplace, municipalities face challenges that include diversifying their economies, making infrastructural investments and linking labour skills and knowledge with business needs.

In addition to market influences, there can be less tangible but equally important factors that help municipalities create their own competitive niche and become appealing places to live and work. These factors involve a sense of place, local character and diversity of amenities. Many consider these factors to be part of a community’s quality of life and will take them into account when making decisions on where to live and carry on business. ²

Another Canadian summary highlights the connection between urban quality of life and the local and global economy:

*Quality of life as a commodity in the macro economy…*

Liveable urban communities have become increasingly significant to the global economy for a number of reasons. First, companies realize that their workers want to live in communities that offer reasonable commutes, a vibrant social life, environmental amenities and housing and transportation choices. Second, certain kinds of business are increasingly conducted beyond the boardroom - in cafes, restaurants, health clubs and public spaces - places where people come together, converse, share ideas and network. Third, the private sector in the new economy equates competitive advantage with the ability to be where the action is and this is in urban or town centres. Therefore, while technology frees businesses to locate anywhere; proximity to suppliers, an educated workforce and networks of learning are drawing business as to the central business district.

The new economy demands a social and communication infrastructure

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² Ontario Ministry of Municipal Affairs and Housing, “Municipal Quality of Life for Economic Prosperity: Building Strong Communities,” 2005 (page 3)
(one that supports safe networks of interaction) as well as a proper physical infrastructure (one that reduces the costs of business, but also supports well-functioning communities). In this new global environment, quality of life at the urban level has become key to national growth. Urban centres with a high quality of life are now a national commodity.³

2. The City of Hamilton’s Vision of Quality of Life

Hamilton’s Vision 2020 quality of life statement proposes a vision to work toward. It introduces the strategic directions of the recently adopted City of Hamilton Official Plan:

**Quality of Life**

All of us achieve our full potential in a safe, non-violent environment. Everyone has adequate food, shelter, income and education. Everyone has a valued role to play in family, work and community. Healthy lifestyles, improved safety measures and quality healthcare have progressively reduced disease and disability. We have access to affordable and appropriate health care, regardless of geography, income, age, gender or cultural background.

Cultural institutions and the arts community are recognized, supported and celebrated for their enhancement of community life and contribution to economic health. Cultural institutions reflect our historical development and the contributions of our diverse population. Our heritage buildings are conserved and re-used.

All of us take responsibility for citizenship and public decision-making. As citizens, we are active participants in co-operative community planning and we take action to ensure community improvement. Government is open, accessible, efficient, effective and participatory. Policies, plans, strategies and operations implement sustainability.

A well-educated, literate population is seen as a total community responsibility. Schools are leaders in effective learning and excellence in teaching. Lifelong learning is valued and supported across the community. All citizens are knowledgeable about sustainable communities. Educational, cultural and business institutions and community groups advocate values consistent with sustainability. Citizens pursue sustainable lifestyles.⁴

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³ Duncan Maclennan, “Housing for the Toronto Economy,” Cities Centre, University of Toronto, July 2008, (page 63)
3. Hamilton Economic Development Office Quality of Life Factors


On its Invest in Hamilton website, Economic Development describes Hamilton’s quality of life in ten categories:

1. Communities and Neighbourhoods
2. Housing
3. Education
4. Healthcare
5. Nature and Environment
6. Arts, Culture & Entertainment
7. Dining
8. Shopping
9. Sports and Recreation
10. Transportation/Public Transit

Most municipalities use a similar set of headings to describe the quality of life aspects that their cities offer to potential residents, employers and investors.

4. Quality of Life and the New Economy

The US-based Progressive Policy Institute’s comprehensive study of American urban centres called The Metropolitan New Economy Index, highlights quality of life as a key factor in attracting the knowledge workers of the new economy.

“There are numerous factors that go into making a region attractive to knowledge workers, and but [sic] one of the most important is quality of life. Most metropolitan areas face a number of challenges in creating a great quality of life, including amenities, crime, and transportation.”

The report goes on to recommend “boosting amenities” with place-specific outdoor recreation opportunities like trails, urban amenities like restaurants and nightlife, and walkable neighbourhoods that “boost public safety” particularly with investment in law enforcement technology and community policing; and “boost traffic mobility” to handle increased congestion with new
roads, regional transit and technology-based transportation improvements.\(^5\)

5. Quality of Life, Creativity, Culture and Prosperity

Creative expression and the aesthetics of place are key components of quality of life, both for individuals and for the vitality of a city. Numerous writers, researchers and on-the-ground practitioners make the argument for the importance of personal creativity to learning and individual success.

Bill Strickland, for example, whose work with at-risk youth in Pittsburgh has been transformative for individuals and neighbourhoods, maintains (and has demonstrated over several decades) that youth will engage through art and creativity when other approaches have failed them.\(^6\) Students in Strickland’s Manchester Craftsmen Guild’s programs participate in visual and performing arts, and once engaged, they learn skills and trades that lead to employment. In Strickland’s schools these include culinary arts, computer graphics, photography and design, pharmaceutical technologies and other market-driven occupations. In a neighbourhood where the normal high school dropout rate hovers at about 50%, Strickland reports that over 80% of his students stay in school, graduate and find employment. Though they do not become artists, necessarily, their exposure to the arts is what unlocks their potential to succeed in other areas.

Strickland also argues (like many theorists in urban design, architecture, landscape architecture and other specialties) that environment drives behaviour, that is, that people respond to the aesthetics of their surroundings. He therefore designs his schools for both function and beauty. “Poor people deserve fountains as much as rich people do,” he maintains, and therefore builds his schools with abundant natural light, fresh flowers, eclectic art on the walls – and always a courtyard fountain – in addition to state-of-the-art teaching equipment. These beautiful spaces have never been vandalized, despite being located in high-crime neighbourhoods. For Hamilton, the opportunities are enormous to capitalize on a beautiful and healthy natural location and the influence a positive environment can have on growth and development of individuals, neighbourhoods and cities.

On a broader scale, many theorists have linked culture and creative industries to the development of cities. The nature of public space and urban design; the contribution of cultural producers to the nature and economy of cities, the role of the urban milieu in creating culture and many other factors have all been

\(^6\) Bill Strickland presentation at Hamilton Place, November 30, 2009 and his book, “Make the Impossible Possible.”
topics of academic research and study for several decades, exploring the complicated relationships between culture, creativity, urban life, prosperity and quality of life.\(^7\)

“Culture lies at the heart of successful places, successful economies and successful communities,” summarizes one author. “It gives people opportunities to learn skills, to express their identities and to share experiences. It gives them a sense of community and a stake in the places where they live. Places which are seen as having a strong cultural identity are also seen as successful and attractive to the skilled and enterprising as places to visit, work in, live in and invest in.”\(^8\)

Richard Florida’s 2002 book, The Rise of the Creative Class, argues that the “creative class” – skilled people in fields including finance, high-tech, science, health care, law, the arts and others – are the engine of the new economy. These people are attracted to locations where they can enjoy diversity and a high quality of life. Moreover, jobs are attracted to the cities where the creative class achieves critical mass.\(^9\)

In *The Flight of the Creative Class: The New Global Competition for Talent* (2005), Florida maintains that the extreme mobility of the creative, high-skilled workers means that cities must compete to attract them. He proposes “three Ts” of economic growth: technology, talent and tolerance. While many other economists have stressed the first two, Florida adds that tolerance – an open society that celebrates diversity and accommodates difference – is equally critical to economic vitality.

Here in Hamilton, the connection between culture, urban quality of life and prosperity is being drawn in many ways. The City of Hamilton’s Culture Division is engaged in a comprehensive cultural planning exercise (see 2.2 below) and the Economic Development Office has identified creative industries as one of its focus clusters. Our own Quality of Life pillar of the JPC has also identified culture and recreation as an essential component (4.4 below).

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\(^7\) For an overview of this literature, see Justin O’Connor, “The cultural and creative industries: a review of the literature,” Report for Creative Partnerships, Arts Council England, November 2007

\(^8\) *Demonstrating the case for culture*, South East England Development Agency and South East Cultural Observatory, 2007

\(^9\) Florida’s definition of “creative workers” – which encompasses not just artists, writers, designers and so on, but also teachers, librarians, nurses, lawyers, business managers and sales executives – includes about 30% of all workers in the U.S. (*The Rise of the Creative Class*, 2002).
6. Quality of Life from the Next Generation’s Point of View

The U.S. based firm Next Generation Consulting specializes in young knowledge workers (ages 20-40) and what makes cities attractive to them. Their recent Canadian ranking puts Hamilton at #20 on a list of the 27 best cities in Canada for the next generation: those communities that have “the assets and amenities that attract and keep a young, educated workforce.” Their “Next City” attributes are grouped into seven indices:

1. Vitality (environmental quality and population health)
2. Earning (employment, income)
3. Learning (education, library use, Wi-Fi hotspots)
4. After Hours (recreation/entertainment)
5. Around Town (walkability, commute times, transit)
6. Cost of Lifestyle (affordability)
7. Social Capital (diversity, crime, engagement).

Together, the seven indices track 45 measures.10

7. Quality of Life from a Youth Retention Point of View

The link between economic prosperity and retaining educated, skilled young people in a community is well documented. Preventing brain drain of local young people to other communities needs to be a priority for Hamilton. In 2008-09, Hamilton participated in an assessment of its strengths and challenges against the “youth friendly city” criteria of an Ontario organization called Play Works.11

Play Works is an independent group of organizations committed to helping youth (ages 13 - 19) by encouraging and promoting a greater investment in play – which they define as “anything a young person does in his/her free time which could include: sport, recreation, drama, dance, music, the arts, volunteerism, leadership development, service leadership and/or civic engagement.” The Play Works partners are: 4-H Ontario, Arts Network for Children and Youth, Boys and Girls Clubs of Ontario, Educational Research Representatives, Laidlaw Foundation, Ontario Physical and Health Education Association, Ontario Young People’s Alliance, Parks and Recreation, Sport Alliance of Ontario, YMCA Ontario and Youth.

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10 http://nextgenerationconsulting.com/consulting/next-cities/

11 www.playworkspartnership.ca
Hamilton received a “Bronze” designation in May 2009 by meeting 10 of 16 Play Works criteria. The 16 criteria include facilities for youth, youth recognition programs, funding, youth volunteerism, effective partnerships with youth etc. Play Works provided a feedback form to guide improvements.

8. Quality of Life and an Aging Population

As a result of the second round of Open Houses, a frequent comment and concern regarding Quality of Life centered around a focus on an aging population in Hamilton. Equally as important as the Next Generation, an environment that provides a superior Q of L is necessary not only for the existing population but for new workers, immigrants etc. who migrate/locate to Hamilton and bring with them an extended family. Planning and implementation of this would include everything from Accessibility, Health Care, Extended Home Care, Retirement residences, Nursing Homes and business and recreational opportunities for a senior population.

9. Quality of Life and Attachment to Community

Currently, a three-year study by Gallup and the John S. and James L. Knight Foundation is exploring people’s emotional attachment to their community – the factors that make people loyal to their community and passionate about it. Most recently (September 2009), their research in 26 American cities identified several important domains, but finds that “three main qualities bind people to place: social offerings such as entertainment venues and places to meet – the top factor in 21 of 26 communities, openness (how welcoming a place is) and the area’s aesthetics (its physical beauty and green spaces). Access to quality education – whether at the elementary, secondary or college level – was also an important factor. The top three qualities remained strong over two years of polling, unaffected by the national economic crisis.”

10. One Hamilton Corporate View

Longstanding Hamilton employer, ArcelorMittal Dofasco highlights a strong community as one of the keys to being able to attract and retain employees. While acknowledging that both the company and the community have gone through one of the toughest years ever, ArcelorMittal Dofasco recommitted itself to seven areas of community investment for 2010: United Way, Education, Healthcare, Arts, Sports and Recreation, Environment and Social Services. “We believe the best way to promote recovery and growth is to build

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the community’s capacity to respond to the challenges it faces,” says the company’s 2009 Report to the Community.  

Quality of Life Indicators and Local Planning Initiatives

Available Quality of Life Indicators

There are a number of organizations monitoring quality of life according to a variety of systems, with well-elaborated research components. Some of those indicator resources include:

The federal government, through Human Resources and Social Development Canada (HRSDC) tracks ten “Areas of Well-being” on its Indicators of Well-being in Canada website:

1. Work
2. Learning
3. Financial Security
4. Family Life
5. Housing
6. Social Participation
7. Leisure
8. Health
9. Security
10. Environment

Within each of the ten areas, indicators are grouped into three sections: status, life events and key influences. Much of the data comes from Statistics Canada and is available both nationally and provincially.

The Federation of Canadian Municipalities (FCM) monitors quality of life in 23 Canadian communities, including Hamilton, through a reporting system they began in 1996. Their quality of life indicators fall into ten domains, in addition to demographic information:

1. Affordable, Appropriate Housing
2. Civic Engagement

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13 For more details on the company’s Community Strength campaign, see www.communitystrength.ca
14 http://www4.hrsdc.gc.ca/h.4m.2@-eng.jsp
3. Community and Social Infrastructure
4. Education
5. Employment
6. Local Economy
7. Natural Environment
8. Personal & Community Health
9. Personal Financial Security
10. Personal Safety

Information is available for the City of Hamilton (rather than the CMA), mainly from Census data. It is supplemented by municipal surveys.

Hamilton’s Vision 2020 established indicators that are tracked. The current report card, available on the web, scores indicator progress in 2003, 2004 and 2008. The Vision 2020 indicators are grouped into the Vision 2020 themes:

- Local economy
- Agriculture and rural economy
- Natural areas and corridors
- Improving the quality of water resources
- Reducing and managing waste
- Consuming less energy
- Improving air quality
- Changing our mode of transportation
- Land use in the urban area
- Arts and heritage
- Personal health and well-being
- Safety and security
- Education
- Community well-being and capacity building

The City of Hamilton also currently tracks “Community Wellness Indicators” and publishes those measures on its website. The indicators, which were designed to

15 http://www.fcm.ca/english/View.asp?mp=1115&x=1043
16 www.myhamilton.ca/myhamilton/cityandgovernment/projectsinitiatives/V2020/
measure the effect of the economic downturn on the city, are organized into three categories: social, economic, other. Social indicators include measures like Ontario Works caseloads, childcare fee subsidy waitlist, social housing waitlist. Economic indicators track EI claimants, bankruptcies, building permits, housing starts and more. The other indicators category includes top news stories, public health measures, transit revenue etc. 17

Hamilton Council and staff have also recently committed to the “Social Determinants of Health” approach to public health services. This approach acknowledges the complex interaction of social, economic, environmental, biological, cultural and individual factors in determining the health status of individuals and populations. 18 The Ontario Public Health Standards (2008) place the social determinants of health in the following order:

- Income and social status
- Social support networks
- Education and literacy
- Employment/working conditions
- Social and physical environments
- Personal health practices and coping skills
- Healthy child development
- Biology and genetic endowment
- Health services
- Gender
- Culture
- Language

The multi-sector Hamilton Roundtable for Poverty Reduction (HRPR) has also established a set of indicators to track the community’s progress on reducing poverty. The domains the HRPR is tracking are demographic, income, economic, employment, housing, household impact, health, neighbourhood and environmental. 19 The indicators in each domain have been chosen through an extensive consultation and with help of an evaluation expert.

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17 www.myhamilton.ca/myhamilton/CityandGovernment/CityDepartments/CorporateServices/FinanceBudgetTaxes/CommunityWellness.htm
18 www.myhamilton.ca/NR/rdonlyres/B9A5AD7E-CB58-4BA3-8F5D-1F5D61A54233/0/Apr27BOH09008SocialDeterminantsofHealthPositionStatement.pdf
19 Hamilton Roundtable for Poverty Reduction, Proposed Core HRPR Indicators – Table – Revised – November 28, 2008
Under development, from the Department of Geography & Earth Sciences of McMaster University (Peter Kitchen and Allison Williams), is a QofL survey based in three different neighbourhoods in Hamilton. Scheduled to begin in September 2009 and be completed a year later, the study’s goals are to advance knowledge of neighbourhood QofL in Hamilton’s rapidly changing urban environment, and “to identify place specific interventions aimed at alleviating growing inequalities in health, income and QofL.”

Other cities have established quality of life tracking systems as well. For example, the City of Winnipeg approaches quality of life in five distinct parts: individual well-being, urban economy, urban environment, community assets, and community leadership and pride. A set of indicators is tracked within each.

**Vital Signs**

Through the national organization Community Foundations of Canada, community foundations in cities across the country produce a report-card-style annual report on the vitality of their communities. Indicators in ten or more domains are tracked each year and the results are graded by the community in terms of their priority for remediation. Toronto, Vancouver, Ottawa, Waterloo Region and a score of other communities now produce these reports, called Vital Signs. The Vital Signs indicator domains are: arts and culture, environment, belonging and leadership, gap between rich and poor, learning, getting around, getting started, health and wellness, safety, housing and work. The indicators used vary from year to year.

**Two Relevant City Planning Processes Underway**

The City of Hamilton is undertaking a municipal cultural planning project called the Our Community Culture Project (OCC). Municipal cultural planning (MCP) is broadly defined as a municipally-led process for identifying and leveraging a community’s cultural resources and integrating culture across all facets of local planning and decision-making. A municipal cultural planning approach creates a stronger leadership role for the municipality in terms of how it supports the creative economy and cultural development. This type of approach integrates culture into policies and plans across all departments; works to support and strengthen cross-sectoral partnerships; collaborates with business and community partners and builds the collective capacity across a wide range of cultural activities and organizations.

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20 Peter Kitchen and Allison Williams, Summary of Proposed Research, Tracking Neighbourhood Quality of Life in Hamilton, Ontario: Linking Research to Policy, , meeting handout August 7, 2009

21 “City of Winnipeg Quality of Life Indicators,” www.iisd.org/pdf/wpg.qoli.pdf
Phase 1 of the *Our Community Culture (OCC) Project* has successfully identified Hamilton’s unique cultural resources through an initial baseline mapping process. This component of the OCC Project has been an important first step in the municipal cultural planning process because it forms the foundation upon which the municipality begins to look at planning and decision making through a cultural lens. Along with the development of a mapping process, Phase 1 reviewed the City’s planning documents and identified over-arching themes with respect to the cultural life of Hamilton.

During the next phase of the OCC Project, Phase 2 will verify and augment baseline cultural resource mapping results and planning themes through a community and stakeholder engagement process. The resulting comprehensive collection of tangible and intangible resources will provide the necessary data and framework to facilitate the integration of culture into local planning and decision making through the development of a Cultural Policy and Plan.

The completion of Phase 2, and the development of a Cultural Policy and Plan for Hamilton, will transform the City’s understanding and approach to culture. It will put cultural planning at the centre of how the City plans for its future and position Hamilton to realize its full potential as a creative city. The OCC Project means that Hamilton joins other leading municipalities in Canada by developing municipal cultural plans as tools to support economic development, regeneration and community development.
Phase 1 - Completed Deliverables
- Established cross-departmental and cross-sectoral Project Steering Team (PST)

Cultural Mapping - What Are Our Assets?
- Established Cultural Mapping Working Group
- Completed baseline mapping and analyzed results
- Established ongoing cultural mapping system for Hamilton

Planning Context - What Are Our Opportunities?
- Completed statistical analysis of Hamilton
- Identified and analyzed existing City plans and strategies
- Identified opportunities to connect culture to the City’s planning context

Final Report
- Summarized Phase 1 findings
- Developed draft principles for culture
- Identified recommendations, considerations and resource requirements for proceeding to Phase 2

Phase 2 – Components & Deliverables

Start Up
- Establish Project Steering Team (cross-departmental and cross-sectoral)
- Establish a community engagement strategy & stakeholder consultation process to guide all components of Phase 2
- Establish a Cultural Resource Mapping Partnership to oversee and support ongoing management and development of the City’s cultural mapping capacities

A Vision of Culture
- Engage in community and stakeholder consultation to explore the cultural mapping findings, strategic themes and opportunities identified in Phase 1.
- Validate the cultural mapping findings from Phase 1
- Develop a vision for culture

City of Hamilton Cultural Mandate
- Develop a mandate to guide the City’s role in cultural development

Policies and Supporting Principles
- Develop a cultural policy to guide planning and decision-making

Concrete Strategies and Actions
- Develop strategies and actions to be implemented by the City in collaboration with its business and community partners

Operational Plans and Performance Measures
- Develop operational plans and performance measures to guide the implementation of strategies and actions

Culture Division Roles
- Identify the Culture Division’s prioritized core business areas and capacity needs
Approximately two years ago the Community Services Department in the City of Hamilton, convened a group of cross sector decision makers to begin to discuss the call for a new way to anticipate and respond to the human services requirements of our diverse population. The old way of planning for human services; sector by sector, was no longer meeting our requirements.

The Human Services Planning Initiative (HSPI) was established to strengthen integrated human services planning across diverse sectors using shared information with the goal of enhancing quality of life for all. It is commonly understood that without a well-planned and integrated physical infrastructure (roads, sewers, land usages etc.) a community cannot successfully function. Similarly, a strong social infrastructure comprised of human services (such as childcare, recreation, culture, affordable housing, learning opportunities, healthcare/public health, employment and income supports, community safety etc.) is critical to the quality of community life and contributes to economic competitiveness of our community.

The three-phased HSPI is community-driven and approaches planning for human services in a collaborative and integrated manner. The approach allows for the sharing of resources, responsibility and accountability to jointly develop a framework for human services planning in Hamilton that will achieve common goals and benefit all partners. This approach is based heavily on David Chrislip’s work on collaborative leadership which is used most effectively when the issue is complex, there are a wide range of stakeholder needs and the solutions are not obvious or easy.

In Phase I (2008) the initiative established vision, principles and scope. In Phase II (2009) the project established a convening group of leaders from community networks and initiatives; began gathering information; developed the planning framework and designed an approach to engage community partners. Phase III, (2010) will broaden the initiative to include a group of community stakeholders to create, implement and evaluate the plan.

The HSPI endeavours to achieve the following outcomes with the Human Services Plan:

- integrated planning across the human services system;
- higher quality of services for residents;
- enhanced co-ordination and integration of services across program areas;
- strategic investment by senior levels of government, non-profit and private sectors; and
- a shared vision for human services delivery across the city.
The initiative has produced a number of resources to inform planning activity in 2010, most notably ‘The Playbook: A Framework for Human Services Planning in Hamilton’. The Playbook sets a path forward to enhance integrated, collaborative human services planning in Hamilton and calls for Hamiltonians to plan from the same page with the same information and a shared vision. It is in essence; a how to guide to human service planning. Additionally a number of technical documents have been produced including: a demographic profile of our community, the Community Infrastructure Study; Ward profiles (produced in partnership with the Planning and Economic Development Department); a policy and plan scan and a Guide to Collaboratives and Planning Initiatives (created in partnership with the Hamilton Training Advisory Board)

Currently the HSPI is sponsored by JPC member Joe-Anne Priel and chaired by JPC member Paul Johnson.
JPC Quality of Life Framework

JPC Quality of Life Themes

A number of recurring themes arise from the JPC Quality of Life team’s numerous discussions:

- **The relationship between cultural/ recreational/ social/ environmental sectors and economic value**
  While these sectors are always seen as offering important attributes of quality of life – like arts and heritage activity, environmental quality, recreation, affordable housing and social services – the QoFL team’s strong view is that they are also economic engines that contribute economic value. It is important that, in addition to their intrinsic value to personal and community well-being, their value as economic drivers be recognized, nurtured and promoted.

- **Broad access to high quality of life**
  A thoughtful discussion of quality of life raises the question of equity: how do we extend Hamilton’s generally excellent quality of life to all Hamiltonians? Ensuring broad access to quality of life and prosperity is critical for a top-flight city.

- **Environmental sustainability**
  It is increasingly clear that sustainability and economic development must be linked and balanced for long-term prosperity, quality of life and to attract new residents. There are also clear economic opportunities in becoming leaders in green technology and sustainable lifestyle.

- **Vital downtown**
  Both economically and culturally, Hamilton’s downtown core is a key asset that must be preserved and promoted with investment in infrastructure, safety, greening etc. The Hamilton core, if maximized, will support and enhance Hamilton’s neighbourhoods and other downtowns (Dundas, Ancaster, etc.) that combine to create the city’s unique character.

- **Work/life balance**
  In our efforts to promote prosperity and focus on job creation/retention, we need to recognize the value of work/life balance and promote strategies that encourage that balance.

In trying to bring a JPC point of view to the quality of life discussion – that is, a point of view that integrates the myriad sectors and philosophies represented in the JPC – those themes, along with other quality of life factors, have been important.
While individuals may place a different emphasis on particular aspects of quality of life, most of us would agree that quality of life grows from both the physical and the social infrastructure of the community. For some Hamiltonians, the notion of quality of life brings up pictures of a long walk in Cootes Paradise, or a gallery crawl along James Street North. For others, quality of life stems from a living wage and access to affordable housing.

How we view quality of life priorities varies from person to person, but some fundamental components tend to enhance or hold back a whole community’s quality of life. Even in the various approaches outlined in previous sections, there is much commonality. That commonality is reflected in this framework.

The View from Outside

What do people ask about Hamilton’s quality of life, when they consider moving or creating jobs here? The specific data is not tracked by the City, but economic development staff summarize the top questions as:

- information about housing: prices in various neighbourhoods and how they compare to other cities
- schools: both for children (public system and private system) and as they relate to training for the prospective workforce
- community activities: recreation, arts, culture and programs for families
- transportation: getting to work
- diversity: cultural associations, places of worship and French language capacity
- crime: some questions about safety and crime rates, but this is a bigger concern for US investors

How Experiencing Hamilton Changes Perception: The CANMET Story

In 2008, when CANMET was talking to its staff about relocating its Materials Technology Laboratory from Ottawa to Hamilton, CANMET’s Moving and Community Adjustment Committee worked with the City, McMaster University and McMaster Innovation Park to organize a weekend in Hamilton to introduce CANMET staff to their new home. 70 employees and their families (120 people) came to Hamilton. They attended an interactive information fair on education, real estate, HR services (for spouses), City services etc. They were welcomed with a BBQ, a McMaster lunch, an afternoon bus tour and a banquet hosted by the City at the Art Gallery of Hamilton. The first-hand exposure to Hamilton changed their perception about the city and its quality of life. More than half the scientific and technical staff are relocating (many others are close to retirement). Overall, 37% of CANMET employees now want to relocate to Hamilton compared to 25% who were willing to leave Ottawa in a comparable Federal laboratory relocation elsewhere.
The View from Inside: Hamilton Calling

In April 2008, Hamilton’s Economic Development and Real Estate Division launched a program called Hamilton Calling. The division’s Business Development Officers meet with top employers in Hamilton and engage them in a 90-minute survey that covers everything from growth plans, to labour needs, to opinions about city services, processes, infrastructure and so on. In 2008, 256 companies were interviewed. By the end of 2009, over 400 more will have been surveyed. Although quality of life is not a specific focus of the survey, a number of questions touch on quality of life issues. While individual responses are confidential, this information is aggregated using a software package that is also in use across North America. The results of these surveys, once reported to Council, may be useful in informing the JPC strategies and in tracking progress.

A JPC Quality of Life Framework

Recognizing that quality of life is crucial to the well-being of individuals and communities, our focus on quality of life within the JPC context has two purposes:

1. to promote Hamilton’s quality of life as an attractor of jobs and investment
2. to strategize ways to improve the quality of life in Hamilton, both generally and as an engine of job creation and retention

With those two goals in mind, and integrating the various perspectives on QoL reviewed earlier, we have outlined a JPC quality of life framework for Hamilton with six components:

1. Liveable, Safe and Affordable
2. Unique Location and Natural Environment
3. World Class Health Care, Education and Lifelong Learning
4. Vibrant Culture and Recreation
5. A Diverse and Engaged Community
6. Economic Opportunity and Quality Employment

For each of these six components, the following section lays out:

- Hamilton’s assets and strengths, along with relevant figures
- a “however” statement setting out the JPC’s proposed future emphasis
- goals and possible strategies for the JPC to move the component forward
- some indicators that might track those quality of life components
This document will be presented to the JPC in January 2010.

The next step will be for the JPC Quality of Life group to prioritize these potential strategies, build an action plan and select the progress indicators they want to benchmark and track over time.

The Quality of Life Agenda

Liveable, Safe and Affordable

Hamilton is a large city that is still affordable, liveable and safe. It has distinct neighbourhoods, good transit, unique historic buildings and a relaxed ambience that offers a wide variety of cultural, recreational and leisure opportunities. Its neighbourhoods offer quality housing at affordable prices, and walkability to local shopping areas, restaurants, parks, schools, recreation, natural areas, Lake Ontario and other amenities.

Hamilton’s Strengths

Hamilton is a city of many communities and several “downtowns” that anchor vibrant local neighbourhoods. The variety of housing options are almost endless – from modern condominiums in the central core, to original brownstones just steps away from the Bay, to town homes and single family homes in smaller communities like Dundas, Ancaster, Waterdown and Stoney Creek, to rural living in the rolling countryside of Flamborough and Glanbrook. Newcomers to Hamilton will be surprised not only at the variety and quality of housing available, but also its affordability.

Restaurants and shopping abound in each of Hamilton’s downtown areas, supported by active Business Improvement Areas (BIAs) and committed residents. Parks, schools, recreation areas and other amenities are spread throughout the Greater Hamilton area, often within easy walking distance of residential neighbourhoods. There is good accessibility for people with disabilities. The central core offers amenities to the whole region: Copps Coliseum for performances and professional sports, the Art Gallery of Hamilton, the Convention Centre, Bayfront Park, Farmers’ Market etc. The newly-relocated Ottawa Street Farmers’ Market is a popular neighbourhood addition to the downtown market.

Public transit (HSR), especially within the Hamilton core, is affordable and well used. Plans are underway for rapid transit improvements. Access to and from Hamilton is easy by car and continuously improving by bus and train (GO and VIA).
Professional police, fire and other emergency services ensure that public safety is comparable to other Canadian cities of Hamilton's size.

At a population of 505,000, Hamilton offers the attractions of a large city while remaining liveable, affordable and safe.

**Hamilton’s Weaknesses**

Neighbourhoods are generators of quality of life and, often, catalysts for economic development. But not all our neighbourhoods, especially in the Hamilton core, have access to basic amenities like grocery stores. Some communities are isolated by lack of public transit. Not all business parks have appropriate public transit for potential employees. For broad quality of life and prosperity, all communities within Hamilton must have the tools to thrive. Every community, every downtown, every neighbourhood – and every resident – is important to our city’s overall quality of life.

**Goal**

To improve Hamilton’s quality of life and prosperity by promoting strong, increasingly equitable neighbourhoods that have a mix of housing (including live/work spaces and affordable housing), a variety of socioeconomic levels, local employment opportunities, services, appropriate transit and all basic amenities like grocery stores.

**Deliverables**

- engage communities and neighbourhoods in expressing their needs and participating in local planning
- promote live/work spaces across Hamilton and try to attract jobs to all areas of the city where people live
- champion the downtown renewal plan for Hamilton’s core
- encourage the HSR, residents and employers to work together to ensure that transit matches employee and potential employee needs (locations, shifts, volume, financial viability etc.) in business/industrial areas (including the airport) and resident needs in all neighbourhoods

**Potential Indicators**

- vitality of commercial areas in local Hamilton neighbourhoods
- available work/live space in Hamilton neighbourhoods
- investment in downtown core – commercial and residential
- growth of investment in downtown public spaces
- purchasing power of average Hamiltonian (e.g. average income vs. average house price)
- Hamilton’s affordability rating
- rental housing unit starts
- transit ridership per capita (in the downtown and other routes)
- average commuting time
- Crime Severity Index

**Quick Facts:**
- The financial Times publication fDi Magazine ranked Hamilton #3 in its “Large Cities: Top Five Quality of Life” ranking in April 2009
- The Real Estate Investment Network named Hamilton the second-best place in Ontario to buy a house or invest in commercial property (October 2009)
- Average house price: $274,442 (2008 MPAC)
- Average price point in 2008: $106,000 lower than comparable homes in Toronto CMA (CMHC)
- Average rents in Q2 of 2009: bachelor apartment $522, 2-bedroom $833; 3-bedroom $1034 (CMHC)
- Value of residential building permits: $395 million in 2007; $246.4 million for first 11 months of 2009
- Crime Severity Index: Hamilton CMA’s over all score of 88.7 is lower than Winnipeg, Edmonton, Vancouver, Victoria and Montreal. However, many other cities in our population category have scored better than Hamilton. (StatsCan Police Resources Canada 2009)
- Hamilton’s main urban core is one of only two in Canada to gain the highest insurance classification available from Fire Underwriters for commercial and residential properties

**Unique Location and Natural Environment**

As a Great Lakes City, Hamilton’s location is both an economic generator (port, airport, transportation hub, mega-region location, centre of a large rural agricultural base, proximity to USA) and also a natural setting second to none for recreation and outdoor activity (waterfront, escarpment, conservation lands). A wealth of natural walking, hiking and biking trails are easy to access from many neighbourhoods. Environmental protection and sustainability are constantly improving.
Hamilton’s Strengths

Located on Lake Ontario, and positioned in the centre of a mega-region of over 120 million population, Hamilton has all the advantages of a great business location: easy access to Canadian and American markets and suppliers, and transportation essentials like a working port, airport, rail and highway system. These are enormous assets for an industrial and post-industrial city alike.

The City of Hamilton, which includes both urban and rural communities, also sits at the centre of a rich agricultural region (now protected by provincial greenbelt legislation and local policies) that gives Hamiltonians easy, sustainable access to fresh produce, tender fruits and wines. Vibrant farmers’ markets, including Canada’s largest indoor market in the Hamilton downtown core and a burgeoning one on Ottawa Street, bring those crops to city dwellers regularly. Urban community gardens are also a growing trend. Those committed to the idea of the 100-mile diet can eat very well!

For quality of life, Hamilton’s location is second-to-none. Hamilton is a Great Lakes City on Lake Ontario, with its waterfront recreation opportunities and tremendous views. We straddle the Niagara Escarpment, a United Nations World Biosphere. Through foresight and careful stewardship, we enjoy 10,000 acres of environmentally significant protected land, and 1500 kilometres of trails, countless parks and natural areas. Our outstanding trail system has attracted world-class biking competitions as well as thousands of recreational riders.

Hamilton’s natural areas foster wildlife and welcome Hamilton residents and visitors. We are on a bird migration route that attracts not only thousands of birds but flocks of bird-watchers, too. The natural environment is all around us, outdoor activities abound, and access is quick from many neighbourhoods.

Hamilton’s Weakness

Pressure on the environment, as in any big city, is constant, and Hamilton has past problems to deal with as well. If we want full benefit from our outstanding natural advantages and the quality of life they afford, we need to both look ahead through a green lens and continue remediation of old problems.

Goal

To improve Hamilton’s quality of life and prosperity by leveraging its unique setting, character and natural assets for a sustainable present and future.
Deliverables

- promote the excellence of what we have – tell the story of our natural assets and their impact on quality of life
- promote access to Hamilton Harbour, the Niagara Escarpment and conservation areas
- help maintain the community’s focus on crucial environmental concerns
- ensure that appropriate financial investments are being made in air and water quality
- support the completion of the Hamilton Harbour Remedial Action Plan
- support improvements in public transit
- promote green technology development and environmental responsibility; accelerate the use of alternative energy sources by consumers, by industry, and for civic projects like transportation
- preserve and support Hamilton’s unique look with design guidelines
- promote re-adaptive use of heritage/industrial buildings
- support and promote our local agricultural economy and local production (e.g. highlight our area’s unique access to local fresh produce, encourage restaurants and large institutions to source food locally)
- support the City’s developing Food Security Policy to ensure affordable safe food for all residents

Potential Indicators

- number of hectares of conservation lands
- number of trees planted annually
- investment in natural areas
- number of kms of trails; kms of waterfront trails
- Compliance with Waste Diversion Target of 65% (Vision 2020)
- Average Residential Electricity Consumption (Vision 2020)
- user numbers for assets like RBG, Bruce Trail etc.
- number of designated heritage buildings
- number of LEED certified project
- number of agricultural acres lost/added per year
Quick Facts:
- Hamilton is located within a 500-mile radius of over 120 million people
- Hamilton has 2,662 acres of parkland in 310 locations; 1,356 acres of natural areas at 32 locations; 1,500 kilometres of trails
- Length of Niagara Escarpment in Hamilton: approximately 50 kms
- have more than 100 waterfalls
- Hamilton Conservation Authority manages over 10,000 acres of environmentally significant land
- The Royal Botanical Gardens (RBG) is recognized around the world for its unique collection, research, exhibition and interpretation of the plant world. The RBG operates five garden areas, four nature sanctuaries and is steward of over 900 hectares of ecologically sensitive natural land
- Hamilton Farmer’s Market is Canada’s largest indoor market: open year-round, with 45,000 s.f. of retail space, 172 stalls, 200 employees and 8,000 shoppers per week
- Hamilton’s Eat Local map identifies more than 60 local producers of food

World Class Health Care, Education and Lifelong Learning

Hamilton is home to an outstanding cluster of world-renowned teaching hospitals, universities, a community college and other institutions. It is a leader in early childhood learning and provides a rich continuum from early learning through elementary and secondary schools to post-secondary and continuing education. These assets ensure state of the art health and education services for the region’s population, diverse lifelong learning opportunities and a wealth of employment opportunities for new and established Hamiltonians.

Hamilton’s Strengths

Hamilton’s world-class health care institutions – medical school, teaching hospitals, specialized clinics and ancillary health organizations – are a huge asset for this community. They guarantee Hamiltonians top quality treatment and care right in our own city. Research builds knowledge every day and attracts skilled professionals from all over the globe. The health sector is a huge employer, accounting for about 12,500 jobs in Hamilton.

Education, from early learning through post-graduate, is also one of Hamilton’s greatest assets. Hamilton’s Best Start Network for early learning is a provincial model. Our public and Catholic school boards, our two universities and one community college, and our private institutions with a variety of specialties are outstanding.
Hundreds of organizations offer courses and hands-on experience in all fields of interest (like the highly-regarded Dundas Valley School of Art, Redeemer University College, the Royal Botanical Gardens and others). The Hamilton Public Library system, well-known for its innovation and community engagement, provides a comprehensive array of services and learning opportunities for Hamiltonians of all ages. At any age and stage of life, there are myriad opportunities for lifelong learning.

Beyond their service value, our world-class knowledge sectors contribute to the local economy in three additional ways: as an economic engine bringing jobs and investment, as a generator of innovation and commercialization of R & D and as a supplier of skilled labour to the job market.

**Hamilton’s Weaknesses**

There are still gains to be made in Hamilton’s population health. We know, for example, that low income has a negative impact on health and Hamilton’s poverty rate remains unacceptably high. Activity levels could be better and obesity (with its attendant health risks) is a growing problem for Hamiltonians of all ages. In early learning, we have made real gains with the Best Start Network and the multiplier effect of investing in early childhood is well documented. But this is still a fragile and fragmented system that needs support to protect those gains. Literacy remains an issue for too many Hamiltonians. Our high school completion rate has fallen behind other jurisdictions, and despite being home to outstanding post-secondary institutions, Hamilton’s working age population lags behind the provincial rate in attaining university certificates, diplomas or degrees. College and trades rates are more favourable. Additionally, while we train thousands of post-secondary students, we don’t retain them in our community.

**Goal**

To improve Hamilton’s quality of life and prosperity by encouraging leading institutions (like hospitals, schools, college and universities) to engage purposefully with local communities to improve the health, skills, capabilities and employability of local citizens at all ages and stages of life.

**Deliverables**

- promote health conditions of local population at the community level
- encourage institutions and businesses to partner with local community hubs to enrich the education and recreation programming available in all communities (like Mohawk College’s investment in the Robert Land hub in Keith Neighbourhood)
- lend support to the offer of hub funding from the Ministry of Education
encourage new post-secondary institutions to locate in Hamilton core

support efforts to increase high school completion rates and university degree attainment rates. (One example is the collaborative “Drive for 85 in 5” commitment to the Keith Neighbourhood hub, to push their graduation rate to 85% in the next 5 years.)

promote the idea of the anchor institution role and its potential impact on local quality of life

support collaborative efforts that link education and employment (such as the Industry Education Council and Hamilton Training Advisory Board)

encourage industry investment in workforce training, R & D and community partnerships

promote volunteerism to enrich the education system

bridge the generation gap between experienced retirees and early learning centres

Potential Indicators

- Hamilton’s poverty rate
- rate of obesity of Hamiltonians age 18 years or over: In 2005 Hamilton’s rate was higher than the Ontario average (18.2% versus 15.1%)\(^{22}\)
- number of early learning and licensed child care spaces available (Best Start)
- school readiness/EDI (HRPR)
- literacy rate
- high school graduation rate
- participation rate in post-secondary education for 15-24 year-olds
- Composite Learning Index that measures lifelong learning (Vital Signs)

\(^{22}\) 2005 Canadian Community Health Survey data reported in the City of Hamilton Public Health Services “Community Health Status Report,” September 2007
Quick Facts

- Hamilton is home to two universities and one community college
- Hamilton’s health care sector employs more than 10,000 and serves a regional population of 2.2 million
- Hamilton’s education sector employs 12,500 education professionals; educates more than 100,000 students annually
- Hamilton Best Start Network empowers communities to offer comprehensive, flexible, integrated and seamless services for all children and parents at familiar neighbourhood locations
- McMaster University sponsored research income: $345 million, first in Canada in research intensity at $308,000 per faculty member
- McMaster University is one of only four Canadian schools to earn a spot in the world’s top 100 universities as graded by Shanghai's Jiao Tong University (2008); it is one of 11 Canadian universities in the top 200 on QS World University Rankings 2009
- Hamilton Public Library collection: over 1.2 million items, 24 locations, free internet access, special services for new Canadians, literacy programs and lifelong learning programs

Vibrant Culture and Recreation

Hamilton’s vibrant cultural assets and abundant recreation opportunities contribute to community building, pride in diversity, healthy lifestyle, life long learning, work/life balance and other key quality of life factors. In addition, creative industries are growing faster than the economy as a whole and will generate many of the new jobs of the future. In Hamilton, cultural industries have become the vanguard of a revitalization of the downtown core. New galleries and studios have joined a variety of outstanding well-established institutions and emerging cultural organizations serving the Hamilton area. Hamilton has a rich calendar of celebrations, heritage and other community-wide events. Sports and recreation opportunities (indoor and outdoor) are also virtually limitless.

Hamilton’s Strengths

Hamilton is home to outstanding performing arts venues like Hamilton Place (a 17,000-seat arena), the world-class Art Gallery of Hamilton, our philharmonic orchestra, opera, several theatre companies and myriad other performing arts organizations. We have a burgeoning community of visual artists, musicians, outstanding studio space managed by the Imperial Cotton Centre for the Arts and longstanding arts training resources like the Dundas Valley School of Art. Specialties like digital media, film, design and others also contribute to Hamilton’s
creative economy. Artists are fully engaged in the community, including with children in cutting-edge programs like Arts at the Centre and other initiatives that integrate artistic expression and early learning. The developing Creative Catalyst will showcase Hamilton’s creative industry on a local and international scale.

The city has many excellent museums, the Marine Discovery Centre at Pier 8, the Canadian Football Hall of Fame, Dundurn National Historic Site (one of five national historic sites open to the public), annual festivals and events and many other attractions.

Hamilton is also a city with a passion for sport. We are home to North America’s oldest professional football team (the Hamilton Tiger-Cats) and North America’s oldest road race (the Around the Bay). We are biannual host of the longest-running international multi-sport event in North America (the CANUSA Games). These and many other events – including Hamilton’s participation in the upcoming 2015 Pan Am Games – contribute to Hamilton’s sport tourism industry that generates more than $2 billion per year.

Community recreation centres, senior centres, pools and arenas dot the city for use by local residents. Parks and hiking trails (described earlier) are readily available. Hamilton is blessed with strong assets in culture and recreation.

Hamilton’s Weakness

Despite these abundant assets in culture and recreation, Hamilton could do more to integrate the arts into daily life and learning, and do more to promote recreation and fitness. We have an opportunity to participate more fully with our local culture and recreation assets and make sure they are accessible to all Hamiltonians.

Goal

To improve Hamilton’s quality of life and prosperity by promoting access to culture and recreation for Hamiltonians at all socioeconomic strata and at all ages.

Deliverables

- reduce barriers to access (financial, geographic and cultural) for programs aimed at all groups
- facilitate access to high quality culture and recreation programs for children in all neighbourhoods – working to enhance programming through neighbourhood hubs and local schools is one approach
o ensure that Hamilton is taking full advantage of province-wide programs (like ArtsVest, the Royal Conservatory’s Learning Through the Arts and others)

o endorse the Parks and Recreation Ontario - Access Task Force policy framework which brings together community recreation providers (including the City and others) to ensure that all children and youth have affordable access to healthy recreation and arts opportunities

o catalogue and publicize the variety of events and programs available in Hamilton, highlighting those that are free or low cost (like the AGH free First Fridays)

o promote Hamilton’s culture offerings both inside and outside the Hamilton market

o support programs that celebrate all cultural communities in Hamilton

o support mentorship and other strategies to strengthen the cultural economy (such as the Creative Catalyst project)

o support a broad strategy for communicating culture and recreation information

o support EcDev strategies to attract specific creative industry firms to Hamilton

o encourage City Council to endorse a cultural vision for Hamilton and integrate cultural planning into City planning processes

o promote healthy neighbourhoods

Potential Indicators

- percentage of labour force employed in culture industries (Hamilton ranked 8th out of 10 largest CMAs in the 2001 HCCI report
- Hamilton Area Salary Survey conducted by PartnerFirm/LCM Associates/Hamilton Chamber of Commerce
- growth in support rating for users and non-users of cultural facilities and programs
- Martin Prosperity Institute’s Bohemian Index
- enrolment rates in creative industry programs at Mohawk, McMaster, Redeemer, Hamilton Conservatory for the Arts and Dundas Valley School of Art (DVSA)
- growth of key programs/events such as Art Bus, Art Walk, Southwest Studio Tour, DVSA annual show/sale, Art Gallery of Hamilton sale, Timeraiser and Fringe Festival
- completion and implementation of the City of Hamilton Cultural Plan
- Ontario Municipal Benchmarking Initiative
• participation rates for recreation facilities and informal leagues

Quick Facts

- Hamilton’s $250-million creative industry\textsuperscript{23} employs more than 8,000 people\textsuperscript{24}
- 78% of people employed in our creative industries are local residents\textsuperscript{25}
- There were 38% more artists and 22% more workers in the overall labour force in 2006 than in 1991, indicating that the art sector is growing faster than the labour force generally
- Hamilton has more than 2,000 cultural resources, including creative cultural industries, community cultural organizations, natural heritage resources, festivals etc.\textsuperscript{26}
- There are more than 130 live music venues in Hamilton
- Hamilton has five national historic sites and a variety of excellent museums
- Art Gallery of Hamilton’s $160 million collection is considered one of Canada’s finest
- 4.1% of Hamilton business establishments are creative cultural industries, compared to the provincial average of 5%\textsuperscript{27}
- Hamilton’s City-owned recreation facilities include 20 arenas providing 22 ice pads, 27 indoor and outdoor pools, 16 recreation centres, 28 community halls and four senior centres
- In addition, scores of other volunteer and privately-run facilities and recreation leagues offer recreation opportunities across the City
- Hamilton’s vast green spaces (see also Section 4.2) offer recreation opportunities in thousands of hectares of Hamilton Conservation Authority and City of Hamilton natural areas

A Diverse and Engaged Community

Hamilton is one of Canada’s most multi-cultural cities and a hub for new Canadians. Cultural diversity, together with all the other differences that make each of us uniquely who we are, creates an urban environment that reflects human diversity in all its richness. Civic engagement in volunteering, local politics

\textsuperscript{23} HCCI Study, Phase 1
\textsuperscript{24} Statistics Canada, 2006 data
\textsuperscript{25} HCCI Study, Phase 1
\textsuperscript{26} Cultural Resource Framework, AuthentiCity. Based on Statistics Canada categories and additional local data.
\textsuperscript{27} City of Hamilton Culture Division, cultural mapping and business pattern data
and neighbourhood events is a Hamilton hallmark. A commitment to youth engagement is a developing priority.

**Hamilton’s Strengths**

Hamilton is becoming more and more culturally diverse as it receives immigrants from more and more countries. About one quarter of our population was born outside Canada, now making Hamilton third (behind Vancouver and Toronto) in proportion of foreign-born population. Connecting newcomers to their neighbourhoods and community builds social cohesion and fosters citizen engagement. Settlement of immigrants (including proportionally more refugees than elsewhere) has become top of mind for Hamilton, with the establishment of the Hamilton Immigration Partnership Council. Hamilton’s Centre for Civic Inclusion is also a strong asset. And, one of the JPC’s other six pillars is Immigration, in addition to this focus under Quality of Life.

But diversity is more than cultural difference. It encompasses all the differences that shape our attitudes, behaviour and expectations – all the characteristics (like gender, age, socioeconomic status, race, Aboriginal identity, ability, faith, sexual orientation etc.) that make us who we are. A broad approach to diversity recognizes and celebrates all these differences and aims to include everyone in civic life.

Traditionally, Hamiltonians have been an engaged citizenry, taking pride in their sports teams, participating in local government and lending their support in time and talent to hundreds of local voluntary agencies. Hamilton still has one of the highest rates of volunteerism in Canada. We are modeling a new kind of collaborative community leadership through the Hamilton Roundtable for Poverty Reduction, the JPC and other multi-sector tables. Through groups like Youth Engagement and Action Hamilton, the issues related to youth engagement and civic leadership are also being given community-wide attention.

**Hamilton’s Weaknesses**

As our society changes, inclusion becomes more challenging and genuine participation becomes more critical – both for immigrant retention and for social cohesion. Although Canada attracts immigrants, we are not as good at keeping them. A Statistics Canada study found that 40% of skilled workers and business class immigrants left Canada within ten years. Recent figures also show that despite their skills, Hamilton’s immigrants have higher unemployment than other Hamiltonians, and are more likely to live in poverty. Given that Canada’s net labour force growth will depend entirely on immigrants by 2011, it is crucial that

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we create a truly welcoming Hamilton where new Canadians can prosper and will choose to stay.

And if the full gamut of diversity, lifestyle choices and opportunities for civic engagement are particularly critical attractors for young people; Hamilton needs to continue to improve its openness, equity and inclusion – and promote our successes. We need to strengthen the valuing of diversity that both keeps our own young people in Hamilton and attracts youth from elsewhere.

**Goal**

To improve Hamilton’s quality of life and prosperity by creating a welcoming, accepting, equitable and inclusive community that values diversity of all kinds and that promotes the engagement of every Hamiltonian in community life.

**Deliverables**

- make becoming a welcoming community a priority in all JPC member organizations
- learn about the need for immigration and be bold in our efforts to attract new citizens
- coordinate with, and support the strategies of the JPC Immigration group and Hamilton’s Local Immigration Partnership Council
- jointly publicize programs for new Canadians
- increase our commitment to language training and other skills for recent immigrants and refugees
- join in community efforts to streamline the credential recognition process for foreign-trained professionals
- acknowledge the role Hamilton’s cultural communities play in the settlement process and support their efforts with resources
- support community efforts toward gender equity
- promote efforts to accommodate participation of people with disabilities in the workforce
- continue to promote Aboriginal stay-in-school initiatives
- promote efforts to give young people a genuine voice in Hamilton’s decision-making in all sectors
- review the Play Works recommendations rating Hamilton on youth-friendly criteria and work toward increasing our level from bronze to silver, gold, and platinum
- promote voter turnout generally, and in specific segments of the community (e.g. youth, cultural communities)
Potential Indicators:

- rise in immigration to Hamilton
- increase in immigrant retention
- average income of immigrants
- poverty rate among immigrants
- youth employment rate
- levels of poverty among women and children
- volunteer participation rate

Quick Facts

- Immigration accounts for 82% of Hamilton’s labour force growth (HTAB)
- 24% of Hamiltonians are foreign-born
- The majority of immigrants to Hamilton are of prime working age
- 80% of immigrants have become Canadian citizens
- Visible minorities grew from 10.9% in 2001 to 13.6% in 2006 in Hamilton (a 20% increase)
- Hamilton’s population growth is slowing
- Hamilton has proportionally more lone-parent families than does Ontario or Canada as a whole. Of those, 83% are headed by women
- Aboriginal peoples comprise between 1.5% and 3% of Hamilton’s population. It is a faster growing segment and a much younger population than Hamilton’s overall population

Economic Opportunity and Quality Employment

By building on its traditional strengths, fostering emerging economic clusters and promoting innovation, Hamilton is creating sustainable economic growth that maximizes investment opportunities and provides good quality employment in the region.

29 Sarah Wayland, JPC Immigration paper, November 2009
30 ibid
31 ibid
32 ibid
33 Hamilton’s Diversity Scan, Sarah Wayland, Hamilton Community Foundation, September 2008
34 ibid
35 ibid
Hamilton’s Strengths

Like many communities with an industrial based economy, Hamilton is evolving with significant structural and varied changes in its economy. Older sectors are becoming more technologically advanced and new sectors are emerging. To complement this change, employers are creating jobs for persons with post secondary qualifications and experience. The positive, adaptable labour force renewal is enhanced by the presence of globally recognized world class educational institutions such as McMaster University, Mohawk College, Redeemer University College and others. Offerings include essential skills, a wide variety of apprenticeships, co-ops and many degree programs. As a result, our culturally diverse workforce has acquired essential skills, and entry and senior level abilities applicable across various sectors of the local economy. With the strong presence of small-to medium-sized enterprises, our Hamilton workforce offers skill sets second to none, from entry level to senior management to self-employed business owner.

To complement the changing economic landscape, local resources and programs offered by the City of Hamilton, the Hamilton Training Advisory Board, various community collaboratives, Hamilton school boards, Ontario Ministries – Economic Development and Trade, Training Colleges and Universities, Community and Social Services and Service Canada (Human Resources Skills Development Canada) – ensure the opportunity for our workforce to acquire skills to compete in a changing business environment and engage in life-long learning.36

Hamilton’s Weakness

If Hamilton is to seize the opportunities of the new economy, (also described as the creative economy) attract young singles and families, become a destination of choice for immigrants and respond to the impact of looming retirements, we need workplaces that are attuned to different cultural and generational needs, and sensitive to new attitudes to work/life balance. We need to be creating a continuum of high quality jobs.

Goal

To improve Hamilton’s quality of life and prosperity by attracting and supporting employers who provide employment conditions that promote quality of life.

36 Thanks to the City of Hamilton Economic Development and Real Estate Division for this description of strengths and assets.
These might include leading edge employment practices like:

- Family-friendly practices (hiring local, flexible schedules, compressed work weeks, job-sharing, on-site childcare etc.)
- meaningful work and opportunities to contribute to the community
- practices that make a better work/life balance possible (e.g. time off for volunteering)
- mentorship opportunities for new Canadians
- workplace training opportunities
- opportunities for people with disabilities to participate in the workforce

**Deliverables**

- explore the implications of a living wage for Hamilton
- document and publicize the success stories of employers with leading edge employment practices
- promote succession planning with employers and community leaders
- continue support to collaborative planning tables like the Jobs Prosperity Collaborative, Hamilton Roundtable for Poverty Reduction, Local Immigration Partnership Council and the Human Services Planning Initiative

**Potential Indicators**

- job growth
- Hamilton’s unemployment rate, compared to Ontario average
- sales force indicators like expansions, retention, jobs, investment and inquiries (Hamilton Calling)
- building permit values
- proportion of Ontario’s creativity-oriented occupations in Hamilton (5% in 2009 Martin Prosperity Institute Report)
- rate of population achieving post-secondary education
- attraction and retention of immigrants in the workforce
- average employment income
- number of employers offering employee benefit plans
- number of people with disabilities in the workforce (HTAB)
- Groups with the highest rates of poverty in Hamilton: currently lone parent families (56%); recent immigrants (50%); aboriginal persons (37%), visible
minority groups (34%), people with disabilities (29%); children age 0 to 14 (24%)\textsuperscript{37}

Quick Facts:

- **Site Selection Magazine** ranked Hamilton #7 among Canadian Metro areas for new corporate facility projects from June 2008 - May 2009 (Conway Data New Plant Database) \textsuperscript{38}
- Hamilton ranked # 7 on the best cities in Canada in which to do business list (Canadian Business magazine, September 2008)
- 87% of Hamilton businesses employ fewer than 20 people (HTAB)
- Ontario has the strongest culture of long work hours in Canada, according to recent research\textsuperscript{39}
- The proportion of part-time jobs in Hamilton has increased dramatically (HTAB)
- Entrepreneurship is on the rise (HTAB)

Next Steps

The Jobs Prosperity Collaborative’s white paper on Quality of Life (QoFL) has formed the foundation for this QoFL component of Hamilton’s Economic Development Strategy. The JPC, and in particular their Quality of Life Sub-committee, in the spring of 2010 will commence the formulation of an action plan to implement the recommendations and achieve the deliverables contained in this component. This action plan will be led by the JPC but will be the responsibility of the community as a whole.

City of Hamilton’s Contribution to the Quality of Life Agenda

With respect to the JPC Plan of Action, the City of Hamilton will maximize its efforts to ensure alignment with the JPC plan and inclusion of these QoL initiatives where possible in annual work plans. Many of the deliverables that have been identified in this component are already being addressed by Council and City Departments. The following table highlights just some of the work on the JPC Quality of Life Agenda currently led by the City:

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\textsuperscript{37} 2001 Census figures, cited in Hamilton’s Diversity Scan 2008

\textsuperscript{38} http://siteselection.com/features/2009/sep/Canada/

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<th>Quality of Life Agenda</th>
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CS – Community Services; PED – Planning & Economic Development; PW – Public Works; PH – Public Health;
Our Foundation

Workforce Development

We must adopt an attraction strategy to bring new immigrants to our city as well as a retention policy to keep our existing youth here. Not only do our youth and newcomers offer a supply of highly skilled, well educated labour, but they also bring new business ventures and economic and social opportunities.

Hussein A. Hamdani, M.A. LL.B
Partner Simpson Wigle Law LLP
WORKFORCE DEVELOPMENT

Introduction

The goal of the Workforce Development component of the Economic Development Strategy is to present a plan of action that will ensure that Hamilton has a workforce with the right skills and education to support the attraction and retention of businesses in our community, and the City of Hamilton's Economic Development Strategy.

As our local economy develops and shifts over time, the ongoing creation of new jobs and job categories with different skill requirements and the obsolescence of existing jobs and job categories underlie the constant demand for workforce education and skill renewal. Since the education and skills required for newly created jobs; and the skills possessed by local workers available in the labour market do not necessarily align, attention must be paid and resources mobilized to prepare workers for the new jobs in our community. This is the essence of workforce development. The challenge is preparing the right mix of workers for new jobs at the right time and to ensure that employers remain competitive in the process.

Hamilton's economy has experienced some significant shifts over the past two decades making the development of a strategic labour market plan imperative for our community. Consider the following:

- Structural changes in Hamilton's economy are a continuing trend and have resulted in significant job loss in our community. Jobs in the primary metals industries have been disappearing for more than two decades. The recent global economic downturn has exacerbated this already challenging situation with the job loss in other manufacturing industries.

- Hamilton's economy is diversifying. Similar to other communities across Canada, we have seen significant growth in service sector employment. Sectors such as education services; healthcare and social services; finance; insurance and real estate; transportation and storage and retail and wholesale trade show significant job growth. There are new opportunities opening in the advanced manufacturing sector and the construction sector in Hamilton continues to be robust.

- The diversification of employment in Hamilton has created a demand for new skills sets and higher education. It is estimated that over 70% of future jobs will require some post-secondary education and only 6% of jobs will need less than a high school diploma. Already job postings show a demand for higher skills by employers in Hamilton. Over the past
number of years an ever-shrinking manufacturing sector in Hamilton has displaced a significant number of workers. Many of these workers do not have the skills and/or educational attainment that are required in our local labour market. Furthermore, their background and experience are not aligned with the sectors that are experiencing acute shortages such as healthcare.

- Another concern in Hamilton is slowing population growth. The 2006 census information shows that Hamilton’s population had increased by only 2.9% from 2001 to 2006. This compares with a 4.8% growth rate between 1996 and 2001. To ensure sustained economic growth we need population growth to supply workforce needs in the future.

- The linkages between slow population growth and increased skill demands by employers coupled with an aging workforce has produced a situation in which skills shortages are expected to become a significant challenge for employers in some sectors. This challenge has been postponed by the recent economic downturn, but it may rise to the forefront during economic recovery.

The following sections outline key labour market highlights and an overview of the planning process to build a workforce development strategy for Hamilton:

- Hamilton’s labour market
- Hamilton’s workforce development capacity
- Related current labour market planning initiatives
- Hamilton’s labour market planning process

AN OVERVIEW OF HAMILTON’S LABOUR MARKET

The following provides highlights from Charting Hamilton’s Labour Market: Past, Present and Future prepared by Tom McCormack from the Centre for Spatial Economics. This report completed in January 2010 provides an evidence-based foundation that will assist labour market planning and decision-making. Access to the full report is available at www.htab.ca.

Historical Review

Despite the recent economic downturn, Hamilton faced a much more difficult adjustment during the recession of the early 1990s.
• Employment in the Hamilton Census Metropolitan Area (CMA\(^1\)) reached 327,000 in 1989 just prior to the recession of the early 1990s. It then fell steadily for three consecutive years, bottoming out at 284,000 in 1993 and resulting in a cumulative four-year loss of 43,000 jobs, a decline of 13%.

• The unemployment rate increased from 5.1% in 1989 to 12% in 1993.

• Between 1993 and 2004, employment on an annual average basis grew steadily in the CMA, increasing from 284,000 in 1993 to 372,000 in 2004.

• The data suggest the CMA’s employment has held steady at that level since 2004. Total employment in the CMA for all of 2009 came in at 373,000, right where it has hovered since 2004, and – despite the severity of the recession province-wide – down only slightly from 375,000 in 2008.

• As a result the unemployment rate in the area during this recession increased much less than it did in the early 90s, from a recent low of 5.5% in 2005 to 8.4% for all of 2009.

Traditionally manufacturing has been an important economic sector for Hamilton but has suffered a significant decline in employment over the past twenty years.

• Employment in primary metals manufacturing – mostly steel in the Hamilton area – declined steadily from 1989 through to 2008. Over that period, the number employed in primary metals fell from 34,000 in 1989 to 10,000 in 2008 (or by 24,000).

• Primary metals employment fell from a pre-recession peak level of 34,000 in 1989 to just 20,000 in 1993, a loss of 14,000. That decline accounted for one-third of all the job losses occurring in the CMA over that period. Recalling that total employment fell by 43,000 between 1989 and 1993. The major restructuring of the steel industry over that period was the reason the recession of the early 1990s was so devastating for the Hamilton area.

• Employment in primary metals slid further between 1993 and 1997 and then hovered at or near 15,000 through the period from 1997 to 2004. Between 2004 and 2008 it fell once again from 17,000 to 10,000 (or by 7,000). It likely fell a bit more in 2009. That decline – which was half that occurring in primary metals in the recession of the early 1990s – had far less of an impact on the area’s economy this time around because the area’s economic base is no longer defined just by steel.

• Over the 1988 to 2008 period, employment in the other manufacturing sectors that are major employers in the area – including transportation

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\(^1\) The CMA is the Census Metropolitan Area and includes Burlington and Grimsby. Labour Force Survey data is not available for Hamilton as a community.
equipment, fabricated metals and food processing – held their own or improved slightly.

- All other manufacturing sectors employed a total of 22,000 people in the area in 2008, down from 37,000 in 1989 prior to the early-1990s recession, and down from 34,000 as recently as 2004. The 2004 to 2008 job losses in all other manufacturing in this area (a total of 13,000 over four years) closely match the decline that occurred in all other manufacturing between 1989 and 1993 (down 16,000 over four years).

While employment in the manufacturing sector suffered in Hamilton, other sectors showed steady increases from 1987 to 2008.

- Employment in educational services and in health and social assistance services both increased fairly steadily over this period. The exception is in the latter half of the 1990s when the province reduced spending in these areas in an attempt to rein in the provincial deficit.

- Employment in a number of industrial related activities – goods distribution (including transportation and warehousing plus wholesale and retail trade), business services, finance and construction – grew fairly steadily over the last two decades.

Future Labour Market Demand

Despite the recent impact on our local labour market of the global economic crisis, there will be a need for new workers to replace retiring workers due to growth in our local economy.

- Between 2006 and 2016 the largest occupational gains in absolute terms by major category – including demand due to economic expansion and to retirements – are in elemental sales and service occupations (more than 5,700), clerical occupations (almost 5,300), intermediate sales and service occupations (almost 5,200), professional occupations in health (almost 4,800), and professional occupations in social science, education, government services and religion (almost 4,700).

- These five categories together account for almost 26,000 of the City’s new requirements or for more than half the City’s total requirements across all 26 occupation groups.

- Across all occupations the projected turnover rate – that is, requirements stemming both from growth in demand and from retirements between 2006 and 2016 expressed as a percent share of the total number of jobs in 2006 – is 26 percent.
By major occupation category the highest turnover rate is faced by professional occupations in health at 51%, followed by 44% in assisting occupations in support of health services and 41% in technical and skilled occupations in health. The next highest turnover rates are faced by paraprofessional occupations in law, social services, education and religion (41%), senior management occupations (39%), skilled administrative and business occupations (35%) and professional occupations in business and finance (31%).

The above projections do not take account of the occupational requirements that might result from the expansion of some or all of the targeted industries revealed in the City’s Economic Development Strategy. The City’s Economic Development Strategy, which identifies future growth opportunities in the areas of Advanced Manufacturing, Clean-Tech, Goods Movement, Lifesciences, Agri-business and Creative Industry - all build on inherent strengths in the City and seize on rapid shifts occurring worldwide.

### Labour Market Supply

Retirements and a slowing birth rate will create recruitment challenges in Hamilton.

- Though we expect participation rates among those 55 and over to increase in the years ahead many of the City’s Baby Boomers will nevertheless retire, a process that starts in 2011 and completes in 2031.
- The City does not have a home-grown population of younger people large enough to fill the jobs expected to be created between 2006 and 2016, especially if the City’s EDS is successful in expanding the economic-base opportunities available in the area.
- That means migrants, and increasingly migrants from abroad, will be required to fill the roles vacated by the Boomers and the new roles created by economic expansion.
- The challenge across most occupations and occupational groups from potential retirements will be almost as great as the challenge from economic expansion.

### LABOUR MARKET RESOURCES

To build and fuel our labour market we need strong community educational and training facilities. Hamilton is home to two degree-granting institutions, McMaster University and Redeemer University College and a community college, Mohawk College. In addition, we have a strong network of community agencies to
support job seekers and those in career transition. Literacy services offered by community support agencies continue to provide a special emphasis on the essential skills assisting those adults lacking basic education. Both the Hamilton-Wentworth District School Board and the Hamilton Wentworth Catholic District School Board have an increasing emphasis on school-to-work transition. Their business/education partnerships supported by the Industry Education Council of Hamilton assist in developing the workforce of tomorrow. The Jobs Prosperity Collaborative (JPC) also sponsor the Learning and Innovation Working Group which recently embarked on the development of a process that will promote Hamilton as a learning community.

Mohawk College

Recent enrolment data from Mohawk College indicate full-time enrolments totalled more than 10,000 and continuing education registration exceeded 44,000 in each of the last two years. Full-time enrolments in the most recent year include more than 9,000 in Mohawk College, diploma or certificate programs, more than 300 international placement and more than 1,200 in collaborative and applied degree programs. The 9,000 plus students in Mohawk College diploma or certificate programs breaks down as follows in order of enrolments:

- Almost 3,000 in the School of Engineering Technology
- More than 2,400 in the School of Arts, Science and Communication
- More than 1,800 in the School of Business
- More than 1,100 in the School of Human Services
- More than 750 in the School of Health Services

Most of the 1,200 in the collaborative and applied degree programs are in the School of Health Sciences (more than 500 in the BScN program and more than 500 in the Medical Radiation Sciences program) with most of the remainder in the BTech program of the School of Engineering Technology.

McMaster University

The most recent data available for McMaster University indicate for the 2008-2009 academic year a total of 24,944.6 students on a fiscal full-time equivalent basis, 21,954.7 undergraduate students (88%) and 2,989.9 graduate students (12%).

- More than 2,500 in Business
- More than 4,000 in Engineering
- More than 4,600 in Health Sciences
- Almost 3,000 in Humanities
• Almost 6,000 in Science
• More than 4,500 in Social Sciences
• Other (including Arts and Science and the Divinity College) at around 500

Research shows that the Hamilton area needs a wide variety of skills in the years ahead with particular emphasis on health care, business professional, engineering and technical specialists. The curriculum emphasis at both Mohawk and McMaster appears to be consistent with the City’s requirements.

**Hamilton-Wentworth District School Board (HWDSB) and Hamilton-Wentworth Catholic District School Board (HWCDSB)**

In addition to traditional work experience programs offered by the school boards including co-operative education and the Ontario Youth Apprenticeship Program, both boards have added the Specialist High Skills Majors (SHSM) program. This program offers the student a range of customized learning opportunities and, in some cases, sector-recognized certifications and training programs in a sector that interests them. The SHSM program builds strong alliances with businesses in our community. It creates the opportunity for students to see the connections between their studies, the world beyond high school, our local labour market and their future careers.

The HWDSB offers the SHSM program in the following sectors:

- Arts and culture
- Aviation / aerospace
- Construction
- Health and wellness
- Horticulture and landscaping
- Hospitality and tourism
- Manufacturing

In 2010-11, the HWDSB will add information and communication technology and justice, community safety and emergency services.

The HWCDSB offers the SHSM program in the following sectors:

- Arts and culture
- Business
- Health and wellness
- Hospitality and tourism

**Community Employment and Training Mapping**
Workforce Information Network Hamilton: WINHamilton.ca

Hamilton is a service-rich community offering a wide range of employment and training services supporting adults who have experienced job loss or are seeking to improve their skills. Despite good promotion of these services, awareness of these programs and services by those who need them and those who provide referrals is less than perfect.

In 2008-09 the Skills Development Flagship (SDF), a community-based committee interested in supporting the workforce development system in Hamilton, undertook a community mapping initiative examining the employment and training services available to adults in our community. The goal of the project was to understand current services as well as the changing job seeker needs in our community and through this understanding strengthen service to clients and improve employment outcomes. The result was the establishment of Workforce Information Network (WIN) Hamilton. This on-line application currently in use by community service providers is a foundational piece for further labour market planning in Hamilton. Having a better understanding of all services and supports available to our local labour market – including what services are in existence and a profile of clients using those services and the analysis that tells us what kinds of service we need to meet client need – is a prerequisite for any local planning.

CURRENT LABOUR MARKET INITIATIVES

Hamilton is very proactive in addressing our labour market challenges. Active engagement by leadership across the community has resulted in some recent initiatives that are complementary and supportive of a labour market strategy and that will be integrated into the final labour market plan.

Youth Retention, Attraction, Engagement in Hamilton (see Appendix for full report)

As our workforce ages and many workers move into retirement, youth employment and youth engagement will become of great importance for our labour market. A recently released report documents the case for a municipal Youth Retention/Attraction (YRA) strategy for Hamilton. This report presents a youth perspective of Hamilton (with a focus on youth in post secondary institutions) and provides an assessment of Hamilton’s standing in the YRA. The report notes that any approach Hamilton takes towards the development of a YRA strategy must take into account recruitment and retention, and also fostering a positive entrepreneurial environment.
Considering best practices from across Canada, the report makes the following recommendations for a YRA strategy and other interim projects that would support YRA:

**Hamilton Task Force on Youth Retention and Attraction**

The City of Hamilton needs to convene a Task Force on Youth Retention and Attraction. This would be a group of civic partners, from the various levels of government and administration, as well as public and private industries around the city. The Jobs Prosperity Collaborative with its framework of sector and community representation would be a natural home for this approach.

**Youth Retention, Attraction and Engagement Strategy for the City of Hamilton**

The role of the task force would be the development of a *Youth Retention and Attraction Strategy for the City of Hamilton* considering existing models and best practices from other jurisdictions and building on the work of the Youth Summit organized in conjunction with the 2009 Hamilton Economic Summit.

**The Young Hamilton Web Portal**

This web portal would serve as a one-stop shop to address youth needs, concerns and assistance in the City of Hamilton. Serving the spectrum of youth, from high-school to post-secondary students, to recent grads and young professionals, this site could function as both a promotional tool for attracting youth to Hamilton, and serve youth in the city with any number of the following components:

**Open Source City**

Building on or linking with the Innocentive.com model, an online community that engages individuals or groups of individuals in web communities, Hamilton could revolutionize its approach to civic governance, engagement and problem solving by opening itself up to the world. By presenting municipal issues online to be solved by citizens both in and outside city limits Hamilton would be powerfully engaging its own citizens, especially youth, and marketing itself internationally as a forward-thinking, innovative city.

**Hamilton Youth Ambassador**

Recognizing the fact that youth are highly mobile and enjoy travel, the existing Hamilton Business Ambassador program could be expanded to include a youth. In conjunction with this program, Hamilton should explore the potential development of an internship exchange style program. Of further benefit would be to engage the youth who take part in this program to explore international approaches to certain civic issues and report on them upon return to Hamilton.
Students as Community Members

A final recommendation is greater inclusion and integration of youth (e.g. student representatives) in all aspects of civic life.

These recommendations will be considered in 2010 – 2011.

Hamilton Immigration Partnership Council (HIPC)

Immigration has been instrumental to Hamilton’s past economic growth and development, and it continues to be so in the present. Looking to the future, we will need ongoing population growth to fill workforce needs and to ensure sustained economic growth. Therefore, attracting and retaining immigrants must be a critical component of any economic development strategy in this city. The Hamilton Immigration Partnership Council (HIPC) was established in early 2009 with the specific task of drawing up a made-in-Hamilton Immigration Strategy. Both their “Immigration Strategy” and “Action Plan” are attached as appendices to this component.

HIPC notes that Hamilton will continue to be shaped by international migration. This migration shapes and influences Hamilton in three ways:

1. Skills – changes in Hamilton’s human capital mix and in the composition of the local labour market.

2. Diversity – changes in the diversity not only of the workforce but in the nature of the population and in people’s contributions, needs and expectations.

3. Size – changes to the size of Hamilton’s population and the size and productivity of the local economy.

Hamilton’s Immigration Strategy will define a vision, strategic priorities and objectives for immigration in Hamilton and show how the agencies and communities of Hamilton can work together to fulfill them. HIPC will consult on drafting the Strategy to ensure that it reflects the views of all of Hamilton’s communities and partners. HIPC has established as its vision: “Hamilton is an inclusive community where the talents and experience that immigrants and refugees bring are valued because they are integral to making Hamilton the best place to raise a child.”

Hamilton will take a proactive approach to immigration within its labour market and economic development strategy. HIPC has identified four major strategic directions in which the Council will proceed:

- Drive collective and collaborative leadership around the immigration vision
- Close the settlement delivery gaps
- Create welcoming communities and the conditions for immigrants and refugees to settle and stay
- Create foundational intelligence baseline

**Suggested Actions for Immigration Strategy**

Responsibility for integrating immigrants into the labour force lies with a number of local stakeholders. It lies with employers, unions, educational institutions, community agencies that serve immigrants, all three levels of government and individual immigrants themselves.

Despite increased awareness of the difficulties of integrating immigrants into the local labour market and recent initiatives that address the issue, the barriers to labour market integration remain significant. More needs to be done.

In implementing a comprehensive plan to integrate and fully utilize the resources that newcomers to Hamilton bring to the local labour force; the City of Hamilton will take a systematic approach that will be built on effective collaboration with a number of key stakeholders such as community agencies, settlement service providers, education and training institutions, as well as other levels of government.

Through such partnerships, the City of Hamilton will develop and/or enhance programs that:

- Provide regular labour market analyses that are widely disseminated.
- Provide timely labour market information to newcomers prior to their arrival through the Hamilton Immigration Portal and through overseas Canadian Embassies.
- Strengthen awareness among local employers about the advantages of hiring immigrants, building on the work of such key local agencies such as the Hamilton Centre for Civic Inclusion, SISO and the Jobs Prosperity Collaborative.
- Provide appropriate information and employment counselling to job seekers (e.g. information about job search, mentoring, internship and career bridge programs etc.)
- Increase professional networking opportunities.
- Expand enhanced and occupational language training programs and other language training options and their “any time” accessibility.
- Extend linkages with existing credential evaluation services and encourage local credential recognition and bridging programs.
- Valorize foreign work experience.
- Develop and implement courses/workshops that are custom-designed to the employment-related needs of highly trained immigrants (e.g. critical skills portfolio development, formal networking etc.).
- Encourage staff development programs for local economic and employment service providers.
- Strengthen employer engagement strategies and recognize those who are hiring immigrants and also those who have adopted mentorship, placement, internship and other forms of bridging programs.
- Build an inventory of employers offering work placements, on-the-job training, internships and co-ops to help job seekers expand their Canadian work experience in jobs matching their skills.
- Act as a clearing house of information on immigrant employment programs and services.
- Ensure human resource practices are transparent, bias-free and inclusive.
- Advocate with other levels of government to attract more economic class immigrants to Hamilton.

Hamilton, notwithstanding the sheer weight of federal and provincial monetary and other fiscal, regulatory and expenditure policies, has considerable power to affect its own economic destiny. The many different stakeholders in Hamilton retain significant power to act across a broad range of fronts to directly influence the local labour market and local business development. This involvement in economic development in Hamilton has evolved from simple industrial promotion and attraction strategies to an emphasis on indigenous development.

**Entrepreneurial Development**

With respect to self-employment as an important labour market option for newcomers, the economic development areas within which Hamilton has a role to play also include a fuller use of the municipality’s statutory obligations and responsibilities. For example:

**Fiscal Policies:**
While property and business taxes may be more bearable for larger enterprises, they have a differential and inequitable impact on small and immigrant-owned businesses.

- A review of the property tax assessment process will be undertaken to ensure that Hamilton will remain a place where small and immigrant-owned businesses can thrive and prosper.
Regulatory Policies:
Local businesses are faced with a host of municipal regulations dealing with land use, issuance of building permits, hours of business and so on. They also relate to such areas as welfare regulations and the ability to generate self-employment earnings, and to public housing regulations and the ability to carry out a home-based business. This municipal economic development strategy will address these issues in a more holistic and comprehensive way.

- Municipal zoning policies, for example, will be reviewed to adequately recognize that many businesses and immigrant businesses - in light manufacturing and services in particular - are no longer incompatible with residential areas (the tradition having always been to separate employment and housing).

Expenditure Policies:
How much the City spends, what it spends it on and where, clearly has an enormous impact on local businesses. Whether it is for roads, sewers, public transportation, public housing maintenance or new social facilities, the effect on the local economy of municipal expenditures could easily outweigh the positive effects of all other economic interventions combined.

How much does the City of Hamilton purchase from the private sector in goods and services? The local servicing of supplies again obviously has a major impact on local economic growth.

- Like many other municipalities who have used their purchasing power as a pro-active economic development tool, the City of Hamilton will review its purchasing procedures to provide local, small and immigrant-owned businesses with the markets they need for stability and growth.

- The City of Hamilton will develop pro-active procurement strategies in support of local economic development.

Business Development Programs

In addition to these above statutory and direct responsibilities, there are a number of other indirect and discretionary economic development activities the City of Hamilton will:

- Build on existing local business and economic development initiatives in partnership with appropriate local stakeholders to develop and strengthen programs such as the Bridging to Business Program by Mohawk and SISO, which support members of immigrant and ethno-racial communities to participate more fully in the local business economy.
• Expand its small business support programs with a focused package of assistance for immigrant entrepreneurs that will include, for example:
  – Improving Access to Finance;
  – Strengthening Entrepreneurship Training and Education;
  – Supporting Immigrant and Ethno-Racial Business Networks;
  – Research and Information Dissemination and
  – International Trade and Business Promotions.

To complement and provide support to the work of HIPC, the framework of the Jobs Prosperity Collaborative (see below for details of this initiative) includes an Immigration Working Group. This working group recently released a ‘white paper’ that establishes thought leadership and makes the business case for immigration to Hamilton’s employers and members of the business sector.

**Jobs Prosperity Collaborative (JPC)**

The mandate of the Jobs Prosperity Collaborative (JPC) is to assist the City of Hamilton in bringing jobs to Hamilton. With a broad, representative membership, the JPC is a vehicle through which organizations in Hamilton can collaborate to solve job challenges. The JPC fully recognizes that many key institutions and organizations all have a role to play in job creation and retention, skills alignment and education, and other employment issues critical to economic prosperity. The commitment to the jobs agenda is demonstrated through participation from government, education, not-for-profits and industry. JPC provides the forum for all who have a stake in Hamilton’s employment base and brings together the leadership for the benefit of the broader City of Hamilton.

The JPC addresses strategic job creation; job retention; training that meets employment and community needs; creating prosperity by attracting high quality jobs and ensuring resiliency to respond to future changes. Their framework acknowledges the larger issues (quality of life, greening goals and initiatives, inclusiveness etc.) that are integral to job creation. The JPC has identified seven key priorities in its action framework on jobs:

- Innovation & Learning
- Hamilton’s Image
- Quality of Life
- Immigration
- Commercial Land & Infrastructure
- Supportive Planning Process
- Economic Portfolio
In each these areas, a Working Group of JPC members and supportive partners exists to review best practices, understand the specifics of our Hamilton context, and develop strategic goals, actions and evaluation metrics to advance each priority.

While each of the initiatives, organizations and services outlined above is individually strong, there is the opportunity to bring this work together through an integrated labour market planning process to develop greater communication and coordination of training, services, research activities and other workforce development activities across the community.

LABOUR MARKET PLANNING PROCESS

In 2009, the City of Hamilton and the Hamilton Training Advisory Board joined forces to develop a strategic labour market plan for Hamilton. This will be a multi-year plan that, through research, community consultation and mobilization, will identify the key labour market issues and strategies necessary to build a strong workforce for Hamilton’s future growth and prosperity. The development of the plan takes a multi-phased approach and is already underway.

Phase I: Community Employment and Training Mapping
completed October 2009

This initiative formed the foundation for workforce development planning by developing an online resource that allows for the mapping of a full range of workforce development services including employment, training and education programs for adults. This interactive program provides a one-stop resource for the community to understand the range of offerings available to support workforce development. The ability to visualize the offerings based on a number of dimensions provides the opportunity to review services offered relative to the needs of the workforce and creates the opportunity for the community to better monitor and understand the services available and the services needed.

Phase II: Labour Market Research
completed January 2010

The report, Charting Hamilton’s Labour Market: Past, Present and Future, a study of the supply and demand labour market dynamics includes comprehensive research and analysis of labour market data available for Hamilton. It creates a baseline profile for Hamilton and, based on economic forecasting models, projects future labour market demand. This research forms a starting point and common understanding of past challenges and future opportunities in Hamilton’s labour market.
Phase III: Community Consultations  
*January to March 2010*

This consultation phase validates the data analysis in the Supply and Demand report and provides an on-the-ground understanding of how the labour market is expected to change in the next two to five years, in particular identifying critical skills requirements, emerging skills gaps, skills development gaps etc. This will be accomplished through the following consultations:

- Sixty plus interviews with businesses from key sectors of Hamilton’s economy as identified in the supply and demand research conducted in Phase II. These interviews also include businesses from key sectors identified in the Business Development Strategy, including:
  - Agriculture
  - Construction
  - Manufacturing including:
    - Food and beverage manufacturing
    - Primary metal manufacturing
    - Fabricated metal product manufacturing
    - Plastic and rubber manufacturing
    - Computer and electronic product manufacturing
    - Transportation equipment manufacturing
  - Transportation Warehousing
  - Professional Scientific & Technical Services
  - Educational Services
  - Healthcare including:
    - Ambulatory Healthcare Services
    - Hospitals
    - Nursing and Residential Care Facilities
  - Arts, Entertainment and Recreation
  - Accommodation and Food Services
  - Biosciences

Questions for businesses in these sectors focus on their skills recruitment and training challenges and supports that the community could provide.

- Additional key informant interviews and/or focus groups with education and industry sector representatives/associations/committees and
community leaders will provide broader community context and understanding of labour market trends and challenges.

- Consultation with other initiatives that have an interest in the local labour market including:
  - Jobs Prosperity Collaborative
  - Immigration Partnership Council
  - Youth Retention Strategy
  - Human Services Planning Initiative
  - Skills Development Flagship

**Phase IV: Key Issues Analysis**  
*March to April 2010*

Upon completion of the consultation phase, this information will be linked with the supply and demand data. This information will be enhanced and informed by the work of other business engagement initiatives:

- Analysis of the results to date from the City’s “Hamilton Calling” project that includes a number of questions for businesses on their workforce development challenges.
- The results from the Access Hamilton research into an effective employer engagement strategy led by Mohawk College.

The key issues emerging from this comprehensive analysis will be used to develop a preliminary list of key labour force issues facing Hamilton at this time and identify any future challenges.

**Phase V: Strategy Development**  
*May to June 2010*

This phase will bring key business and community stakeholders together to:

- consider the findings of research and consultation phases;
- consider the capacity of Hamilton’s workforce development system;
- reach a consensus regarding the City’s most critical labour market issues and
- develop strategic directions for dealing with key priorities.

**Phase VI: Implementation Plan**  
*June to September 2010*

A critical element for this labour market plan will be engaging and working with organizations and initiatives to develop a coordinated and integrated action plan
that will deliver strong results relative to our strategic plan. Key stakeholders will be identified and will be engaged for each strategic direction and an action plan developed that addresses the priorities identified through the planning process. An evaluation process will measure our progress relative to each action and to our overall strategic plan.

Conclusion

Hamilton has much to build on when it comes to workforce development. We have a solid educational system, strong community services and a workforce with a wide array of skills. Understandably in these challenging economic times and with rapid technological change continuing, there are gaps and weaknesses to our system. There are also opportunities and a willingness for our community to pull together to develop a strong workforce. The labour market strategy outlined will rally the community and provide a framework for action to ensure that our community has the workforce it needs to support future economic growth and prosperity.
Our Foundation

Workforce Development

Appendix A – Charting Hamilton’s Labour Market
Appendix B – Youth Retention, Attraction, Engagement and Hamilton
Appendix C – Immigration Strategy Report
Appendix D – Immigration Strategy Action Plan
CHARTING Hamilton’s Labour Market: Past, Present and Future

Appendix A to the Hamilton Economic Development Strategy, Workforce Development Component

JANUARY 2010

Hamilton Training Advisory Board
Commission consultative sur la formation à Hamilton

IN PARTNERSHIP WITH

C4SE
THE CENTRE FOR SPATIAL ECONOMICS
CHARTING HAMILTON’S LABOUR MARKET: PAST, PRESENT AND FUTURE

FEBRUARY 2010
**SUMMARY**

**CHARTING HAMILTON’S LABOUR MARKET: PAST, PRESENT AND FUTURE**

**Major Trends**

- The focus of attention for this study is the demand for and supply of labour in the City of Hamilton over the period from 2006 to 2016. Despite the temporary negative impacts of the recent recession on the demand for workers in the area, the near term (to 2016) and longer term (to 2031) pressures for growth in the area will be strong.

- Strong underlying demand for workers – coupled with growing rates of retirement – means many new workers will be required in the area between now and 2016.

- Total employment in the City will increase by almost 29,000 people between 2006 and 2016, from just over 197,000 in 2006 to 226,000 in 2016, due to economic growth.

- Some 21,000 of the people holding jobs in Hamilton in 2006 could retire by 2016.

- Thus the City needs more than 50,000 new workers between 2006 and 2016 to fill the 29,000 new jobs created through economic expansion and the more than 21,000 made available due to retirements.

**The Demand for Labour in Hamilton**

- In 2006 employers provided a total of 197,180 jobs in the City of Hamilton. C4SE’s decomposition indicates that 45,245 of those jobs (or 23 percent) represented economic-base jobs with the remaining 151,935 (or 77 percent) representing community-base jobs.¹

- The primary sector (mostly agriculture in Hamilton) and mining (most likely quarrying in Hamilton) accounts for 73 percent of Hamilton’s economic-base jobs and manufacturing for 73 percent. Thus the traditional economic-base sectors together account for 80 percent of Hamilton’s economic-base employment. The remaining 20 percent is accounted for by regional services (a total of 9,160, including 2,834 in education and 6,326 in health). The share of jobs offered by Hamilton’s employers in the future will gradually shift away from the primary and manufacturing sectors, toward services in general, especially toward health care and social services.

**The Demand for Labour by Major Occupation Group in Hamilton**

- Exhibit S-1 reveals that in absolute terms between 2006 and 2016 the largest occupational gains by major category – including demand due to economic expansion and to retirements – are in elemental sales and service occupations (more than 5,700), clerical occupations (almost 5,300), intermediate sales and service occupations (almost 5,200), professional occupations in health (almost 4,800), and professional occupations in social science, education, government services and religion (almost 4,700).

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¹ Economic-base (or export-base) industries produce goods that are shipped to markets outside the community (agriculture, manufacturing, etc.), or they provide services to visitors to the community (hotels, specialized hospitals, etc.) or to businesses outside the community (specialized financial, professional, scientific and technical services). Community-base industries produce services that meet the needs primarily of the local residents in the community (retail, most medical, primary and secondary education, etc.). Growth typically occurs in a region only if its export-base is expanding.
Exhibit S-1
City of Hamilton Employment by Place of Work by Occupational Group Projections

<table>
<thead>
<tr>
<th>Total all occupations</th>
<th>197,140</th>
<th>28,998</th>
<th>21,374</th>
<th>50,372</th>
</tr>
</thead>
<tbody>
<tr>
<td>Senior Management Occupations</td>
<td>1,870</td>
<td>266</td>
<td>467</td>
<td>713</td>
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<tr>
<td>Middle and Other Management Occupations</td>
<td>15,725</td>
<td>2,261</td>
<td>1,831</td>
<td>4,092</td>
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<tr>
<td>Professional Occupations in Business and Finance</td>
<td>3,560</td>
<td>671</td>
<td>427</td>
<td>1,098</td>
</tr>
<tr>
<td>Skilled Administrative and Business Occupations</td>
<td>11,545</td>
<td>2,372</td>
<td>1,661</td>
<td>4,033</td>
</tr>
<tr>
<td>Clerical Occupations</td>
<td>19,205</td>
<td>3,287</td>
<td>2,038</td>
<td>5,294</td>
</tr>
<tr>
<td>Professional Occupations in Natural and Applied Sciences</td>
<td>4,245</td>
<td>407</td>
<td>414</td>
<td>821</td>
</tr>
<tr>
<td>Technical Occupations Related to Natural and Applied Sciences</td>
<td>4,350</td>
<td>358</td>
<td>434</td>
<td>792</td>
</tr>
<tr>
<td>Professional Occupations in Health</td>
<td>9,370</td>
<td>3,637</td>
<td>1,131</td>
<td>4,767</td>
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<tr>
<td>Technical and Skilled Occupations in Health</td>
<td>3,863</td>
<td>1,341</td>
<td>243</td>
<td>1,584</td>
</tr>
<tr>
<td>Assisting Occupations in Support of Health Services</td>
<td>4,485</td>
<td>1,627</td>
<td>354</td>
<td>1,980</td>
</tr>
<tr>
<td>Professional Occupations in Social Science, Education, Government Services and Religion</td>
<td>15,485</td>
<td>2,804</td>
<td>1,851</td>
<td>4,655</td>
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<tr>
<td>Paraprofessional Occupations in Law, Social Services, Education and Religion</td>
<td>4,485</td>
<td>1,568</td>
<td>257</td>
<td>1,824</td>
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<tr>
<td>Professional Occupations in Art and Culture</td>
<td>1,850</td>
<td>296</td>
<td>240</td>
<td>536</td>
</tr>
<tr>
<td>Technical and Skilled Occupations in Art, Culture, Recreation and Sport</td>
<td>2,675</td>
<td>455</td>
<td>207</td>
<td>662</td>
</tr>
<tr>
<td>Skilled Sales and Service Occupations</td>
<td>10,210</td>
<td>2,048</td>
<td>987</td>
<td>3,036</td>
</tr>
<tr>
<td>Intermediate Sales and Service Occupations</td>
<td>19,350</td>
<td>3,329</td>
<td>1,824</td>
<td>5,154</td>
</tr>
<tr>
<td>Elemental Sales and Service Occupations</td>
<td>20,340</td>
<td>3,803</td>
<td>1,921</td>
<td>5,154</td>
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<tr>
<td>Trades and Skilled Transport and Equipment Operators</td>
<td>18,220</td>
<td>-546</td>
<td>2,081</td>
<td>1,535</td>
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<tr>
<td>Intermediate Occupations in Transport, Equipment Operation, Installation and Maintenance</td>
<td>8,250</td>
<td>989</td>
<td>1,187</td>
<td>2,176</td>
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<tr>
<td>Trades Helpers, Construction Labourers and Related Occupations</td>
<td>1,325</td>
<td>210</td>
<td>87</td>
<td>297</td>
</tr>
<tr>
<td>Skilled Occupations in Primary Industry</td>
<td>1,575</td>
<td>-187</td>
<td>394</td>
<td>206</td>
</tr>
<tr>
<td>Intermediate Occupations in Primary Industry</td>
<td>1,315</td>
<td>-244</td>
<td>117</td>
<td>-127</td>
</tr>
<tr>
<td>Labourers in Primary Industry</td>
<td>1,445</td>
<td>251</td>
<td>130</td>
<td>381</td>
</tr>
<tr>
<td>Processing, Manufacturing and Utilities Supervisors and Skilled Operators</td>
<td>1,775</td>
<td>-428</td>
<td>200</td>
<td>-228</td>
</tr>
<tr>
<td>Processing and Manufacturing Machine Operators and Assemblers</td>
<td>6,625</td>
<td>-1,009</td>
<td>594</td>
<td>-416</td>
</tr>
<tr>
<td>Labourers in Processing, Manufacturing and Utilities</td>
<td>3,995</td>
<td>-568</td>
<td>330</td>
<td>-238</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE

- These 5 categories together account for almost 26,000 of the City’s new requirements or for more than half the City’s total requirements across all 26 occupation groups.

- Across all occupations the projected turnover rate – that is, requirements stemming both from growth in demand and from retirements between 2006 and 2016 expressed as a percent share of the total number of jobs in 2006 – is 26 percent.

- By major occupation category the highest turnover rate is faced by professional occupations in health at 51 percent, followed by 44 percent in assisting occupations in support of health services and 41 percent in technical and skilled occupations in health. The next highest turnover rates are faced by paraprofessional occupations in law, social services, education and religion (41 percent), senior management occupations (39 percent), skilled administrative and business occupations (35 percent) and professional occupations in business and finance (31 percent).

- The above projections do not take account of the occupational requirements that might result from the expansion of some or all of the targeted industries revealed in the City’s Economic Development Strategy. The City’s economic development strategy – which identifies future growth opportunities in the areas of advanced manufacturing, Clean-Tech products and services, goods movement, Bioscience products and services, Agri-business products and creative industry products and services – all build on inherent strengths in the City and seize on rapid shifts occurring world-wide.
Successful implementation of the EDS would reap major job benefits in manufacturing, in business services and in transportation-warehousing-logistics.

**The Demand for Labour by Detailed Occupation in Hamilton**

- Exhibit S-2 summarizes our projections for the 25 largest detailed occupations in 2006.
- The top 25 occupations in 2006 – out of a total of 520 detailed occupations altogether – will account for almost 15,000 of the new jobs created through economic expansion, or for close to half the total number of jobs created in that manner.
- The top 25 occupations in 2006 account for almost 8,000 – or 37 percent – of the expected retirements between 2006 and 2016.
- Thus the top 25 occupations in 2006 account for almost 23,000 – or 47 percent – of the positions that will need to be filled between 2006 and 2016 due to both economic expansion and retirements. By way of comparison, these top 25 occupations accounted for 39 percent of all the jobs available in the City in 2006.
- The top 25 in 2006 account for 19 of the top 25 new requirements (due to both economic expansion and retirements) between 2006 and 2016.
- The top 5 occupations in 2006 were retail salespersons and sales clerks; registered nurses; food counter attendants, kitchen helpers and related occupations; cashiers; and retail trade managers. These 5 accounted for 15 percent of all the jobs in Hamilton in 2006.
- The top 5 new occupational requirements between 2006 and 2016 – including those due to both economic expansion and retirements – includes registered nurses (more than 2,800); retail salespersons and clerks (almost 2,500); nurse aides, orderlies and patient service associates (almost 1,500); food counter attendants, kitchen helpers and related occupations (more than 1,400); and retail trade managers (more than 1,200). These five account for 19 percent of the total requirements for new workers in the City between 2006 and 2016.
- The top 5 in 2006 are almost identical to the top 5 gainers between 2006 and 2016. The difference is that cashiers are among the top 5 in 2006 but not among the top 5 gainers between 2006 and 2016. Nurse aides, orderlies and patient service associates is the occupation not found in the top 5 in 2006 but found among the top 5 gainers between 2006 and 2016.
- Several occupations in the top 25 in 2006 fall well outside of the top 25 new requirements from 2006 to 2016. The list includes welders and related machine operators (17th in number in 2006 but 514th in new requirements from 2006 to 2016); material handlers (24th to 54th); grocery clerks and shelf stockers (25th to 35th); customer service, information and related clerks (22nd to 33rd); and post-secondary teaching and research assistants (13th to 29th).
- The demand for community-base workers will expand significantly in the Hamilton area as pressure for growth in the population of the City mounts. Rapid job expansion in the communities west of Toronto – most notably in Peel, Halton, Waterloo, etc. – guarantees that the City’s population will grow, thus propelling growth in community-base activities.
### Exhibit S-2
City of Hamilton Employment by Place of Work by Occupation Projections


<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All occupations</td>
<td>197,235</td>
<td>3,002</td>
<td>28,983</td>
<td>21,370</td>
<td>50,352</td>
<td>39.1</td>
</tr>
<tr>
<td>Top 25 occupations</td>
<td>77,205</td>
<td>3,545</td>
<td>14,860</td>
<td>7,852</td>
<td>22,712</td>
<td>45.1</td>
</tr>
<tr>
<td>Percent share of total</td>
<td></td>
<td>128.1</td>
<td>51.3</td>
<td>36.7</td>
<td>45.1</td>
<td></td>
</tr>
<tr>
<td>6421 Retail salespersons and sales clerks</td>
<td>9,605</td>
<td>1</td>
<td>29</td>
<td>2</td>
<td>32</td>
<td>86</td>
</tr>
<tr>
<td>3152 Registered nurses</td>
<td>5,575</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>4</td>
<td>855</td>
</tr>
<tr>
<td>6641 Food counter attendants, kitchen helpers and related occupations</td>
<td>5,290</td>
<td>3</td>
<td>3</td>
<td>11</td>
<td>14</td>
<td>346</td>
</tr>
<tr>
<td>661 Cashiers</td>
<td>4,570</td>
<td>4</td>
<td>23</td>
<td>5</td>
<td>32</td>
<td>108</td>
</tr>
<tr>
<td>621 Retail (trade managers)</td>
<td>4,455</td>
<td>5</td>
<td>38</td>
<td>7</td>
<td>4</td>
<td>70</td>
</tr>
<tr>
<td>4142 Elementary school and kindergarten teachers</td>
<td>3,840</td>
<td>6</td>
<td>5</td>
<td>12</td>
<td>5</td>
<td>217</td>
</tr>
<tr>
<td>1411 General office clerks</td>
<td>3,640</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>171</td>
</tr>
<tr>
<td>3413 Nurse aides, orderlies and patient service associates</td>
<td>2,905</td>
<td>8</td>
<td>2</td>
<td>4</td>
<td>10</td>
<td>449</td>
</tr>
<tr>
<td>6608 Janitors, caretakers and building superintendents</td>
<td>2,820</td>
<td>9</td>
<td>45</td>
<td>19</td>
<td>3</td>
<td>57</td>
</tr>
<tr>
<td>1241 Secretaries (except legal and medical)</td>
<td>2,630</td>
<td>10</td>
<td>12</td>
<td>11</td>
<td>7</td>
<td>138</td>
</tr>
<tr>
<td>7411 Truck drivers</td>
<td>2,595</td>
<td>11</td>
<td>101</td>
<td>21</td>
<td>6</td>
<td>19</td>
</tr>
<tr>
<td>6453 Food and beverage servers</td>
<td>2,420</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>6</td>
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<tr>
<td>4122 Post-secondary teaching and research assistants</td>
<td>2,385</td>
<td>13</td>
<td>11</td>
<td>23</td>
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<td>1221 Administrative officers</td>
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<td>14</td>
<td>18</td>
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<td>6242 Cooks</td>
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<td>14</td>
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<td>4141 Secondary school teachers</td>
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<td>7266 Welders and related machine operators</td>
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<td>1413 Receptionists and switchboard operators</td>
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<td>7</td>
<td>9</td>
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<td>6661 Light duty cleaners</td>
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<td>19</td>
<td>10</td>
<td>13</td>
<td>14</td>
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<tr>
<td>7321 Automotive service technicians, truck and bus mechanics, etc.</td>
<td>2,020</td>
<td>20</td>
<td>24</td>
<td>18</td>
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<tr>
<td>4214 Early childhood educators and assistants</td>
<td>1,935</td>
<td>21</td>
<td>4</td>
<td>6</td>
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<td>1453 Customer service, information and related clerks</td>
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<td>22</td>
<td>55</td>
<td>30</td>
<td>50</td>
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<tr>
<td>1431 Accounting and related clerks</td>
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<td>23</td>
<td>69</td>
<td>32</td>
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<td>34</td>
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<td>7452 Material handlers</td>
<td>1,825</td>
<td>24</td>
<td>504</td>
<td>104</td>
<td>34</td>
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<td>6622 Grocery clerks and store shelf stockers</td>
<td>1,775</td>
<td>25</td>
<td>80</td>
<td>31</td>
<td>56</td>
<td>28</td>
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</tbody>
</table>

Source: Statistics Canada and C4SE
The Supply of Labour in Hamilton

- Though we expect participation rates among those 55 and over to increase in the years ahead many of the City’s Baby Boomers will nevertheless retire, a process that starts in 2011 and completes in 2031.

- The City does not have a home-grown population of younger people large enough to fill the jobs expected to be created between 2006 and 2016, especially if the City’s EDS is successful in expanding the economic-base opportunities available in the area.

- That means migrants, and increasingly migrants from abroad, will be required to fill the roles vacated by the Boomers and the new roles created by economic expansion.

- The challenge across most occupations and occupational groups from potential retirements will be almost as great as the challenge from economic expansion.

Conclusions

- On balance our review of the “official data” trends and prospects leads us to conclude Hamilton faces very few labour market issues at this time.

- The round of interviews of major employers currently underway throughout the City could lead to the identification of issues that cannot be gleaned at this level of analysis.

- Following on the interview process C4SE will be assist HTAB in developing a preliminary list of the key labour force issues facing Hamilton at this time.

- These issues will be discussed with key stakeholders in March of 2010. The objective at that time will be to reach a consensus regarding the City’s most critical labour market issues and to develop a strategy for dealing with them.
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Section 1
INTRODUCTION

This report was prepared by the Centre for Spatial Economics (C4SE) at the request of the Hamilton Training Advisory Board (HTAB). On behalf of the Board C4SE collected, compiled and analyzed recent publicly available information regarding the Hamilton labour market to provide HTAB with an evidence-based foundation for future labour market planning and decision making.

This report represents the first of a three step process toward the development of a labour market strategy for the area. Step two involves the carrying out by HTAB in early 2010 of about 60 one-on-one consultations with key employers in the Hamilton area to obtain an on-the-ground understanding of how the area’s labour market is expected change in the next 2 to 5 years, particularly with respect to which skills are most critical, where skill gaps might be emerging, etc. Drawing on the conclusions of this report and on HTAB’s employer consultations C4SE will assist the Board in developing a preliminary list of the key labour force issues facing Hamilton at this time. These issues will be discussed with key stakeholders in March of 2010. The objective at that time will be to reach a consensus regarding the City’s most critical labour market issues and to develop a strategy for dealing with them.

This labour market strategy development process represents collaboration between the Hamilton Training Advisory Board and the City of Hamilton, most notably the City’s Economic Development Department and Employment Resource Centre. HTAB acknowledges funding support for this process from the Ontario Ministry of Training, Colleges and Universities.

This report is divided into eleven sections:

Section 1: Introduction
Section 2: The Pressures for Growth in the Hamilton Area
Section 3: Historical Trends in Employment by Industry in the Hamilton Area
Section 4: The Economic Base of the City of Hamilton
Section 5: The Economic Reach of the City of Hamilton
Section 6: The Potential for Employment Growth in the City of Hamilton
Section 7: Labour Supply in the City of Hamilton
Section 8: The Potential for Labour Force Growth in the City of Hamilton
Section 9: The Future Demand for Skills in the City of Hamilton
Section 10: The City of Hamilton’s Economic Development Strategy
Section 11: Conclusions Regarding Occupational Requirements in Hamilton
Section 2
THE PRESSURES FOR GROWTH IN THE HAMILTON AREA

In 2008 the private and public sectors of the City of Hamilton together generated more than $17 billion of goods and services and provided employment to almost 200,000 job holders. The City’s 205,000 dwellings provide accommodation to 527,000 residents whose combined incomes drive personal spending totaling $13 billion.

The City is the focal point of the Hamilton Census Metropolitan Area (CMA). The CMA includes Hamilton itself and the neighbouring municipalities of Burlington and Grimsby (Exhibit 1). The Hamilton CMA is Canada’s 9th most populated metropolitan region (at 731,000 people) and accounts for Canada’s 9th largest metropolitan labour pool (at 374,000). Within Canada the Hamilton CMA’s workers supply the 4th largest number of people working in manufacturing (54,000), the 6th largest in wholesale trade (16,000), the 7th largest in construction (27,000) and the 8th largest in each of business services (40,000) and educational services (31,000). Within manufacturing it accounts for the largest metropolitan pool of people working in primary metals (10,000; this despite significant job losses in this sector in the 80s and 90s); for the 6th largest number of workers in each of food (6,000), fabricated metals (6,000), machinery (4,000) and transportation equipment (10,000); and for the 7th largest number of workers in computers and electronics (4,000). The area’s rankings in these industries all exceed its 9th place ranking in terms of total population and total employment. The Hamilton CMA is the province of Ontario’s 3rd largest agglomeration of people and workers (Toronto and Ottawa place 1st and 2nd).

Exhibit 1
Map of the City of Hamilton and the Hamilton Census Metropolitan Area

Source: CSE
The population of the metropolitan area grew from 282,000 in 1951 to 731,000 in 2008. It is therefore 2.59 times more populated today than it was 6 decades ago. Over that same period Ontario grew a bit more (2.86 times) while Canada grew a bit less (2.42 times). In other words, throughout the Post War era, the Hamilton CMA kept close pace with economic and demographic growth on a national and provincial scale and remains a major player in Canada’s and Ontario’s industrial, business and education pursuits.

Following the release of the 1996 Census data, C4SE began drawing attention to the fact that the eight metropolitan areas immediately surrounding the western end of Lake Ontario – including Toronto at the centre; Oshawa to the east; Barrie to the north; Hamilton, Guelph, Kitchener-Waterloo and Brantford to the west; and St. Catharines-Niagara to the south – were all expanding outwards such that their suburbs were increasingly blending into one another. Daily commuting from one area to another was on the rise resulting in a mega-metropolitan agglomeration now widely referred to as the Greater Golden Horseshoe (GGH).

In recognition of this significant suburban expansion of people and jobs in this area the Ontario Government in 2005 published Places to Grow, its vision for growth and land use policies throughout the GGH. Places to Grow provides a plan for the accommodation of an increase in the population of the GGH from 7.8 million in 2001 to 11.5 million in 2031, and of an associated growth in employment. The plan proposes the achievement of a compact urban form to promote the use of transit and create live-work opportunities. The plan sets population and employment targets for each of the 16 regions, cities and counties it considers to be part of the GGH. It calls for the population of the City of Hamilton to grow from 510,000 in 2001 to 660,000 in 2031 and for the number of jobs provided by employers in the City to expand in tandem.

The concentration of economic and demographic growth in the GGH within Canada and Ontario over the last several decades has been facilitated by a number of factors:

- Canada’s automotive trade agreement with the United States in the 1960s led to an expansion of that industry in Ontario and the GGH.

- The election of the Parti Quebecoise government in Quebec in 1976 led to the out-migration of a number of major Montreal-based corporate headquarters to Ontario.

- The Canada-United States Free Trade Agreement of the late 1980s (followed by the North American Free Trade Agreement in the early 1990s) coupled with the deregulation of the financial sector in the early 1990s, hit Ontario negatively at first because of the significant industrial readjustments those policies put into play. Following the recession of the early 1990s, however, those policies led to a significant expansion in two-way trade between Ontario and the US, and the GGH benefitted disproportionally.

- The GGH is endowed with the lion’s share of the nation’s and the country’s transportation infrastructure including its busiest airport (Pearson International) and two major Great Lakes ports (Toronto and Hamilton). Most of the province’s 400 series highways pass through the area, connecting it to the extensive US Interstate Highway System and to the huge US market for consumer and industrial products through major border crossings in the Detroit-Windsor and Niagara-Western New York trade corridors.
These advantages have created a climate in which businesses have increasingly favoured the location of their Canadian and/or Ontario production, distribution and service operations in the Golden Horseshoe, decisions which have generated a strong demand for new workers in the area. The business attractiveness of the area has generated a virtual explosion in population and dwelling growth throughout the GGH. These same advantages will continue to facilitate further disproportional expansion of the Golden Horseshoe’s base within Canada and Ontario in the decades ahead, and will continue to generate considerable pressure for growth on the City of Hamilton and its neighbouring municipalities.

C4SE considers the broad population and employment growth targets set for the GGH in the province’s plan to be credible. Indeed, it is our view that population and employment growth for the GGH overall could exceed the targets set by the province. There is a good chance, in our view, that the targets for Hamilton have also been set too low (Exhibit 2).

Exhibit 2
City of Hamilton Population
Actual 1976 to 2008, Projected 2009 to 2031

Source: Places to Grow and C4SE

The focus of attention for this study is the supply of and demand for labour in the City of Hamilton over the period from 2006 to 2016. In view of this time frame there is no need here to quibble about the possible level of people and jobs in Hamilton in 2031. It is sufficient to know that – despite the temporary negative impacts of the recent recession on the demand for workers in the area – the near and longer term pressures for growth in the Hamilton area will be strong.

This strong underlying near term demand for workers – coupled with growing rates of retirement among the Baby Boomers, the oldest of whom turn 65 in 2011 – means many new workers will be required in the area between now and 2016. The development of a labour market strategy to assist the area in dealing with these new requirements is therefore in order.
Section 3
HISTORICAL TRENDS IN EMPLOYMENT BY INDUSTRY IN THE HAMILTON AREA

Statistics Canada publishes monthly estimates of the broad aggregates of labour market activity for each metropolitan area in Canada based on the Labour Force Survey. Though the CMA estimates are seasonally adjusted and based on three-month moving averages they nevertheless show considerable monthly variation across time at the CMA level, less so at the province-wide level. Trends in total seasonally adjusted employment for both Ontario and the Hamilton CMA are illustrated in Exhibit 3. Employment in both cases is presented in index form so that direct comparisons can be made regarding relative growth over time between the two jurisdictions. Exhibit 3 reveals that:

- Province-wide employment grew steadily from early 1998 through to late 2008 with a brief leveling off occurring over that period through the latter half of 2001.

- Provincial employment reached a peak level in September 2008 then fell steadily with the onslaught of the recession through to May of 2009. Over this period employment in Ontario fell by 245,000, or 3.6 percent. Since May 2009 it has been recovering steadily, but slowly, increasing by 38,000, or 0.6 percent, over the May to December period.

- Over the 1998 to 2006 period monthly employment for the Hamilton CMA was on a general upward trend though major but temporary downturns occurred over that period in late 1999, late 2001 and late 2004. Nevertheless, as of early 2006 total employment in the CMA was close to that of the province as a whole at an index level of around 117.

- Since early 2006, however, employment in the CMA has leveled off, fluctuating above and below a level equal to about 115, even through the recession.

Annual data for the Hamilton CMA based on these monthly estimates but covering a longer time frame – from 1988 through to 2009 – indicate the area faced a much more difficult adjustment during the recession of the early 1990s than has been the case this time around (Exhibit 4):

- Employment in the area reached 327,000 in 1989 just prior to the recession of the early 1990s. It then fell steadily for three consecutive years, bottoming out at 284,000 in 1993 and resulting in a cumulative four-year loss of 43,000 jobs, a decline of 13.0 percent.

- The unemployment rate increased from 5.1 percent in 1989 to 12.0 percent in 1993.

- Between 1993 and 2004 employment on an annual average basis grew steadily in the CMA, increasing from 284,000 in 1993 to 372,000 in 2004.

- The data suggest the CMA’s employment has held fairly steady at that level since 2004. Total employment in the CMA for all of 2009 came in at 373,000, right where it has hovered since 2004, and – despite the severity of the recession province-wide – down only slightly from 375,000 in 2008.

- As a result the unemployment rate in the area during this recession increased much less than it did in the early 90s, from a recent low of 5.5 percent in 2005 to 8.4 percent for all of 2009.
Exhibit 3
Total Employment in Ontario and the Hamilton CMA
As an Index with the Annual Average for 1998 = 100
Monthly Seasonally Adjusted from January 1998 to December 2009

Source: Statistics Canada, Labour Force Survey

Exhibit 4
Hamilton Census Metropolitan Area Annual Data
Total Employment (Thousands, Blue Bar, Left Scale)
Unemployment Rate (Percent, Red Line, Right Scale)

Source: Statistics Canada, Labour Force Survey
Exhibit 5 illustrates the trends in employment within manufacturing by major industry in the Hamilton CMA on an annual average basis over the period from 1987 to 2008 (data by industry for 2009 have not yet been released). Exhibit 5 reveals that:

- Employment in primary metals manufacturing – mostly steel in the Hamilton area – declined steadily from 1989 through to 2008. Over that period the number employed in primary metals fell from 34,000 in 1989 to 10,000 in 2008, or by 24,000.

- Primary metals employment fell from a pre-recession peak level of 34,000 in 1989 to just 20,000 in 1993, a loss of 14,000. That decline accounted for one-third of all the job losses occurring in the CMA over that period (recall that total employment fell by 43,000 between 1989 and 1993). The major restructuring of the steel industry over that period was the reason the recession of the early 1990s was so devastating for the Hamilton area.

- Employment in primary metals slid further between 1993 and 1997 then hovered at or near 15,000 through the period from 1997 to 2004. Between 2004 and 2008 it fell once again from 17,000 to 10,000, or by 7,000 (it likely fell a bit more in 2009). That decline – which was half that occurring in primary metals in the recession of the early 1990s – had far less of an impact on the area’s economy this time around because the area’s economic base is no longer defined just by steel (more on the topic of Hamilton’s economic base in the next section).

- Over the 1988 to 2008 period employment in the other manufacturing sectors that are major employers in the area – including transportation equipment, fabricated metals and food processing – held their own or improved slightly.

- All other manufacturing sectors employed a total of 22,000 people in the area in 2008, down from 37,000 in 1989 prior to the early-1990s recession, and down from 34,000 as recently as 2004. The 2004 to 2008 job losses in all other manufacturing in this area (a total of 13,000 over four years) closely match the decline that occurred in all other manufacturing between 1989 and 1993 (down 16,000 over four years).

On balance, total manufacturing’s absolute importance in the Hamilton CMA, at least in employment terms, has been halved over the last two decades. In 1989 manufacturers as a group provided jobs to 98,000 people in the CMA. By 2008 that number had fallen to just 54,000 and the total likely fell further in 2009.

Exhibits 6 and 7 (following Exhibit 5) illustrate trends in employment over the 1987 to 2008 in selected other major industries in the Hamilton CMA:

- Exhibit 6 reveals that employment in educational services and in health and social assistance services both increased fairly steadily over this period. The exception is in the latter half of the 1990s when the province reduced spending in these areas in an attempt to rein in the provincial deficit.

- Exhibit 7 reveals that employment in a number of industrial related activities – goods distribution (including transportation and warehousing plus wholesale and retail trade), business services, finance and construction – grew fairly steadily over the last two decades.
Exhibit 5
Hamilton Census Metropolitan Area Annual Data
Employment by Major Manufacturing Sector (Thousands)
Annual Data 1987 to 2008

Source: Statistics Canada, Labour Force Survey

Exhibit 6
Hamilton Census Metropolitan Area Annual Data
Employment in Education and in Health and Social Assistance (Thousands)
Annual Data 1987 to 2008

Source: Statistics Canada, Labour Force Survey
**Exhibit 7**

**Hamilton Census Metropolitan Area Annual Data**

**Employment in Selected Industrial-Related Sectors (Thousands)**

**Annual Data 1987 to 2008**

![Graph showing employment in selected industrial-related sectors (Thousands) from 1987 to 2008. The graph illustrates trends in construction, distribution, finance, and business services with data points for each year from 1987 to 2007.]

Source: Statistics Canada, Labour Force Survey

Annual labour force survey data for industries not illustrated above are for industries that employ fewer than 20,000 people. These other industries exhibit wide variations in employment growth from year to year over time. In order not to lose sight of the importance of these industries Exhibit 8 provides information in tabular rather than chart form regarding employment in every industry (including those illustrated in Exhibits 5 through 7 above) for each of Canada and the Hamilton CMA for each of 1987 and 2008. This table provides the number employed in each industry in each jurisdiction in each of the two years, the change in the number over the 21 year time span, and the CMA’s relative role in each industry within Canada in each year. The final column of the table reveals the CMA’s relative ranking across all 27 of the CMAs in Canada related to the number it employed in each industry in 2008.

Exhibit 8 reveals the following:

- In 1987 the Hamilton CMA accounted for 2.5 percent of all the jobs in Canada. By 2008 its share had fallen to 2.2 percent. Between 1987 and 2008 the Hamilton CMA accounted for a job gain of just over 69,000, but that gain accounted for only 1.4 percent of the 4.8 million jobs created in Canada over that period.

- Over that period the CMA’s jobs in manufacturing fell from a 3.9 percent share of all manufacturing jobs in Canada in 1987 to 2.7 percent in 2008. The CMA’s manufacturing jobs fell by about 26,000 over that period. The number of manufacturing jobs lost in all of Canada over that period was about 71,000. In other words the Hamilton CMA alone accounted for 37.1 percent of all of Canada’s manufacturing job losses over that period.
### Exhibit 8
### Canada and the Hamilton Census Metropolitan Area
### Employment by Industry in 1987 and 2008 (Thousands, Percent Shares and Rankings)

<table>
<thead>
<tr>
<th>Industry of Employment</th>
<th>1987 Canada (000s)</th>
<th>1987 Hamilton (000s)</th>
<th>Share (%)</th>
<th>2008 Canada (000s)</th>
<th>2008 Hamilton (000s)</th>
<th>Share (%)</th>
<th>87-08 Share (%)</th>
<th>87-08 Rank *</th>
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<tbody>
<tr>
<td>Total</td>
<td>12,333.0</td>
<td>305.2</td>
<td>2.5</td>
<td>17,125.8</td>
<td>374.4</td>
<td>2.2</td>
<td>4,792.8</td>
<td>1.4</td>
</tr>
<tr>
<td>Agriculture Forestry Fishing and Hunting</td>
<td>567.1</td>
<td>4.5</td>
<td>0.8</td>
<td>402.9</td>
<td>4.3</td>
<td>1.1</td>
<td>-164.2</td>
<td>0.2</td>
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<tr>
<td>Mining and Oil and Gas Extraction</td>
<td>184.4</td>
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<td>0.0</td>
<td>264.2</td>
<td>0.0</td>
<td>0.0</td>
<td>79.8</td>
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<td>Utilities</td>
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<td>0.0</td>
<td>151.8</td>
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<td>1.4</td>
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<td>Construction</td>
<td>726.6</td>
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<td>27.4</td>
<td>2.2</td>
<td>505.6</td>
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<td>Manufacturing</td>
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<td>80.0</td>
<td>3.9</td>
<td>1,970.3</td>
<td>53.8</td>
<td>2.7</td>
<td>-70.7</td>
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<td>Wholesale Trade</td>
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<td>2.6</td>
<td>215.3</td>
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<td>Retail Trade</td>
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<td>41.4</td>
<td>2.6</td>
<td>2,046.0</td>
<td>42.8</td>
<td>2.1</td>
<td>481.4</td>
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<td>Transportation and Warehousing</td>
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<td>8.1</td>
<td>1.3</td>
<td>857.7</td>
<td>17.1</td>
<td>2.0</td>
<td>223.7</td>
<td>9.0</td>
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<td>Information and Cultural Industries</td>
<td>332.9</td>
<td>5.9</td>
<td>1.8</td>
<td>397.4</td>
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<td>2.2</td>
<td>64.5</td>
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<td>778.7</td>
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<td>Real Estate Rental and Leasing</td>
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<td>296.7</td>
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<td>Professional Scientific and Technical Services</td>
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<td>8.1</td>
<td>1.7</td>
<td>1,200.0</td>
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<td>1.8</td>
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<td>Management of Companies and Enterprises</td>
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<td>0.0</td>
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<td>0.0</td>
<td>0.0</td>
<td>4.2</td>
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<tr>
<td>Administrative and Support</td>
<td>269.5</td>
<td>10.4</td>
<td>3.9</td>
<td>679.1</td>
<td>17.5</td>
<td>2.6</td>
<td>409.6</td>
<td>7.1</td>
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<td>Educational Services</td>
<td>776.6</td>
<td>20.1</td>
<td>2.6</td>
<td>1,192.8</td>
<td>30.8</td>
<td>2.6</td>
<td>416.2</td>
<td>10.7</td>
</tr>
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<td>Health Care and Social Assistance</td>
<td>1,152.0</td>
<td>29.2</td>
<td>2.5</td>
<td>1,903.4</td>
<td>48.2</td>
<td>2.5</td>
<td>751.4</td>
<td>19.0</td>
</tr>
<tr>
<td>Arts Entertainment and Recreation</td>
<td>178.1</td>
<td>5.1</td>
<td>0.9</td>
<td>362.2</td>
<td>7.2</td>
<td>2.0</td>
<td>184.1</td>
<td>2.0</td>
</tr>
<tr>
<td>Accommodation Services</td>
<td>716.7</td>
<td>15.0</td>
<td>2.1</td>
<td>1,073.5</td>
<td>22.1</td>
<td>2.1</td>
<td>356.8</td>
<td>7.1</td>
</tr>
<tr>
<td>Other Services</td>
<td>633.1</td>
<td>14.4</td>
<td>2.3</td>
<td>751.1</td>
<td>15.6</td>
<td>2.1</td>
<td>118.0</td>
<td>1.2</td>
</tr>
<tr>
<td>Public Administration</td>
<td>765.4</td>
<td>13.8</td>
<td>1.8</td>
<td>925.7</td>
<td>13.2</td>
<td>1.4</td>
<td>160.3</td>
<td>0.6</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>2,041.0</td>
<td>80.0</td>
<td>3.9</td>
<td>1,970.3</td>
<td>53.8</td>
<td>2.7</td>
<td>-70.7</td>
<td>26.2</td>
</tr>
<tr>
<td>Food</td>
<td>226.2</td>
<td>5.2</td>
<td>2.3</td>
<td>259.4</td>
<td>6.1</td>
<td>2.4</td>
<td>33.2</td>
<td>0.9</td>
</tr>
<tr>
<td>Plastics and Rubber</td>
<td>93.6</td>
<td>2.8</td>
<td>3.0</td>
<td>103.2</td>
<td>1.7</td>
<td>1.6</td>
<td>9.6</td>
<td>-1.1</td>
</tr>
<tr>
<td>Non-Metallic Minerals</td>
<td>61.0</td>
<td>3.3</td>
<td>0.4</td>
<td>59.0</td>
<td>0.0</td>
<td>0.0</td>
<td>-2.0</td>
<td>-3.3</td>
</tr>
<tr>
<td>Primary Metals</td>
<td>121.8</td>
<td>28.4</td>
<td>2.3</td>
<td>77.4</td>
<td>10.0</td>
<td>1.29</td>
<td>-44.4</td>
<td>-18.4</td>
</tr>
<tr>
<td>Fabricated Metals</td>
<td>162.1</td>
<td>39.3</td>
<td>5.7</td>
<td>177.5</td>
<td>6.1</td>
<td>3.4</td>
<td>15.4</td>
<td>-3.2</td>
</tr>
<tr>
<td>Machinery</td>
<td>96.5</td>
<td>4.7</td>
<td>4.9</td>
<td>112.3</td>
<td>4.2</td>
<td>3.7</td>
<td>15.8</td>
<td>-0.5</td>
</tr>
<tr>
<td>Computers and Electronics</td>
<td>103.9</td>
<td>2.6</td>
<td>1.5</td>
<td>109.5</td>
<td>3.8</td>
<td>3.5</td>
<td>5.6</td>
<td>2.2</td>
</tr>
<tr>
<td>Electric Equipment, Appliances</td>
<td>76.0</td>
<td>4.2</td>
<td>5.5</td>
<td>47.8</td>
<td>0.0</td>
<td>0.0</td>
<td>-28.2</td>
<td>-4.2</td>
</tr>
<tr>
<td>Transportation Equipment</td>
<td>235.9</td>
<td>7.0</td>
<td>3.0</td>
<td>269.9</td>
<td>9.6</td>
<td>3.6</td>
<td>34.0</td>
<td>2.6</td>
</tr>
<tr>
<td>All Other Manufacturing</td>
<td>864.0</td>
<td>13.5</td>
<td>1.6</td>
<td>754.3</td>
<td>12.3</td>
<td>1.6</td>
<td>-109.7</td>
<td>-1.2</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, Labour Force Survey

Within manufacturing the Hamilton CMA:

- Accounted for a major portion of the nation’s lost jobs in primary metals over that period (41.4 percent of them) and in electric equipment and appliances (14.9 percent).

- Lost more jobs in non-metallic minerals than did Canada as a whole, and it lost jobs when the nation was creating them in each of plastics and rubber, fabricated metals and machinery.

- Created almost 40 percent of the nation’s new jobs in computers and electronics over that period.

Outside of manufacturing the CMA also lost jobs in the primary industries (agriculture, forestry, fishing and hunting; most likely all agriculture in the Hamilton CMA) and in public administration, though the decline in both of these cases was minor.

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**CHARTING HAMILTON’S LABOUR MARKET: PAST, PRESENT AND FUTURE**
On a positive note Exhibit 8 also reveals that major employment gains were achieved in the Hamilton CMA between 1987 and 2008 in a number of other industrial sectors:

- Employment in health care and social assistance grew by 19,000 between 1987 and 2008 as this industry retained its national share at 2.5 percent over that period.
- Employment in professional, scientific and technical services grew by 14,000 between 1987 and 2008 as this industry increased its national share slightly to 1.8 percent in 2008 from 1.7 percent in 1987.
- Employment in construction grew by more than 11,000 over that period, holding this industry’s national share at 2.2 percent.
- Employment in educational services grew by almost 11,000 over that period, sustaining this industry’s national share at 2.6 percent.
- Employment in transportation and warehousing increased by 9,000, increasing this industry’s share of the Canadian total significantly from 1.3 to 2.0 percent.
- Employment in administrative and other business support – which includes everything from corporate management to security services to waste management – grew by 7,000, though this industry’s share within Canada nevertheless fell from 3.9 to 2.6 percent.
- Employment in food and accommodation services also grew by 7,000 as this industry sustained its share of such jobs within Canada at 2.1 percent.
- Employment in wholesale trade increased by 6,000 as this industry increased its national share slightly from 2.5 to 2.6 percent.
- Employment in finance and insurance increased by 5,000 but this industry nevertheless saw a slight dip in its national share from 2.3 to 2.2 percent.

Collectively the above 9 industries increased employment in the Hamilton CMA by 89,000 between 1987 and 2008, more than offsetting the decline of 26,000 in manufacturing jobs.

In Section 4 of this report the economic base of the City of Hamilton is defined drawing on a detailed review of 2006 Census data regarding employment “by place-of-work”. The analysis in this section of long-term trends in Hamilton CMA employment by industry is on a “by place-of-residence” basis. It reveals that job creation in the Hamilton area – both in the City and in nearby communities – is rapidly shifting away from goods production to business supportive and community supportive services. Similar shifts in emphasis are expected in the future.

Exhibit 9 summarizes the above-described trends in employment by industry for the Hamilton CMA over the period from 1987 to 2008.

Over that period:
The number of people residing in the CMA holding jobs in manufacturing fell by 26,200 with the largest declines occurring in primary metals (18,400), fabricated metals (3,200) and electric equipment and appliances (2,200). Within manufacturing, however, transportation equipment (up 2,600), computers and electronics (up 2,200) and food processing (up 900) posted gains over that period.

The major employment gains were achieved in health care and social assistance (up 19,000); professional, scientific and technical services (up 14,000); construction (up 11,400); education (up 10,700); transportation and warehousing (up 9,000); food and accommodation (up 7,100); administrative and support services (up 7,100); wholesale trade (up 5,900); and finance and insurance (up 5,000).

Exhibit 9
Hamilton Census Metropolitan Area
Employment by Industry in 1987 and 2008 and Change 1987 to 2008 (Thousands)

<table>
<thead>
<tr>
<th>Industry</th>
<th>1987</th>
<th>2008</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total all industries</td>
<td>305,200</td>
<td>374,400</td>
<td>69,200</td>
</tr>
<tr>
<td>Agriculture, Other Primary</td>
<td>4,500</td>
<td>4,300</td>
<td>-200</td>
</tr>
<tr>
<td>Utilities</td>
<td>2,500</td>
<td>2,100</td>
<td>-400</td>
</tr>
<tr>
<td>Construction</td>
<td>16,000</td>
<td>27,400</td>
<td>11,400</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>80,000</td>
<td>53,800</td>
<td>-26,200</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>10,400</td>
<td>16,300</td>
<td>5,900</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>41,400</td>
<td>42,800</td>
<td>1,400</td>
</tr>
<tr>
<td>Transportation and Warehousing</td>
<td>8,100</td>
<td>17,100</td>
<td>9,000</td>
</tr>
<tr>
<td>Information and Cultural Industries</td>
<td>5,900</td>
<td>8,700</td>
<td>2,800</td>
</tr>
<tr>
<td>Finance and Insurance</td>
<td>12,200</td>
<td>17,200</td>
<td>5,000</td>
</tr>
<tr>
<td>Real Estate Rental and Leasing</td>
<td>6,700</td>
<td>6,900</td>
<td>200</td>
</tr>
<tr>
<td>Professional, Scientific, Technical Services</td>
<td>8,100</td>
<td>22,100</td>
<td>14,000</td>
</tr>
<tr>
<td>Administrative and Support</td>
<td>10,400</td>
<td>17,500</td>
<td>7,100</td>
</tr>
<tr>
<td>Educational Services</td>
<td>20,100</td>
<td>30,900</td>
<td>10,700</td>
</tr>
<tr>
<td>Health Care and Social Assistance</td>
<td>29,200</td>
<td>48,200</td>
<td>19,000</td>
</tr>
<tr>
<td>Arts Entertainment and Recreation</td>
<td>5,200</td>
<td>7,200</td>
<td>2,000</td>
</tr>
<tr>
<td>Accommodation Services</td>
<td>15,000</td>
<td>22,100</td>
<td>7,100</td>
</tr>
<tr>
<td>Other Services</td>
<td>15,700</td>
<td>16,700</td>
<td>1,000</td>
</tr>
<tr>
<td>Public Administration</td>
<td>13,800</td>
<td>13,200</td>
<td>-600</td>
</tr>
<tr>
<td>Total manufacturing</td>
<td>80,000</td>
<td>53,800</td>
<td>-26,200</td>
</tr>
<tr>
<td>Primary Metals</td>
<td>28,400</td>
<td>10,000</td>
<td>-18,400</td>
</tr>
<tr>
<td>Fabricated Metals</td>
<td>9,300</td>
<td>6,100</td>
<td>-3,200</td>
</tr>
<tr>
<td>Food</td>
<td>5,200</td>
<td>6,100</td>
<td>900</td>
</tr>
<tr>
<td>Transportation Equipment</td>
<td>7,000</td>
<td>9,600</td>
<td>2,600</td>
</tr>
<tr>
<td>Machinery</td>
<td>4,700</td>
<td>4,200</td>
<td>-500</td>
</tr>
<tr>
<td>Electric Equipment, Appliances</td>
<td>4,200</td>
<td>2,000</td>
<td>-2,200</td>
</tr>
<tr>
<td>Non-Metallic Minerals</td>
<td>3,300</td>
<td>2,100</td>
<td>-1,200</td>
</tr>
<tr>
<td>Plastics and Rubber</td>
<td>2,800</td>
<td>1,700</td>
<td>-1,100</td>
</tr>
<tr>
<td>Computers and Electronics</td>
<td>1,600</td>
<td>3,800</td>
<td>2,200</td>
</tr>
<tr>
<td>All Other Manufacturing</td>
<td>13,500</td>
<td>8,200</td>
<td>-5,300</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, Labour Force Survey

At this point it is worth noting that although manufacturing jobs in 2008 in Canada were slightly lower than was the case in 1987 – they fell from 2.04 million to 1.97 million over that period, or by 3.5 percent – manufacturing production in 2008 was much greater than it had been back in 1997, by 43.0 percent. The implication is that output per worker, grew by 48.2 percent over that period, from $59,990 in constant 2002 dollars in 1987 to $88,880 in 2008.

Over the last two decades manufacturing output nation-wide grew at an average annual rate of 1.8 percent while manufacturing jobs fell at an average annual rate of 0.1 percent. Manufacturing productivity, therefore, grew at an annual rate of 1.9 percent. These productivity gains were achieved through improvements in organization, the increased use of new technologies and the replacement of less skilled workers with higher skilled workers, workers trained in the use of the new automated procedures.
We expect manufacturing output and productivity to continue to grow at similar rates well into the future. In other words, we expect manufacturing jobs to continue to decline in number over the longer term, though there will be some job growth in the short term from the recession-induced low levels of 2008 and 2009 due to the economic recovery now underway. But we expect the remaining manufacturing jobs to be filled with workers with ever increasing skill levels.

Exhibit 10 illustrates the different paths taken by manufacturing output and employment in Canada between 1987 and 2008, and the impacts the expected recovery and expansion in manufacturing output nation-wide will have on the number of manufacturing jobs. We expect the number of jobs in manufacturing nation-wide in 2016 will take us back to the number prevailing in 2008. In other words while manufacturing’s presence on a community by community basis is gradually being eroded in terms of the number of jobs it provides its presence on a volume of production basis and on a quality of job basis will continue to grow.

Exhibit 10
Canadian Manufacturing Output ($ Millions 2002, Blue Bar, Left Scale)
Canadian Manufacturing Employment (Thousands of Persons, Burgundy Line, Right Scale)
Actual Data 1987 to 2008, Estimated and Projected Data 2009 to 2016

Source: Statistics Canada and C4SE
Section 4
THE ECONOMIC BASE OF THE CITY OF HAMILTON

This section of the report identifies the economic base of the City of Hamilton along industrial lines relative to the province of Ontario as a whole.

The economic activities occurring in a major city or metropolitan region can be divided into those that are export-based and those that are community-based. Export-based industries produce goods that are shipped to markets outside the community (agriculture, forestry, fishing and manufacturing), or they provide services either to visitors to the community (hotels, tourism attractors, specialized hospitals, colleges and universities) or to businesses outside the community (specialized financial, professional, scientific and technical services). Community-based industries produce services that meet the needs primarily of the local residents in the community (retail, medical, primary and secondary education, and personal and government services). Growth will typically occur in a metropolitan region only if its export-base is expanding. Expansion of the export-based industries drives the growth of the community at large. Without growth in its export-based industries growth in a region’s community-based activities is unlikely to occur. The export-based industries in a region are often referred to as the economic-base of the area. The terms export-based industries and economic-base industries can be used interchangeably as they refer to the same concept.

Exhibit 11 decomposes Hamilton’s just under 200,000 jobs in 2006 on a place-of-work by industry basis into its economic-base (EB) and community-base (CB) components. The decomposition is based on the City’s activity rates (employment per capita) relative to those for Ontario. All jobs in the agriculture, forestry, mining and manufacturing sectors are considered to be export-based, while export-based jobs in the other industries are determined where the activity rate in the City in that industry exceeds the rate in that industry province-wide.  

In 2006 employers provided a total of 197,180 jobs in the City of Hamilton. Our decomposition indicates that 45,245 of those jobs (or 23 percent) represented economic-base jobs with the remaining 151,935 (or 77 percent) representing community base jobs.

The primary sector (mostly agriculture in Hamilton) and mining (most likely quarrying in Hamilton) accounts for 7 percent of Hamilton’s economic-base jobs and manufacturing for 73 percent. Thus the traditional economic-base sectors together account for 80 percent of Hamilton’s economic-base employment. The remaining 20 percent is accounted for by regional services (a total of 9,160, including 2,834 in education and 6,326 in health). This decomposition reveals that Hamilton’s economic-base is heavily weighted toward the traditional sectors.

---

1 In this procedure we calculate the number of jobs per capita on a place-of-work basis in the City of Hamilton itself and for Ontario as a whole for each of 35 industries, 17 of which represent individual manufacturing sectors. We attribute all jobs in the primary (agriculture, forestry, mining, etc.) and manufacturing sectors in Hamilton and Ontario to the economic-base of each since most of the products produced in these industries are destined for markets elsewhere. We compare the per capita levels across all of the remaining industries, most of which are services, and attribute all jobs above the norm in the City to be economic-base jobs, since, because they are above the norm, they must represent jobs providing services to people not normally residing in the community (or exportable services). When economic-base service jobs crop up in the retail, food-accommodation, and arts-entertainment-recreation sectors, that is a sign that tourism forms part of the City’s economic-base (such as occurs in Niagara in Ontario). When economic-base service jobs crop up in the health, education and government sectors it is a sign that the City in question is a major regional service provider to surrounding communities (such as occurs in the case of Hamilton).
### Exhibit 11
City of Hamilton Employment by Place-of-Work in 2006
Economic-Base and Community-Base Decomposition

<table>
<thead>
<tr>
<th>Employed by POW</th>
<th>EPOW per 1,000</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Hamilton</td>
<td>Ontario</td>
</tr>
<tr>
<td>Total Population (Postcensal)</td>
<td>523,774</td>
<td>12,665,346</td>
</tr>
<tr>
<td>Total Employment (Census)</td>
<td>197,180</td>
<td>5,570,855</td>
</tr>
<tr>
<td>Agriculture, Fishing</td>
<td>2,955</td>
<td>95,690</td>
</tr>
<tr>
<td>Forestry, Logging</td>
<td>55</td>
<td>4,135</td>
</tr>
<tr>
<td>Mining</td>
<td>185</td>
<td>21,490</td>
</tr>
<tr>
<td>Total manufacturing</td>
<td>32,890</td>
<td>826,430</td>
</tr>
<tr>
<td>Professional Services</td>
<td>8,970</td>
<td>416,400</td>
</tr>
<tr>
<td>Utilities</td>
<td>935</td>
<td>43,900</td>
</tr>
<tr>
<td>Construction</td>
<td>6,800</td>
<td>176,115</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>7,645</td>
<td>273,795</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>23,885</td>
<td>656,575</td>
</tr>
<tr>
<td>Transportation, Warehousing</td>
<td>7,610</td>
<td>225,505</td>
</tr>
<tr>
<td>Information, Culture</td>
<td>3,450</td>
<td>152,225</td>
</tr>
<tr>
<td>Finance, Insurance</td>
<td>10,265</td>
<td>415,370</td>
</tr>
<tr>
<td>Other Business Services</td>
<td>6,815</td>
<td>227,470</td>
</tr>
<tr>
<td>Education</td>
<td>18,895</td>
<td>388,370</td>
</tr>
<tr>
<td>Health, Social Assistance</td>
<td>29,620</td>
<td>563,260</td>
</tr>
<tr>
<td>Arts, Entertainment, Recreation</td>
<td>3,685</td>
<td>117,075</td>
</tr>
<tr>
<td>Accommodation</td>
<td>13,340</td>
<td>367,640</td>
</tr>
<tr>
<td>Other Services</td>
<td>10,375</td>
<td>265,735</td>
</tr>
<tr>
<td>Public Administration</td>
<td>8,805</td>
<td>333,675</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE

Within manufacturing (Exhibit 12) Hamilton has a strong representation (in order of importance) as a job provider in primary metals (38.8 percent of all manufacturing jobs in Hamilton), fabricated metals (14.3 percent), food processing (11.1 percent) and transportation equipment (10.6 percent). These four industries collectively accounted for 72 percent of all the manufacturing jobs in the City in 2006.

Other major manufacturing employers in the City in 2006 included machinery (7.1 percent of all manufacturing jobs), textiles and clothing (3.5 percent), non-metallic minerals (2.3 percent), furniture (2.1 percent), plastics and rubber (1.9 percent), printing (1.8 percent), electrical products (1.7 percent) and chemicals (1.6 percent), all of which each provided at least 500 jobs.

Exhibit 13 summarizes the relative importance of the primary, manufacturing, education and health sectors on an employment by place-of-work basis within the economic base of the City in 2006.
Exhibit 12
City of Hamilton Employment by Place-of-Work in Manufacturing by Industry in 2006

<table>
<thead>
<tr>
<th>Industry</th>
<th>Hamilton</th>
<th></th>
<th>Ontario</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Total manufacturing</td>
<td>32,890</td>
<td>100.0</td>
<td>826,430</td>
<td>100.0</td>
</tr>
<tr>
<td>Food</td>
<td>3,640</td>
<td>11.1</td>
<td>89,445</td>
<td>10.8</td>
</tr>
<tr>
<td>Textiles, Clothing, Leather</td>
<td>1,140</td>
<td>3.5</td>
<td>31,480</td>
<td>3.8</td>
</tr>
<tr>
<td>Wood</td>
<td>465</td>
<td>1.4</td>
<td>27,465</td>
<td>3.3</td>
</tr>
<tr>
<td>Paper</td>
<td>355</td>
<td>1.1</td>
<td>26,855</td>
<td>3.2</td>
</tr>
<tr>
<td>Printing</td>
<td>585</td>
<td>1.8</td>
<td>36,950</td>
<td>4.5</td>
</tr>
<tr>
<td>Petroleum, Coal</td>
<td>85</td>
<td>0.3</td>
<td>3,935</td>
<td>0.5</td>
</tr>
<tr>
<td>Chemical</td>
<td>540</td>
<td>1.6</td>
<td>41,895</td>
<td>5.1</td>
</tr>
<tr>
<td>Plastics, Rubber</td>
<td>625</td>
<td>1.9</td>
<td>61,880</td>
<td>7.5</td>
</tr>
<tr>
<td>Non-metallic Minerals</td>
<td>770</td>
<td>2.3</td>
<td>21,030</td>
<td>2.5</td>
</tr>
<tr>
<td>Primary Metals</td>
<td>11,760</td>
<td>35.8</td>
<td>39,360</td>
<td>4.8</td>
</tr>
<tr>
<td>Fabricated Metals</td>
<td>4,690</td>
<td>14.3</td>
<td>83,355</td>
<td>10.1</td>
</tr>
<tr>
<td>Machinery</td>
<td>2,350</td>
<td>7.1</td>
<td>61,490</td>
<td>7.4</td>
</tr>
<tr>
<td>Computers</td>
<td>325</td>
<td>1.0</td>
<td>46,720</td>
<td>5.7</td>
</tr>
<tr>
<td>Electrical products</td>
<td>560</td>
<td>1.7</td>
<td>22,990</td>
<td>2.8</td>
</tr>
<tr>
<td>Transportation Equipment</td>
<td>3,470</td>
<td>10.6</td>
<td>164,995</td>
<td>20.0</td>
</tr>
<tr>
<td>Furniture</td>
<td>675</td>
<td>2.1</td>
<td>38,100</td>
<td>4.6</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>855</td>
<td>2.6</td>
<td>28,485</td>
<td>3.4</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE

Exhibit 13
City of Hamilton Economic-Base Employment by Place-of-Work by Industry in 2006

- Primary: 7%
- Manufacturing: 73%
- Education: 6%
- Health: 14%

Source: Statistics Canada and C4SE
Section 5
THE ECONOMIC REACH OF THE CITY OF HAMILTON

Statistics Canada defines Census Metropolitan Areas based on groupings of contiguous municipalities with a high level of economic and social interdependence. At the time of the 2001 Census StatCan identified 27 CMAs. With the release of the 2006 Census results StatCan added another 6 CMAs to the list (including Barrie, Brantford, Guelph and Peterborough in Ontario, Moncton in New Brunswick and Kelowna in British Columbia) bringing the total to 33.

From an analytical and policy viewpoint StatCan’s CMA definitions can often pose problems:

- CMAs rarely align themselves geographically with politically defined metropolitan regions such as the Greater Golden Horseshoe, the Greater Toronto Area, the Greater Vancouver Regional District, etc.

- StatCan’s list of 33 CMAs includes Oshawa, which in our view is no longer a separate CMA but rather a suburban region within the GTA; and Abbotsford, which is also not a separate CMA but rather a suburban region to the GVA.

- StatCan’s list of 33 leaves out many metropolitan areas in Canada that have populations of 100,000 people. In Ontario it leaves out places such as Cornwall, Brockville, Belleville, Woodstock-Tillsonburg, Chatham, Sarnia, Sault Ste. Marie and Renfrew.

In view of the relentless intermingling of the suburban municipalities of the 8 metropolitan areas defining the Greater Golden Horseshoe (see Section 2) the case can be made that Hamilton, Niagara, Kitchener, Guelph and Brantford can no longer each be considered separate CMAs. This point is illustrated by an assessment of commuting patterns related to the City of Hamilton (Exhibit 14):

- In 2006 a total of 246,340 City of Hamilton residents held jobs. In contrast, employers provided a total only 197,180 jobs within the City. Thus the number of resident job holders exceeded the number of jobs offered by 49,160.

- Of the 246,340 residents who worked, 13,600 worked at home and 145,485 held one of the jobs offered by employers in Hamilton. Another 24,395 had jobs with no fixed address (most often held by sales and service personnel and by construction workers). A total of 61,610 – or 27 percent of all the City’s employed residents – worked in a nearby community while another 1,255 worked in another province or country altogether. The most important nearby communities to which the 61,610 Hamilton residents commuted included Peel-Halton (44,410), Toronto (6,925), Waterloo-Wellington-Dufferin (4,395), Niagara (3,340) and Grand Erie (3,520).

- Of the 197,180 jobs provided by employers in the City, 159,085 (or 81 percent) were held by City residents including those working at home. The remaining 38,095 were mostly held by residents of Peel-Halton (12,080), Niagara (10,740), Grand Erie (10,025), Waterloo-Wellington-Dufferin (1,975) and Toronto (1,220).
Exhibit 14
City of Hamilton Commuting Patterns in 2006

<table>
<thead>
<tr>
<th>Employed by place of residence</th>
<th>246,340</th>
</tr>
</thead>
<tbody>
<tr>
<td>At home</td>
<td>13,600</td>
</tr>
<tr>
<td>Outside Canada</td>
<td>895</td>
</tr>
<tr>
<td>No fixed workplace</td>
<td>24,395</td>
</tr>
<tr>
<td>In City of Hamilton</td>
<td>145,485</td>
</tr>
<tr>
<td>In another county or region</td>
<td>61,610</td>
</tr>
<tr>
<td>In another province</td>
<td>360</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Employed by place of work</th>
<th>197,180</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hamilton residents working at home</td>
<td>13,600</td>
</tr>
<tr>
<td>Hamilton residents working in City of Hamilton</td>
<td>145,485</td>
</tr>
<tr>
<td>Not held by Hamilton residents</td>
<td>38,095</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, 2006 Census

This section began by noting that Statistics Canada identifies Census Metropolitan Areas based on groupings of contiguous municipalities with a high level of economic and social interdependence. A CMA’s central city must have a population of at least 100,000 people and other municipalities included in the CMA must be progressively contiguous to the central city. The concept of the CMA originated to define relatively self-enclosed economic regions.

The Hamilton CMA is defined by StatCan to include the abutting municipalities of Burlington in Halton Region and Grimsby in Niagara Region, reasonable assignments based on long standing commuting patterns. But the analysis here reveals that thousands of Hamilton’s residents commute each day to places far beyond Burlington and Grimsby, and that thousands of people commute to jobs in Hamilton each day from places far beyond these same two municipalities.

The reality is that the City of Hamilton based economic region now reaches well beyond the bounds defined by the Hamilton CMA. Further analysis would reveal that the Kitchener, Guelph, Brantford, Niagara and Toronto CMAs also all reach well outside the bounds defined by their respective areas. All of which leads us to conclude that it means less and less each year to talk about these 8 separate CMAs. It becomes increasingly more important to talk about the mutually reinforcing strengths of centre in carrying forward the growth agenda of the Greater Golden Horseshoe.

The focus of this report is to assess the supply and demand for labour in the Hamilton Area to the year 2016. The case has been made here that the demand for workers residing in Hamilton will primarily stem from job growth created by employers in the City. But the demand for workers residing in Hamilton will also arise through job creation in nearby communities. All of this demand for new workers in the area many of whom will choose to reside in the City of Hamilton will attract new residents to the City, new residents requiring local services, etc. Thus the number of jobs on a place-of-work basis in the City will increase both as its economic-base and as its community-base jobs expand.
Section 6
THE POTENTIAL FOR EMPLOYMENT GROWTH IN THE CITY OF HAMILTON

The economic base and community base components of employment by place-of-work in the City were delineated in Section 4 of this report.

We have prepared projections for employment in Hamilton’s traditional economic base industries – the primary sector and its various manufacturing industries in detail – by assuming they will grow in tandem with the pace expected for such jobs province-wide. Exhibit 15 reveals that, given the mix of employment of these jobs in the City’s base in 2006, and given our projections for growth for each industry province-wide between now and 2021, the number of traditional economic-base jobs in the City will not likely change much by 2021 from the level prevailing in 2006. The City’s economic-base output will grow as productivity gains in these sectors continue at high rates. Thus the economic presence of these industries in the City will continue to expand. But the number of people employed by them in the City between now and 2021 will not change by much.

Exhibit 15
City of Hamilton Traditional Economic-Base Jobs 2006 to 2021

The education and health sectors were identified in Section 4 as also being contributors to the City’s economic base. About 20 percent of the City’s jobs in health and social services and about 13 percent of its jobs in education were so identified. The analysis of long-term historical trends in industrial employment by residents of the Hamilton CMA in Section 3 revealed that both of these industries were major contributors to overall employment growth among the CMA’s residents over the 1987 to 2008 period.
That same analysis in Section 3 revealed that employment growth among the CMA’s residents in goods distribution, business services, construction, food and accommodation and finance and insurance was strong over the last two decades as well. Yet the economic-base assessment of Section 4 revealed that these industries had not yet grown within the City to the point where they could be said to have developed an economic-base component. Nevertheless, any and all of these service industries have reached economic-base proportions in other centres throughout Canada, and the potential exists for them to do so in the City of Hamilton as well in the years ahead.

Given that these industries have not yet developed an economic-base component in the City we drove our projections for employment for each to 2021 using our expectations about the gains in the City’s population between now and then. In other words we assumed employment in these industries will grow in line with local community requirements only. Exhibit 16 shows the path of expansion we expect for employment in each of these industries between now and 2021 under that assumption.

Exhibit 16
City of Hamilton Community-Base Jobs 2006 to 2021

Exhibits 12 and 13 were purposely extended beyond the time frame of the labour supply and demand analysis required here to show that the trends indicated for beyond 2016 mirror those indicated for the period 2006 to 2016.

The labour market strategy established for the Hamilton area in early 2010, therefore, will not only position the area to reflect its labour needs to 2016, but it will position it as well to reflect its needs beyond 2016.
Exhibit s15 and 13 combined reveal that the total number of jobs provided by employers in the City is likely to increase from 197,180 in 2006 to 226,160 by 2016 – a gain of almost 29,000 – and to 245,300 by 2021 – a further gain of 19,000. In other words, there will be many new jobs created in the City over this period. Looking at the gain of 29,000 expected for total employment between 2006 and 2016 the changes break down by industry as follows:

- Employment in the primary sector will fall by more than 700.
- Employment in the manufacturing of primary and fabricated metals will fall by 5,000.
- Employment in the manufacturing of all other products will fall by 2,400.
- Employment in health and social services will increase by almost 12,000.
- Employment in education services will increase by 2,500.
- Employment in goods distribution will increase by 4,400.
- Employment in business services will increase by 3,600.
- Employment in personal services will increase by 11,600.
- Employment in public administration will increase by 3,000.

To the extent that the economic-base components of education, and of health care and social services, can be developed further, the gains in these two industries could exceed the amounts indicated above. To the extent that an economic-base component can be developed in business services, that industry too could grow by more than indicated above. The projections provided here, therefore, can be viewed as the minimum growth likely to occur in employment by place-of-work by industry in the City between 2006 and 2016.

Exhibit 17 reveals how the share of jobs offered by Hamilton’s employers will continue to gradually shift between 2006 and 2021 away from the primary and manufacturing sectors, toward services in general, especially toward health care and social services:

- The bottom seven categories in Exhibit 17 include all jobs in the primary and manufacturing sectors. The share of this group gradually declines from 18.3 percent of all jobs in 2006 to only 11.2 percent in 2021, a decline of 7.1 percentage points.
- Over that same period jobs in the health care and social services sector increase from 15.0 percent to 19.5 percent of the total, an increase of 4.5 percentage points.
- The share for public administration increases by 0.4 percentage points while that for business services increases by 0.3 points.
- The shares for all other industries mostly hold steady over the projection period.
Exhibit 17
City of Hamilton Employment by Industry by Place-of-Work 2006 to 2021

Source: Statistics Canada and C-SE
Exhibit 18 shows the occupational mix of the 197,185 jobs provided by employers in the City of Hamilton in 2006. In absolute terms the most frequently found occupations in the City are elemental sales and service occupations, intermediate sales and service occupations, clerical occupations, trades and skilled transport and equipment operators, middle and other management occupations, and professional occupations in social science, education and government services, each of which numbers in the 15,000 to 20,000 range.

Exhibit 18
City of Hamilton Jobs by Occupation in 2006

Source: Statistics Canada

Exhibit 19 compares the composition of these occupations in Hamilton to their composition province-wide through an index for each group showing its relative importance within Hamilton to its relative importance across Ontario. Exhibits 16 reveals that health care related, manufacturing related and primary industry related occupations are all found at higher rates in Hamilton than is the case province-wide, no surprise given the industrial profile of the City. It also reveals occupations related to business and financial services are all found at lower rates in Hamilton than province-wide.
Exhibit 19  
Composition of City of Hamilton Jobs by Occupation Relative to Ontario in 2006

Where the index for a given industry equals 100 that occupation is found in the City of Hamilton at the same frequency it is found province-wide. Where the index for a given industry exceeds 100, that occupation is found in the City of Hamilton at a greater frequency than it is found province-wide. Where the index for a given industry falls short of 100, that occupation is found in the City of Hamilton at a lower frequency than it is found province-wide.

Source: Statistics Canada and C4SE

The labour force of the City of Hamilton is drawn from its population aged 15 years and older. In 2006 there were 407,600 people residing in the City aged 15 and above. However, only 60.4 percent of them – a total of 246,340 people – held jobs. Section 5 revealed that most of these people held positions in the City but a significant portion worked outside in nearby communities (while a few worked outside Ontario altogether).

Of the 39.6 percent of the people aged 15 and over in Hamilton who did not hold jobs, a small portion were unemployed. The remainder either chose not to participate, or were not able to participate, in labour market activities.

Exhibit 20 profiles the 407,600 people aged 15 and over in the City by their highest level of education attained. The blue portion of each bar indicates the number at each education level that had jobs in 2006 while the burgundy portion indicates the portion that did not. Exhibit 21 shows the percent share of each education group that was employed in 2006 (that is, Exhibit 21 is based on the information in Exhibit 20).
Exhibit 20
City of Hamilton Population 15 and Over by Highest Level of Education in 2006
The Blue Section Indicates Those Employed, the Burgundy Section Those Not Employed

Source: Statistics Canada

Exhibit 21
City of Hamilton Population 15 and Over by Highest Level of Education in 2006
Percent Share Employed by Education Level

Source: Statistics Canada
Exhibit 20 (above) reveals the largest group by highest education level attained among those 15 and over is those with a high school certificate or equivalent (111,225) while the next largest is those with no certificate, diploma or degree (102,180). Among the remaining 194,195 people 15 and over – those with some post secondary education – the largest groups are as follows:

- Those with college or other non-university certificates or diplomas number 79,530.
- Those with an apprenticeship or trade certificate or diploma number 38,115.
- Those with a bachelor’s degree number 37,795.
- Those with a university certificate or diploma below the bachelor level number 13,290.
- Those with a master’s degree number 11,935.
- Those with a university certificate or diploma above the bachelor level number 8,110.
- Those with earned doctorates number 3,000.
- Those with medical degrees number 2,420.

The employment share of all those aged 15 and over is 60.4 percent irrespective of highest level of education attained. Exhibit 21 (above) reveals the employment share is highest among those with a secondary school education or higher. The average share of 60.4 percent is exceeded in every education category except among those with no certificate, degree or diploma. In this latter group the employment share is just 37.6 percent.

Exhibit 22
City of Hamilton Employment by Level of Education Relative to Ontario in 2006

Source: Statistics Canada
Exhibit 22 (above) compares in index form the distribution of job holders in Hamilton by level of education to the distribution of job holders province-wide. It reveals that job holders in Hamilton are less likely to be trained at the college or university level than job holders generally in Ontario. Hamilton job holders are more likely to have reached the level of high school certification only, to have an apprenticeship or trades certificate or diploma, or to have no certificate, diploma or degree at all, than is the case for job holders generally across the province. This characteristic of Hamilton’s job holders reflects the composition of occupations they held in 2006 which, in turn, reflects the industrial composition of jobs being offered in the area at that time.

Exhibit 23 extends the analysis of labour supply to the CMA as a whole. It shows the growth in employment by major occupational group over the long term – from 1987 through to 2008 (data for 2009 will not be available until early 2010) – among those who reside in the Hamilton CMA. It is worth repeating that many of these CMA residents work not only in the Hamilton CMA but also in Halton, Peel, Toronto, etc.

Exhibit 23 is the occupational mix version of Exhibit 9 which illustrated the growth over this same period in jobs among employed residents of the Hamilton CMA by major industrial group.

**Exhibit 23**

**Hamilton Census Metropolitan Area**

**Employment by Occupation in 1987 and 2008 (Thousands, Change in Thousands, Percent Change)**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>1987</th>
<th>2008</th>
<th>Rank</th>
<th>Chg</th>
<th>Chg</th>
<th>%</th>
<th>Chg</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total all occupations</td>
<td>305.3</td>
<td>374.4</td>
<td>---</td>
<td>69.1</td>
<td>---</td>
<td>22.6</td>
<td>---</td>
</tr>
<tr>
<td>Management occupations</td>
<td>24.9</td>
<td>37.6</td>
<td>1</td>
<td>12.7</td>
<td>1</td>
<td>51.0</td>
<td>7</td>
</tr>
<tr>
<td>Professional occupations in business and finance</td>
<td>4.1</td>
<td>8.3</td>
<td>17</td>
<td>4.2</td>
<td>10</td>
<td>102.4</td>
<td>2</td>
</tr>
<tr>
<td>Financial, secretarial and administrative occupations</td>
<td>17.6</td>
<td>18.5</td>
<td>8</td>
<td>0.9</td>
<td>16</td>
<td>5.1</td>
<td>16</td>
</tr>
<tr>
<td>Clerical occupations, including supervisors</td>
<td>32.0</td>
<td>36.3</td>
<td>2</td>
<td>4.3</td>
<td>9</td>
<td>13.4</td>
<td>13</td>
</tr>
<tr>
<td>Natural and applied sciences and related occupations</td>
<td>15.3</td>
<td>19.6</td>
<td>6</td>
<td>4.3</td>
<td>8</td>
<td>28.1</td>
<td>11</td>
</tr>
<tr>
<td>Professional occupations in health, nurse supervisors and registered nurses</td>
<td>10.5</td>
<td>11.8</td>
<td>15</td>
<td>1.3</td>
<td>13</td>
<td>12.4</td>
<td>14</td>
</tr>
<tr>
<td>Technical, assisting and related occupations in health</td>
<td>7.1</td>
<td>14.9</td>
<td>11</td>
<td>7.8</td>
<td>5</td>
<td>109.9</td>
<td>1</td>
</tr>
<tr>
<td>Occupations in social science, government service and religion</td>
<td>8.1</td>
<td>16.0</td>
<td>10</td>
<td>7.9</td>
<td>4</td>
<td>97.5</td>
<td>3</td>
</tr>
<tr>
<td>Teachers and professors</td>
<td>9.5</td>
<td>18.7</td>
<td>7</td>
<td>9.2</td>
<td>3</td>
<td>96.8</td>
<td>4</td>
</tr>
<tr>
<td>Occupations in art, culture, recreation and sport</td>
<td>6.0</td>
<td>10.5</td>
<td>16</td>
<td>4.5</td>
<td>7</td>
<td>75.0</td>
<td>5</td>
</tr>
<tr>
<td>Wholesale, technical, insurance, real estate sales specialists; retail, wholesale buyers</td>
<td>9.6</td>
<td>13.1</td>
<td>13</td>
<td>3.5</td>
<td>11</td>
<td>36.5</td>
<td>10</td>
</tr>
<tr>
<td>Retail salespersons, sales clerks, cashiers, including retail trade supervisors</td>
<td>21.1</td>
<td>23.1</td>
<td>5</td>
<td>2.0</td>
<td>12</td>
<td>9.5</td>
<td>15</td>
</tr>
<tr>
<td>Chefs and cooks, and occupations in food and beverage service, including supervisors</td>
<td>7.1</td>
<td>12.1</td>
<td>14</td>
<td>5.0</td>
<td>6</td>
<td>70.4</td>
<td>6</td>
</tr>
<tr>
<td>Occupation in protective services</td>
<td>6.6</td>
<td>6.6</td>
<td>19</td>
<td>0.0</td>
<td>18</td>
<td>0.0</td>
<td>18</td>
</tr>
<tr>
<td>Childcare and home support workers</td>
<td>2.9</td>
<td>4.0</td>
<td>24</td>
<td>1.1</td>
<td>14</td>
<td>37.9</td>
<td>8</td>
</tr>
<tr>
<td>Sales and service occupations not elsewhere classified (travel, sport, supervisors)</td>
<td>25.0</td>
<td>34.4</td>
<td>3</td>
<td>9.4</td>
<td>2</td>
<td>37.6</td>
<td>9</td>
</tr>
<tr>
<td>Contractors and supervisors in trades and transportation</td>
<td>5.0</td>
<td>5.9</td>
<td>22</td>
<td>0.9</td>
<td>15</td>
<td>18.0</td>
<td>12</td>
</tr>
<tr>
<td>Construction trades</td>
<td>7.2</td>
<td>7.2</td>
<td>18</td>
<td>0.0</td>
<td>18</td>
<td>0.0</td>
<td>18</td>
</tr>
<tr>
<td>Other trades occupations</td>
<td>25.6</td>
<td>26.2</td>
<td>4</td>
<td>0.6</td>
<td>17</td>
<td>2.3</td>
<td>17</td>
</tr>
<tr>
<td>Transport and equipment operators</td>
<td>15.9</td>
<td>13.8</td>
<td>12</td>
<td>-2.1</td>
<td>23</td>
<td>-13.2</td>
<td>22</td>
</tr>
<tr>
<td>Trades helpers, construction, and transportation labourers and related occupations</td>
<td>7.0</td>
<td>6.4</td>
<td>20</td>
<td>-0.6</td>
<td>20</td>
<td>-8.6</td>
<td>20</td>
</tr>
<tr>
<td>Occupations unique to primary industry</td>
<td>6.9</td>
<td>6.0</td>
<td>21</td>
<td>-0.9</td>
<td>21</td>
<td>-13.0</td>
<td>21</td>
</tr>
<tr>
<td>Machine operators and assemblers in manufacturing, including supervisors</td>
<td>24.3</td>
<td>18.4</td>
<td>9</td>
<td>-5.9</td>
<td>24</td>
<td>-24.3</td>
<td>24</td>
</tr>
<tr>
<td>Labourer in processing, manufacturing and utilities</td>
<td>6.0</td>
<td>5.0</td>
<td>23</td>
<td>-1.0</td>
<td>22</td>
<td>-16.7</td>
<td>23</td>
</tr>
</tbody>
</table>

Source: Statistics Canada

Exhibit 23 reveals the following:
In absolute terms the major occupational gainers between 1987 and 2008 among employed Hamilton CMA residents were management occupations (up 12,700), sales and service occupations (up 9,400), teachers and professors (up 9,200), occupations in social science, government and religion (up 7,900) and technical, assisting and related occupations in health (up 7,800). These five occupational groups collectively accounted for 47,000 new jobs over this period, or for 68 percent of all the new jobs held by CMA residents between 1987 and 2008.

Employment in each of the final five occupational categories in Exhibit 23 fell between 1987 and 2008. These five occupations reflect those found primarily in the primary and manufacturing sectors.

Total employment among Hamilton CMA residents grew by 22.6 percent over the 1987 to 2008 period. The fastest growing occupational categories in relative terms were technical, assisting and related occupations in health (up 109.9 percent, or more than doubling), professional occupations in business and finance (up 102.4 percent), occupations in social science, government and religion (up 97.5 percent), teachers and professors (up 96.8 percent) and occupations in art, culture, recreation and sport (up 75.0 percent).

This review of the occupational and educational mix of City of Hamilton job holders suggests its supply of labour today reflects, not surprisingly, the health care, education, manufacturing and primary industry orientation of its economy. The review of long term trends in the occupation mix among Hamilton CMA residents reflects the area’s shift in employment creation on an industry basis, away from goods production towards services provision.

The average household income of City of Hamilton residents in 2006 was $70,025 per year, slightly higher than the national average of $69,649 (by 0.5 percent) but lower than the provincial average of $78,009 (by 10.2 percent). Among the 290 Census Divisions in Canada Hamilton’s average household income ranked 44th while among Ontario’s 49 CDs Hamilton’s average household income ranked 14th. In other words Hamilton is among the top 15 percent of CDs on the basis of average household incomes received across Canada and it is among the top 29 percent in Ontario. Its elevated household income position within both Canada and Ontario reflects the relative richness of the industrial and occupational mix of the jobs provided to its residents within both the City itself and its commuter shed area.

The Office of the Superintendent of Bankruptcy reports that average annual rates of consumer insolvency (4.5 percent) and bankruptcy (3.5 percent) in the City over the last five years were slightly higher than the rates prevailing province-wide (4.3 percent and 3.2 percent respectively) but that rates of business insolvency (4.4 percent) and bankruptcy (3.7 percent) in the City significantly exceeded rates province-wide (3.5 percent and 3.0 percent respectively).

Statistics Canada reports that self-employment earning in the City account for 6.7 percent of total employment earnings among employed City residents, a share lower than the 7.5 percent share prevailing provincially. Between 2001 and 2006 the number of self employed in the City grew by 5.8 percent compared to 7.1 percent for the province as a whole.
The employment by industry projections in Section 6 for the City of Hamilton on a place-of-work basis suggest the share of primary and manufacturing industry jobs will continue to decline significantly between 2006 and 2021. The projections indicate that the share of service sector jobs will increase, particularly in such areas as health care and social services, and to a lesser extent in public administration and in business services. Section 9 addresses the detailed occupational implications of these industrial shifts in the City.

Before addressing that issue, however, it is useful to assess in a broader sense the extent to which the Hamilton area can provide enough people to fill the jobs expected to be created in the area between 2006 and 2021. That issue is addressed in Section 8.
Section 8
THE POTENTIAL FOR LABOUR FORCE GROWTH IN THE CITY OF HAMILTON

We noted in Section 2 that the population projections for the City of Hamilton in the province’s growth plan (Places to Grow) are roughly equivalent to the Centre’s own through the near term (to 2021). Over the longer term, however, we believe the province may be under-predicting the City’s economic and demographic potential. In this section we look at past, present and future trends in the key drivers of the City’s population growth from 1986 to 2021 to determine whether there will be enough people of working age in the City to fill the jobs we expect to be created.

We prepared our projections for the City using a standard age cohort population projection model. The model starts with a base year age profile – in this case Statistics Canada’s post-censal estimates of the City’s population by single-year age and gender for the year 2008 – and projects forward from that base using assumptions regarding future fertility rates by age of mother, mortality rates by age and gender and in-migration and out-migration rates by age and gender.

In preparing our projections we assumed fertility rates would hold steady through to 2021, that mortality rates would decline gradually at a pace equivalent to that achieved in the past, and that the age and gender shares of in-migrants and out-migrants would mirror those to date this decade, thus capturing the very strong bias among migrants toward persons between the ages of 18 through 35. This age pattern has defined migration flows internationally, inter-provincially and intra-provincially for several decades. We set future overall out-migration rates equal to those of recent years and solved the system for future overall in-migration rates to generate enough residents of working age in the City to satisfy the growth expected in local jobs (that is, both jobs created in Hamilton and in the nearby communities to which Hamilton residents commute).

Exhibit 24 shows the population of the City of Hamilton by single year age group and gender as it was in 2006 and as we project it will be in 2016 based on the fertility, mortality and migration assumptions described above. The population of the City in 2006 was 524,800 on a post-censal basis (adjusted for the estimated undercount of the census). We project it will reach 548,700 by 2016, a gain of 23,900.

Exhibit 25 illustrates the change in Hamilton’s population that will occur over that period by age and gender. The change in age reflects two key factors: the aging by ten years of all those who remain residents of the City over this period, and the net positive in-flow of migrants who tend to be young people. Exhibit 25 reveals the largest population gains between 2006 and 2016 will occur among those aged 50 to 74 and those aged from their early 20s to their early 30s, with gains also noted among those aged 85 and over. Major declines will occur among those aged less than 20 years and among those aged from their mid 30s to their late 40s-early 50s.

Most job holders are between the ages of 15 and 74. Not everyone aged 15 to 74 chooses to participate, or is able to participate, in labour market activities. In 2006 in Hamilton 62.4 percent of the people aged 15 to 74 were employed.

Labour force participation rates by age among Hamilton residents have tended to average slightly lower than those prevailing nation-wide or province-wide, though age and gender results indicate local rates among those under 25 in 2006 were a bit higher than was the case for Canada and Ontario while rates among those 25 and over in Hamilton were a bit lower (Exhibit 26).
Exhibit 24
City of Hamilton Population by Single-Year Age Group and Gender
Actual in 2006 and Projected for 2016

Source: Statistics Canada and C4SE

Exhibit 25
City of Hamilton Population by Single-Year Age Group and Gender
Change from 2006 to 2016

Source: Statistics Canada
National data reveal that labour force participation rates over the last several decades among those aged 15 to 24 have been fairly flat, as have been rates among males aged 25 to 54. Rates among females aged 25 to 54 have been increasing steadily. Among males 55 to 64 rates were declining through to the mid 1990s but have been increasing since then. Among females 55 to 64 rates have been increasing. Among people 65 and over rates have been low and declining.

In developing our projections we assumed rates among both males and females aged 25 to 54 will follow the trends exhibited in the past – high rates of participation among males and increasing rates of participation among females – and that rising rates among both males and females 55 to 64 will continue into the future. We also assumed rates among males and females 65 to 74 will increase gradually over the projection horizon. This latter assumption represents a reversal of past trends among those 65 to 74. We assumed their rates will increase instead of decrease for several reasons:

- People are living longer and are staying healthy longer. Many prefer to remain active in the labour force simply because they can, often in part-time roles.

- The emphasis on services jobs – which accommodate part-time opportunities better than goods jobs – supports this trend toward continued work among persons 65 and over.

- The recession had a major impact on the net worth of many Canadians. The retirement plans of many Canadians have had to be postponed.

Exhibit 27 illustrates our assumed participation rates by major age group among Hamilton residents from 2006 to 2016. Exhibit 28 illustrates the sources of labour force growth among Hamilton residents implied by the projected populations by age group between 2006 and 2016 (Exhibit 25) and by the assumptions made about participation rates (Exhibit 27).
Exhibit 27
City of Hamilton Participation Rates by Major Age Group
2006 to 2016

Exhibit 28
City of Hamilton Labour Force by Major Age Group
2006 to 2016

Source: Statistics Canada and C4SE
Exhibit 28 (above) reveals that the assumptions used to develop our projections means the following:

- The labour force among persons 15 to 24 will decline slightly due to the population declines in these age groups.
- The labour force among persons 35 to 44 will decline significantly due to the population declines in these age groups.
- The labour force among persons 55 to 64 will increase significantly due both to increases in their number and to increases in their expected rates of labour force participation.
- The labour force among persons 25 to 34 will increase due mainly to net in-migration of people in these age groups.
- The labour force among persons 45 to 54 will increase due mainly to the aging in place of people 35 to 44.
- The labour force among those 65 and over will increase slightly.

Between 2006 and 2016 the total labour force among residents of the City increases from 263,600 to 305,700, or by 42,100 and the total employment among residents of the City increases from 246,345 to 288,390, or by 42,045. In Section 6 we projected that the total number of jobs provided by employers in the City is likely to increase from 197,180 in 2006 to 226,160 by 2016, or by almost 29,000. In 2006 the number of employed residents of the City exceeded the number of jobs available in the City by 24.9 percent. We are therefore projecting that differential will increase slightly to 27.5 percent by 2016. If the economic-base component of Hamilton’s employment by place-of-work grows more than we project in Section 6, the differential between the supply of workers from Hamilton and the number of jobs available in Hamilton would decline instead of increase.

Exhibit 29 (next page) illustrates the historical and projected path of births and deaths for the City of Hamilton lying behind the historical and projected population for the City.

Exhibit 30 (next page) illustrates the net natural population change (births less deaths) and the net flow of in-migration that will be required to generate enough working residents in Hamilton to fill the jobs the City and its nearby communities are expected to create between 2006 and 2016.

Exhibits 25 and 26 carry the projections forward to 2021, five years past the period of interest of this report, in order to point out that migrants will increasingly account for most of the new workers in Hamilton from 2011 onwards, and migration will become increasingly important as a source of new workers in Hamilton beyond the year 2016.

Exhibit 31 (further below) compares the City of Hamilton’s immigrant and visible minority population shares with those of the province as a whole. As of 2006 immigrants accounted for 25.4 percent of Hamilton’s total population, slightly lower than the province’s share of 28.3 percent. The visible minority share of Hamilton’s population at 13.6 percent was much lower than that of the province at 22.8 percent.
Exhibit 29
City of Hamilton Births and Deaths
Actual 1986 to 2008, Projected 2009 to 2021

Exhibit 30
City of Hamilton Population Change: Net Natural and Net Migration Sources
Actual 1986 to 2008, Projected 2009 to 2021
Exhibit 31
City of Hamilton and Ontario in 2006
Immigrant and Visible Minority Shares of the Population (Percent)

<table>
<thead>
<tr>
<th></th>
<th>Hamilton</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immigrants</td>
<td>25.4</td>
<td>28.3</td>
</tr>
<tr>
<td>Visible minority population</td>
<td>13.6</td>
<td>22.8</td>
</tr>
<tr>
<td>Chinese</td>
<td>1.9</td>
<td>4.8</td>
</tr>
<tr>
<td>South Asian</td>
<td>3.0</td>
<td>6.6</td>
</tr>
<tr>
<td>Black</td>
<td>2.8</td>
<td>3.9</td>
</tr>
<tr>
<td>Filipino</td>
<td>0.8</td>
<td>1.7</td>
</tr>
<tr>
<td>Latin American</td>
<td>1.1</td>
<td>1.2</td>
</tr>
<tr>
<td>Southeast Asian</td>
<td>1.2</td>
<td>0.9</td>
</tr>
<tr>
<td>Arab</td>
<td>1.1</td>
<td>0.9</td>
</tr>
<tr>
<td>West Asian</td>
<td>0.7</td>
<td>0.8</td>
</tr>
<tr>
<td>Korean</td>
<td>0.3</td>
<td>0.6</td>
</tr>
<tr>
<td>Japanese</td>
<td>0.2</td>
<td>0.2</td>
</tr>
<tr>
<td>Visible minority n.i.e.</td>
<td>0.2</td>
<td>0.5</td>
</tr>
<tr>
<td>Multiple visible minority</td>
<td>0.4</td>
<td>0.6</td>
</tr>
</tbody>
</table>

Source: Statistics Canada

The significant inflows of new migrants to the City from 2011 onwards implied by our projections suggest a growing share of the City’s population and labour force will be accounted for by immigrants.

Given the concentration of Canadian immigrants in recent years among people from Asia, a growing share of the City of Hamilton’s residents and employed residents will be accounted for by visible minorities.
Section 9
THE FUTURE DEMAND FOR SKILLS IN THE CITY OF HAMILTON

CSE develops long-term projections for employment by industry by place-of-work for each of 49 metropolitan areas in Canada. The economic base projections for each metropolitan area are developed assuming that the metro area will maintain its share of such jobs within its constituent province over the projection horizon while the community base projections for each are based on expected local population growth and on nation-wide projected increases in such jobs per capita. Employment projections for a total of 35 industries are produced for each metropolitan area.

For this report we have taken our projections of employment by industry by place-of-work for the City of Hamilton and transformed them into projections for employment by place-of-work by detailed occupation. Projections have been created for 520 individual occupations by assuming that the share of jobs in each of the 520 occupations in each of the 35 industries in 2006 in the City of Hamilton will prevail in each year into the future. This assumption is obviously a tenuous one to make given that rapid rates of change in technological adoption, organizational design and skills development are likely to shift the mix of occupations-by-industry to some extent in the years ahead. Assuming fixed shares is made necessary by the absence of sufficient information about future changes in technology, organization and skills. Assuming fixed shares allows us to develop first approximations of likely future changes in the occupational mix among City of Hamilton employers.

In developing these projections of the City’s labour requirements by occupation we have not only considered the increased demand for such workers based on economic growth by industry, but we have also taken into account the reality that many workers in each occupation will likely retire between 2006 and 2016. (We focus our attention here on expected changes between 2006 and 2016 – ignoring the intervening years – to avoid complicating the picture with the impacts on the occupational mix of the recent recession and current recovery.) In assessing the potential impact on future occupational requirements we assumed that two-thirds of all those aged 55 and over in each occupation will retire between 2006 and 2016. We note that everyone 55 and over in each occupation in 2006 will be 65 and over in 2016. So we are implicitly assuming one-third of those aging into the 65 and over category in each occupation between 2006 and 2016 will continue to work. This is consistent with our earlier participation rate by age assumptions (Section 8).

Exhibit 32 (below) summarizes our projections for the 25 largest occupational categories in 2006. The highlights of Exhibit 32 include the following:

- Total employment in the City of Hamilton will increase by almost 29,000 people between 2006 and 2016, from just over 197,000 in 2006 to 226,000 in 2016, due to economic expansion.

---

2 Statistics Canada identifies Census Metropolitan Areas based on groupings of contiguous municipalities with a high level of economic and social interdependence. From an analytical and policy viewpoint the CMA definitions can often pose problems as CMAs rarely align themselves geographically with metropolitan regions such as the GTA, the GVRD, etc., all of which are defined along the lines of political boundaries. In recognition of these geographic coverage limitations CSE has created its own set of metropolitan regions across Canada defined along regional and county lines (or in terms of recognized political boundaries, as is done in the United States) to better match the political landscape. We define a total of 49 metropolitan regions, putting Toronto and its four suburban regions together to form the GTA, and putting Vancouver and Abbotsford together to form the BC Lower Mainland.
Exhibit 32
City of Hamilton Employment by Place of Work by Occupation Projections

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>All occupations</td>
<td>197,235</td>
<td>3,002</td>
<td>28,983</td>
<td>21,370</td>
<td>50,352</td>
<td>3,002</td>
<td>28,983</td>
<td>21,370</td>
<td>50,352</td>
<td>39.1</td>
</tr>
<tr>
<td>Top 25 occupations</td>
<td>77,205</td>
<td>3,545</td>
<td>14,860</td>
<td>7,852</td>
<td>22,712</td>
<td>3,545</td>
<td>14,860</td>
<td>7,852</td>
<td>22,712</td>
<td>45.1</td>
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<tr>
<td>Percent share of total</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail salespersons and sales clerks</td>
<td>9,605</td>
<td>1</td>
<td>28</td>
<td>2</td>
<td>32</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>32</td>
<td>86</td>
</tr>
<tr>
<td>Top 25 occupations</td>
<td>77,205</td>
<td>3,545</td>
<td>14,860</td>
<td>7,852</td>
<td>22,712</td>
<td>3,545</td>
<td>14,860</td>
<td>7,852</td>
<td>22,712</td>
<td>45.1</td>
</tr>
<tr>
<td>Registered nurses</td>
<td>5,575</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>9</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>9</td>
<td>18.1</td>
</tr>
<tr>
<td>Food counter attendants, kitchen helpers and related occupations</td>
<td>5,290</td>
<td>3</td>
<td>11</td>
<td>3</td>
<td>15</td>
<td>3</td>
<td>11</td>
<td>3</td>
<td>15</td>
<td>31.5</td>
</tr>
<tr>
<td>Cashiers</td>
<td>4,570</td>
<td>4</td>
<td>23</td>
<td>5</td>
<td>28</td>
<td>4</td>
<td>23</td>
<td>5</td>
<td>28</td>
<td>6.4</td>
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<tr>
<td>Retail trade managers</td>
<td>4,455</td>
<td>5</td>
<td>38</td>
<td>7</td>
<td>4</td>
<td>5</td>
<td>38</td>
<td>7</td>
<td>4</td>
<td>116.8</td>
</tr>
<tr>
<td>Elementary school and kindergarten teachers</td>
<td>3,840</td>
<td>6</td>
<td>5</td>
<td>12</td>
<td>5</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>12</td>
<td>19</td>
</tr>
<tr>
<td>General office clerks</td>
<td>3,640</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>6</td>
<td>7</td>
<td>8</td>
<td>8</td>
<td>31</td>
</tr>
<tr>
<td>Nurse aides, orderlies and patient service associates</td>
<td>2,905</td>
<td>8</td>
<td>2</td>
<td>4</td>
<td>10</td>
<td>3</td>
<td>8</td>
<td>2</td>
<td>4</td>
<td>12</td>
</tr>
<tr>
<td>Janitors, caretakers and building superintendents</td>
<td>2,820</td>
<td>9</td>
<td>45</td>
<td>19</td>
<td>3</td>
<td>10</td>
<td>9</td>
<td>45</td>
<td>19</td>
<td>11</td>
</tr>
<tr>
<td>Secretaries (except legal and medical)</td>
<td>2,630</td>
<td>10</td>
<td>12</td>
<td>11</td>
<td>7</td>
<td>9</td>
<td>10</td>
<td>12</td>
<td>11</td>
<td>7</td>
</tr>
<tr>
<td>Truck drivers</td>
<td>2,595</td>
<td>11</td>
<td>101</td>
<td>21</td>
<td>6</td>
<td>13</td>
<td>11</td>
<td>101</td>
<td>21</td>
<td>12</td>
</tr>
<tr>
<td>Food and beverage servers</td>
<td>2,420</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>66</td>
<td>19</td>
<td>12</td>
<td>13</td>
<td>14</td>
<td>12</td>
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<tr>
<td>Post-secondary teaching and research assistants</td>
<td>2,385</td>
<td>13</td>
<td>11</td>
<td>23</td>
<td>61</td>
<td>29</td>
<td>13</td>
<td>11</td>
<td>23</td>
<td>12</td>
</tr>
<tr>
<td>Administrative officers</td>
<td>2,340</td>
<td>14</td>
<td>18</td>
<td>16</td>
<td>11</td>
<td>15</td>
<td>14</td>
<td>18</td>
<td>16</td>
<td>12</td>
</tr>
<tr>
<td>Cooks</td>
<td>2,260</td>
<td>15</td>
<td>14</td>
<td>15</td>
<td>36</td>
<td>16</td>
<td>15</td>
<td>14</td>
<td>15</td>
<td>12</td>
</tr>
<tr>
<td>Secondary school teachers</td>
<td>2,185</td>
<td>16</td>
<td>19</td>
<td>27</td>
<td>19</td>
<td>25</td>
<td>16</td>
<td>19</td>
<td>27</td>
<td>12</td>
</tr>
<tr>
<td>Welders and related machine operators</td>
<td>2,165</td>
<td>17</td>
<td>519</td>
<td>316</td>
<td>31</td>
<td>314</td>
<td>17</td>
<td>519</td>
<td>316</td>
<td>12</td>
</tr>
<tr>
<td>Receptionists and switchboard operators</td>
<td>2,145</td>
<td>18</td>
<td>7</td>
<td>9</td>
<td>15</td>
<td>11</td>
<td>18</td>
<td>7</td>
<td>9</td>
<td>23</td>
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<tr>
<td>Light duty cleaners</td>
<td>2,070</td>
<td>19</td>
<td>10</td>
<td>13</td>
<td>14</td>
<td>14</td>
<td>19</td>
<td>10</td>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>Automotive service technicians, truck and bus mechanics, etc.</td>
<td>2,020</td>
<td>20</td>
<td>24</td>
<td>18</td>
<td>23</td>
<td>18</td>
<td>20</td>
<td>24</td>
<td>18</td>
<td>14</td>
</tr>
<tr>
<td>Early childhood educators and assistants</td>
<td>1,935</td>
<td>21</td>
<td>4</td>
<td>6</td>
<td>56</td>
<td>12</td>
<td>21</td>
<td>4</td>
<td>6</td>
<td>12</td>
</tr>
<tr>
<td>Customer service, information and related clerks</td>
<td>1,895</td>
<td>22</td>
<td>55</td>
<td>30</td>
<td>50</td>
<td>33</td>
<td>22</td>
<td>55</td>
<td>30</td>
<td>12</td>
</tr>
<tr>
<td>Accounting and related clerks</td>
<td>1,870</td>
<td>23</td>
<td>69</td>
<td>32</td>
<td>16</td>
<td>23</td>
<td>23</td>
<td>69</td>
<td>32</td>
<td>12</td>
</tr>
<tr>
<td>Material handlers</td>
<td>1,825</td>
<td>24</td>
<td>504</td>
<td>304</td>
<td>34</td>
<td>54</td>
<td>24</td>
<td>504</td>
<td>304</td>
<td>12</td>
</tr>
<tr>
<td>Grocery clerks and store shelf stockers</td>
<td>1,775</td>
<td>25</td>
<td>80</td>
<td>31</td>
<td>56</td>
<td>35</td>
<td>25</td>
<td>80</td>
<td>31</td>
<td>12</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE
• A total of just over 21,000 of the people holding the jobs supplied by Hamilton employers in 2006 could retire by 2016.

• Thus the City needs more than 50,000 new workers between 2006 and 2016 to fill the 29,000 new jobs expected to be created through economic expansion and the more than 21,000 made available due to expected retirements.

• The top 25 occupations in 2006 – out of a total of 520 occupations – will account for almost 15,000 of the new jobs created through economic expansion, or for close to half the total number of jobs created in that manner.

• The top 25 occupations in 2006 account for almost 8,000 – or 37 percent – of the expected retirements between 2006 and 2016.

• Thus the top 25 occupations in 2006 account for almost 23,000 – or 47 percent – of the positions that will need to be filled between 2006 and 2016 due to both economic expansion and retirements. By way of comparison, these top 25 occupations accounted for 39 percent of all the jobs available in the City in 2006.

• The top 25 occupations in 2006 account for 19 of the top 25 new requirements (due to both economic expansion and retirements) between 2006 and 2016.

• The top 5 occupations in 2006 were retail salespersons and sales clerks; registered nurses; food counter attendants, kitchen helpers and related occupations; cashiers; and retail trade managers. These 5 accounted for 15 percent of all the jobs in Hamilton in 2006.

• The top 5 new occupational requirements between 2006 and 2016 – including those due to both economic expansion and retirements – includes registered nurses (more than 2,800); retail salespersons and clerks (almost 2,500); nurse aides, orderlies and patient service associates (almost 1,500); food counter attendants, kitchen helpers and related occupations (more than 1,400); and retail trade managers (more than 1,200). These five account for 19 percent of the total requirements for new workers in the City between 2006 and 2016.

• The top 5 in 2006 are almost identical to the top 5 gainers between 2006 and 2016. The difference is that cashiers are among the top 5 in 2006 but not among the top 5 gainers between 2006 and 2016. Nurse aides, orderlies and patient service associates is the occupation not found in the top 5 in 2006 but found among the top 5 gainers between 2006 and 2016

• Several occupations in the top 25 in 2006 fall well outside of the top 25 new requirements from 2006 to 2016. The list includes welders and related machine operators (17th in number in 2006 but 514th in new requirements from 2006 to 2016); material handlers (24th to 54th); grocery clerks and shelf stockers (25th to 35th); customer service, information and related clerks (22nd to 33rd); and post-secondary teaching and research assistants (13th to 29th).

Exhibit 33 (below) lists the 25 occupations in 2006 with the highest average incomes in 2005. Incomes reveal the relative importance of particular occupations to society in general.
### Exhibit 33

**City of Hamilton Employment by Place of Work Occupation Projections: Highest Income Occupations**


<table>
<thead>
<tr>
<th>Occupation Description</th>
<th>Number 2006</th>
<th>Average Income 2005</th>
<th>Net New Positions 06-11</th>
<th>Net New Positions 06-16</th>
<th>Potential Retirees 06-16</th>
<th>Total Required 06-16</th>
<th>Percent of 2006 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total all occupations</td>
<td>197,235</td>
<td>$48,975</td>
<td>3,002</td>
<td>28,983</td>
<td>21,370</td>
<td>50,352</td>
<td>26</td>
</tr>
<tr>
<td>Total below</td>
<td>9,970</td>
<td>$130,465</td>
<td>17</td>
<td>1,285</td>
<td>1,407</td>
<td>2,692</td>
<td>27</td>
</tr>
<tr>
<td>Percent share of total</td>
<td>5.1</td>
<td></td>
<td>0.6</td>
<td>4.4</td>
<td>6.6</td>
<td>5.3</td>
<td></td>
</tr>
<tr>
<td>3111 Specialist physicians</td>
<td>815</td>
<td>$372,662</td>
<td>127</td>
<td>327</td>
<td>154</td>
<td>481</td>
<td>59</td>
</tr>
<tr>
<td>3112 General practitioners and family physicians</td>
<td>1,020</td>
<td>$205,929</td>
<td>159</td>
<td>409</td>
<td>144</td>
<td>553</td>
<td>54</td>
</tr>
<tr>
<td>3131 Pharmacists</td>
<td>345</td>
<td>$146,331</td>
<td>22</td>
<td>81</td>
<td>37</td>
<td>118</td>
<td>34</td>
</tr>
<tr>
<td>4112 Lawyers and Québec notaries</td>
<td>815</td>
<td>$140,744</td>
<td>95</td>
<td>214</td>
<td>154</td>
<td>368</td>
<td>45</td>
</tr>
<tr>
<td>2261 Non-destructive testers and inspectors</td>
<td>50</td>
<td>$120,792</td>
<td>-9</td>
<td>-7</td>
<td>13</td>
<td>6</td>
<td>13</td>
</tr>
<tr>
<td>3113 Dentists</td>
<td>320</td>
<td>$116,808</td>
<td>50</td>
<td>128</td>
<td>74</td>
<td>202</td>
<td>63</td>
</tr>
<tr>
<td>2131 Civil engineers</td>
<td>345</td>
<td>$113,967</td>
<td>23</td>
<td>72</td>
<td>64</td>
<td>135</td>
<td>39</td>
</tr>
<tr>
<td>8211 Supervisors, mining and quarrying</td>
<td>10</td>
<td>$99,319</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>-2</td>
</tr>
<tr>
<td>912 Utilities managers</td>
<td>185</td>
<td>$96,853</td>
<td>26</td>
<td>58</td>
<td>23</td>
<td>81</td>
<td>44</td>
</tr>
<tr>
<td>16 Senior managers - goods production, utilities, transportation and construction</td>
<td>635</td>
<td>$96,795</td>
<td>-48</td>
<td>9</td>
<td>164</td>
<td>173</td>
<td>27</td>
</tr>
<tr>
<td>7252 Steamfitters, pipefitters and sprinkler system installers</td>
<td>405</td>
<td>$90,297</td>
<td>-72</td>
<td>-56</td>
<td>27</td>
<td>-30</td>
<td>-7</td>
</tr>
<tr>
<td>9211 Supervisors, mineral and metal processing</td>
<td>695</td>
<td>$89,568</td>
<td>-206</td>
<td>-226</td>
<td>111</td>
<td>-115</td>
<td>-17</td>
</tr>
<tr>
<td>211 Engineering managers</td>
<td>215</td>
<td>$89,293</td>
<td>-18</td>
<td>-2</td>
<td>27</td>
<td>25</td>
<td>12</td>
</tr>
<tr>
<td>14 Senior managers - health, education, social and community services, etc.</td>
<td>260</td>
<td>$89,204</td>
<td>29</td>
<td>75</td>
<td>40</td>
<td>115</td>
<td>44</td>
</tr>
<tr>
<td>7211 Supervisors, machinists and related occupations</td>
<td>145</td>
<td>$87,695</td>
<td>-27</td>
<td>-17</td>
<td>30</td>
<td>13</td>
<td>9</td>
</tr>
<tr>
<td>313 School principals and administrators of elementary and secondary education</td>
<td>300</td>
<td>$86,988</td>
<td>18</td>
<td>43</td>
<td>57</td>
<td>100</td>
<td>33</td>
</tr>
<tr>
<td>213 Computer and information systems managers</td>
<td>290</td>
<td>$85,988</td>
<td>-3</td>
<td>29</td>
<td>7</td>
<td>36</td>
<td>12</td>
</tr>
<tr>
<td>7361 Railway and yard locomotive engineers</td>
<td>15</td>
<td>$84,658</td>
<td>-4</td>
<td>-3</td>
<td>10</td>
<td>7</td>
<td>44</td>
</tr>
<tr>
<td>2271 Air pilots, flight engineers and flying instructors</td>
<td>110</td>
<td>$82,583</td>
<td>8</td>
<td>25</td>
<td>7</td>
<td>31</td>
<td>29</td>
</tr>
<tr>
<td>3215 Medical radiation technologists</td>
<td>510</td>
<td>$82,303</td>
<td>77</td>
<td>199</td>
<td>27</td>
<td>226</td>
<td>44</td>
</tr>
<tr>
<td>6281 Police officers (except commissioned)</td>
<td>790</td>
<td>$81,981</td>
<td>136</td>
<td>265</td>
<td>27</td>
<td>292</td>
<td>37</td>
</tr>
<tr>
<td>2115 Other professional occupations in physical sciences</td>
<td>115</td>
<td>$81,399</td>
<td>-32</td>
<td>-35</td>
<td>7</td>
<td>-28</td>
<td>-24</td>
</tr>
<tr>
<td>2141 Industrial and manufacturing engineers</td>
<td>390</td>
<td>$81,164</td>
<td>-69</td>
<td>-52</td>
<td>20</td>
<td>-32</td>
<td>-8</td>
</tr>
<tr>
<td>1473 Production clerks</td>
<td>360</td>
<td>$80,576</td>
<td>-60</td>
<td>-45</td>
<td>57</td>
<td>12</td>
<td>3</td>
</tr>
<tr>
<td>7242 Industrial electricians</td>
<td>830</td>
<td>$79,401</td>
<td>-205</td>
<td>-206</td>
<td>127</td>
<td>-79</td>
<td>-9</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE
The first data column of Exhibit 33 indicates the number of people in each occupation in 2006; the second the average income of each occupation in 2005; the remaining data columns show the projected increase in the number due to economic expansion 2006 to 2011 and 2006 to 2016; the potential number of retirees 2006 to 2016; the total number required 2006 to 2016; and the percent change implied by this latter figure relative to the number in 2006 (the turnover rate).

Exhibit 33 reveals the following:

- The top 25 best paying occupations in 2006 reveal pay ranges from a high of $372,700 per year among specialist physicians (815 people) to $79,400 among 25th ranked industrial electricians (830 people). The average income across all occupations was almost $49,000 in Hamilton in 2005. Thus the top 25 earn anywhere from 1.6 to 7.6 times the average pay in the City.

- The top 25 accounted for a total of almost 10,000 positions in 2006, or 5.1 percent of all the 197,000 plus jobs available in the City in 2006.

- The top 25 earning occupations in 2006 will account for about 1,300 new jobs due to economic expansion between 2006 and 2016 (or 4.4 percent of the total number of new jobs due to growth in demand) and for more than 1,400 of the retirements likely to occur over that period (or for 6.6 percent of all the retirements likely to occur). Thus the top 25 earning occupations will account for almost 2,700 (or 5.3 percent) of the new workers required in the City due to both expansion and retirements between 2006 and 2016.

- Total new requirements across all occupations irrespective of income – from both growth and retirements between 2006 and 2016 – equal 26 percent of the total employment base in 2006. For the top 25 earning occupations the comparable turnover rate is 27 percent.

- Many of the top 25 earning occupations face turnover rates much higher than 27 percent including dentists (63 percent); specialist physicians (59 percent); general practitioners and family physicians (54 percent); lawyers (45 percent); utilities managers, senior health and social care managers, and medical radiation technologists (all at 44 percent); civil engineers (39 percent); police officers (37 percent); pharmacists (34 percent); and school principals and school administrators (33 percent).

Overall conclusions regarding these trends in occupational requirements can be found in Section 11 of this report.

**Mohawk College**
Recent enrolment data from Mohawk College (Exhibit 34) indicate full-time enrolments totaled more than 10,000 and continuing education registrations exceeded 44,000 in each of the last two years.

Full-time enrolments in the most recent year include more than 9,000 in Mohawk College diploma or certificate programs, more than 300 in international placements and more than 1,200 in collaborative and applied degree programs.
The 9,000 plus Mohawk diploma or certificate programs break down as follows in order of enrolments:

- Almost 3,000 in the School of Engineering Technology
- More than 2,400 in the School of Arts, Science and Communication
- More than 1,800 in the School of Business
- More than 1,100 in the School of Human Services
- More than 750 in the School of Health Services

Most of the 1,200 in the collaborative and applied degree programs are in the School of Health Sciences (more than 500 in the BScN program and more than 500 in the Medical Radiation Sciences program) with most of the remainder in the BTech program of the School of Engineering Technology.

Exhibit 34

<table>
<thead>
<tr>
<th></th>
<th>07-08 FTE</th>
<th>08-09 FTE</th>
<th>Change</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Full-Time Post Secondary Activity</td>
<td>10,067</td>
<td>10,648</td>
<td>581</td>
<td>5.8</td>
</tr>
<tr>
<td>Domestic Full-Time FTE</td>
<td>8,723</td>
<td>9,107</td>
<td>384</td>
<td>4.4</td>
</tr>
<tr>
<td>School of Arts. Science and Communications</td>
<td>2,287</td>
<td>2,431</td>
<td>144</td>
<td>6.3</td>
</tr>
<tr>
<td>School of Business</td>
<td>1,880</td>
<td>1,857</td>
<td>-23</td>
<td>-1.2</td>
</tr>
<tr>
<td>School of Engineering Technology</td>
<td>2,752</td>
<td>2,928</td>
<td>176</td>
<td>6.4</td>
</tr>
<tr>
<td>School of Health Sciences</td>
<td>711</td>
<td>751</td>
<td>40</td>
<td>5.6</td>
</tr>
<tr>
<td>School of Human Services</td>
<td>1,093</td>
<td>1,140</td>
<td>47</td>
<td>4.3</td>
</tr>
<tr>
<td>International Full-Time FTE</td>
<td>301</td>
<td>318</td>
<td>17</td>
<td>5.6</td>
</tr>
<tr>
<td>Collaborative and Applied Degree Programs</td>
<td>1,043</td>
<td>1,223</td>
<td>180</td>
<td>17.3</td>
</tr>
<tr>
<td>School of Health Sciences</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BScN</td>
<td>487</td>
<td>555</td>
<td>68</td>
<td>14.0</td>
</tr>
<tr>
<td>Medical Radiation Sciences</td>
<td>521</td>
<td>544</td>
<td>23</td>
<td>4.4</td>
</tr>
<tr>
<td>School of Engineering Technology</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BTech</td>
<td>29</td>
<td>114</td>
<td>85</td>
<td>293.1</td>
</tr>
<tr>
<td>International Collaborative and Applied Degree, Full-Time</td>
<td>6</td>
<td>10</td>
<td>4</td>
<td>66.7</td>
</tr>
<tr>
<td>Continuing Education Course Registrations</td>
<td>44,644</td>
<td>44,293</td>
<td>-351</td>
<td>-0.8</td>
</tr>
<tr>
<td>Funded</td>
<td>35,477</td>
<td>36,030</td>
<td>553</td>
<td>1.6</td>
</tr>
<tr>
<td>Non-Funded</td>
<td>9,167</td>
<td>8,263</td>
<td>-904</td>
<td>-9.9</td>
</tr>
<tr>
<td>Apprenticeship Programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>School of Engineering Technology and Human Services</td>
<td>3,191</td>
<td>3,318</td>
<td>127</td>
<td>4.0</td>
</tr>
<tr>
<td>School of Human Services</td>
<td>334</td>
<td>347</td>
<td>13</td>
<td>3.9</td>
</tr>
</tbody>
</table>

Source: Mohawk College
Full-time enrolments exceeding 10,000 suggests the number of graduates from Mohawk College must be in the range of 3,500 to 5,000 per year.

In December 2009 the college announced a new state-of-the-art centre that will train hundreds of apprentices annually for rewarding careers in the transportation industry. The $4 million Gerald Marshall Centre for Transportation is the new and expanded home for Mohawk's Truck and Coach Apprentice, Truck and Trailer Apprentice and Pre-Apprentice Truck and Coach Programs. Located at the Mohawk STARRT Institute for Skilled Trades and Apprenticeship Research, Resources and Training in Stoney Creek, more than 400 apprentices will train at the new centre every year. Students will begin training in the new Centre in January. This emphasis at the college is consistent with our projections for the continued need for people with transportation skills and with the City’s Economic Development Strategy emphasis regarding Goods Movement (Section 10).

McMaster University
The most recent data available for McMaster University indicate for the 2008-2009 academic year a total of 24,944.6 students on a fiscal full-time equivalent basis, 21,954.7 undergraduate students (88.0 percent) and 2,989.9 graduate students (12.0 percent).

Over the last five years (2004 to 2008) McMaster granted degrees to a total of 25,803 people (averaging 5,161 per year).

Exhibit 35 shows the number of FFTE students by faculty in the 2008-2009 year and the number of graduates by faculty each year from 2004 to 2008. Between 2004 and 2008 McMaster granted 5,316 degrees in the social sciences (20.6 percent of the total number of degrees granted), 5,229 science degrees (20.3 percent), 4,541 health science degrees (18.6 percent), 3,718 engineering degrees (14.4 percent), 3,709 humanities degrees (14.4 percent) and 2,732 business degrees (10.6 percent). The remaining 558 degrees were combined arts and science degrees, other interdisciplinary degrees or divinity college degrees.

Exhibit 36 compares the percent share of enrolments by faculty in 2008-2009 to the percent share of graduates by faculty cumulatively from 2004 to 2008. Recent enrolments compared to completed studies suggest significant shifts toward the pursuit of degrees in science, engineering and health sciences and significant shifts away from the pursuit of degrees in the humanities and social sciences.

McMaster attracts international students from more than 100 countries. In 2008 international students accounted for 6.6 percent of the university’s total enrolments while provinces and territories in Canada but outside of Ontario accounted for 2.8 percent of total enrolments.

The number of applicants to McMaster doubled between 1999 and 2008. It is the first choice university for about 20 percent of all its applicants.
Exhibit 35
McMaster University Enrolments 2008-2009 and Degrees Awarded 2004 to 2008 by Faculty

<table>
<thead>
<tr>
<th>Faculty</th>
<th>Under Total 08-09</th>
<th>Graduate Total 08-09</th>
<th>Total 08-09</th>
<th>2004 Degrees Awarded</th>
<th>2005 Degrees Awarded</th>
<th>2006 Degrees Awarded</th>
<th>2007 Degrees Awarded</th>
<th>2008 Degrees Awarded</th>
<th>Total Degrees Awarded</th>
</tr>
</thead>
<tbody>
<tr>
<td>University Total</td>
<td>21,954.7</td>
<td>2,989.9</td>
<td>24,944.6</td>
<td>4,355</td>
<td>4,759</td>
<td>5,174</td>
<td>5,957</td>
<td>5,558</td>
<td>25,803</td>
</tr>
<tr>
<td>Business</td>
<td>2,183.1</td>
<td>346.2</td>
<td>2,529.3</td>
<td>569</td>
<td>524</td>
<td>572</td>
<td>570</td>
<td>497</td>
<td>2,732</td>
</tr>
<tr>
<td>Engineering</td>
<td>3,431.6</td>
<td>587.6</td>
<td>4,019.2</td>
<td>679</td>
<td>784</td>
<td>724</td>
<td>742</td>
<td>789</td>
<td>3,718</td>
</tr>
<tr>
<td>Health Sciences</td>
<td>3,772.7</td>
<td>857.6</td>
<td>4,630.3</td>
<td>722</td>
<td>784</td>
<td>879</td>
<td>1,077</td>
<td>1,079</td>
<td>4,541</td>
</tr>
<tr>
<td>Humanities</td>
<td>2,632.0</td>
<td>205.4</td>
<td>2,837.4</td>
<td>559</td>
<td>631</td>
<td>780</td>
<td>934</td>
<td>805</td>
<td>3,709</td>
</tr>
<tr>
<td>Science</td>
<td>5,329.5</td>
<td>548.8</td>
<td>5,878.3</td>
<td>772</td>
<td>905</td>
<td>1,030</td>
<td>1,275</td>
<td>1,247</td>
<td>5,229</td>
</tr>
<tr>
<td>Social Sciences</td>
<td>4,232.3</td>
<td>311.6</td>
<td>4,543.9</td>
<td>947</td>
<td>1,030</td>
<td>1,096</td>
<td>1,235</td>
<td>1,008</td>
<td>5,316</td>
</tr>
<tr>
<td>Arts &amp; Science</td>
<td>273.5</td>
<td>273.5</td>
<td>273.5</td>
<td>53</td>
<td>49</td>
<td>58</td>
<td>68</td>
<td>51</td>
<td>279</td>
</tr>
<tr>
<td>Divinity College</td>
<td>100.0</td>
<td>100.0</td>
<td>100.0</td>
<td>51</td>
<td>43</td>
<td>26</td>
<td>36</td>
<td>43</td>
<td>199</td>
</tr>
<tr>
<td>Other</td>
<td>132.7</td>
<td>132.7</td>
<td>132.7</td>
<td>3</td>
<td>9</td>
<td>9</td>
<td>20</td>
<td>39</td>
<td>80</td>
</tr>
</tbody>
</table>

Source: McMaster University

Exhibit 36
McMaster University Enrolments 2008-2009 and Degrees Awarded 2004 to 2008 by Faculty

Percent Share of the Total

Source: McMaster University
Our projections suggest that the number of jobs in Hamilton will increase by about 50,000 between 2006 and 2016 – including both jobs created by economic expansion and jobs created through retirements – or by about 5,000 per year. The combined graduation pace of Mohawk College and McMaster University exceeds 10,000 per year. Thus the City’s post-secondary institutions are producing graduates at a pace that exceeds the City’s future annual employment growth needs, a not surprising outcome given our determination in Section 4 that the City’s post-secondary institutions account for a growing share of the City’s economic base employment.

Our projections also indicate that the Hamilton area needs a wide variety of skills over that period with particular emphasis on health care, business professional, engineering and technical specialists. The curriculum emphasis at both Mohawk and McMaster appears to be consistent with the City's requirements in the years ahead.
Section 10
THE CITY OF HAMILTON’S ECONOMIC DEVELOPMENT STRATEGY

Our assessment of future skill requirements in the Hamilton area in Section 8 assumed that Hamilton’s economic-base employment by industry will maintain its share of projected provincial trends and that the City’s community-base employment will follow projected population growth for the City. The projections in Section 8 did not consider the possibility that – as a result of local economic development initiatives – certain industries might grow faster than assumed in our base case projections.

The City of Hamilton is currently updating its Economic Development Strategy (EDS). The core of that strategy is its business development component which consists of three segments:

- Business Attraction
- Business Retention and Expansion
- A Focus on Key Industry Groups or Clusters

The purpose of this section is to describe the key industry groups identified in the EDS and to consider key skill sets likely to be required if the business attraction component of the Strategy is to be successful.

The key industry groups were identified through stakeholder consultation and economic research. The groups were chosen because:

- The City has inherent strengths in each.
- Each has a strong growth potential.
- Each has the potential to employ many Hamilton residents.
- Developing these groups will accelerate the on-going diversification of the area.

Each group is described in turn. There is considerable crossover from one cluster to another. The descriptions are C4SE summaries based on the detailed descriptions found in the EDS.

Advanced Manufacturing
Advanced manufacturing involves processes involving new techniques and machines combined with information technology, microelectronics and new organizational practices. Such manufacturers incorporate more flexibility and technology in their processes and they demonstrate superior customer service, improved quality, lower costs and just-in-time delivery.

Such manufacturers abandon labour intensive and mass production processes. They are attracted to communities such as Hamilton with strengths that include research facilities, centres of excellence, progressive educational institutions, highly skilled labour, superior communications infrastructure, etc.
Many of the City’s advanced manufacturers have prospered due to investment in capital equipment, process technology and research/innovation. They include producers for such niche markets as industrial textiles, hydraulic systems and circuit boards, etc.

Further opportunities are considered to exist in Hamilton in such areas as the production of equipment for the light rail transit industry, for Alberta’s oil sands, for the aerospace industry, for the power generation industry, and for the “new domestic” automotive parts industry (Toyota, Honda, Nissan, etc.).

**Agriculture, Agra-Food and Agra-Based Products Sector**

The majority of land within the City of Hamilton qualifies as prime agricultural land. According to Statistics Canada Hamilton agricultural land generated cash receipts in 2006 equal to $1,687 per acre, the fourth highest per acre revenue yield in Ontario.

The major farm commodity groups in Hamilton that year were greenhouse products, poultry and eggs, nursery products, sod, mushrooms, dairy products, small grains, horses and ponies. The strongest performers are greenhouse and horticulture producers who face strong prices for most of their products.

The agricultural workforce has declined significantly over the last 50 years, one third of those remaining in 2006 were 55 years of age or older in 2006, the industry pays non-competitive wage rates, its employment tends to be largely seasonal, and there is a declining interest of the next generation in carrying on agricultural production. These labour market trends in agriculture challenge the area’s ability to pursue new and growing agricultural production opportunities beyond food production in such areas as bio-products, bio-energy, bio-fuels, pharmaceuticals, nutriceuticals and bio-fibers.

In view of the above the industry needs to work with educational institutions at all levels to include agricultural programming in the curriculum and to encourage the provision of education and support programs for farmers. Post secondary education programs in agri-business, biomedical and other bioproducts need to be developed.

**Biosciences**

Biosciences cross many different sectors including health, environment, agriculture and manufacturing. Biosciences include the branches of science that involve living organisms. Human health dominates the biotechnology sector in Canada. Some of the biotechnology applications under development include cancer therapeutics and vaccines; treatments for heart disease, arthritis and diabetes; stem cell research; and infectious disease treatments.

McMaster University is one of Canada’s most innovative research institutions in the bioscience field and its success stories have already put Hamilton on the world map of health sciences. The area has demonstrated leading edge approaches and success in drug discovery and validation, gene therapy, clinical trials and health economics, and in research expertise in infectious and respiratory diseases, cancer, cardiovascular diseases and diabetes.

The key challenges to this industry include attracting and retaining key employees, raising capital and dealing with the inevitably long time periods before products can be brought to market.
Clean-Tech (Business and the Environment)
Clean-Tech industries include companies that design, develop or manufacture products or services that reduce negative environmental impacts. They represent a wide range of industries including alternative energy generation, energy efficiency, manufacturing, water and wastewater, waste and recycling materials.

Clean-Tech industries are tied in with the development of Advanced Manufacturing and Biotechnology-Life Sciences (see above) and Goods Movement (see below). For example, the production of renewable energy systems such as wind turbines requires an advanced manufacturing industry. Clean-Tech industries cover a broad spectrum of goods and services production including solar, wind, geothermal, fuel cell and hydro power; light-rail equipment and services; cogeneration; biomass products; the recycling of one product to produce another, etc.

Growth of this industry relies on a highly skilled labour force. Most of the so-called “green-collar” jobs of the future do not yet exist and when they do they will cover a wide range of skill requirements. Some will be highly skilled researchers. Others will be involved in design work. Still others will be construction workers retrained to install new renewable energy systems.

Strong centres of activity in the Clean-Tech area are already developing in and around the Golden Horseshoe and in Hamilton.

Creative Industries
Creative industries are considered critical to the provision of a rich and diverse quality of life and to the provision of outlets for creativity and innovation. Film, culture, art and other outlets for self expression help to provide such a quality of life and can be seen, therefore, as the result of a strong economy. Increasingly, however, creative industries are being seen as drivers of a strong economy, especially at the community level.

The Province of Ontario identifies cultural industries to include not only artistic endeavors such as crafts, dance, literature, music, theatre, media and visual arts, but to include as well businesses whose main purpose is to create and distribute arts and entertainment, including film, video, music, television, radio, live commercial theatre, books, magazines and new media.

Some countries include not only the industries mentioned but also printing, publishing, multimedia, visual arts, phonographic productions, cinematographic productions, architecture, visual and performing arts, sports, manufacturing of musical instruments, advertising and cultural tourism.

A common feature of these industries is that they are both knowledge intensive and labour intensive; they create employment and wealth; and they nurture creativity and foster innovation in both production and commercialization processes.

To foster growth in these endeavors the City needs to reach out to local and regional educational institutions to bring students in these fields of study to the area and to keep them here. Hamilton needs to become the “location of choice” for such graduates to help grow more creative industries from the ground up. The City needs to help foster appropriate programs in these educational institutions and to market these programs to the broader public.
**Goods Movement**

Hamilton has the potential to become a major North American Gateway for goods movement, logistics and distribution operations. This cluster is referred to as the Goods Movement Cluster. It includes not only the transportation aspects of goods movement but also all of the related forward and backward linkages such as supply chain management, logistics, warehousing facilities, distribution facilities, communications infrastructure, etc.

Multi-modal transportation is playing an increasing role in our lives as China, India and Brazil provide and consume increasing volumes of the world’s goods; as retailers (Wal-Mart) drive the supply chain; and as just-in-time delivery requirements drive production and transportation scheduling. The globalization of goods production and movement increases the need for Port and Airport facilities.

Canada’s and Ontario’s primary trading partners are the United States and Mexico. Consequently, North American goods movement is now focused in two areas: the multimodal transportation network and the North American Super Corridor Coalition (NASCO) that runs through the main corridors of the three countries.

These trends favour the further development of Goods Movement industries in the Hamilton area.

**Skills Implications of the City’s Economic Development Strategy**

The City’s Economic Development Strategy does not provide job creation targets for the six groups underlying its strategy, nor is it realistic to expect it to do so. The occupational requirements implied by the plan, therefore, cannot be quantified. However, a notional assessment of the plan’s impacts on future skill requirements in the area can be made.

Many of the areas targeted for expansion – such as advanced manufacturing, creative industries and goods movement – imply growth in occupations that already existed in the City in 2006. In these cases EDS success means the number of people required will exceed the number we have projected. More importantly, the level of knowledge required by the people in these occupations – particularly with respect to their computer and computational abilities – will exceed the level required in the past.

In contrast, other areas targeted for expansion – such as agro-based products, biosciences and clean-tech – not only imply higher skill requirements for existing occupations but also the creation of occupations that do not yet exist.

In view of the above we have not attempted to “layer” our base case projections in Section 9 with the additional requirements implied by the EDS. Rather we have drawn up a list of observations about occupational trends in general in the Hamilton area between 2006 and 2016. That list of observations appears in the final section of this report (Section 11).
Section 11
CONCLUSIONS REGARDING OCCUPATIONAL REQUIREMENTS IN HAMILTON

Some Overall Observations
Exhibit 37 summarizes our projections of the number of people that will be required between 2006 and 2016 in the City of Hamilton on a place-of-work basis for each of 26 major occupation categories. It indicates the number in each major occupational group in 2006, the number required between 2006 and 2016 due to economic expansion, the number required over that period due to potential retirements, the number required due to both factors and the total number required as a percent share of the base number in 2006 (the turnover rate). It also presents rankings across the 26 major groups with respect to the number employed in 2006, the total number required between 2006 and 2016 and the turnover rate from 2006 to 2016.

The greatest absolute skill challenges for the Hamilton area are in those occupational groups facing the greatest number of new workers required (the top ten are shaded in Exhibit 37).

The greatest relative skill challenges for the area are in those occupational groups facing the highest turnover rates.

Exhibit 37
City of Hamilton Employment by Place of Work by Occupational Group Projections

<table>
<thead>
<tr>
<th>Occupational Category</th>
<th>Total 2006</th>
<th>Potential Retirees 06-16</th>
<th>Required 06-16</th>
<th>Total Net New 06-16</th>
<th>Total Required 06-16</th>
<th>Required as % of Base 2006 Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total all occupations</td>
<td>397,140</td>
<td>28,998</td>
<td>21,374</td>
<td>50,372</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Senior Management Occupations</td>
<td>1,870</td>
<td>266</td>
<td>467</td>
<td>733</td>
<td>17</td>
<td>39.5</td>
</tr>
<tr>
<td>Middle and Management Occupations</td>
<td>15,725</td>
<td>2,261</td>
<td>1,831</td>
<td>4,092</td>
<td>6</td>
<td>26.16</td>
</tr>
<tr>
<td>Professional Occupations in Business and Finance</td>
<td>3,560</td>
<td>671</td>
<td>427</td>
<td>1,098</td>
<td>14</td>
<td>31.7</td>
</tr>
<tr>
<td>Skilled Administrative and Business Occupations</td>
<td>11,545</td>
<td>2,372</td>
<td>1,661</td>
<td>4,033</td>
<td>7</td>
<td>35.6</td>
</tr>
<tr>
<td>Clerical Occupations</td>
<td>19,305</td>
<td>3,287</td>
<td>2,008</td>
<td>5,294</td>
<td>2</td>
<td>28.32</td>
</tr>
<tr>
<td>Professional Occupations in Natural and Applied Sciences</td>
<td>4,245</td>
<td>407</td>
<td>414</td>
<td>821</td>
<td>15</td>
<td>19.19</td>
</tr>
<tr>
<td>Technical Occupations Related to Natural and Applied Sciences</td>
<td>4,350</td>
<td>358</td>
<td>434</td>
<td>792</td>
<td>16</td>
<td>18.20</td>
</tr>
<tr>
<td>Professional Occupations in Health</td>
<td>9,570</td>
<td>637</td>
<td>1,331</td>
<td>4,767</td>
<td>4</td>
<td>51.1</td>
</tr>
<tr>
<td>Technical and Skilled Occupations in Health</td>
<td>3,865</td>
<td>1,341</td>
<td>243</td>
<td>1,584</td>
<td>12</td>
<td>41.3</td>
</tr>
<tr>
<td>Assisting Occupations in Support of Health Services</td>
<td>4,485</td>
<td>1,627</td>
<td>354</td>
<td>1,980</td>
<td>10</td>
<td>44.2</td>
</tr>
<tr>
<td>Professional Occupations in Social Science, Education, Government Services and Religion</td>
<td>15,485</td>
<td>2,804</td>
<td>1,851</td>
<td>4,655</td>
<td>5</td>
<td>30.8</td>
</tr>
<tr>
<td>Paraprofessional Occupations in Law, Social Services, Education and Religion</td>
<td>4,485</td>
<td>1,568</td>
<td>257</td>
<td>1,824</td>
<td>11</td>
<td>41.4</td>
</tr>
<tr>
<td>Professional Occupations in Art and Culture</td>
<td>1,850</td>
<td>296</td>
<td>240</td>
<td>536</td>
<td>19</td>
<td>29.10</td>
</tr>
<tr>
<td>Technical and Skilled Occupations in Art, Culture, Recreation and Sport</td>
<td>2,675</td>
<td>455</td>
<td>207</td>
<td>662</td>
<td>18</td>
<td>25.17</td>
</tr>
<tr>
<td>Skilled Sales and Service Occupations</td>
<td>10,210</td>
<td>2,048</td>
<td>987</td>
<td>3,036</td>
<td>8</td>
<td>30.9</td>
</tr>
<tr>
<td>Intermediate Sales and Service Occupations</td>
<td>19,350</td>
<td>3,329</td>
<td>1,824</td>
<td>5,154</td>
<td>3</td>
<td>27.13</td>
</tr>
<tr>
<td>Elemental Sales and Service Occupations</td>
<td>20,340</td>
<td>3,803</td>
<td>1,921</td>
<td>5,724</td>
<td>1</td>
<td>28.11</td>
</tr>
<tr>
<td>Trades and Skilled Transport and Equipment Operators</td>
<td>18,220</td>
<td>-546</td>
<td>2,081</td>
<td>1,535</td>
<td>13</td>
<td>8.22</td>
</tr>
<tr>
<td>Intermediate Occupations in Transport, Equipment Operation, Installation and Maintenance</td>
<td>8,250</td>
<td>-989</td>
<td>1,187</td>
<td>2,176</td>
<td>9</td>
<td>26.15</td>
</tr>
<tr>
<td>Trades Helpers, Construction Labourers and Related Occupations</td>
<td>1,325</td>
<td>210</td>
<td>87</td>
<td>297</td>
<td>21</td>
<td>22.18</td>
</tr>
<tr>
<td>Skilled Occupations in Primary Industry</td>
<td>1,575</td>
<td>-187</td>
<td>394</td>
<td>206</td>
<td>22</td>
<td>13.21</td>
</tr>
<tr>
<td>Intermediate Occupations in Primary Industry</td>
<td>1,315</td>
<td>-244</td>
<td>117</td>
<td>127</td>
<td>23</td>
<td>-10.25</td>
</tr>
<tr>
<td>Labourers in Primary Industry</td>
<td>1,445</td>
<td>251</td>
<td>130</td>
<td>381</td>
<td>20</td>
<td>26.14</td>
</tr>
<tr>
<td>Processing, Manufacturing and Utilities Supervisors and Skilled Operators</td>
<td>1,775</td>
<td>-428</td>
<td>200</td>
<td>-228</td>
<td>24</td>
<td>-13.26</td>
</tr>
<tr>
<td>Processing and Manufacturing Machine Operators and Assemblers</td>
<td>6,625</td>
<td>-1,009</td>
<td>594</td>
<td>-416</td>
<td>26</td>
<td>-6.24</td>
</tr>
<tr>
<td>Labourers in Processing, Manufacturing and Utilities</td>
<td>3,995</td>
<td>-568</td>
<td>330</td>
<td>-238</td>
<td>25</td>
<td>-6.23</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE

3 Readers seeking detailed information for each of the 520 occupations can obtain them by requesting a copy of the Excel spreadsheet entitled Hamilton Occupations Projections.xls available from C4SE (contact tmccormack@c4se.com).

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CHARTING HAMILTON’S LABOUR MARKET: PAST, PRESENT AND FUTURE
Exhibit 37 reveals that the greatest absolute and relative challenges by major occupation group are as follows:

- In absolute terms the largest requirements are in the elemental sales and service occupations category (more than 5,700), the clerical occupations category (almost 5,300), the intermediate sales and service occupations category (almost 5,200), the professional occupations in health category (almost 4,800), and the professional occupations in social science, education, government services and religion category (almost 4,700).

- These 5 occupational categories alone (out of 26 occupational groups in total) account for almost 26,000 of the City’s expected new requirements, or for more than half the City’s expected total new requirements.

- The highest relative turnover rate at 51 percent is faced by the professional occupations in health category, followed by 44 percent in the assisting occupations in support of health services category and the 41 percent rate in the technical and skilled occupations in health category.

- The next highest turnover rates are faced by the paraprofessional occupations in law, social services, education and religion category (41 percent), the senior management occupations category (39 percent), the skilled administrative and business occupations category (35 percent) and the professional occupations in business and finance category (31 percent).

As noted in Section 10, the above projections do not take account of the occupational requirements that might result from the expansion of some or all of the targeted industries in the City’s Economic Development Strategy. As noted in that section, it is difficult to quantify the potential impacts from this source.

Furthermore, the above projections are based on the assumption that the occupational share of jobs by industry will not change between 2006 and 2016. We know those shares will change due to technological change and organizational improvements. But, again, it is difficult to quantify the potential impacts from these sources.

Section 8 revealed that in the years ahead the Hamilton area will increasingly need to rely on immigration, especially immigration, to provide the new workers its economy will require. Exhibit 38 shows the extent to which immigrants, especially recent immigrants (those arriving between 2001 and 2006), were represented in 2006 among workers in the area in each the 26 major occupational groups.

The 26 occupational groups are ranked according to the relative importance of recent immigrants within each group. The table indicates a relative recent immigrant index of 219 for the first occupational group in the table – labourers in processing, manufacturing and utilities – indicating recent immigrants are twice as frequently found in this occupational group as they are across all occupational categories.

The occupations in Exhibit 38 are color coded as follows:
- Those occupational groups shaded in pink are those for which recent immigrant representation is greater than 100 and for which the future turnover rate exceeds the overall turnover rate average of 26 percent. In these occupational categories immigration can probably be relied upon as a source of new workers.

- Those occupational groups shaded in blue also face higher than average turnover rates, but within these groups the index of recent immigrant representation is less than 100. Meeting the occupational group’s future worker needs may be more of a challenge, therefore, because recent immigrants have shown a lower than average inclination to fill such positions.

- Within those occupational groups shaded in green the recent immigrant representation is well above the norm. But these occupational groups all face turnover rates well below the average. Three out of the four occupational groups in this cluster face negative turnover rates, meaning layoffs will likely occur in these groups between 2006 and 2016. High recent immigrant representation rates in these three occupational groups means the layoffs will fall disproportionally higher on recent immigrants, an outcome posing significant adjustment challenges to the Hamilton area.

Exhibit 38 suggests that immigration is likely to be helpful in filling the future demand for workers in those occupational groups shaded in pink, but less so in filling the future demand for workers in those occupational groups shaded in blue. Because the representation of recent immigrants is high in the group of occupations shaded in green – a group facing lower than average and even negative turnover rates – the adjustment challenges will be compounded.

Exhibit 38
City of Hamilton Employment by Place of Work by Occupational Group Projections

<table>
<thead>
<tr>
<th>Total all occupations</th>
<th>Recent Immigrants</th>
<th>Recent Turnover Rate</th>
<th>Expected Immigrants</th>
</tr>
</thead>
<tbody>
<tr>
<td>71,615</td>
<td>10,460</td>
<td>258,730</td>
<td>100</td>
</tr>
<tr>
<td>Labourers in Processing, Manufacturing and Utilities</td>
<td>2,470</td>
<td>490</td>
<td>5,545</td>
</tr>
<tr>
<td>Intermediate Occupations in Primary Industry</td>
<td>561</td>
<td>130</td>
<td>1,630</td>
</tr>
<tr>
<td>Professional Occupations in Natural and Applied Sciences</td>
<td>2,575</td>
<td>530</td>
<td>6,960</td>
</tr>
<tr>
<td>Processing and Manufacturing Machine Operators and Assemblers</td>
<td>5,145</td>
<td>840</td>
<td>11,590</td>
</tr>
<tr>
<td>Elementa Sales and Service Occupations</td>
<td>7,475</td>
<td>1,560</td>
<td>26,615</td>
</tr>
<tr>
<td>Assisting Occupations in Support of Health Services</td>
<td>2,065</td>
<td>260</td>
<td>5,000</td>
</tr>
<tr>
<td>Technical and Skilled Occupations in Health</td>
<td>815</td>
<td>185</td>
<td>3,660</td>
</tr>
<tr>
<td>Technical Occupations Related to Natural and Applied Sciences</td>
<td>1,905</td>
<td>290</td>
<td>7,020</td>
</tr>
<tr>
<td>Trades Helpers, Construction-Labourers and Related Occupations</td>
<td>1,040</td>
<td>140</td>
<td>3,955</td>
</tr>
<tr>
<td>Intermediate Sales and Service Occupations</td>
<td>6,005</td>
<td>880</td>
<td>24,555</td>
</tr>
<tr>
<td>Labourers in Primary Industry</td>
<td>555</td>
<td>105</td>
<td>2,725</td>
</tr>
<tr>
<td>Intermediate Occupations in Transport, Equipment Operation, Installation and Maintenance</td>
<td>3,525</td>
<td>515</td>
<td>14,180</td>
</tr>
<tr>
<td>Professional Occupations in Business and Finance</td>
<td>1,160</td>
<td>260</td>
<td>4,585</td>
</tr>
<tr>
<td>Paraprofessional Occupations in Law, Social Services, Education and Religion</td>
<td>1,260</td>
<td>180</td>
<td>5,300</td>
</tr>
<tr>
<td>Middle and Other Management Occupations</td>
<td>5,285</td>
<td>690</td>
<td>20,800</td>
</tr>
<tr>
<td>Professional Occupations in Health</td>
<td>2,470</td>
<td>260</td>
<td>8,285</td>
</tr>
<tr>
<td>Trades and Skilled Transport and Equipment Operators</td>
<td>8,730</td>
<td>830</td>
<td>26,645</td>
</tr>
<tr>
<td>Skilled Sales and Service Occupations</td>
<td>3,430</td>
<td>375</td>
<td>12,685</td>
</tr>
<tr>
<td>Clerical Occupations</td>
<td>4,945</td>
<td>695</td>
<td>24,480</td>
</tr>
<tr>
<td>Professional Occupations in Art and Culture</td>
<td>560</td>
<td>65</td>
<td>2,495</td>
</tr>
<tr>
<td>Senior Management Occupations</td>
<td>625</td>
<td>55</td>
<td>2,285</td>
</tr>
<tr>
<td>Technical and Skilled Occupations in Art, Culture, Recreation and Sport</td>
<td>770</td>
<td>90</td>
<td>4,040</td>
</tr>
<tr>
<td>Skilled Occupations in Primary Industry</td>
<td>580</td>
<td>35</td>
<td>1,935</td>
</tr>
<tr>
<td>Processing, Manufacturing and Utilities Supervisors and Skilled Operators</td>
<td>630</td>
<td>35</td>
<td>2,040</td>
</tr>
<tr>
<td>Skilled Administrative and Business Occupations</td>
<td>2,945</td>
<td>230</td>
<td>13,545</td>
</tr>
</tbody>
</table>

Source: Statistics Canada and C4SE
Further Observations

Taking all of the above information into consideration a few statements can be made about the labour market future faced by the City of Hamilton between 2006 and 2016.

On the demand side:

- Jobs in Hamilton’s traditional goods producing economic-base industries – primary metals and agriculture – are not going to grow much in the future. Though official counts of layoffs are not available, a news report from U. S. Steel (Stelco) in March of 2009 announced the temporary shutdown of its Hamilton mill and most of its nearby Lake Erie operations affecting 1,500 workers. And in December 2009 ArcelorMittal (Dofasco) announced plans to reduce its global workforce in 2010, though a local spokesperson noted that its 5,000 workers in Hamilton should not be affected other than through normal attrition. The message is clear from both major employers: the number of jobs in the steel industry in the Hamilton area is not going to grow.

- Our assessment of the area’s economic base suggests health and education are already account for one out five of the City’s economic base jobs, and that jobs in both industries face significant future potential due to strong demand both locally and province-wide for the specialized services each provides.

- The City’s economic development strategy – which identifies future growth opportunities in the areas of advanced manufacturing, Clean-Tech products and services, goods movement, Bioscience products and services, Agri-business products and creative industry products and services – all build on inherent strengths in the City and seize on rapid shifts occurring world-wide. Successful implementation of the EDS would reap major job benefits in manufacturing, in business services and in transportation-warehousing-logistics.

- The demand for community-base workers will expand significantly in the Hamilton area as pressure for growth in the population of the City mounts. Rapid job expansion in the communities west of Toronto – most notably in Peel, Halton, Waterloo, etc. – guarantees that the City’s population will grow, thus propelling growth in community-base activities.

On the supply side:

- Though we expect participation rates among those 55 and over to increase in the years ahead many of the City’s Baby Boomers will nevertheless retire, a process that starts in 2011 and completes in 2031. The City does not have a home-grown population of younger people large enough to fill the jobs expected to be created between 2006 and 2016, especially if the City’s EDS is successful in expanding the economic base opportunities available in the area.

- That means migrants, and increasingly immigrants, will be required to fill the roles vacated by the Boomers and the new roles created by economic expansion.

The challenge across most occupations and occupational groups from potential retirements will be almost as great as the challenge from economic expansion.
Key Labour Market Challenges
The City faces a particularly difficult labour market challenge in connection with 4 of the major occupation groups found in the final 5 rows of Exhibit 37. In these 4 cases the number of potential retirees in each is less than the decline in demand for employees expected for each between 2006 and 2016. In other words, attrition in these 4 categories falls short of the expected decline in demand so involuntary layoffs will be required.

These 4 categories include:

- **Processing and manufacturing machine operators and assemblers**: The demand for this occupation will fall by 1,009 but the number of likely retirees is only 594, suggesting layoffs in this occupation could total 416.

- **Labourers in processing, manufacturing and utilities**: Layoffs here could reach 238 (demand down 568, potential retirees 330).

- **Processing, manufacturing and utilities supervisors and skilled operators**: Layoffs here could reach 228 (demand down 428, potential retirees 200).

- **Intermediate occupations in the primary industry**: Layoffs here could reach 127 (demand down 244, potential retirees 117).

Workers in these four major occupation groups face significant challenges. Most are males earning above average incomes with relatively low levels of education and holding skill sets that are not readily transferred. As revealed in Exhibit 38, recent immigrants are represented disproportionately within the ranks of these groups. Within these occupations those with good pension plans and early retirement options will fare better than those with neither. Unless these workers upgrade their skills they will be forced to take low-paying minimum-skill jobs in the service sector.

A majority of the workers required between 2006 and 2016 – 61.9 percent of them – are in occupations that in 2005 paid lower than average wages. Only 38.1 percent of the workers required in the future are in occupations paying greater than average wages.

Again it is worth repeating that these projections are based on two tenuous assumptions: that the share of occupations by industry in 2016 will match the share prevailing in 2006 and that the City’s economic base employment will not grow. Earlier discussion concluded that technological change and organizational improvements will alter the occupation by industry shares in the future. It concluded, as well, that the Hamilton’s economic development initiatives will impact the size and distribution of the City’s economic base jobs. With respect to both factors, however, it was concluded that the impacts could not be readily quantified.

We can nevertheless conclude, however, that the existence of both factors means job growth among occupations paying greater than average wages will likely exceed the 38.1 percent share suggested above.
Given the prevailing hype in labour market circles regarding future needs for increased skill levels across all occupations, for flexibility among individuals who will need to change occupations several times over their careers, etc., the projections described here will be viewed by many as suspect because they identify a continued strong need for workers in lower skill endeavors such as elemental sales, cashiers, personal services, etc. Yet the reality is that many business and community supportive tasks do not require post-secondary trained individuals.

In view of this, the projections described here will be viewed by some as alarming because they appear to suggest a future of labour market winners (high skilled, high paid) and losers (low skilled, low paid) and not much in between, suggesting a future widening of the income gap between the haves and the have-nots.

Two key factors will prevent such a widening of the income gap from occurring:

- **Canada, Ontario and the Hamilton area will continue to need** many relatively low skilled workers in the future. But many of these lower skilled occupations – mostly found in the service sector – will nevertheless require increasing skill sets and competence levels (especially in health, education, government and business services). These relatively lower skilled tasks, therefore, will command relatively higher rates of pay in the future than they have in the past.

- **Historically it is a fact that productivity levels have always been highest among goods producers.** As a result, goods producing workers have generally earned relatively higher wages. Furthermore, productivity gains have been highest among goods producers. Nevertheless, productivity gains in those sectors have been spread *throughout society in general* in the form of lower goods prices and lower rates of price increase for goods for all consumers, resulting in real wage gains for all. This complicated process describes the manner by which incomes have been redistributed throughout most western industrialized economies for the last century and a half. Our mixed economies based on strong representation of both private and public endeavors ensures there will always be a wide range of income earners but that the real wages of all earners will rise in tandem so the income gap will not widen.

**Conclusions**

The evidence presented in this report suggests that the City of Hamilton faces a future of considerable prosperity due to its already established and rapidly diversifying economic base and to its unique geographic position within the Greater Golden Horseshoe.

The City has put forward an Economic Development Strategy consistent with its existing and developing strengths.

Our projections suggest the need for new workers in the future stemming both from economic growth and from the need to replace retiring workers. Because the City’s current population base cannot provide enough people aged 15 to 74 to fill the new positions increasing flows of net immigration will be required.

The City’s two major post-secondary education institutions are producing graduates with the range of skills required to meet the City’s higher skill needs in the years ahead.
The major labour market challenges for the City appear to boil down to the following:

- Jobs in the primary and manufacturing sectors are not likely to grow in the future. Attrition will take care of part of this declining need, but layoffs will likely be necessary as well. Males and immigrants account for a disproportionally high share of the workers in these sectors.

- Many of the City’s highest paying occupations – most in the health care industry but others in areas such as education and justice – face turnover rates much higher than the economy-wide average. The list includes dentists (63 percent); specialist physicians (59 percent); general practitioners and family physicians (54 percent); lawyers (45 percent); utilities managers, senior health and social care managers, and medical radiation technologists (all at 44 percent); civil engineers (39 percent); police officers (37 percent); pharmacists (34 percent); and school principals and school administrators (33 percent). While the area’s post-secondary institutions are producing graduates that could readily fill these roles in Hamilton the City will be competing with other major centres throughout the province for these same people.

On balance our review of the “official data” trends and prospects leads us to conclude Hamilton faces very few labour market issues at this time.

The round of interviews of major employers currently underway throughout the City could lead to the identification of issues that cannot be gleaned at this level of analysis.

Following on the interview process CtSE will be assist HTAB in developing a preliminary list of the key labour force issues facing Hamilton at this time.

These issues will be discussed with key stakeholders in March of 2010. The objective at that time will be to reach a consensus regarding the City’s most critical labour market issues and to develop a strategy for dealing with them.
Appendix B to the Hamilton Economic Development Strategy, 
Workforce Development Component

YOUTH RETENTION, ATTRACTION, 
ENGAGEMENT AND HAMILTON

Written by: 
Ryan Moran
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   - FedNor: Northern/Eastern Ontario Development Programs
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   - Interim, Other and Additional Projects to be Explored
Introduction

As Hamilton prepares for its future, it must ensure that the steps it takes now will set it on a more prosperous course. In striving for this direction, the City of Hamilton has engaged various community partners in the collaboration and creation of the roadmap to Hamilton’s better future, The Economic Development Strategy. This strategy covers six specific yet mutually inclusive components; Business Development, Community Redevelopment, Labour Force Development, Infrastructure for Innovation, Marketing and Outreach, and Quality of Life. Though there are six components, many of the items that are crucial to the success of the strategy overlap across each category. An example of such an item is Youth Retention in the City of Hamilton.

Youth Retention and Attraction is a topic that, though it may specifically fall under Labour Force Development, is so dynamic and multi-faceted that it can hardly be addressed without being considered across all six components. YRA is so integral to the socio-economic success of a city, especially one such as Hamilton, with three post-secondary institutions within its city limits, that to develop a strategy that does not address it, is like building a home without a foundation. Addressing YRA, and developing a successful strategy in regards to it, not only ensures that Hamilton has a diverse, vibrant, educated and engaged Labour Force, it essentially ensures that Hamilton has a future.

Youth Retention and Attraction must be a carefully considered and immediately addressed component of Hamilton’s Economic Development Strategy.

Background

Youth Retention and Attraction, as a specialized area of focus for the governance of any specific region, is often overlooked. Typically it is considered as being addressed in other categories of socio-economic strategies. Frequently, such strategies focus on concepts related to attraction and retention broadly, and across categorical demographics of age or professional status. This approach can, in fact, be in opposition to both the desired outcome of such a strategy, as well as the foresight for the future professional and socio-economic growth in a region. This is because it inherently ignores the more subtle nuances of such groups of citizenry.

Fortunately, with the research and work of such individuals as Richard Florida, Don Tapscott, and Rebecca Ryan, the identification of students, young professionals and “The Creative Class” as groups to specifically appeal to is on the rise. Greater discussion on how to not only empower youth within a community and region, but rather to engage and include them in its very development and direction is becoming the norm in many social and geographic
Youth Retention and Attraction Report
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governance circles. From youth-group denominations of major Canadian political parties, to the government of Newfoundland initiating the development of a provincial Youth Retention and Attraction strategy more and more we are seeing the perceived prosperity that can come from engaging youth, and the development and implementation of strategies to retain and attract them.

Identifying a specific age boundary within which "youth" falls is difficult. Research and other writings on the topic find it stretching anywhere between the ages of 16 and 35. For the purpose of this report, and in following with the work done in Newfoundland & Labrador, youth will be broadly defined as:

- "School-aged youth" - All those still in secondary-school, building their skills and considering their options for the future.
- "Young people" - All those pursuing some form of post-secondary education, training, and/or are in the process of initiating their careers.
- "Young adults" - All those establishing their careers, planting roots in a community and looking to set and accomplish certain life goals.

1. Existing and Related Strategies

The following is a brief assessment of YRA investments and programs existent across Canada. Further discussion of their practices and more in depth look at their strategies are dealt with in Section 3.

Youth Retention and Attraction Strategy for Newfoundland and Labrador

For the first time since joining confederation, Newfoundland & Labrador is a "have" province. Presently, the economic picture of this province has never been brighter. However, the government has acknowledged that to have any hope of maintaining this prosperity, specialized strategies must be developed. Such strategies include the development of a Youth Retention and Attraction Strategy that aims to build upon previous work done in the areas of regional diversification, poverty reduction, and a northern development plan.

Significant challenges facing the province’s future are of a “double demographic” nature. Both population decline and aging are identified as the two most pressing concerns threatening the province’s socio-economic future. Related to this, the province has the nation’s lowest fertility rates and among the nation’s lowest immigration rates. Born of these concerns comes the recognition that not only halting a decrease in the province’s skilled workforce, but rather, reversing and reinvigorating the market and demographic trends is the undeniable solution.

Of specific concern is the net out migration of youth. Although current trends are comparably much better than those seen in the 1990’s, the overall amount of
young, skilled workers aged 15-29, who annually leave the province as opposed to those who settle within it, is of notable concern. In “A Vision to Action: A Roadmap to 2020,” a 2007 conference led by the rural secretariat, Youth retention and Attraction was identified as the most pressing concern facing the province.

In response, the Government of Newfoundland and Labrador’s 2008 budget committed itself to a $1.38M investment in the development of a Youth Retention and Attraction Strategy for Newfoundland and Labrador.

**Omineca Beetle Action Coalition (OBAC) Attraction and Retention Strategy**

Mandated and funded by the Government of British Columbia, the Omineca Beetle Action Coalition (OBAC) was formed in 2005 to begin the development of initiatives that would mitigate the social, economic, industrial and environmental damage caused by the outbreak of mountain pine beetle. The OBAC is a partnership of private and public researchers and professionals, First Nations representatives, and all sectors and levels of Government. Together they represent the Highway 16 region communities in British Columbia, stretching from, but not limited to, Smithers to Valemount and including Prince George.

Within this region, over fifty-percent of the forests are pine and thirty-seven-percent of the jobs are dependent on the forestry sector. As a result of the pine-beetle outbreak it is estimated that within six-years over eighty-percent of mature pine forests will be lost. This essentially spells great loss within the timber and forestry industry upon which the area is largely dependent.

Recognizing the impact that this would have upon the region’s communities, the OBAC formed to explore various strategies to offset the potential social and economic destruction; in December 2008, this included the development of a retention and attraction strategy.

With a net-out migration of roughly 2000 per year, for the past ten years, from the OBAC region, the OBAC Attraction and Retention Strategy is intended to address broadly, and across demographic lines, the need for skilled workers and professionals to (re)settle in the region. Identified as a specific area of concern is the outflow and lack of engagement of the youth demographic, which does make up a large portion of the region’s population. To this end, one of the four primary objectives of the OBAC Attraction and Retention Strategy is to specifically retain, attract and engage youth, particularly by repairing and improving the connections to and between education and employment.
FedNor: Northern and Eastern Ontario Development Programs

Throughout Northern and Eastern Ontario, and exclusively within rural and non-metropolitan areas, the Canadian Government’s regional development division, FedNor, has established a chain of programs through which initiatives to retain, attract and engage citizenry are funded and implemented. Through both the Northern and Eastern Ontario Development Programs, projects overseen by FedNor, Community Futures groups take up the task of fostering the environment necessary for development and prosperity. This is particularly through the expansion of business and employment opportunities.

Recognizing a need to specifically target under-represented populations, such as First Nations, Women, Francophone, and Youth, FedNor created programs expressly mandated for better integrating these groups in the economic development of Northern and rural Eastern Ontario, this occurs under the banner of Special Initiatives. Through the Northern and Eastern Ontario Development Programs and administered by the Community Futures groups, FedNor attempts to retain, attract and engage youth primarily through the Youth Internship Program (YIP). Intended to complement the Canadian Youth Employment Program, FedNor’s YIP aims to find a suitable placements for recent, Post-Secondary Graduates in either not-for-profit or private sector organizations located within its regions of concern. In this case, though not a plan unto itself, as in the case of the Newfoundland or OBAC approach, FedNor does identify youth retention and attraction as an important component in their broader economic development strategy.

Town and Gown Association of Ontario: Student Engagement

In the realm of Post-Secondary civic engagement there exists no concrete strategy at any of Ontario’s institutions, or their respective municipalities, in regards to the retention, attraction, and engagement of youth following the completion of their studies. Though a number of municipalities, in conjunction with their local PSE institutions may engage in some admirable practices, more often than not the student/community relationship is characterized as being one of many challenges. A quick glance at any local newspaper around the start of an academic year will hold this true.

Nevertheless, there are a number of groups across national and international boundaries that work to make this relationship better. The Town and Gown Association of Ontario has, since its inception, worked in this regard. Comprised of representatives from universities, municipalities, student associations and law enforcement, the TGAO, among its many other activities, holds an annual symposium to discuss and progress PSE/community relations in Ontario.
Specifically concerning student engagement, the TGAO, in partnership with its student group representatives, has continued to encourage municipalities to recognize better methods of improving student/community relations. The message is that students must be engaged and welcomed into a community, to not have things “done to” them as a targeted group, but rather, to do things with them as a community partner. The more a student may feel engaged by the community, and included in it, the more respect and responsibility they will, in turn, treat it with. More importantly, the more likely they may consider settling there beyond their studies.

Taking this further, in April 2008 the President of the TGAO, Scott Courtice, published an article on the TGAO’s website that illustrates precisely what a municipality may do to better engage students. This article puts forth “four humble suggestions” that are highlighted as crucial, not simply to YRA strategies, but could indeed prove crucial to the future socio-economic development of municipalities across Ontario. They are:

1. “Engage student leaders as a partner when addressing Town and Gown challenges.” Essentially, make sure to involve student groups and associations in PSE/Municipal discussions.
2. “Remember that words matter when discussing Town and Gown issues.” Persisting stereotypes, such as the “student as a trouble maker,” only serves to cultivate a polarized civic role experienced by students and student groups.
3. “Municipalities, post-secondary institutions, and student unions must support students to become active and engaged local citizens.” Students and youth want to be involved and engaged in their community but are either unaware or cynical about how to do so. All town and gown partners must play a role in blurring the lines of being a student/citizen.
4. “Focus on job creation, and foster a vibrant arts, culture, and entertainment scene.” This suggestion focuses on the importance of each item in retaining students and young talent, not simply after graduation, but all throughout their PSE experience.

As Courtice recognizes at the outset of his article, the Conference Board of Canada has projected that by 2020 Ontario will face “a critical deficit of 190,000 skilled workers.” Thus, though not a complete YRA strategy unto itself, Courtice’s “humble suggestions” should be direly considered in any municipality’s YRA approaches and PSE institution relations.

2. Local Analysis

In any consideration of strategic plan to address certain unfavourable trends within a region, an assessment of its necessity must be made. This was no
different in the last section describing the specific Youth Retention and Attraction strategies in regions across Canada, and will be no different in regards to assessing the City of Hamilton’s consideration of the development of an YRA strategy.

Similarly, of primary concern are such items as education and training, employment opportunities, social culture, and recreation and lifestyle. However, unlike the previous section, and the regions described therein, Hamilton finds itself in a categorically different situation. Unlike the examples of Newfoundland & Labrador or Northern Ontario, Hamilton is primarily urban and is situated in the most densely urban stretch of geography in Canada. Moreover, the Golden Horseshoe/Greater Toronto Area within which Hamilton is located is geographically less than half the size of the regions discussed in the last section.

Any assessment of Hamilton needs to take such vast geographic and socio-economic differences into consideration. Of significant note is that existing programs and investments are most prominently and thoroughly taking place in rural areas and regions, rather than individual cities. More importantly, that these programs are primarily developed to prevent the net-out migration of youth from rural and remote areas to city centres, such as the GTA and the broader Golden Horseshoe. In its development of a strategy, Hamilton must both develop on a micro level, but with broad considerations in mind for the GTA and Golden Horseshoe, to which it is undeniably connected. Unlike Newfoundland and Labrador, Hamilton cannot develop a strategy that aims to simply entice youth and talent away from the GTA. Instead, Hamilton must find a way to capitalize on what it has and offers, and tip the scales with the GTA to create a more beneficial balance for itself.

It should be noted that much of the research in this section surrounds the experience and considerations of young people currently enrolled in some form of post-secondary education, whether it be University, College or professional skills-training. Unfortunately, there was difficulty in accessing similar information as it pertains to those who enter the work force upon completion of High-School. Although, what research does exist would indicate that their needs are not drastically different. Nevertheless, in pursuing the creation of YRA approach in Hamilton, the Task-Force discussed in Section Four must ensure that this group does not go unrecognized and that their interests are addressed in due consideration.

What follows in this section is a preliminary assessment of the City of Hamilton’s standing in the retention and attraction of youth. What will be discussed here is an initial analysis of Hamilton’s community profile and demographic trends, survey results related to student and youth experience with the city, and a SWOT analysis conducted with youth and student representatives from Hamilton’s post-
secondary institutions. Essentially, where does Hamilton stand in the retention and attraction of youth, and what do youth think about Hamilton.

**Statistics Canada: Hamilton Community Profile**

The most immediate thing to note upon analysis of Statistics Canada’s community profile of Hamilton (city) between 2001 and 2006 is that the percentage of population growth was a little over half that of the period between 1996 and 2001. In the latter period, the percentage in population growth was 4.8%, where as in the 2001 to 2006 period, the percentage of population growth was 2.9%. Though this may not indicate an emergency, it is still not a positive trend. This is particularly true when it is taken into consideration that London (city), Ontario a region roughly close in population and with a similarly thriving Post-Secondary sector experienced a percentage growth in population in the same periods of 3.3% to 4.7% respectively. Additionally, the province of Ontario, overall, experienced percentage growth, though scarce, of 6.1% to 6.6% in the same periods of time. Though this trend is currently not linked directly to youth, a brief analysis of age demographics and trends show that it will in the years to come.

**Age of Population**

The aging of populations is by no means a local concern. Across both national and international boundaries there exists great anxiety in regards to the increasing depletion of labour forces and professional, skilled workers. Reproduction rates in Canada have dropped to such a level that by the year 2020 there will be statistically less children in Canada than there are now and, due to age related reasons, more than half the country will be unemployed.

In association with a decline in reproduction rates is the increasing maturation of the current workforce and population. Between the 2001 and 2006 Statistics Canada Community Profiles of Hamilton the median age of population rose from 37.6 to 39.6 respectively, indicating a trend of increasing maturation of population that will likely worsen in the coming decade.

As the “Baby Boomer” generation ages, and successive generations decline in reproduction rates, age characteristics in Hamilton’s community profile do not indicate a positively youthful future.

**Education of Population**

It would also be worthwhile to note, for the sake of identifying the relative talent of Hamilton’s young workforce, that in 2006 roughly 60% of those between the ages of 25 and 34 have attained some form of post-secondary education, the majority
of that being College. This is slightly less than the provincial average of 62.7%, with the majority located in University. This is important in that retention of Hamilton’s youth assumes that such youth have talents and education that should be retained relative to the levels of comparable regions, or at least that of the province. In any approach to YRA in Hamilton, just as much focus should be placed on ensuring that home-grown youth have skills to retain, as there is placed on attracting and retaining skilled youth from outside the city.

**Post-Secondary Student Experience and Hamilton**

Given such age and youth trends as those identified above, the retention and attraction of youth to Hamilton should be of immediate concern. To this end, and specifically in regards to post-secondary students, it would be necessary to know precisely why or why not students, who come to study in Hamilton, stay here beyond the completion of their studies. Currently, there are a number University related surveys that detail the importance of various aspects of the Post-Secondary experience to the individual experience of the student. These surveys, unfortunately, tend to deal more specifically with on-campus academic and extra-curricular activities than they do with the experience of surrounding community and municipality.

Nevertheless, many do touch upon this subject, and from this, inferences can be made. What follows here is a brief assessment of some of these surveys and documents as they relate to the students of McMaster University. Unfortunately, similar information in regards to the experience of college students was not accessible. However, it should be noted that in conversation with student representatives from Mohawk and Redeemer Colleges, the following sentiments were echoed.

- **University Applicant Survey**

  The *University Applicant Survey* was developed to help Universities across Ontario better understand application and recruitment trends, as well as to better understand and more effectively direct marketing opportunities. In its 2005 report, the *UAS* identifies a number of items that would be of concern to the City of Hamilton. Specifically, these fall under the areas of “Community Characteristics.”

  The “Community Characteristics” item falls under the section that more broadly considers the applicant’s "Key Decision Factors" in making the choice to attend a specific institution in Ontario. “Community Characteristics” addresses those characteristics of the broader municipality as they occurred to the applicant. In this regard, Hamilton’s characteristics in appealing to the applicant’s decision were scarcely positive and essentially neutral. “Off-Campus Safety” was the best
performing of these indicators, with "Cultural Offerings" and "Relevant Industry" respectively ranking lowest.

However, it would be beneficial to note that for those particularly from Central Ontario; the choice of McMaster was favourable due to Hamilton’s proximity to the applicant’s home. This is positive in that Hamilton can market itself for young people, as a place in which they can settle independently, without being too far from home. Yet, it must be actively addressed, as it could also establish a potentially negative commuter culture wherein students may only come to Hamilton to study, and otherwise invest in the lifestyles of other Central Ontario municipalities.

- **Canadian University Survey Consortium**

Similarly, the June 2007 First Year Student Survey by the Canadian University Survey Consortium likewise touches on areas of concern for Hamilton, specifically those that fall under the headings of “Reasons Motivating Attendance and Choice of University” and “University Experience.”

Without going into as much detail, the CUSC report does acknowledge similar trends as those identified in the UAS, it also shows that these trends persist two years following the release of the UAS report. The CUSC report does, however, also touch upon the topic of public transportation in an institution’s municipality, and recognizes this factor’s importance in motivating the decision of the respondent. Under this topic, 22% of those surveyed from McMaster identified this as important in their decision making process, which is down from the 26% who found this to be important within the institutional category that McMaster is identified under.

This could very well demonstrate the “bubble” trend, of students decidedly living closer to campus, neglecting both the use of public transportation and involvement in the greater Hamilton area. This would lead to a poor civic experience, and less chance that the youth will remain beyond their studies. This could also be an increasingly disappointing theory, when it is taken into consideration that McMaster students pay for an eight-month bus pass as apart of their fees, and thus, could theoretically live anywhere in the city. Given such a circumstance, it might be expected that McMaster students would place more weight upon the offering of public transportation.

- **Summary: Globe and Mail University Report Card**

As far as quality public transportation is concerned, a summary of The Globe and Mail University Report Card rankings are more generous. Between 2004 and 2007 quality of public transportation is consistently
ranked with an “A-.” However, throughout those years, the general ranking of “Off-Campus Life” at McMaster University is a consistent “B+,” with quality and cost of off-campus housing, off-campus safety, and cultural diversity of the surrounding community getting the lowest grades. Such rankings may lend credence to the “bubble” notion, and thus, a lack of civic engagement potentially indicated in the CUSC report and integral to making the decision to remain in Hamilton beyond school.

Hamilton YRA SWOT Discussion

The following is the result of a series of discussions held with a number of relevant parties in relation to the strengths, weaknesses, opportunities and threats facing Hamilton’s approach to youth retention and attraction. These discussions occurred throughout late-spring and early summer 2009 and were held with representatives from:

- McMaster Students Union
- Mohawk Student Association
- Redeemer Student Senate
- Community Service Learning Office, McMaster
- McMaster Alumni Association
- McMaster Office of Student Affairs

All of the following points are reflective of the opinion of the representative and in some cases may not necessarily be factually correct in relation to Hamilton. They do, however, represent an instance in which greater communication, involvement and engagement on the behalf of Hamilton with its young populations could be of great benefit. Moreover, many topics throughout the discussions were continuously reiterated, and thus may appear to be here as well, though effort has been made to prevent that. To that end, again, many of those topics may also be relatively incorrect, but they may very well also represent large-scale, populous, trends of misinformation and incorrect perceptions of the City of Hamilton, and thus a problem that the city must immediately address.

**Strengths**

- “Fell in love with the city while at school”
- “Location specific capital,” relationships and connections made in immediate area. Hamilton has much to offer if it can ensure that such connections get made with youth
- The benefits of a medium sized city, such as inexpensive housing, convenience of location in city and in relation to surrounding cities
- Proximity to a variety of locations both in and outside of city.
- Abundance of green and recreational spaces
- A lot of underutilized and unrecognized innovation in a variety of sectors, can be leveraged and continually grown
- Large event venues
- Many not-for-profit groups attempting to improve social problems and social infrastructure
- Strong sense of community among Hamiltonians, but seemingly among Hamiltonians only
- Implementation of an Active Citizenship course at Mohawk College, a class that educates students on opportunities in their communities and encourages them to be more engaged [http://activecit.mohawkcollege.ca/](http://activecit.mohawkcollege.ca/)
- A lot of opportunity

**Weaknesses**

- Increasing development of commuter mentality at McMaster University. More and more students are not actually living in student housing or residence, but rather, opting to take the GO or other transit forms on daily basis. No social connection, or personal investments made in Hamilton
- Similarly, commuter citizenry represents similar problem, citizens sleeping in Hamilton, but work and social activities done in Toronto
- Promotion and engagement of youth with Hamilton “Location Specific Capital,” many students from outside Hamilton don’t get acquainted with much beyond Limeridge Mall and Hess Village. There is a lack of commercial and big name stores in more urban and walkable areas
- Downtown core is stigmatized as having being unsavoury and unsafe
- Hamilton does have a number of attractions, but walkability or public transportation linking them is cumbersome or non-existent, additionally, no reason to walk in or to many areas
- Redeemer is all but completely unconnected, specifically in terms of transit and civic engagement, to the city. There is a concern with no bus service to campus considering that the students do pay for an HSR pass as a part of their fees. By and large, Redeemer students remain unengaged and untapped in regards to the city, especially compared with McMaster and Mohawk
- Health concerns due to perception of Hamilton’s environment and air.
- Burgeoning “scenes,” but no established. Lack of niche areas (or advertised niche areas), such as theatre district, restaurant district, etc.
- Lack of jobs, or, at least perceived unhealthy job market for students and young professionals
- Lack of civic inclusion programs for students during and following their studies
- Bad perception of municipal politics
- According to the McMaster Alumni Association, post-grad settlement used to be largely Hamilton focused; trends now show Hamilton and Toronto on par
- Lack of municipal pride for PSE institutions, lack of American style campus town community and support
- “Hamilton is brutal for outside youth from a community and career point of view”
- Urban sprawl, both the trend itself, and the quality of the development, especially following CBC’s Marketplace report
- Lack of co-op and internship possibilities for diverse markets
- Hamilton does not do its part to engage students and youth as citizens

Opportunities

- No competition with Toronto (save for healthy traditions, such as Labour Day classic). Recognition that Hamilton has a distinctly different character, but also much to share with its neighbour.
- Awe-inspiring physical geography, including anything from Bayfront Park to the city’s various waterfalls.
- The opportunity to exploit all opportunities that Hamilton has, current feeling is that Hamilton, for one reason or another, simply does not take advantage of itself.
- Place-making: Utilize all spaces Hamilton offers for characteristic and specific, eye-catching events, functions and happenings. eg. Concrete Canvas Graffiti Art event that took place on Jackson Square roof in 1999, otherwise space is massively under utilized.
- Continued HSR bus tours on McMaster’s Welcome Day and other related events, helping to ease incoming students into Hamilton.
- More frequent and convenient public transportation to alleviate physical barriers. Eg. Connecting McMaster students to Ancaster power-centre, Harbourfront and downtown core, or connecting Redeemer students to Hamilton in general.
- More frequent and convenient public transportation beyond the city, connecting youth to the Golden Horseshoe.
- Greater promotion of relatively inexpensive housing rates.
- Wealth of new youth and young professional potential thanks to three PSE institutions.
- Wealth of “shovel-ready” properties, buildings and development lands, both new and ripe for gentrification.
- Emerging cultures and arts scenes need continued support, encouragement and promotion.
- Opportunity to change our image by embracing our past. The culture and art of old industry, and evolution of development.
- Small business opportunity incentives.
- With the advancement of new image advance municipal relationships around the world, establish international reputation.
- A number of Community Service Learning style programs and offices operating out of Hamilton’s PSE institutions, ample opportunity to engage them in civic projects.
- Career opportunities, both in comparison to and in proximity with rural areas and development. Hamilton ideal for those from more remote areas looking for unintimidating urban lifestyle, but also ideally located for those looking for involvement rural related industries.
- Hamilton has small, but could easily be a burgeoning market for various industries, eg. Travel and Tourism.

**Threats**

- Toronto perceived as an end living destination for all young people.
- Urban-Hamilton first impressions. Bad impressions based on first sight and superficial perceptions.
- Student relationship to communities: lack of welcome and inclusion, lack of equal treatment and engagement as a member of the community. No identification made by the youth with Hamilton, and thus, no reason to stay beyond completion of their studies.
- A sense that local investments and municipal business decisions do not cater to youth/student needs whether during the course of their studies, or following their completion. No municipal eye to future populations and broad population trends.
- A significant lack of the social infrastructure that would aid in the creation of an empowered downtown. An overwhelming sense from students and youth that the reason to go downtown is to volunteer or “help-out.”
In looking to foster future prosperity, a sense from youth that such would be pursued without also improving the situation of vast numbers of Hamilton’s current population.

Transportation, civic-engagement, and civic information dissemination all perceived as poor by student population, particularly for some institutions over others.

Sense of lack of acceptance for those from outside the city, specifically students as a group, persistent feeling of isolation and alienation, eventually leads to no affinity for the city and no reason to stay. Housing and community issues “leave a bad taste.”

London, Ontario similarly sized and styled city, but with perceived less expensive housing, aesthetically nicer and more appealing and inviting community.

Hamilton lacks image of career growth and employment sector diversity.

Perceived lack of information and support for entrepreneurial spirit, as well as municipal assistance.

Lack of knowledge among youth of how to be engaged and active in the city.

3. Best Practices and Strategies

Prior to considering what the City of Hamilton can do to address its situation and improve upon its retention and attraction of youth, it is necessary to consider the strategies and best practices of those YRA projects discussed in section one. Though each circumstance is socio-economically distinct from the other, and each of them are distinct from Hamilton’s situation, the principles of any YRA strategy remain static. At the 2008 North Carolina League of Municipalities Annual Conference, these principles were clearly outlined at the outset of a YRA presentation given by Jennifer S. Lobenhofer, the Director of the Community and Economic Development Program at the University of North Carolina’s School of Government:

“What’s a Community to do?: Youth Retention as Economic Development

- Entrepreneurship – ‘Grow your own’
- Retention – ‘Keep the ones you’ve got’
- Recruitment – ‘Attract new (or not-so-new) young professionals’

The following is a brief assessment of the actions undertaken (thus far) by the previously considered YRA projects, as well as how those actions conform to the above principles.
Youth Retention and Attraction Strategy for Newfoundland and Labrador

After announcing and allocating the funds necessary to develop a YRA Strategy, the Province of Newfoundland and Labrador engaged the prominent social policy think tank, Canadian Policy Research Networks (CPRN), in the initiation of the strategy’s development.

With the assistance of a Youth Advisory Panel and a Ministerial Committee, CPRN commenced the process by holding 13 Deliberative Youth Dialogue Sessions held throughout the province, and one occurring in each Ontario and Alberta. The purpose of these dialogues and the subsequent Youth Summit were to engage youth from within, and from but living outside, the province in a discussion on both what would encourage youth to stay, as well as what would attract former young residents and newcomers to settle in the province. These discussions were held according to the Province’s proposed timeline for the development and eventual presentation of the YRA Strategy. A rough timeline from the Government’s Labour Market Information Works (LMIworks) site is as follows:

June 2008:
- Development of the Youth Retention and Attraction Strategy commenced.
- Youth Advisory Panel was established.
- Ministerial Committee was established.

September - October 2008:
- 13 Deliberative Youth Dialogue Sessions were held throughout the province.

November 2008:
- CPRN conducted Provincial Youth Summit.

November and December 2008:
- All residents and stakeholders in NL have opportunity to submit ideas and recommendations to government to support the Strategy development.

December 2008:
- CPRN presents key findings from the Youth Deliberative Dialogue Sessions and Provincial Youth Summit to Government and Youth Advisory Panel.

Winter 2009:
- CPRN submits Final Report to Government with youth recommendations on making Newfoundland and Labrador a province of choice for young people to live and work.

Early Fall 2009:
- Anticipated release of the Youth Retention and Attraction Strategy
As can be seen, through the engagement of youth in the development process, the province has adhered to the identified principles of YRA. Moreover, CPRN’s final report, released winter 2009, as well as the youth dialogue findings further demonstrate these principles. Themes of entrepreneurship, a healthy education and transportation system, and the development of desirable industries and employment opportunities are prominent. Though the province’s strategy is not yet released, the techniques above illustrate a best practice in the development process of a YRA Strategy. Both CPRN’s Synthesis Report and Summit Report are well worth the read prior to initiating such development in Hamilton.

Update, January 2010: Strategy has been released and more information can be found at [http://www.lmiworks.nl.ca/yras/about.html](http://www.lmiworks.nl.ca/yras/about.html)

**Omineca Beetle Action Coalition: Attraction and Retention Strategy**

The existent strategy and tangible practices and outcomes for the Omineca Beetle Action Coalition plan remain unreleased. However, the steps that the OBAC have taken and intend to take are made clear within their *Attraction and Retention Strategy* document.

Upon identifying Attraction and Retention as an area of focus, a working group of the OBAC was convened to concentrate specifically on these concerns. Similar to Newfoundland and Labrador, this working group immediately engaged local communities and partners in both targeted community dialogue sessions as well as a regional summit. Additionally, in the process of compiling the strategy, the working group engaged a number of community partners and consultants for content and research purposes, as well as worked very closely with the University of Northern British Columbia’s Community Development Institute.

The benefits of this approach can be clearly seen in its high quality and highly detailed outcomes, including five recommendations based on four stated objectives. Within the *Attraction and Retention Strategy* document, each of these recommendations get thoroughly broken down, identifying their:

- individual priority actions
- the rationale behind these actions
- which partners would find themselves particularly responsible for the action
- a categorical timeline (defined labels of “short-term,” “mid-term,” “long-term,” and “ongoing”) of the action’s implementation
Examples of particular concern in addressing YRA techniques (though no less important than the other recommendations), are found in recommendations three and four:

"Recommendation 3. Enable the region’s young people and other residents to access training, obtain jobs and facilitate self-employment opportunities.

Recommendation 4. Further identify and develop the services and amenities required to attract and retain young people, seniors, skilled workers, professionals and others.”

Following each of these recommendations is a detailed list of specific actions to take, their rationale, a timeline of implementation, and within whose responsibility the action falls, including anyone from the Province of B.C. to Post-Secondary Institutions.

The OBAC Attraction and Retention Working Group has conceived and begun implementation on an approach to the issue of YRA that should be a model for regions to consider prior to initiating their own projects. Their recommendations embrace each of the aforementioned YRA principles, and their engagement (similar to that of Newfoundland and Labrador) of parties both inside and outside the region for the purpose of developing the strategy are steps that should be emulated. It is also particularly important to note their focus on, and concern for the development, both professional and educational, of their domestic populations. This is crucial, as any region’s YRA approach should be just as concerned with the quality of life, education, and abilities of its own citizens as it should be with the attraction and retention of new talent.

**FedNor and Northern/Eastern Ontario Development Programs**

Although, as stated previously, the N/EODP and FedNor approaches are not fully constructed and detailed YRA strategies, they still do represent practices that would be worthwhile to include in a region’s broader YRA tactical plans. The two items to specifically consider here are the Youth Internship Program, and N/EODP community development projects, particularly the EODP’s Community Futures Development Corporations program.

What should be taken from the YIP is simply a positive way in which to aid youth from a specific region in finding employment in that region. This program works to place recent Post-Secondary graduates in either not-for-profit or private sector internship opportunities within more rural and remote areas in northern and eastern Ontario. The program looks to find placements in specific areas of employment, such as technological innovation and trade, research, community development, and small business and entrepreneurial support, among others. Through this program, FedNor encourages both the personal and skill
development of youth (through mandating eligibility to recent post-secondary grads), the retention of youth from the region, and the economic development of a region through the encouragement of exploring new industries.

The EODP’s CFDC program encourages similar pursuits, although it is not specifically targeted to youth, as in the case of YIP. Nevertheless, the aim of this program is to pass Government of Canada funding through the EODP to the Community Futures Development Corporations. The CFDCs, community based organizations representing regions across Eastern Ontario and led by a board of local, voluntary directors, then make local investment decisions with the funding. Specifically, investments made are centred on community advancement projects, socio-economic development, and business and entrepreneurial support, including training and counseling. Though their mandate is the broad population of whichever region they represent, the activities undertaken by the CFDCs do work to encourage and support youth retention and attraction through potential investment and incentives. The youth initiatives category, on the Ontario CFDCs website’s “Success Stories” section, is a testament to how this approach could be translated into a municipal best practice.

**Ontario Undergraduate Student Alliance: Student Engagement**

In municipalities with post-secondary institutions across Ontario there exists no solid YRA strategy for retaining the youth that the institution(s) may attract. Yet, as the Town and Gown Association of Ontario has highlighted, doing so could be a crucial factor to the future socio-economic success of such municipalities. In April 2008, TGAO President Scott Courtice put forth “four humble suggestions” that essentially concern; engaging youth and students as true community partners, including them in municipal processes and practices, and ensuring for them the socio-economic, and cultural infrastructure that is essential to their experience both during and following their studies.

In the same year, the Arati Sharma, Vice-President Education for the McMaster Students Union and Kaitlyn Young, Municipal Affairs Commissioner for the Queen’s University Alma Mater Society, compiled a Municipal Affairs research paper for the Ontario Undergraduate Student Alliance. This paper explored the best practices, as they exist related to the student/community experience. It was also particularly concerned with the extent to which PSE/municipal partners engage the students that a given institution has attracted, and maintain a positive relationship with them. Specifically explored are the seven member schools of OUSA (Brock, Laurier, McMaster, Queens, Waterloo, Western and Windsor).

In each case, the engagement of students off-campus is of primary concern, both those from the given municipality and those from outside. Nevertheless, this still relates heavily to the principles of attraction and retention, as the more that a city
may engage its institution’s youth, the more it shows them what it has to offer, giving them reasons for precisely why they should stay. Yet, the relative success of each of the aforementioned institutions and municipalities in relation to their practices is spotty. It is positive to mention that McMaster has among the best practices for engaging youth in the community and city, but on a less than positive note (and in the majority of all the discussed instances) the practices are primarily student driven, and not municipally.

Optimistically, this leaves much room for Hamilton to become a leader in engaging, and thus, retaining the students that its institutions attract. Two specific practices, discussed in the research paper, that would be beneficial for Hamilton, its PSE institutions, and their respective student groups to consider are:

- Sydenham Ward Tenant and Ratepayers Association (SWATRA). Queen’s University in Kingston falls in the ward of Sydenham. Within this ward is a community association that offers membership to both students and permanent residents, as well it asks a member of the Queen’s Alma Mater Society (their student union) to sit on their board. This group has contributed to the establishment of very positive student/community relations in Kingston.

- The Mayor’s Student Advisory Committee (MSAC). In Waterloo, this group, developed by the office of the Mayor, is charged with fostering greater levels of student civic engagement and working to produce better municipal/student relations. This group is composed of student representatives from the University of Waterloo, Wilfrid Laurier University and Conestoga College, and works alongside City Councilors and the Mayor. More about this group can be found online at: waterloomsac.com.

4. Recommendations for Hamilton: Attraction, Retention and Engagement

Hamilton is neither rural nor is it remote, rather it is situated in the middle of one of the most industrialized swaths of land in North America. Undertaking an approach to youth in Hamilton would make the city a leader in the development of theories and strategies related to municipal YRA. Hamilton could be among the first cities in Canada to implement such a comprehensive municipal strategy, and thus demonstrate its dedication to innovation and the prosperity of its people.

Among the challenges Hamilton would face in the development of a YRA strategy, one of the most prescient would be to grasp and successfully work with all the socio-economic nuances that Hamilton’s geographic location entails. A YRA strategy for Hamilton must not regard the city, its citizens and industry as an island. Rather, such a strategy must embrace its neighbours and share strategic components with them. Meanwhile utilize its own strengths and opportunities,
and promote its own distinct culture and character.

Any approach Hamilton takes towards the development of a YRA strategy must consider the principles described in Section Three, recruitment and retention, and also fostering a positive entrepreneurial environment. However, it would also be worthwhile to adopt two additional principles: engagement and education.

Engagement is specifically pertinent to the concept of retention. Engagement concerns ensuring the necessary connections that would encourage personal investment and settlement between youth and the city are made. Whether a young individual is a life long resident of Hamilton, or they have come to study at one of the city’s post-secondary institutions, they have no reason to stay if the city and its culture do not engage them. Engagement does not necessarily need to infer one’s involvement in the city or its communities; it could be as simple as one’s experience and relationship with the region in the time that they are here. However, it does have the capability to make the crucial distinction between what an individual may consider to be a stop along their way, and home.

Education is more specifically related to ideas regarding retention. What is meant by education does not concern schools specifically, but could include the entire spectrum of learning, training, and both personal and professional development. It is about working to provide the opportunities necessary to help Hamilton’s citizenry be more capable and conscientious. Of specific importance to YRA in Hamilton, is ensuring a healthy social infrastructure that encourages every child and teen to stay in school. Moreover, ensuring that this infrastructure aids in breaking down barriers for these youth, helping them decide to eventually pursue some manner of post-secondary, whether that be professional training, college, or university. The Ontario Undergraduate Student Alliance identified this as “early outreach,” and recognized the value of what such accessibility and thus, an enriched workforce can bring to Ontario. In 2007, and despite being an organization representing the interests of several of Ontario’s university’s students, OUSA defined “early outreach” as one of their lobbying priorities. Under the same logic, by pursuing similar goals, Hamilton can enrich its population, increase its home-grown talent, and make the need for specialized retention strategies ever more dire.

What follows now are recommended actions and projects for the City of Hamilton to take up as a coordinated approach youth retention and attraction.

a) Hamilton Task Force on Youth Retention and Attraction

*Projected formation and initiation - Early Spring 2010*

Similar to the Newfoundland and Labrador, and OBAC examples, within the City of Hamilton there needs to convene a Task Force on Youth Retention
and Attraction. As with the examples, such a group would be made up of a number of civic partners, from the various levels of government and administration, to both representatives from public and private industries around the city.

What is particularly beneficial to note here is that such a group already exists within Hamilton and, like OBAC, primarily concerns itself with the city’s future socio-economic interests. The Hamilton Jobs Prosperity Collaborative is a partnership of representatives of a number of sectors and industries in and around Hamilton. With seven defined and targeted priorities, the JPC is an outstanding, community driven approach to building Hamilton’s future.

It could be said that the seven priorities may easily encompass concepts related to YRA. However, in much the same way that Immigration is defined as the fourth priority, Youth, as a specialized demographic for attraction and retention, should similarly be a priority of the JPC. To this end, a group, not unlike those committees that concern themselves with the seven established directives, should be convened to deal specifically with YRA, and how it aids in the direction of each of the other priorities.

Of course, it is the decision of the JPC as to whether or not such a group may be convened under their mandate. Moreover, if interest is there, it would also need to be sorted out whether such a group would be defined as an additional priority, or merely a temporary, ad-hoc, working group. However, considering the previously discussed examples, addressing YRA, as an additional priority would be the most productive approach.

Regardless, a Task Force specifically concerned with YRA in Hamilton, whether from the JPC or consisting of another form of municipal partnership, is a paramount first step to addressing Youth Retention and Attraction in this city.

**Membership and Representatives**

Although membership to such a group should remain open, those sitting on it should include representatives from many of the same sectors already involved with the JPC, particularly those who sit on the:

- Innovation & Learning Priority
- Hamilton’s Image Priority
- Quality of Life Priority
- Immigration Priority
- Supportive Planning Process Priority

Given the character of this issue, membership must also be expanded to representatives from groups such as:
McMaster Students Union and McMaster student representatives
McMaster University Student Affairs (and any relevant subdivisions)
Mohawk Students Association and Mohawk student representatives
Mohawk Student Services Department
Redeemer Student Senate and Redeemer student representatives
Redeemer Student Life Department

As well, given the extent to which Hamilton’s YRA approach should be concerned with the engagement and education of youth, additional members should be summoned from Hamilton’s various community groups and organizations. This could include individuals representing anything from The United Way, to the North-Hamilton Community Health Centre, to the Industry Education Council of Hamilton.

b) Youth Retention, Attraction and Engagement Strategy for the City of Hamilton

Development initiated – Autumn 2010
Strategy completion and implementation – Autumn 2011

Immediately upon the formation of the Hamilton Task Force on YRA the first priority must be initiating the development of a comprehensive strategy. This, of course, would be referred to as the Youth Retention and Attraction Strategy for the City of Hamilton. Although, the task force may want to deliberate on the notion of adding the term “Engagement” to the title, to ensure that civic engagement becomes an essential component directing the strategy. This might also help in further defining Hamilton’s strategy and demonstrating it as a leader in municipal approaches.

In terms of process, it would be recommended that the Hamilton group review the actions taken up by those in Newfoundland and B.C., and to some extent, emulate them. Actions taken, such as Newfoundland’s “Deliberative Youth Dialogue Sessions,” are invaluable in getting the support and collaboration of civic partners, citizens and youth. In this regard, Hamilton is actually already a step ahead, as the Youth Summit organized in conjunction with the 2009 Hamilton Economic Summit was an undoubtedly successful endeavour. The only area in which it was problematic was in the significant lack of post-secondary student participation. This issue may have been largely due to the time of year in which the summit was held, as May is not an optimum time to reach and engage a large majority of post-secondary students. Nevertheless, this summit was a brilliantly organized and executed exercise in engaging and empowering Hamilton’s younger citizens.

Along with involving civic-parties in deliberative dialogues and revisiting, and ideally repeating, the Hamilton Youth Summit approach, the Hamilton
Task Force should weigh the value of employing outside talent in the strategy's development process. In the same way that the province of Newfoundland and Labrador employed Canadian Policy Research Networks, Hamilton may want to consider such external assistance in the process of research, compiling, and interpreting data. Engaging such a group may be invaluable in attaining a broader understanding of the issues as they pertain to Hamilton, and in the further development of successful approaches.

An optimum timeframe for the development of this strategy would be to occur throughout the course of a year. If the project is initiated in autumn of 2010 and is finalized and released by autumn 2011, it gives adequate time for the implementation of its components to begin throughout the 2011/12 academic year. It would be of potentially greater benefit to release it during the summer prior to this academic year, that way implementation would already be in process when students return to school. However, reaching and engaging students in secondary and post-secondary schools in Hamilton would only be one part of the broader strategy which, beyond anything else, should not be rushed in its development.

c) Interim, Other and Additional Projects to be Explored

The development and implementation of the Hamilton YRA strategy aside, the Hamilton task force may also want to look at the development of other programs and projects to operate both in the interim and eventually in concert with the strategy. The following is a brief list of suggested projects and programs that were, throughout the SWOT discussions, viewed favourably by the participants. Variations of the following, may, and in some cases do exist, thus the potential for the development of certain suggestions may be as simple as partnering with specific agencies and organizations.

i) The Young Hamilton Web Portal

This web portal would serve as a one-stop shop to address youth needs, concerns, assistance in the city of Hamilton. Serving the spectrum of youth, from high-school to post-secondary students, to recent grads and young professionals, this site can function as both a promotional tool for attracting youth to Hamilton, and serving youth in the city with any number of the following components:

- Information on and links to post-secondary institutions both in the city and outside it. Accompanying this with information on how studies in a certain area at these institutions relate back to employment in specific sectors in Hamilton.
- Links and information on how youth can get involved in the city, from organizations such as Volunteer Hamilton, to the United Way.
- Links to and information on social life and cultural happenings in the city, from festivals, to nightlife, to the burgeoning arts scene.
- Job boards and links, partnering with anyone from McMaster University’s Career Services, to Charity Village.
- “Choose Your Own Adventure: Hamilton,” information on and links to all recreational opportunities and happenings in Hamilton
- “The Easy Life: Hamilton,” similar to the entrepreneurial section, this would be a guide providing all information and links for young people looking to move to, study, or settle in Hamilton.
- A web-community component, or, at least, an email collection for the purpose of regular newsletters or notices.

ii) Open Source City

In the book *Wikinomics*, author Don Tapscott identifies how communicative technologies and mass collaboration are changing the landscape of modern business and beyond. The future of consumption does not simply permit consumers, but rather “Prosumers,” individuals who are actively involved in both the production and consumption of a given product. Examples of success in this approach can be seen in anything from Lego to pharmaceutical companies. This approach sees organizations opening up their information and products and allowing consumers to play direct roles in designing future products. A further approach sees companies engaging individuals or groups of individuals over web communities such as Innocentive.com. The organizations and innovations open up their proprietary information to allow these individuals or groups to solve any product development, science or business issues. The companies then review submissions and reward viable solutions.

How this relates to youth is that many groups of students from different institutions all over the world have actually established clubs or collectives that work online. Using what they are learning in the classroom to solve tangible, real world problems and receive remuneration from online communities such as Innocentive.

By creating a similar platform, or even directly taking part on Innocentive, Hamilton could revolutionize its approach to civic governance, engagement and problem solving by opening itself up to the world. By presenting municipal issues online to be solved by citizens both in and outside city limits (and perhaps globally), Hamilton would be
powerfully engaging its own citizens, and marketing itself internationally as a forward-thinking, innovative city.

Moreover, such an action as this does not need to be at the expense of jobs within the city. As upon receipt of potential solutions, City Council could select which are appropriate and then direct city staff to develop and enact them. What this really highlights is the easy involvement of both municipal and global talent in the promotion and prosperity of the City of Hamilton.

iii) Hamilton Youth Ambassador

This recommendation revolves around expanding the existing Hamilton Business Ambassador program to include a youth portion that functions like the “Canada123Go.ca” website.

People enjoy travel, and particularly in youth, wanderlust is rampant. Hamilton, as a city, should to some extent encourage youth to leave it, to travel, and to enrich their lives, moreover it should present and provide opportunities for youth to do so in conjunction with the governments of Ontario and Canada. By partnering with its global twin cities, and Hamilton organizations that have subsidiaries around the world, Hamilton should explore the potential development of an internship exchange style program. Of further benefit would be to engage the youth who take part in this program to explore international approaches to certain civic issues and report on them upon return to Hamilton. Additionally, the potential for receiving interns in the exchange process, further opens Hamilton up to international recognition and the exploration of global perspectives.

In undertaking a project such as this, Hamilton may attract avid travelers who want to take part in such a program, and thus, through the program develop a certain allegiance to the city, and take interest in its future prosperity.

iv) Students as Community Members

A last recommendation to be made is one that has be brought up a number of times by different parties in and around the city. Essentially this concerns the recognition of students, particularly those coming to study from outside the city, as community members. Work in this regard has, of course, been undertaken, but there is always more that can be done.

Dialogues must be had with the relevant student parties around Hamilton about how to properly push this forward. However, the most basic recommendations to be made include:
- Inclusion in or development of community associations and groups that allow for student membership. A student will never develop respect or affection for this city if they do not feel as though it is their home (even if interim). Involving and engaging students in their community is essential to producing a sense of ownership, respect and allegiance to the city. There is a marked detachment and polarization experienced by Mohawk and McMaster students from outside the city, and remarkably little, if any, semblance of a civic relationship established with students at Redeemer.

- Welcome programs. This is relatively simple, basically the development of student welcome programs and initiatives in the city. This could include anything from banners or posters around the city, to discounts (even temporary) provided by local businesses.

- Rotating City of Hamilton fairs at the city’s various institution’s Student Centres. This would be a day of promotion and giveaways from the city, providing information on its services, activities, governance and employment opportunities (particularly summer). Should take place in autumn but could be coordinated to occur each semester (twice a year) at each of the three institutions.
The Hamilton Immigration Partnership Council

The Immigration Strategy

April 2010
Introduction

For many reasons, Hamilton needs to take a proactive approach to immigration. Population growth is stalled, our labour force is aging, newcomers trying to access the labour market are faced with unnecessary barriers and too many of them are living in poverty. Many immigrants to Hamilton are highly educated with job-specific skills and entrepreneurial talents – the very ingredients that are essential for Hamilton to compete and prosper in the knowledge-based, global economy.

The Hamilton Immigration Partnership Council has been established to respond to these challenges. This small, independent community collaborative consists of leaders representing key organizations and sectors in Hamilton, and has been tasked with drawing up a made-in-Hamilton Immigration Strategy and Action Plan to address the issues surrounding immigration for the betterment of the city as a whole.

To guide its work, the Hamilton Immigration Partnership Council has articulated this vision:

*Hamilton is an inclusive community where the talents and experience that immigrants and refugees bring are valued because they are integral to making Hamilton the best place to raise a child.*

Based on the numerous community consultations and research undertaken, the Hamilton Immigration Partnership Council has identified four strategic priorities for Hamilton in pursuit of this vision:

1. Building collective and collaborative leadership in pursuit of Hamilton’s immigration vision
2. Strengthening the delivery of immigrant and refugee settlement services
3. Creating a welcoming community and thereby the conditions that encourage immigrants to both settle and stay in Hamilton
4. Creating and disseminating foundational knowledge of immigration and immigrants in Hamilton

The Hamilton Partnership Immigration Council is calling on all Hamiltonians – as residents and as members of voluntary, private or public organizations – to endorse, support and commit to this Immigration Strategy. This collective support is necessary to strengthen Hamilton’s identity as an immigrant-friendly and welcoming city.

The Hamilton Immigration Partnership Council will continue to drive this Immigration Strategy forward by championing with various community partners and stakeholders to determine ownership of the Immigration Strategy and the actions they must take to incorporate it into their particular contexts.
This Immigration Strategy can only be achieved through a collective commitment by all residents in all our different roles and capacities, working together toward the goal of Hamilton as a welcoming, inclusive community.

The following chart briefly summarizes the made-in-Hamilton Immigration Strategy and identifies the needs and drivers for the Immigration Strategy. In responding to these imperatives, the middle column identifies the four strategic priorities which recognize and stress the notion that settlement and integration is a two-way process involving responsibilities on the part of both the newcomer and Hamilton as the host society. The remaining column identifies some of the potential benefits and outcome measures of successfully implementing these four strategic priorities.
The Immigration Strategy

The vision of the Hamilton Immigration Partnership Council is that “Hamilton is an inclusive community where the talents and experience that immigrants and refugees bring are valued because they are integral to making Hamilton the best place to raise a child.” The pursuit of this vision recognizes that immigrant integration is a dynamic, two-way process in which newcomers and the receiving society of Hamilton work together to build a secure, vibrant and cohesive community. Achieving this vision requires an intentional effort that must engage all members of Hamilton’s community. Mutual responsibility, multi-sector involvement, and a multi-strategy approach are the cornerstones of the Immigration Strategy.

Why Now: The Imperatives for Hamilton Immigration Strategy

The confluence of demographic, economic and social factors creates an urgent imperative for a local, coordinated immigrant integration strategy. To continue thriving, Hamilton must be intentional about weaving newcomers into the fabric of our society. How well we integrate immigrants and provide opportunities for all members has far-reaching implications for our current and future vitality.

DEMOGRAPHIC
- Immigration can help counteract an aging and declining population.
- Global migration is a growing phenomenon that shows no signs of abatement. This trend has enormous implications for Hamilton, to ensure we attract our “fair share” as a migrant-receiving city.
- The increasing diversity and dispersion of newcomer populations throughout Hamilton requires adapting immigrant settlement services and strengthening our inclusionary traditions.

ECONOMIC
- Current and future economic growth and stability in Hamilton will depend increasingly on immigrants and refugees who can help to address labour market shortages and expand Hamilton’s global competitiveness.
- Immigrants and their children – as workers, taxpayers, consumers, and entrepreneurs – will become even more critical to our economic vitality, as birth rates continue to decline and as the Baby Boom generation begins to retire.

SOCIAL & CIVIC
- Levels of marginalization and exclusion on the basis of race, religion, language, immigrant and refugee status, and so on, are realities in Hamilton that need to be urgently addressed.

Strategic Priorities to Integration

Through these four strategic priorities, all stakeholders in Hamilton can work together to leverage immigrants’ human capital to the benefit of our entire community. Immigrant integration efforts can draw upon a myriad of strategies from organizing and advocacy to research and communications.

NEWCOMERS ↔ RECEIVING COMMUNITY

1. Building Collective and Collaborative Leadership
   All community partners, institutions, organizations, residents and levels of government work together to ensure the successful integration of newcomers into our community.
   - Seek opportunities to participate actively in all areas of community life
   - Systematically engage newcomers in developing inclusive policies, programs and practices.

2. Strengthening the Delivery of Settlement Services
   A sustainable and seamless settlement service delivery system that is well-coordinated and readily accessed enables the successful and prompt integration of all newcomers.
   - Access services addressing immediate settlement needs
   - Offer appropriate and well-coordinated settlement services
   - Utilize and support mainstream services
   - Provide equitable access to quality services i.e. education, health, housing
   - Access to jobs
   - Provide bridging and access to employment

3. Creating a Welcoming Community
   Being proactive in developing an inclusive public and civic culture will help to ensure that all the people who reside in our city really feel at home here.
   - Capacity and confidence to participate in all areas of Hamilton’s social, cultural, political and economic life
   - Take robust steps to eliminate exclusionary practices in organizational policies and programs

4. Creating and Disseminating Knowledge of Immigration
   The achievement of the successful integration of newcomers and the pursuit of a welcoming community must be built on a solid base of information and research.
   - Engage in identifying appropriate integrative and inclusionary services
   - Learn about and respect diverse cultures. Reduced public anxieties towards immigrants
   - Increase community engagement capacity building
   - More informed public, private and voluntary sectors can better respond to newcomer needs and benefit from the assets newcomers bring.

Benefits of Integration

Through collaboration among all stakeholder groups in Hamilton, increased immigration and a well-coordinated immigrant integration process holds the potential to create:

- Stronger communities with the ability to meet wide ranging needs; address racial, ethnic, and economic diversity and enrich the social and cultural fabric of our city.
- Increased productivity and a robust economy through an expanded base of workers, consumers, taxpayers, and entrepreneurs.
- Improved global competitiveness through a multilingual, multi-cultural workforce.
- A more vibrant Hamilton community in which all groups are accepted as equal members with the opportunity and responsibility to engage and contribute to the common good.
- A more cohesive, inclusive community where all residents of Hamilton—regardless of race, national origin, or socioeconomic status—live in dignity and equality.
Strategic Priorities

What is the roadmap in pursuit of the Hamilton Immigration Partnership Council’s vision?

The behaviours of the host society in providing a welcoming environment are fundamental to the successful settlement of immigrants and refugees to Hamilton and the notion of integration and an inclusive community. This is confirmed by international research that indicates the level of involvement and understanding by the receiving society is the most important factor and has the greatest impact on immigrant integration (Public Policy Forum, Ottawa, 2008).

The four theme areas – corroborating the international research – have been identified by the Hamilton Immigration Partnership Council as the strategic priorities by which we in Hamilton can support the successful settlement of immigrants and refugees to our city:

1. Building collective and collaborative leadership in pursuit of Hamilton’s immigration vision
2. Strengthening the delivery of immigrant and refugee settlement services
3. Creating a welcoming community and thereby the conditions that encourage immigrants to both settle and stay in Hamilton
4. Creating and disseminating foundational knowledge of immigration and immigrants in Hamilton

Priority: Building Collective and Collaborative Leadership

All community partners, institutions, organizations, residents and levels of government must work together to ensure the successful integration of newcomers into our community.

To more fully embrace and realize the enormous social, cultural and economic assets that immigrants offer and that already exist within our extraordinarily diverse city, significant changes must be made to our civic, cultural and organizational practices.

The Immigration Strategy is a guidance document that encourages all sectors in Hamilton to recognize the importance of immigration and to consider how each can demonstrate their particular leadership roles in facilitating a more inclusive and welcoming community.

The issues of immigration have an impact on all areas of life in Hamilton. To have legitimacy, significance and impact, this made-in-Hamilton Immigration Strategy requires community ownership and buy-in. The involvement of the residents of the
city is essential along with the active involvement and participation of the major organizational and institutional sectors in Hamilton.

By articulating this collective commitment and leadership, the Immigration Strategy seeks the formal support and endorsement of key stakeholder organizations throughout Greater Hamilton. This formal support is secured through obtaining signatories to the Declaration of Intent that follows.
THE HAMILTON IMMIGRATION STRATEGY

DECLARATION OF INTENT

In a city that is increasingly diverse in the makeup of its people, and functioning in an increasingly global age, immigration and the integration of immigrants and refugees is a key determinant of the future success and prosperity of Hamilton.

Consistent with the vision of the Hamilton Immigration Partnership Council we, the undersigned do hereby endorse the priorities and actions set out in the strategy. This strategic framework enables us to manage and influence the impact of immigration for the benefit of all the residents of Hamilton.

We will continue to facilitate, cooperate and collaborate in measures, actions and policies which will effectively contribute to the concept of Hamilton as an open, welcoming and inclusive city.

Furthermore, we as stakeholders in the economic, social and cultural life of Hamilton undertake to continue to take a proactive and robust approach in integrating immigrant settlement issues and a diversity and inclusive dimension in all our strategic planning and business processes and encourage those with whom we work to do the same.

Possible signatories with corporate logos:

Mayor and City of Hamilton
Board of Trade/Chamber of Commerce
President, McMaster and Mohawk
Chairs, Boards of Education
Unions
RBG
AGH
Priority: Strengthening the Delivery of Settlement Services

A sustainable and seamless settlement service delivery system that is well-coordinated and readily accessed enables the successful and prompt integration of all newcomers.

Hamilton can be proud of a long and well-established settlement service delivery system. Still, there are a number of barriers that prevent newcomers to the city from being integrated efficiently:

Settlement is taking Longer:

In the past twenty years, the levels of unemployment, income and poverty among recent newcomers to Hamilton indicate that the settlement period for immigrants – in terms of their economic outcomes converging with those of the native-born population – has practically to more than ten years. Consequently, the backlog of unsettled and un-serviced newcomer clientele in the city’s settlement agencies continues to balloon.

Barriers to Integration:

The barriers to settlement for immigrants and refugees in Hamilton have been well-documented and continue to persist. These barriers have generally been grouped into the following main areas:

- Immigration process itself (e.g., there is a 5 to 6 year waiting period for people to enter Canada and an estimated 1 million people waiting)
- Employment (e.g. lack of Canadian experience, insufficient recognition of credentials earned outside of Canada, etc.)
- Initial settlement process
- Language education (e.g. eligibility criteria for accessing language training)
- Access to addressing health needs
- Access to affordable housing

The Role of the Settlement Sector:

Historically, publicly-funded settlement services have provided specifically defined services to individual newcomers and they have also performed other critical functions including research, public education, advocacy and community development.

Due to the current economic climate, funding restrictions and new criteria, there is a danger that these broader critical functions to effective settlement and the provision of more individualized services might be lost.
All community partners must work together to address the pressures faced by the settlement sector along with gaps in service provision to create a more responsive and integrated service provision system.

It is also important to distinguish between formal settlement services and more informal associations/voluntary groups accessed by immigrants and refugees to help manage their transition. Informal networking activities initiated by immigrants (available and accessible through their ethno-cultural associations) meet both instrumental and expressive needs. Faith-based institutions are particularly important in this regard.

It is necessary to identify, acknowledge and support the informal and voluntary settlement sectors for their important role in the integration of newcomers. A well-coordinated system of settlement services that ensures effective integration of all newcomers will require the creation of strong linkages between formal and informal settlement services.

**Priority: Creating a Welcoming Community**

Being proactive in developing an inclusive public and civic culture will help to ensure that all people who reside in our city really feel at home here.

Private and public partnerships need to be established in order to implement a number of public education programs that support a climate where all immigrants and refugees to Hamilton feel welcomed and are able to participate in all aspects of civic life. Constructive discussion about immigration needs to be brought in from the margins to the mainstream of Hamilton life.

A welcoming community is one in which anxieties, misconceptions, discrimination, exclusionary practices and hate activity with regard to immigration is uncommon. Instead, the contributions and achievements of immigrants are promoted, diversity is encouraged and celebrated, inclusion is regularly practiced, community cohesion is evident and there is meaningful interaction between newcomers and the settled community.

**Priority: Creating and Disseminating Knowledge of Immigration**

The achievement of the successful integration of newcomers and the pursuit of a welcoming community must be built on a solid base of information and research.

The lack of information and intelligence and the lack of widely sharing that information is part of the reason for the absence of coordination and the ad-hoc and crisis reaction stance to too many settlement and integration activities. This lack of shared knowledge also contributes to a heightened level of ambivalence and uncertainty among residents about the impacts of immigration on their community.
Building foundational knowledge and data is crucial to achieving the outcomes of this local immigration strategy because:

- Service providers and employers who have access to the most recent immigrant research and data and are more aware of immigrants’ needs and values will be less inclined to engage in exclusionary practices, allowing greater access.

- Strengthening awareness and capacity to integrate immigrants is best achieved through a sharpened narrative and a more informed body of knowledge about immigration, particularly on the longer-term effects on Hamilton.

- The first step toward planning and coordinating settlement services is to ensure that local stakeholders are fully aware of the issues, impact and importance of immigration so that they are well-informed and well-equipped to plan and deliver quality services that meet the specific needs of all immigrants to Hamilton.

- The provision of enhanced information/intelligence on immigration and immigrants in Hamilton will improve due diligence in promoting relevant, high-quality settlement and integration services in Hamilton and facilitate effective monitoring and oversight.

**The Immigration Strategy: Action Plan**

The attached document outlines some of the major goals and corresponding strategic actions necessary to implement each of the four priorities outlined in the Immigration Strategy. This is the starting point for more detail to be developed by community partners who will create actions specific to their own institutions and organizations.

The implementation of the Immigration Strategy requires multi-dimensional cooperation and collaboration among and within all of the community's institutions, organizations, private sector and not-for-profit groups.

This Strategy also requires implementation of the four strategic priorities at different levels of the community including individual, local, neighbourhood, organizational, and city wide.

*The Individual Level:*

Every individual is responsible for doing their part in dispelling the myths and misconceptions of immigration to become more accepting and tolerant.
This positive practice will lead to a more welcoming community for newcomers. Individual immigrants are also responsible for becoming integrated into the host society by:

- Seeking opportunities to participate actively in all areas of community life
- Accessing services that address immediate settlement needs
- Utilizing and supporting mainstream services
- Actively seeking employment
- Building the capacity and confidence to participate in all areas of Hamilton’s social, cultural, political and economic life
- Engaging in identifying appropriate integrative and inclusive services.

The Community/Neighbourhood Level:

Newcomers emigrate to Canada but they settle and integrate into local communities and neighbourhoods. The friendliness of neighbours and the quality of interactions in the neighbourhoods of our city are key determinants for newcomers in feeling that they “belong” in their locality. It is in the neighbourhoods of Hamilton where a sense of belonging and feeling welcome is articulated and negotiated. It is the quality of the relationships made at the local, neighbourhood level that can bind diverse communities.

The Organizational Level:

While settlement services in Hamilton are focused primarily on the immediate, short-term transitional settlement needs of immigrants and refugees, it is the institutional sectors - whether it is education, human services, health, or employment services - that play a critical role in the medium and long-term settlement and integration process. This reality reinforces the point that immigration is everybody’s business, and that the settlement and integration process cannot be left to the settlement service providers in Hamilton alone to deal with.

The City-Wide Level

The Immigration Strategy also requires action at a city-wide level. Only when the public as a whole realizes and accepts the value of immigration to Hamilton’s social, cultural and economic life will immigrants be completely integrated and fully involved in the community and experience a true sense of belonging. Creating a cohesive community and a civic identity through the inclusive behaviours and practices of the host city benefits all of its residents.
The Hamilton Immigration Partnership Council

The Immigration Strategy:

Action Plan

This Action Plan provides a framework for implementing the strategic priorities identified in the Immigration Strategy. It is organized by the goals and major strategic actions necessary to achieve each of the Strategy’s four priorities. More detailed strategic actions are to be created by community partners including the municipal government, community institutions and organizations, both profit and not-for-profit, as well as community-based groups.

The implementation of this plan will be carried out collectively and collaboratively by all community partners at all levels of the community with support from the Hamilton Immigration Partnership Council.

April 2010
**Priority: BUILDING COLLECTIVE AND COLLABORATIVE LEADERSHIP**

*All community partners, institutions, organizations, residents and levels of government work together to ensure the successful integration of newcomers into our community.*

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategic Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Formal community support and endorsement of the Immigration Strategy</td>
<td>- <em>Obtain signatories to the Declaration of Intent (see the Immigration Strategy).</em></td>
</tr>
</tbody>
</table>
| Each institution and organization in Hamilton will take the lead to ensure that immigration issues become a normal part of their everyday business | - *Work toward integrating immigration in all strategic documents which may affect Hamilton’s settlement and integration efforts*  
- *Systematically engage newcomers in developing inclusive policies, programs and practices.*  
- *Establish and implement an immigrant settlement policy and inclusionary strategy.*  
- *Undertake Inclusionary Impact Assessments for operational policies, procedures, processes and practices to ensure they do not exclude immigrants and refugees.*  
- *Develop strategies for leadership capacity building that ensures representation of all of Hamilton’s diverse communities.*  
- *Identify barriers to employment and implement initiatives to remove barriers and improve representation of the workforce.*  
- *Provide equal access to purchasing requirements for all diverse businesses and encourage local diverse and immigrant-owned businesses to register on supplier lists.*  
- *Develop effective communications mechanisms to promote greater awareness of the importance of immigration at all levels of the organization, disseminate inclusive ‘good practices’ and support greater public access to data and services.*  
- *Implement ongoing diversity training.*  
- *Develop a community engagement strategy to include external outreach with diverse and newcomer communities.*  
- *Produce and disseminate Annual Inclusion Reports and establish other such reporting and accountability structures.* |
| All sectors in Hamilton work toward the same vision and goals | - *Serve and provide direction and oversight as a standard bearer for immigration issues in Hamilton.*  
- *Actively promote the development of policies, protocols and structures that will embed best practices regarding settlement services in the public institutions of Hamilton.*  
- *Review performance data on settlement and integration and make recommendations to support policy and/or operational initiatives.* |
| Closer collaboration and agreements among all three levels of government | - *Recommend that the municipal government lobby for a seat at the immigration policy table at the provincial and federal levels.*  
- *Create opportunities for real exchanges of information among the three levels of government.*  
- *Improve communication and collaboration among the municipal departments within the City of Hamilton.* |
# Priority: STRENGTHENING THE DELIVERY OF SETTLEMENT SERVICES

A sustainable and seamless settlement service delivery system that is well-coordinated and readily accessed enables the successful and prompt integration of all newcomers.

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategic Actions</th>
</tr>
</thead>
</table>
| A detailed analysis of the nature and role of all agencies in Hamilton involved with the provision of short and medium term settlement and integration support | • Compile an inventory of Hamilton’s formal settlement services  
• Undertake an assessment of the informal services and voluntary networks that assist in settling newcomers in Hamilton  
• Identify programs and services that have particular impact and relevance to the settlement process |
| A fuller understanding of the settlement process in Hamilton as experienced by newcomers including the nature of newcomers’ needs and the barriers to successful integration | • Undertake ongoing consultations with newcomer communities  
• Partner with local and regional settlement research initiatives to access recent trends and issues  
• Collect the appropriate data to measure and assess whether fair and equitable services are provided to newcomers and publicly share this data to allow for public monitoring  
• Ensure the recognition and participation of immigrant and ethno-specific agencies in various areas of service planning and delivery |
| A well-coordinated and seamless settlement service system in Hamilton | • Identify and address gaps in settlement service provision  
• Facilitate mechanisms for ongoing collaboration with local settlement agencies  
• Strengthen the linkages between the informal and formal settlement sector |
| Increased awareness of and access to settlement services               | • Provide ongoing support to the Hamilton Immigration Portal and other online settlement and newcomer information systems  
• Develop and establish a Hamilton Immigration Partnership Council website with links to settlement services information  
• Publish and disseminate information on both the formal and informal settlement services in Hamilton |
| Recognition of and support for the informal and voluntary sectors in the provision of settlement services | • Consult with funding agencies to establish a funding stream that recognize and gives support to the informal, voluntary sector and its critical role in the settlement and integration process  
• Recognize informal settlement services and develop complementary forms of collaboration and assistance  
• Disseminate information about formal settlement services to newcomers to these informal networks |
| Enhanced services such as language training, employment, housing, health and public transit to facilitate the settlement process | • Identify policy and program improvements that reduce the barriers to efficient integration  
• Establish and expand such initiatives as internships, mentoring, job-shadowing and co-op placements to improve newcomer access to the labour market  
• Provide bridging access to employment  
• Identify and address newcomer needs to improve access to affordable and stable housing  
• Determine usage among newcomers to public transit and address concerns regarding cost, availability, etc.  
• Identify the differential healthcare needs of newcomers and develop appropriate responses for accessible and suitable healthcare provision |
### Priority: CREATING A WELCOMING COMMUNITY

*Being proactive in developing an inclusive public and civic culture will help to ensure that all the people who reside in our city really feel at home here.*

<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategic Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reduced public apprehension, anxieties and misconceptions about immigrants and immigration to Hamilton</td>
<td>• Develop and implement a Public Education Strategy that highlights the contributions and achievements made by Hamilton’s diverse immigrant communities</td>
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<tr>
<td></td>
<td>• Produce and widely disseminate information combating the myths and misconceptions about migrants and immigration</td>
</tr>
<tr>
<td>The elimination of racial discrimination, incidents of hate activity and the marginalization of residents because of their immigrant and refugee status</td>
<td>• Reconfirm through various public means and political platforms Hamilton’s commitment to the elimination and unacceptability of discrimination and exclusionary practices</td>
</tr>
<tr>
<td>Institutional practices that are inclusive and the elimination of barriers that exclude newcomers from participating in the political, economic, social and cultural life of the city</td>
<td>• Identify the best practices of Hamilton’s institutional sectors and promote the strategies that benefit from and celebrate Hamilton’s immigrant communities</td>
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<td></td>
<td>• Ensure all communications reflect and represent the diversity of Hamilton and are disseminated through a variety of channels, formats and languages</td>
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<td></td>
<td>• Establish proactive community engagement initiatives that seek and identify the needs and aspirations of newcomer communities</td>
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<td></td>
<td>• Involve newcomers in making decisions that affect their settlement experience in Hamilton and their participation in every aspect of life in the city</td>
</tr>
<tr>
<td></td>
<td>• Take robust steps to eliminate exclusionary practices in organizational policies and programs</td>
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<tr>
<td>A cohesive community with an inclusive civic identity</td>
<td>• Promote mechanisms for meaningful interaction between newcomers and the resident community at the local neighbourhood level</td>
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<tr>
<td></td>
<td>• Increase the capacity, skills and confidence of newcomers to participate in the political, economic, social and cultural life of the city</td>
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<tr>
<td>Priority: CREATING AND DISSEMINATING KNOWLEDGE OF IMMIGRATION</td>
<td></td>
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<td>---------------------------------------------------------------------------------------------------------------</td>
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<tr>
<td><em>The achievement of the successful integration of newcomers and the pursuit of a welcoming community must be built on a solid base of information and research.</em></td>
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<table>
<thead>
<tr>
<th>Goals</th>
<th>Strategic Action</th>
</tr>
</thead>
</table>
| An up-to-date, evidence-based body of information and intelligence to support well-coordinated settlement services | • *Commission, collect and review research in areas such as:*  
  o immigration demographics  
  o inventory of settlement services provided in Hamilton  
  o informal settlement services  
  o gap analysis of settlement services  
  o newcomer needs  
  o immigration bibliography  
  o immigrants and the Hamilton economy  
  o institutional sectors and settlement issues  
  o specific immigrant population groups (e.g., youth, women, seniors, children, etc.; and diverse ethnicities and races) |

| Knowledge about immigration in Hamilton is continually disseminated, promoted and utilized | • *Develop and disseminate both electronic and print versions of a variety of materials including a Newcomer Guide to Hamilton, Fact Sheets about immigration, newsletters, position papers, newspaper articles, etc.*  
• Ensure service providers have access to the most recent research and data on immigrants to Hamilton to facilitate inclusive and equitable planning and delivery of services  
• Develop and provide information on settlement services in Hamilton:  
  o Create an electronic directory of settlement services available in Hamilton in partnership with Inform Hamilton  
  o Support the Hamilton Immigration Portal and the development of other online settlement and newcomer information systems  
• Develop a Hamilton Immigration Partnership Council website containing all research compiled as well as links to settlement services available  
• Learn about and respect diverse cultures to help reduce public anxieties towards immigrants and enable public and private sectors to better respond to immigrants’ needs while benefiting from the assets they bring to our community |
The diversification of Hamilton’s economy is critical to the future prosperity of this community. Focusing on different key industry groups provides economic stability and a variety of business opportunities for all companies that call Hamilton home.

Ron Foxcroft, CEO & Founder
Fox 40 International and Fluke Transportation Ltd.
BUSINESS DEVELOPMENT

Introduction

The primary purpose of the Business Development component of the Economic Development Strategy is simple - it is to increase Hamilton's non-residential assessment base and create well paying jobs in the community. The goals of diversification of the City’s economic base and increasing the competitiveness of its businesses are complementary objectives that must be realized in order for Hamilton to achieve financial sustainability and improve the standard of living of its residents.

Sustainability, and not just financial, is a key principle throughout the entire Economic Development Strategy. The term Sustainable Development is generally defined as a pattern of resource use that aims to meet human needs while preserving the environment so that these needs can be met not only in the present, but also for future generations. The concept is interchangeable with the "Triple Bottom Line" approach that captures an expanded spectrum of values and criteria used for measuring both private and public sector organizations. It is really a shareholders as opposed to stakeholders perspective on development.

This Economic Development strategy has endeavoured to achieve the “balance” of Sustainable Development and is the reason why it contains components like Quality of Life, Workforce Development and Community Development. Of the six components that comprise the City’s Economic Development Strategy, it is Business Development that represents the core of the document. That being said, the overall performance and effectiveness of this section is entirely dependent on the achievement of the identified deliverables in the other five components.

In keeping with the principles of sustainability, the Business Development component has been formulated with both the recent economic and existing climate crisis in mind. Although this strategy can not be considered as a true green plan it does contain many elements from “Towards a Global Green Recovery” an action paper presented to the recent G20 Economic Summit in London, UK. Specifically it contains the following: Supporting Clean Technology markets; Increasing Energy Efficiency and Upgrading Physical Infrastructure (e.g. integrated freight transport systems and increasing public transit).

The Business Development component of the Strategy identifies how Hamilton will recruit new companies as well as retain and grow its existing business base.
More specifically, it defines exactly which key industry groups will be the focus of the new strategy along with what types of companies in these groups will be targeted for growth. To measure the success of this component both short and long deliverables have been established as benchmarks.

There are three major segments of this Business Development component:

- Business Attraction
- Business Retention and Expansion (BR&E)
- Key Industry Groups (clusters)
BUSINESS ATTRACTION

Business attraction and recruitment strategies gained great popularity from the 1970s through to the millennium when cities, provinces and states were able to secure new offshore investment through the attraction of geographically mobile companies via the use of incentives, tax abatements and site specific infrastructure development. In both the politicians’ and public’s minds, Business Attraction incorrectly became synonymous with Economic Development. This conclusion was a direct result of the belief that aggressive business attraction efforts create a significant number of jobs in a short period of time.

Today, business attraction and business incentives still remain the most common form of local economic development and particularly in the United States and Quebec. Business incentives are supported by virtually all levels of government and range from regulatory flexibility to tax abatements and grants. However, the actual effectiveness and cost/benefit of these strategies has and continues to be challenged by politicians, taxpayers and economic development practitioners alike. Too often the firms that have been recruited may not stay long in a community before moving to another cheaper, incentive laden location. Also, contrary to popular belief, the number of major investments such as automotive assembly plants and computer chip manufacturing companies are few and far between. Consider for example in 2003, there were approximately 2,000 significantly sized plant locations in the US If the following assumptions are made: i) that the Canadian market/population is 10% of the US - then this translates to roughly 200 plant locations per year in Canada; and ii) that Montreal, the Greater Toronto Area, Calgary and Vancouver account for 70% of those plant locations; that leaves 700 municipalities and 10 provincial governments in Canada all devoting resources to land approximately 60 plants. Not good odds for success with all of these players chasing the same prize.

Coincidentally, site selection research results generally support the notion that businesses benefit more from governmental investment in infrastructure, workforce development and quality of life, than they do from tax breaks or grants. It is for this reason that Hamilton has embarked on a comprehensive Economic Development Strategy that includes all of these components and more. Unlike the larger Economic Development plan, this Business Attraction section is but a single strategy in the Business Development component.

All that being said, Business Attraction/Recruitment (if successful) is still the quickest means for a city to increase its non-residential assessment and create jobs - provided that it is investment ready. And although plant location is largely market driven, an effective attraction program can swiftly breed success via a lemming effect. For example, if a municipality is able to secure and market a
number of early wins in business recruitment then it automatically hits the radar screens as a location of interest for suppliers, competing companies, industrial realtors, site selectors, etc.

In this version of the Economic Development Strategy, Hamilton’s Business Attraction Program will consist of the following five sections:

1) **Becoming an Investment Ready community**

Hamilton’s strategic goal of aggressively attracting new business is completely dependent upon its ability to accommodate that growth. By far, this is the most critical factor for success and has, in fact, been underway in Hamilton for the last several years. Being an investment ready community encompasses a wide variety of areas, the most important of these are included in the following table:

<table>
<thead>
<tr>
<th>Investment Ready Action</th>
<th>Status And Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Infrastructure</td>
<td><em>In Progress</em> - Infrastructure Master Plans, Transportation Master Plans (with Metrolinx, and Province)*</td>
</tr>
<tr>
<td>Cost Competitive Environment</td>
<td><em>Complete/In Progress</em> - Business Tax Reduction Program, Subsidized Industrial Development Charges and Competitive permitting fees*</td>
</tr>
<tr>
<td>Streamlined Development and Permitting Processes</td>
<td><em>Complete</em></td>
</tr>
<tr>
<td>Investment oriented web site</td>
<td><em>Complete</em> - <a href="http://www.investinhamilton.ca">www.investinhamilton.ca</a></td>
</tr>
<tr>
<td>Available Property Inventory</td>
<td><em>Complete</em></td>
</tr>
<tr>
<td>Innovation Climate/Skills Development</td>
<td><em>In-Progress</em> - McMaster Innovation Park</td>
</tr>
<tr>
<td>Pro Active Economic Development Team (Municipality and Community)</td>
<td><em>Complete</em> - City of Hamilton, Chambers of Commerce, Jobs Prosperity Collaborative</td>
</tr>
<tr>
<td>Financial Incentive Programs</td>
<td><em>Complete</em> - ERASE, Downtown, LEEDs,</td>
</tr>
</tbody>
</table>
As evidenced above, the City has already taken great strides towards making itself investment ready which was evidenced in 2009 when Hamilton was selected as the most Investment Ready community in Ontario by an independent US site selection firm. It is recommended that the City must establish the goal of continuously improving its position in all of these above investment readiness areas in order to attract new businesses to the community.

2) Identifying and targeting the prospects

As previously mentioned, all too frequently municipalities commit scarce financial resources to expensive, ineffective business attraction programs. And these initiatives all share many of the same tactics, namely: expensive consultants, branding campaigns, costly literature and media buys, exploratory foreign trips with politicians and even the establishment of satellite offices. However, the lack of success in business attraction by a community is almost always attributable to one factor – at no time were there any significant efforts to focus on targeting specific companies in specific sectors.

Hamilton’s Business Attraction Program will be directed at both domestic and off-shore investment based on the Council approved six key industry groups identified in this Economic Development strategy. Within these industry groups, only certain types of offshore companies (see Key Industry Sectors below) will be targeted for attraction. Furthermore, their direct investment potential will be determined through comprehensive market/company research conducted by the Division’s Business Analyst and Research officer. This will ensure that the division’s resources are efficiently and effectively used and there is a reasonable probability that the plant location can be secured for Hamilton. It will also serve as the foundation for the annual work plan where a minimum of five (5) companies in each key industry group will be aggressively targeted for relocation/expansion to Hamilton.

The initial phase of the Business Attraction Program will concentrate on the Greater Toronto Area (GTA), Ontario, Quebec and the northern US. A formal Foreign Direct Investment Strategy (see Marketing and Outreach component) will be developed separately at a later date complete with a budget and performance measures for off-shore recruitment activities. Listed below, in order of priority, are the City’s six key industry groups and the geographic markets that have been identified based on preliminary research of where the highest concentration of these types of companies reside. These priority rankings were based on the three criteria: 1) potential for non-residential assessment and jobs; 2) past and current enquiries; and 3) future opportunities and trends based on our analysis of the key industry sectors.
I. Advanced Manufacturing (source: U.S. Mindbranch; EUREKA Pro-Factory)
   - Greater Toronto Area
   - US (New York, Indiana, Illinois, Pennsylvania)
   - Europe (Germany, UK, Italy, Scandinavia)
   - China and Japan

II. Agri-business and Food Processing (source: USDA ; European Commission Rural Development)
   - Ontario and Western Canada
   - US (California, Texas, Minnesota, Iowa, Nebraska, Pennsylvania)
   - Europe (UK, Netherlands, Germany, France)

III. Clean Technology (source: bizjournals 2008; Cleantech Group LLC )
   - Ontario and Quebec
   - U.S. (California, Massachusetts, New Jersey, Pennsylvania)
   - Europe (Germany, Scandinavia, France)

IV. Creative Industries
   - Ontario

V. Goods Movement
   - Ontario and Quebec
   - US (Northeast and Midwest)
   - Europe and Far East and Central and South America

VI. Life Sciences (source: Fierce Biotech 2009; European Commission Cordis FP7)
   - Greater Toronto Area and Quebec
   - US (Massachusetts, New Jersey, Colorado, California )
   - Europe (UK, Germany, France, Sweden)

3) Marketing Hamilton for Investment

A detailed plan that includes tactics has been developed by the consulting firm of Millier Dickenson and Blais along with Y Factor Communications as part of the Comprehensive Marketing Strategy which is located in the Marketing and Outreach component of the Economic Development Strategy.
The following site selection specialists and related organizations have been identified as the primary delivery channels for Hamilton’s business attraction program.

- **Greater Toronto Area**
  - Society of Industrial and Office Realtors (SIOR) and Industrial Commercial Institutional Realtors (ICI)
  - Local Business Ambassadors
  - Banks, Accounting and Legal Firms

- **US and Canada (an Integrated Market)**
  - Department of Foreign Affairs and International Trade and Canadian Consulates
  - US based parent companies of local firms
  - US based Site Selectors
  - Local Business Ambassadors

- **Foreign (Off-Shore) Direct Investment Strategy (see Marketing and Outreach component)**
  - Engagement of local business leaders and contacts (beyond the efforts of the Hamilton Business Ambassador Program)
  - Working an established network of multinationals already in the community

4) **Tracking, working with and securing the investment**

In late 2008, the Economic Development and Real Estate Division created a Senior Business Development Officer position with the specific responsibilities for Business Attraction and plant relocation. Many of the investment ready initiatives described earlier are the necessary tools required to achieve the performance objectives.

All investment and attraction opportunities are input into a web based Customer Relationship Management (CRM) system tool called *Salesforce*. This online tool allows the Business Development office to track and organize its contacts with all potential prospects and ensures that investment inquiries are monitored and handled in a timely and expeditious manner.

This Senior Business Development Officer position also serves as the primary point of contact and manages all incoming direct investment enquiries and files. This individual also coordinates a larger team of senior staff (City Manager, General Managers etc.), politicians (Mayor, Council, MPs and
MPPs) and community stakeholders (Jobs Prosperity Collaborative, Chambers etc.) on and as needed basis for major company relocations and business attraction initiatives.

5) **After sales service**

Business Attraction and Business Retention are not mutually exclusive activities. Any new business evaluating a community for investment, relocation or expansion does so by surveying or talking with companies that are already established there. In order to ensure that any new business attracted to Hamilton flourishes and receives optimal customer service, they will be immediately transferred into the division’s proactive Business Retention and Expansion (BR&E) and corporate calling programs. Further details on this are available in the next section of the Business Development Strategy.
BUSINESS RETENTION AND EXPANSION (BR&E)

Introduction

In difficult economic times, the question consistently arises whether a municipality should discontinue its business attraction activities in favor of an exclusive Business Retention and Expansion focus? The answer to that question is obviously NO because new companies establishing in a city will bring jobs, new non-residential assessment and new opportunities for growth.

However, today in a period where economic growth is non-existent and corporate mergers and acquisitions dominate the Canadian landscape, retaining and growing local companies must be the City’s top priority. When a decision about a local company’s future is being made offshore, the municipality must do everything possible to guarantee that the business remains, continues to pay taxes and provides jobs for local residents. Regardless of economic conditions, any city that is not committed to a comprehensive and aggressive BR&E Program is guilty of a major disservice to its taxpayers.

Major Trends and Issues

Overall, Business Attraction is a more intense activity in terms of time, labour and money as compared to BR&E. In the cost conscious private sector, it is ten times cheaper to retain customers than to attract new ones. So to be more effective, an economic development organization can stretch its limited resources by focusing on existing customers instead of spending heavily to attract new ones. It is a documented fact in the economic development profession that 80% of all new jobs and capital investment in a community are generated by local companies. Therefore, for an economic development strategy to be successful, the Business Retention and Expansion Program must be a key component that is adequately resourced and supported by the entire corporation including City Council.

Most communities in North America have a BR&E Program but what differs is the complexity of the program and how effectively it is delivered. Some municipalities use sophisticated data collecting systems for their local business base, others concentrate on building long term relationships with existing companies, and still other cities employ a combination of both. Regardless, the best BR&E programs all recognize the same need – “that business expects and deserves value with each interaction”.

The economic development organizations’ with BR&E Programs that focused only on collecting data on companies often failed to demonstrate value to the local company. Although they did possess comprehensive information on the local industrial base, they failed to establish a relationship with the company that
made them the first point of contact for any potential growth, operational, downsizing or closure related issues.

Conversely, those communities that oriented their BR&E Program strictly to establishing long-term relationships with local business consistently proved to be much more effective in business retention activities. However, the importance of detailed information on local industry cannot be discounted because it is essential to the municipality’s ability to plan for growth (e.g. employment land) and to maintain and improve its competitive business environment. As a result, Hamilton’s BR&E Program employs a hybrid approach of relationship building and data collection.

Promoting Business Retention and Expansion within the City of Hamilton

The City of Hamilton has put into place one of the most aggressive Business Retention and Expansion Programs in the province of Ontario. The Program focuses on establishing long term relationships with existing companies in order to address their needs and concerns. It has also been designed to ensure wherever possible that each company’s jobs and assessment are maintained and expanded within the City of Hamilton.

The promotion of local business retention and expansion efforts requires a complex interaction of capable staff, local business leaders, informed politicians and focused policy. The need to refine and strengthen these relationships and to utilize this network to gain additional insights into the issues and trends facing the local economy are paramount among the staff of the Economic Development and Real Estate Division.

Corporate Calling Program

A mainstay within many Business Retention and Expansion Programs, the Corporate Calling Program, represents an outward representation of the commitment by the municipality and City Council to listen and resolve the concerns of the local business community. The Program provides a detailed data collection opportunity, a means to celebrate local successes and a valuable analysis tool through which to develop and refine existing programs and policy.

In April of 2008, the Economic Development and Real Estate Division launched its "Hamilton Calling" Program. Since then, the division's Business Development Officers have been meeting with Hamilton's top employers and engaging them in a comprehensive two hour survey. The survey's 45 questions cover everything from growth and expansion plans, labour needs and research and development investments to opinions about city taxes, planning processes, infrastructure and development charges.
The latest technology is also being used to assist in this work. The first is the **Synchronist** System. This is an internet based software tool designed to organize, analyze and report company information derived from an intensive two hour interview. The greatest benefits being that it provides incredible insight into the dynamics of the local economy by identifying companies with the best growth potential, by predicting companies at risk, and by measuring a city’s strengths and weaknesses in comparison to other municipalities.

Examples of e-synchronist information collected in 2009:

- 63% are looking to expand in the next three (3) years
- 83% have introduced new products in the last five (5) years
- 54% have difficulty attracting skilled labour
- 37% indicate that their primary market is internationally based
- 27% state that there are reasons why Hamilton may not be considered for future expansion

This information will be an extremely valuable tool to allow the Business Development staff the opportunity to tailor their efforts to work with companies looking at expanding their operations. It will also provide valuable direction and insight to Council and the City of Hamilton as they set strategic direction and policy pertaining to the corporate community.

The City has also invested in a web based Contact Resource Management (CRM) tool that streamlines customer relationship management. The CRM enables staff to build detailed profiles on our local companies and international contacts and then immediately connect them to important economic development initiatives (e.g. trade mission, new funding programs etc.) related specifically to their business.

Staff visits to local businesses will include the City Manager, General Manager(s) and other Senior Staff, elected representatives and the Mayor and Ward Councilor. The purpose of these visits will be communicated beforehand and timely and detailed follow ups will be made should the need be expressed.
Examples of recent Business Retention and Expansion (BR&E) successes

- **Steel Service Centre** - Major steel processor located in east Hamilton was planning for a +70,000 s.f. expansion to their current facility. A major issue regarding development fees arose that made the expansion a no-go decision. The company, a regular Corporate Call recipient, contacted Economic Development staff to determine if there was any way to resolve the cost impediment. In less than 24 hours, after considerable consultation with senior staff in other departments, it was discovered that the proposed charges were overstated based on an initial incorrect interpretation of the by-law. The result was a significantly lower charge and the company proceeding with their major expansion.

- **Industrial Supply Company** - Economic Development staff met with a company and learned that they were looking for money to finance a new technology. Staff made company aware of the SMART program offered through the Province and referred them to a Ministry of Economic Development and Trade (MEDT) representative. The company applied and received a grant of $50,000.

- **Confectionary Manufacturer** - Faced with a dwindling market share for its confectionary products and wishing to grow its private labelling capacity, the company began working with staff from the Economic Development and Real Estate Division to save its business. Staff provided direction in many areas including enlisting the services of the City’s employment division to help the company identify and contact applicants to fill its third shift for a 20 week period (60 - 70 employees).

  Most notably, Economic Development staff created key linkages between the company and Mohawk College. Through this arrangement, Mohawk students put into practice their business theories as they analyzed the company’s operations and provided key advice on ways to improve the plant’s profitability and increase business efficiencies.

- **Metals Recycling firm** - Staff met with a company, learned of their expansion requirements and introduced them to the Hamilton Port Authority. This company has now expanded their operations and facility at the Port and was involved in the first container feeder trial shipment, which linked Hamilton to Montreal carrying containers aboard a tug-barge unit.
Business Retention and Expansion (BR&E) Targets

The results of the BR&E Program are dependent on actions emanating from three sources: 1) the proactive Corporate Calling Program; 2) direct referrals from community stakeholders; and/or 3) direct enquiries from a local business. The annual targets for Hamilton’s BR&E Program are as follows:

- The top 100 employers in the City will be visited once every two years
- The top 25 companies/businesses in each Key Industry Group will be visited annually
- The City Manager and/or General Manager will accompany Economic Development staff on ten corporate visits per year
- The Mayor and/or Ward Councillor will be included on all strategic or critical issues related to BR&E

KEY INDUSTRY GROUPS (Clusters)

Both the Business Development and larger Economic Development Strategy are based on six key industry groups that have been selected through stakeholder input and economic research for the following reasons:

- Hamilton has inherent strengths in each of these groups
- Many are existing key industry groups that the City has developed over the last decade
- There is strong potential for growth in these industry groups
- Each industry group has the ability to employ many Hamilton residents
- Their development will accelerate the on-going diversification of the local economy

Why a Cluster based strategy?

An economic cluster is defined as “a geographic concentration of competing and cooperating companies, suppliers, service providers and associated institutions. They have the ability to raise the standard of living provided there is a high-quality business environment that fosters innovation and rising productivity.”

Michael Porter, Harvard University “Clusters of Innovation Initiative: The San Diego Report”

Council on Competitiveness Oct 2001
Cluster-based economic development continues to gain momentum as a preferred strategy for most North American municipalities. In Canada, 12 of the largest 13 municipalities all employ a cluster based model in their economic development strategies. By concentrating on a City’s inherent economic strengths and its existing business base, this approach to economic development provides an effective method by which municipalities can achieve their development and social goals while simultaneously efficiently utilizing their resources.

The best way to determine how a cluster approach can positively affect a City’s economy is to consider both the economic theory behind them and some real world examples (e.g. Biosciences in Montreal or Digital Media in Vancouver). Cluster-based economic development is one of those rare examples where theory and real world experience overlap completely.

In the US where cluster based economic development has been in practise much longer than in Canada, the strategy has consistently resulted in the following benefits to the municipality; an increase in productivity of companies in the area; accelerated the pace of innovation and stimulated the formation of new businesses. In order to fully realize these benefits there are a number of prerequisites for cluster development that must first exist:

- Innovation and research and development capacity
- Networks and partnerships
- A strong skill base
- An entrepreneurial spirit and infrastructure
- Access to financial resources

Analysis by the International Economic Development Council in the US supports the fact that innovation is by far the most critical of these factors for successful cluster development because it is much more than just scientific discovery. Innovation is the driver of long-term increases in productivity which in turn improves competitiveness. In cluster development where innovation is the dominant practise there is no such thing as low tech industries - only low tech companies. It is for these reasons, that Hamilton’s Economic Development Strategy has included an entire component on **Infrastructure for Innovation**.

Extensive research undertaken by the US Council on Competitiveness reinforces the long-term nature of cluster development and recommends that local government must take on a stewardship role of monitoring the long-term plan.
and adapting it over a multi-decade timeframe.¹ This is exactly what has been done in Hamilton over the last seven years and is the basis for the next five years.

Local government also has the responsibility to create a business environment that is conducive to cluster growth. This is accomplished by the following actions:

- improving the quality of inputs that firms draw on such as human resources, physical and technological infrastructure and capital;
- creating rules and regulations that encourage innovation and upgrading;
- building and supporting the formation of key industry sectors/clusters and
- raising the sights of local firms and citizens by articulating an economic vision for the future.

Typically, cluster development is associated with wealth generation and highly skilled, well paying employment - exactly the type of vision shared by the City of Hamilton and the Jobs Prosperity Collaborative. But cluster-based economic development is about more than just the creation of jobs. The cluster-based model contends that economic growth requires quality foundations which include the physical and social infrastructure of the community. Cluster-based development makes it clear that economic progress is not possible unless attention is paid to skills development, social needs and the quality of life of the community - these elements are, therefore, essential components of an Economic Development Strategy². Exactly the reason why there are Workforce Development and Quality of Life components included in this version of Hamilton’s Economic Development Strategy.

Hamilton’s Clusters of Innovation Model

Hamilton’s City Council decision in February 2001 to pursue an integrated growth strategy with an emphasis on particular key industry groups was a historic first step to achieving the goals of prosperity and the diversification of the city’s economic base. As in the previous two versions of the Strategy, the foundation of Hamilton’s Economic Development Strategy and programs will be based on growing and capitalizing on our distinctive industry clusters. This iteration of the Strategy will include six key industry groups or clusters of innovation. They are as follows:

---

² Caledon report (Social Vision for the New City of Hamilton)
- Advanced Manufacturing
- Agri-Business and Food Processing
- Clean-Tech
- Creative Industries
- Goods Movement
- Life Sciences
Advanced Manufacturing

Cluster of Innovation

Vision

That the City of Hamilton is the premier location for Advanced Manufacturing companies in Canada, and that the City continues to develop and promote Hamilton’s innovation resources including research centres and post secondary institutions as a competitive advantage.

Stakeholder Focus Group

Introduction

Historically, Hamilton’s concentration of manufacturing industries developed as a result of a number of attributes, the primary ones being a superior transportation network, low-cost power and a labour force with an outstanding work ethic. These factors, along with the strong entrepreneurial spirit of Hamilton’s business leaders, were responsible for the growth of large local firms and attracting many of North America’s Fortune 500 companies. The result was the City’s emergence as the manufacturing capital of Canada in the mid-twentieth century.

Starting in the 1950’s, for more than 20 years, the City of Hamilton expanded quickly as local industry spawned residential and commercial growth and provided employment opportunities that attracted thousands of people to the community. The high per capita incomes credited to Hamilton’s manufacturing industries provided a quality of living for residents that ranked amongst the very best in the country. This was further supported by the 60/40 non-residential to residential assessment ratio. In short, Hamilton’s economy exemplified wealth creation in Canada.

However, in the late 70’s the entire nature of manufacturing began to change because of the trend to the globalization of production and consumption. Subsequently, there has been a rapid decline in North America’s uncontested dominance as the manufacturing centre of the planet. The global leader now resides in the Far East with China, Japan, Korea and the Asian Tigers (Vietnam, Thailand, Malaysia, Singapore and the Philippines); add to this the exponential population growth of China and India coupled with an increased demand for more sophisticated products and the result is wealth generation in their economies on a scale never seen before.
Hamilton and North American-based companies simply do not have the ability to compete head on with low-cost countries in traditional manufacturing. Furthermore, the increasing and costly regulatory constraints imposed by North American Governing agencies, which do not exist in China, India and Mexico, also contributes to a major cost disadvantage for Hamilton in traditional manufacturing industries. As a result, Hamilton’s challenge is to retain and grow its manufacturing cluster. To do so, it must refocus on advanced manufacturing industries where innovation, technology and highly skilled labour increase competitiveness and productivity.

Exactly what is Advanced Manufacturing? Essentially, it involves new techniques and machines combined with information technology, microelectronics and new organizational practises in the manufacturing process. The result is a Canadian manufacturer that can now meet the productivity, quality and cost reduction demands of competitive global markets.

**Industry Overview**

“Manufacturing is vital to Canada’s economy – and to the prosperity and living standards of all Canadians. Yet, today Canada’s manufacturing industries face unprecedented challenges, not only from the bottom-line pressures of a strong Canadian dollar and high business costs, but from the longer-term impacts of globalization, demographics and rapid technological change. There are also unprecedented opportunities for businesses expanding in markets around the world.

The business of manufacturing is also changing, as are the basics of manufacturing competitiveness. Today, advanced manufacturing is a system encompassing all the activities that are required to deliver products that meet customer needs - a system that extends from research and development, design and engineering, to production, finance, sales and marketing, and after-sales service. It is a system that extends beyond any single enterprise, across supply chains and business networks that are increasingly global in scope and that incorporate services as well as production activities.”

Canadian Manufacturing Coalition 2009

Today, Canadian manufacturers must incorporate more flexibility and technology in their production processes. They must demonstrate superior customer service, improved quality, lower costs and speed (just-in-time). It is because of these pressures that North American manufacturers are being forced to abandon labour intensive, mass production manufacturing processes.
Advanced manufacturing companies, unlike traditional manufacturers, thrive and are attracted to communities with strengths that include: research facilities, centres of excellence, progressive educational institutions, highly skilled labour, superior communications infrastructure etc. Unlike other Ontario manufacturing communities, Hamilton fortunately possesses much of this infrastructure. For example: McMaster University; Mohawk College of Applied Arts and Technology; research centres such as the CANMET (Federal Metals Testing Laboratory) and McMaster Manufacturing Research Institute and strong community partnerships with organizations like Excellence in Manufacturing Consortium (EMC), Canadian Manufactures and Exporters (CME), Golden Horseshoe Materials Manufacturing Association and the Toronto Region Research Alliance (TRRA). Therefore, the city’s major challenges will be to capitalize on this infrastructure, attract more research and commercialization facilities, and integrate it into the fibre of local manufacturers.

**Local Analysis**

Industry and manufacturing have been synonymous with the City of Hamilton since its incorporation as a municipality in 1847. The City’s geographic location combined with the presence of Canada’s two largest integrated steel mills made it the location of choice for manufacturing operations and US branch plants in the Twentieth Century.

The dominant types of manufacturing in Hamilton were primary metals, fabricated metal products, machining, transportation equipments, electrical equipment and food and beverage operations. According to Statistics Canada, Hamilton is still regarded as one of the Province’s five largest manufacturing centres. Even with North America’s industrial decline, Hamilton’s manufacturing sector contributes an estimated $17 billion dollars per year into the Provincial economy or roughly 3% of Ontario’s Growth Domestic Product (GDP). The economic wealth generated from the Manufacturing cluster is driven by exports (tradable goods) with over 96% consumed by the United States. The majority of Hamilton manufacturers (the unofficial number is 80%) are exporting their products to US markets which results in the receipt of foreign exchange thereby directly creating wealth.

Although the traditional manufacturers in the City have been hit hard by the combination of the severe recession, energy prices and the continued flood of cheap imports, many of the City’s advanced manufacturing companies have prospered. This is largely due to investment in capital equipment, process technology and research/innovation which has made them competitive. They produced products for niche markets that include everything from industrial textiles to hydraulic systems to circuit boards. With the exception of large companies like ArcelorMittal Dofasco, the majority of Hamilton’s Advanced
Manufacturers are small and medium-sized companies with less than 50 employees. Most of them are privately owned, they export a significant percentage of their product and they all possess a highly skilled workforce. Results of Hamilton’s Business Retention and Expansion Program indicate that forty-four (44) local manufacturing companies plan to expand in the next three years, reinforcing the resilience of Hamilton’s manufacturing industry.

According to the Canadian Manufacturers Association, in order for Hamilton’s Advanced Manufacturing companies to continue to grow and prosper the municipality must ensure the following five areas are priorities:

1. The availability of a highly-skilled workforce
2. Maintaining a competitive business environment (including utilities)
3. Access to research and innovation-related facilities
4. Availability of land and buildings to accommodate expansion
5. Transportation infrastructure - highways/rail/public transit/port/airport

SWOT Analysis (Source: Adv. Manufacturing stakeholder focus group)

Strengths

- Mohawk College graduates more apprentices than any college in the Province
- CANMET – Federal Metals and Minerals Testing Laboratory
- McMaster Manufacturing Research Institute (MMRI)
- Geographic location access to markets and proximity to the US Border
- Transportation links - inter-modal transit opportunities
- Appropriate zoning to permit a range of heavier industrial land uses and outside storage opportunities
- Strong synergistic backward and forward linkages for industry
- Quality of life and cost of living compared to GTA
- Fibre-optic interconnectivity
- Abundant water supply
- Established industrial base
- Scientific Research and Experimental Development tax credits for research and development
- Support of local industry support groups such as Excellence in Manufacturing Consortium (EMC) and Canadian Manufacturers and Exporters (CME)
Weaknesses

- Access to capital for long-term investments in technology and manufacturing especially for start-ups and small companies
- Attracting skilled managers and workers (quality and quantity)
- Land use conflicts between residential and industrial land uses
- High industrial tax rates - especially in relation to the Golden Horseshoe municipalities
- Contaminated properties which are uneconomical to remediate; large tax arrears with these sites
- Lack of large parcels of available, serviced industrial land - both Greenfield and Brownfield
- Approvals process and development fees
- Image of the City (plant location and equipment)
- Rail access to newer and emerging business parks
- Lack of a prestige industrial park to attract specialized high end manufacturers
- Lack of effective communication networks among companies, clusters and the general population

Opportunities

- Containerization of port and the resulting attraction of manufacturers from other Great Lakes locations
- Brownfield redevelopment programs - business attraction
- New CANMET facility at McMaster Innovation Park
- Products processing, film production and telecommunications
- Manufacturing near or at the Hamilton Airport for Just in Time (JIT) oriented companies
- Hamilton as a destination for grid-locked, GTA-based manufacturers and distributors
- Environmental related manufacturing industries (synergies with Clean-Tech Cluster)
- LEED certification to reduce operating costs for manufacturers
- Innovation Park to enhance Research and Development activity
- Niagara - GTA Corridor
- Scientific Research and Experimental Development (SR and ED) Tax Incentive program
- Advanced Manufacturing Investment Strategy (AMIS) Program
- CME’s Smart Program Incentive
- Yves Landry Foundation - Achieving Innovation and Manufacturing Excellence Incentive
- Next generation of Jobs Fund

**Threats**

- High property taxes
- Impacts of integrated markets and global competition - especially in steel
- Off-shore decision making of foreign owned companies with branch operations in Hamilton
- Actions of other municipalities regarding tax policies/rates for industrial and commercial development
- Perception of Hamilton as a labour-dominated City
- Industrial / Business incentives in the US and Quebec
- High energy and raw materials costs
- Growth of third world economies and globalization of trade
- Increasing cost of doing business in Canada
- Aging population and out migration of skilled workers
- Tighter Canada/US border
- Weakening US and global economy
- Weakening auto sector
- Role of media creating a poor image of manufacturing
- Societal pressures to enter white collar professions rather than blue collar

**Target Opportunities**

The changing global economic conditions require manufacturing industries to remain as lean and competitive as possible. Hamilton companies can no longer rely on the steel and auto industries as the main drivers for growth and prosperity. As markets evolve, manufacturing companies must evolve simultaneously or face extinction. These companies need a diverse customer base and must offer highly specialized skills and products that set them apart from their competition. Innovation is clearly the key ingredient that will enable the success of local manufacturing firms and allow them to compete on a global scale. A two pronged approach is suggested to develop Hamilton advanced manufacturing cluster – strategies for immediate implementation and strategies for future growth.
STRATEGIC FOCUS FOR IMMEDIATE IMPLEMENTATION

Light Rail Transit

Hamilton continues to move forward with ambitious plans to implement rapid transit. Opportunities exist for local manufacturing companies to diversify into the potential of building/assembly/maintenance of light rail vehicles and supporting components such as:

- Metal wheels and wheel axles
- Track components
- Exterior shells and structural components
- Power poles
- DC motors and propulsion systems
- Electricity supply systems and wires

The increasing demand for these vehicles is evident as an increasing number of cities are shifting towards environmentally sustainable public transportation systems.

Alberta Oil Sands

The Alberta oil sand industry is one of Canada’s largest developments in history. Despite a global economic slowdown, billions of dollars are still allocated for projects currently underway in the oil sands industry. This will require skilled trades, equipment and materials that could be supplied by manufacturing companies located in Hamilton. As the economy recovers, Alberta will once again be faced with a tremendous labour shortage and will require components such as:

- Fabricated metal products
- Tanks, pressure vessels and heat exchangers
- Industrial machinery, equipment and services
- Engineering and construction
- Structural steel

Many local manufacturing companies currently provide these services and will be able to fulfil these needs without major capital investments or extensive training. An aggressive strategy to link local and Alberta based companies will have lasting benefits for the local manufacturing industry.
Steel Fabrication Products

Although not directly related to the Peak Oil philosophy, the rising cost of energy and its implications are goods movement has precipitated the need for international companies to consider the production of large, bulk equipment/products closer to the market. The cost advantage of manufacturing these products off-shore, even though labour costs are lower, is being eroded by the cost of transportation and the delays in delivery. As a result, many companies are looking for a strategic location to supply the North American market. A recent example is the investment by Germany’s Max Aicher Group in two idled US Steel mills in Hamilton.

Infrastructure products

As Hamilton’s infrastructure ages and deteriorates, so does every other community’s infrastructure. As part of the Federal and Provincial government’s plan to help stimulate a sagging economy and assist with the financial burden of rebuilding communities’ infrastructure, billions of dollars have been allocated for major construction projects across the country. Infrastructure investments involve a great deal of disciplines and Hamilton’s manufacturing industry is well suited to supply the skills, products and materials required in what is almost a perpetual investment. Local manufacturing firms can supply items such as:

- Structural steel and steel processing
- Material handling systems and solutions
- Fabricated steel structures and components
- Rebar, pipes and other metal products
- Concrete and construction equipment

Aerospace

One industry that demands accuracy and precision measured to the highest standards is the Aerospace industry. The reward for such craftsmanship is an industry that can offer wages that are much higher than average as well as a great potential for economic growth. Hamilton manufacturing firms utilize cutting-edge technology such as automation, robotics and advanced materials to maintain their competitive advantage. They have obtained the internationally recognized quality standards certifications which reinforce their commitment to quality. Hamilton’s highly skilled manufacturing firms which include many machine shops, tool and die makers and metalworking facilities are well positioned to supply the Aerospace industry. Currently, there are over 200 companies in Southern Ontario that are directly related to the Aerospace industry of which approximately 120 are manufacturers.
Mohawk College, in conjunction with the Hamilton International Airport, the
Canadian Warplane Heritage Museum and the Economic Development and Real
Estate Division of the City are embarking on the development of this particular
area of Advanced Manufacturing. Further, there exists the potential in three to
five years to spin-off Aerospace as a key industry group. The principal driver
being Mohawk College’s leadership in the development and supply of skilled
labour in the aerospace/aviation industry. This will include occupations from
Aerospace Materials Specialists to Aircraft Technicians to Aviation Welding and
Fabrication Specialists.

**Power Generation Equipment**

Canada’s renewable energy industry (water, solar, wind, biomass and earth
energy) is expected to expand significantly over the coming years. This
expansion represents an opportunity for local businesses to develop and
commercialize new and competitive technologies, to manufacture products and
offer services in support of a growing industry.

The nuclear power industry is also a very attractive option for meeting Ontario’s
electricity needs, as well as providing local manufacturers with opportunities for
growth. Close to half of Ontario’s energy supply is derived from nuclear power
which benefits from safe, reliable and environmentally friendly power generation.
Hamilton’s strong industrial supply base is well situated to support the needs of
this industry.

The March 2010 announcement of the closure of the Siemens Gas Turbine
manufacturing facility in Hamilton in the summer of 2011 provides the reason and
direction to aggressively pursue other Power Generation companies. The
presence of a readily available skilled labour force, a suitable facility, excellent
transportation network and countless other advantages offers an opportunity to
solicit other multinational companies - such as Mitsubishi. Consequently, this will
be one of the immediate short-term deliverables in this strategy.

**STRATEGIC FOCUS FOR FUTURE GROWTH**

There are number of other types of manufacturing companies that this Strategy
will also consider for business attraction purposes in both the short and long
term.

- Alternative Energy Equipment and Systems Manufacturers
- Auto Parts Manufacturers (Tier 1 and Tier Suppliers for Domestic and
  New Domestic Manufacturers)
- Auto Parts Engineering and Design Firms
- Alternative Energy Equipment and Systems Manufacturers
- Engine Turbine and Power Transmission Equipment
- Steel Processing and Finishing, Rolling, Drawing and Tube Manufacturing
- Forging, Stamping and High-End Fabrication of large equipment/products
- Building Products Manufacturing
- Specialized Shipping Containers, Metal Tanks and Boilers
- Greenhouse/Nursery Equipment

**Leveraging Hamilton’s Innovation Resources**

A strong, engaged and skilled workforce spanning all levels of an organization is a key element necessary for growth in the manufacturing industry. Success will require strategies that leverage knowledge and resources to develop and deliver solutions, skills and tools that build on local manufacturers’ competitive advantage. Unique opportunities exist to provide the support and resources manufacturers need to innovate and grow. Economic uncertainties further emphasize the need to leverage resources and strengthen partnerships. No single strategy or tactic alone will provide all the solutions needed by today’s manufacturers.

**CANMET**

Hamilton’s strength and potential in being a leader in the manufacturing industry is evident with the relocation of the CANMET Materials Technology Laboratory from Ottawa to McMaster’s Innovation Park. It is the largest research centre in Canada dedicated to metals and materials fabrication, processing and evaluation. It is engaged in a series of research and development programs designed to provide technology solutions for automotive applications, next-generation nuclear reactors, oil and gas pipeline infrastructures and other emerging materials. Hamilton’s manufacturing firms that produce and fabricate materials in the transportation, construction and energy sectors will serve as clients, collaborators and stakeholders of this state of the art facility.

**McMaster Manufacturing Research Institute (MMRI)**

The McMaster Manufacturing Research Institute (MMRI) is one of the largest, most advanced and best-equipped manufacturing research institutes in Canada. It is designed to meet the sophisticated research and development needs of leading manufacturers in the polymer, automotive and aerospace industry, as well as the tool and die and mould industry. The availability of advanced testing equipment and techniques in our own community is a great advantage for local manufacturing firms vying to compete on a global scale.
Mohawk College’s Skilled Trades and Apprenticeship Research, Resources and Training (STARRT) Institute

Mohawk College is a leader in skilled trades and apprenticeship training in Ontario. The recently completed STARRT Institute will double the number of skilled workers who enter the labour force. This is a vital resource for local manufacturing firms that, due to the aging baby boomer population, will need to replace the skills and knowledge of their retirees. The programs and training available through Mohawk College’s STARRT Institute will directly contribute to the economic growth and further enhancement of Hamilton’s competitive edge.

Automotive Parts - New Domestics

As the North American automobile sector continues to evolve, the greatest emerging opportunity associated with the sector will be from the production of the new domestics as Asian and European manufacturers continue to establish a local presence and build capacity through new investment and infrastructure within the North American market. Significant opportunity for parts manufacturing and assembly within the Ontario market will continue to represent areas of investment within the Windsor to Toronto (Hwy #401) corridor. The development of an attraction strategy targeting the new domestic manufacturers (Toyota, Honda, Nissan etc.) and associated parts manufacturers is considered to be an important tool required to fully exploit advantages at the local level.

Specialized or Niche Markets

Often business owners view a niche market as narrowing their sales or cutting into a profit margin, so it is usually feared and overlooked. The truth is that a niche market could be defined as a unique component that sets one manufacturer apart from the rest. It is an important strategy particularly in an industry that has experienced tremendous job losses due to increased competition overseas. Hamilton manufacturing firms have the tools and resources to offer specialized manufacturing services across several growing industries.

Short Term Deliverables (less than four years)

- See also Strategic Focus for Immediate Implementation above
- Secure a multi-national turbine manufacturer in Hamilton
- 50 Corporate calls per year including the top 25 employers in the cluster
- Two City led trade missions in support of local industry (e.g. Oil Sands Opportunities)
o Relevant trade show participation with the intent of marketing local industry
o Assist in the promotion and expansion of the Excellence in Manufacturing Consortium
o Development of a comprehensive Attraction and Marketing Strategy with components that address opportunities within the Automotive, and Alternative Energy Sectors
o Development of sector-specific marketing materials
o Updated Advanced Manufacturing industry profile
o Evaluation of export opportunities for existing industry
o Development of a local sourcing program (buy local)
o Development of opportunities for green or environmental industry within Hamilton
o Promotion of LEED technologies, energy efficiencies for manufacturing facilities
o Formation of a cluster advisory group

**Long-term Deliverables (greater than four years)**

o Development of a Prestige Industrial Park for advanced manufacturers
o Attraction of advanced manufacturing to the McMaster Innovation Park and West Hamilton Innovation District
Agriculture and Agri-Business (Food Processing)

Cluster of Innovation

Agriculture

Vision

“The City of Hamilton is as well recognized for its innovative and diverse Agricultural economy as it is for its steel and manufacturing industrial base.”

Introduction

This vision for agriculture will be achieved through a continued focus on innovation and the capability to meet evolving market demands. Agriculture cannot be an isolated sector. As shown in Figure 1, it is intrinsically linked to a broader economic cluster. Government, industry and other stakeholders all shape the agricultural environment and must collaborate to promote the evolution of this industry. A successful agricultural industry ultimately creates benefits for the entire community.

Figure 1 – Chart C5.1 – The Value Chain of Agriculture Specific Input and Service Suppliers

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The agriculture and agri-business cluster is structurally changing and now incorporates a number of innovative and diverse industries and sectors. Everything from primary commodity groups to foodservice providers, food manufacturers and non food products and services will be essential elements of the next generation of the agriculture and agri-business cluster in Hamilton.

“Agriculture is a vital component of the physical, environmental, economic, cultural and social structure of the City of Hamilton. The strength, diversity and potential of industry are recognized by the community it represents, and will be protected and promoted so it can continue to grow and evolve.”

Hamilton Agricultural Action Plan

Industry Overview

In 2008, the City of Hamilton released the Hamilton Agricultural Profile confirming that Hamilton’s agriculture sector has grown to a $1.26 billion a year industry with great potential for continued growth. This study reported that the strengths of Hamilton’s agricultural sector are its diversity, prime farming lands, proximity to water, good climate, multi-modal transportation network and access to markets. While the local industry is not without its challenges, these factors put agriculture in Hamilton in an excellent position to grow, diversify and contribute in even greater ways to the quality of life and the economy locally.

The agricultural cluster is one of the oldest sectors in the Canadian economy and still accounts for one in eight jobs and 8% of Gross Domestic Products (GDP). Over the last several decades there have been substantial changes to the face of agriculture and the production of agri-products in Ontario and Canada. As shown on Figure 2, primary production, while still important, accounts for a relatively small share of the larger agri-products value chain.
Agriculture has led the Canadian economy in productivity growth and its value has tripled over the last 45 years. In Hamilton, between 1996 and 2006, despite a decline of approximately 10,000 acres in the amount of land under production, the value of gross farm receipts generated increased from $182 million to $225 million.

Through the adoption of new technologies, superior products and innovative methods of production, agricultural growth has outperformed that of manufacturing and business sectors over the same period. Canada has the potential to benefit from the new agricultural environment that is emerging from the traditional practices and markets; new markets and scientific advance offer optimism that this sector can achieve a prosperous and profitable future.

Local Analysis

The agricultural sector in Hamilton is a significant component of the local economy and also has a major impact on the regional and provincial economies. The significance of this industry in Hamilton is reflective of the strong agricultural land base. The majority of the 227,000 square acres within the Hamilton boundaries qualify as prime agricultural lands. Considering that less than 5% of the Canadian land mass constitutes prime land, the importance of this resource in Hamilton is significant.

*Agriculture and Agri-Food Canada, “An Overview of the Canadian Agriculture and Agri-Food System 2009”, pg 24.*
Hamilton’s agricultural community is at a pivotal point in its history. The City has recently completed three important initiatives: a new Rural Hamilton Official Plan, a Growth Related Integrated Development Strategy and future implementation of a new Rural Zoning By-law. These initiatives will put into practice planning policies that manage the agricultural land base in a progressive and balanced manner. These plans, combined with Province of Ontario’s introduction of three land use initiatives which include revisions to the Provincial Policy Statement, development of the “Places to Grow” Growth Plan for the Greater Golden Horseshoe and the establishment of a Greenbelt for the Greater Golden Horseshoe area; will ensure the ongoing strength and stability of Hamilton’s agricultural land base and agriculture industry.

Based on the analysis completed in 2008, it was determined that agriculture in Hamilton has grown to be a billion dollar industry with a positive annual impact on our local economy of in excess of $1.26 billion. An economic assessment of the agricultural sector confirmed a total direct impact of $823 million dollars in annual sales, $265 million of indirect sales and $171 million in induced impacts per annum in 2006. This represents an increase of approximately $10 million from the 2003 data. Hamilton contributes approximately 2.44% of the gross farm receipts generated in Ontario. This is considered significant because Hamilton only occupies 1% of the provincial land area.

According to Statistics Canada, in 2006 there were 975 farms in Hamilton, occupying 133,205 acres and generating $224,776,914 in gross farm receipts. This equates to gross farm receipts of $1,687.00 per acre, the 4th highest in the Province.

As shown on Figure 3, the commodity profile in Hamilton is diverse and evolving. The major farm commodity groups in the City of Hamilton for 2006 were greenhouse product, poultry and egg, nursery products and sod, mushroom, dairy, vegetables, small grain and the horse and pony sectors.

When considering the six individual former municipalities, the mix of major commodity group’s change by area. As shown on Figure 4, the distinctive characteristics of each of the former municipalities reflect a diverse commodity mix.
Hamilton Agricultural Profile 2008
An Update of the City of Hamilton Agricultural Economic Impact and Development Study (2003)

CITY OF HAMILTON

FIGURE 3
Gross Farm Receipts Comparison by Farm Type, 2001 and 2006

Photo Source: Robert Podus (Hamilton-Wentworth Pork Producers)

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Prepared by:
PLANSCAPE
BUILDING COMMUNITY THROUGH PLANNING

City of Hamilton Boundary
Former Municipal Boundary
Urban Area
Agricultural Designations
Niagara Escarpment Plan

1: 300,000

Source: City of Hamilton Planning & Development Department, Information Technology Services, GIS Services Section, City of Hamilton - 2001 & 2006 BC/Can Census of Agriculture - Special Order.

Note: This map is for general illustrative purposes only. For boundary interrogations, please contact the City of Hamilton Planning & Development Department.
Major Issues and Trends

Canada has a large base of land for agriculture production relative to the population, therefore production exceeds domestic consumption. Canadian producers have sought out access to global markets and today the agriculture sector exports 40% of its production. Productivity and production increases, combined with the dramatic increase of global production, have placed downward pressure on world prices and had significant impacts on Canadian producers. Canadian producers faced additional challenges over the last decade including Bovine Spongiform Encephalopathy (BSE), avian influenza, fluctuating markets, higher fuel prices, flooding and drought, all of which have adversely affected the ability of producers to produce and sell products. There are however, a number of strong performers in the industry with greenhouse and horticulture producers experiencing relatively strong prices for most of their products. Supply managed producers continue to enjoy stable incomes due to the regulated market environments; however, there is cause for concern in this area with pressure from the World Trade Organization on supply management groups.

Traditionally, farm families are the backbone of agriculture and this is the case in Hamilton with, as shown on Figure 5, considerable variety in the scale of operations within the farm cluster.

**Figure 5** Trends for Farms Classified by Total Gross Farm Receipts* by Ontario and the City of Hamilton, 2001 and 2006

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<td>11.0%</td>
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<td>Percentage (%)</td>
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<td>11.7%</td>
<td>8.5%</td>
<td>5.8%</td>
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<td>2006</td>
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<td>Ontario</td>
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<td>6,521</td>
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<td>Percentage (%)</td>
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<td>18.9%</td>
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<td>85</td>
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<td>18</td>
<td>19</td>
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<tr>
<td>Percentage (%)</td>
<td>26.7%</td>
<td>19.5%</td>
<td>11.6%</td>
<td>10.1%</td>
<td>12.9%</td>
<td>8.7%</td>
<td>6.8%</td>
<td>1.8%</td>
<td>1.9%</td>
<td></td>
</tr>
</tbody>
</table>

*Gross farm receipts and some operating expenses are understated at the aggregate level due to the increase in contractual arrangements (e.g., contract feeding), custom work performed by non-farmers, and the involvement in primary agriculture of large non-farm corporations such as food processors, meatpacking plants and others. Data for number of farms is calculated on all farms reporting. Source: Statistics Canada, 2006 Census of Agriculture, Farm Data and Farm Operator Data, catalogue no. 95-629-XWE.

While the largest farms can be business focused and self sustaining, smaller lifestyle farms do not always follow the same business management practices. There are profitable operations of all shapes and sizes across Canada and in Hamilton, but profitability has been driven by a number of factors including the ability to manage increased cost while dealing with low returns for products.
Profitability issues have resulted in the emergence of off-farm incomes playing a critical role in the farm family’s financial well being.

Over the last 50 years there has been a considerable reduction in the agricultural labour force which has lead to a concern about who will farm in the future. One third of all producers are over the age of 55; this combined with the declining interest of the next generation and the cost for new operators to get into the business raises the awareness of the need for succession planning within the agricultural industry.

Infrastructure needs in the rural community are keys to a successful and vital agriculture industry. Road improvements, high speed Internet access and everything from improved communication support services to highways to railways to water management will be necessary to support the production of agriculture and agri-food products. Producers will continue to require local supplies of inputs, capital and labour to operate their farms. Strong rural communities will remain critical to providing a strong base for Canadian agriculture. Hamilton is very fortunate to have a valuable infrastructure system in place that supports the local agriculture industry.

A leading trend in Canada and Ontario’s agriculture industry is the increasing level of research, technology and science developments that make this sector a world leader in advanced technologies. These trends will benefit the local Hamilton agriculture sector.

Significant research and development programs are currently studying the unlimited potential of the farm entity for production beyond food. The dynamics of today’s Bio Economy opens door to many alternative opportunities for the local economy that include crops, farm waste and infrastructure investments that can be used in the manufacturing of bio-products, bio-fuels, bio-energy, pharmaceuticals, neutraceuticals and biofibres. The Green Energy act introduced in Ontario in 2009 has introduced changes to the Planning Act, environmental protection act and electricity act opening doors for local farmers willing to invest in biogas and solar systems. Government funding programs are supporting farmers willing to invest in farmstead wind systems, farm based biogas systems, microfit solar rooftop and ground-mounted systems. Hamilton’s rural and urban areas are well positioned to receive the direct and indirect benefit of adding processing and manufacturing facilities to produce these new non food agricultural products and processes.

The future is far from bleak for Hamilton’s agriculture industry; with a liberalized trade environment it should increase Canada’s presence in the largest markets namely the U.S., Europe and the Far East. These large market consumers with middle class disposable incomes will demand a greater range of value-added
products. Consumers will seek more from their food values including an increased demand for more protein and pre-packaged foods. Consumer interest will continue to grow with regards to the source and origin of their food products and trends such as buying local at the growing number of farmers’ markets will directly benefit our local producers. Consumers are becoming more aware of the health impacts of food and will be looking for food to provide specific health attributes. Similarly, consumer preferences will lead to the existence of niche markets, methods of production, environmental practices and food production process will support the expansion of these markets.

With urban growth areas abutting Hamilton’s surrounding farmland; it is likely that urbanites will become increasingly educated about the significance and importance of the agriculture industry. Urban consumers will place an increased value on the rural areas as a place to escape, relax and to protect. These trends will lead to the emergence of opportunities in the agri-tourism industry in Hamilton. Agri-tourism supports a growing desire by consumers to head outdoors and to the country for more leisure opportunities. Recent changes to the Places to Grow and greenbelt legislations along with Hamilton’s Rural Official Plan are supporting the emergence of a value-added agri-tourism industry for our local farmers.

The buy local, eat local movement and trend towards healthier lifestyles are being promoted and embraced by this community. The City of Hamilton partners with the Friends of the Greenbelt Foundation and Environment Hamilton to produce the Hamilton Farm Map and Directory. This Eat Local / Buy Local initiative not only benefits our local farmers but our many residents from across this region. Through the development of these partnerships along with Provincial and Federal funding programs Hamilton’s agriculture community is achieving its goal of feeding our local residents and providing safe healthy food to all demographics of this City.
Agri-Business (Food Processing)

Primary agriculture supports a diverse and productive variety of agri-businesses. As shown on Figure 6, although primary production generates approximately 25% of the food sector GDP, it is the essential element that supports the entire system. Having a strong agricultural sector in Hamilton supports a strong agri-business cluster.

Figure 6 - Chart C4.1 – Disposition of the Value of Agricultural Production, 2005

The agri-business or agri-food system is defined as “the farm input and service supplier industries, primary agriculture, food beverage and tobacco (FBT) processing, wholesale, distribution and retail food industries and food service”. As shown in Figure 7, the national agri-food system contributed 14% of national GDP in 2008, and continues to grow.

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5 Agriculture and Agri-Food Canada, “An Overview of the Canadian Agriculture and Agri-Food System 2009”, pg 98
Ontario dominates the agri-food sector. It is an essential element of the Canadian agri-business sector and, in 2008, contributed 32% of national agriculture and food processing GDP. In the Ontario economy, the agriculture and agri-food manufacturing clusters account for 10.7% of total GDP. As shown in Figure 8, the FBT manufacturing sector is the largest contributor to manufacturing GDP after Transportation and Equipment.

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6 Ibid. pg 24
In 2008, the Ontario agri-food sector exported in excess of $8.8 billion in commodities. While this is a considerable amount, it is countered by the fact that during the same period the value of agri-food imports was in excess of $16.8 billion. Figures 9 and 10 provide a breakdown of exports versus imports and confirm that the export profile is dominated by unprocessed commodities.

Figure 11 underscores the discrepancy in the trade balance between imports and exports and illustrates the opportunities that exist for expansion in the sector. There is huge potential for expanding the range of products and for adding value to primary commodities.
**Figure 9**  Ontario Agri-Food Imports By Commodity Group, 2009

![Pie chart showing distribution of agri-food imports by commodity group in 2009.](image)

*Source: Statistics Section / OMAFRA*

**Figure 10**  Ontario Agri-Food Exports By Commodity Group, 2009

![Pie chart showing distribution of agri-food exports by commodity group in 2009.](image)

*Source: Statistics Section / OMAFRA*
Figure 11  Ontario Agri-Food Trade Balance By Commodity Group, 2009
Hamilton plays an important role in the Ontario agri-business cluster; **Figure 12** provides a breakdown of employment in the agri-business cluster for Hamilton.

**Figure 12** Total Agri-Food Industry Employees by Sector, City of Hamilton, 2009

[Diagram showing breakdown of employment by sector]

**Figure 13** provides a breakdown of the number of businesses in the various sectors.

**Figure 13** Number of Businesses in the Agri-Food Industry Businesses, City of Hamilton, 2009

[Diagram showing breakdown of businesses by sector]
The agri-food cluster in Hamilton is dominated by smaller business. Figure 14 provides a breakdown of businesses by employment range. As this figure illustrates, the agri-food sector is dominated by business with less than 5 employees and the majority of businesses have less than 20 employees.

Figure 14 Size of Agri-Food Industry Businesses by Employment Range, City of Hamilton, 2009

The sectors with the largest number of employees are the Food Beverage and Tobacco manufacturing and wholesale sectors. Although the profile is dominated by smaller firms, there are significant numbers of large employers involved in food processing in Hamilton.

<table>
<thead>
<tr>
<th>NAICS Code</th>
<th>Total Average Number of Employees in those Businesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>11 - Crop Production</td>
<td>91.7 179.3 363.2 527.2 267 396.8 267.8 0 2096.8 111 2206.8</td>
</tr>
<tr>
<td>12 - Animal Production</td>
<td>62 85.5 65.7 0 0 0 0 0 210.8 135 345.6</td>
</tr>
<tr>
<td>15 - Support Activities for Agriculture and Forestry</td>
<td>24.7 32.7 26.6 0 0 0 0 0 84 29 113</td>
</tr>
<tr>
<td>31 - Food Manufacturing</td>
<td>21.6 66.5 120.1 243.5 616.3 1217.5 875.7 1024.9 4219.7 23 4242.8</td>
</tr>
<tr>
<td>32 - Beverages and Tobacco Product Manufacturing</td>
<td>8.4 12.3 26.1 0 0 142.9 0 0 190.1 2 192.1</td>
</tr>
<tr>
<td>41 - Farm Product Wholesaler-Distributors</td>
<td>0 0 14.2 0 68.1 0 0 0 86.9 4 90.9</td>
</tr>
<tr>
<td>42 - Food, Beverage and Tobacco Wholesaler-Distributors</td>
<td>47.7 70 95.7 310.4 340.2 120.9 546.8 0 1540.7 39 1579.7</td>
</tr>
<tr>
<td>Total</td>
<td>263.3 446.3 743 1081.4 1292.2 1889.8 1689.8 1024.9 8430.9 343 8773.9</td>
</tr>
</tbody>
</table>

Source: Canada Business Patterns December 2009

Figure 15 Average Number of Agri-Food Industry Employees, City of Hamilton, 2009
To understand the distribution of businesses throughout the City a series of maps were produced using Scott’s Directory 2009. These maps, Figures 16 to 20 illustrate that Hamilton is home to a cluster of agri-businesses.

Queries were done of listings in Scott’s Industrial Guide to locate and quantify food related businesses in the Hamilton. It should be noted that this work will only be as comprehensive as the listing provided by Scott’s. Scott’s Directory is an information gathering organization that maintains an up-to-date manufacturing database of Ontario online. The database is supported by full-time staff. To ensure data legitimacy and accuracy, staff verifies information directly with various affiliations and alliances. A full data verification cycle is completed every 12 months so that data is always up to date. NOTE: Information supplied to Scott’s is voluntary and should be perceived as an indicator as opposed to statistically accurate.
FIGURE 19
FOOD MANUFACTURING MAJOR EMPLOYERS
THE CITY OF HAMILTON
Understanding the size, location and function of the existing agri-business cluster allows Hamilton to work with and foster the sector. The recent announcements that Canada Bread will be establishing a mega-bakery employing 350 staff in the Red Hill Business Park and that Tim Horton’s is building a coffee roasting facility employing 50 in the Ancaster Business Park are evidence that Hamilton’s efforts are successful.

To ensure that the City is on the right track and will continue to be effective in promoting Hamilton as the destination of choice for agri-businesses ongoing efforts are being made to understand the forces at play. As part of these efforts a SWOT analysis was conducted to assist.

**SWOT Analysis (Source: Agricultural Stakeholders Focus Group)**

As a result of completing the 2008 Hamilton Agricultural Profile update and the completion of the 2007 Hamilton Agriculture Action Plan, it is apparent that Hamilton has numerous **Strength, Weaknesses, Opportunities and Threats** within this sector. Fortunately, many of the weaknesses and threats can be remedied at the local level. The strengths and opportunities all demonstrate that Hamilton does possess a strong agriculture base well-positioned for growth and prosperity in the 21st century.

**Strengths**

- Continue to build on successes of Tim Horton’s Coffee Roasting facility and new Canada Bread mega-bakery
- Multi-faceted industry with strength in all commodities, especially higher value added production such as greenhouse and nursery
- Efficient multi-modal transportation infrastructure in proximity to huge urban markets and concentrated customer base
- The majority of Hamilton’s agricultural land base qualifies as prime agricultural lands
- Hamilton has some of the most diversified agriculture in Canada with quality products
- Significant contribution to the quality of life in Hamilton – physical, environmental, economic, cultural and social
- Access to intensive multi-media resources to market the industry
- Control over food security, quality and safety with a reliable supply of water
Weaknesses

- Land use conflicts, development pressures between urban and rural uses
- Society’s lack of understanding of the rural lifestyle and agriculture sector
- Aging workforce with a decline in family links to agriculture
- Labour issues such as non-competitive wage rates and seasonal employment opportunities
- Lack of agriculturally related businesses in Hamilton
- Value of agriculturally related businesses in Hamilton

Opportunities

- Increase the awareness and understanding of modern agriculture in an urban-based society
- Emerging consumer demands for value added products – growing trends such as eat local, buy local, farmers markets, niche markets, ethnic markets, processed food, safe food and the health impacts of food
- Liberalized trade into emerging countries and markets
- Green Initiative opportunities that support agriculture
- Growing Agro-Tourism industry
- Improvements to this traditional sector are leading to new products, markets and opportunities – bio medical, bio products, bio fuels with access to world class bio-technology R & D facilities and expertise
- Location, land base and climate present unique opportunity to produce higher value products
- Cooperative marketing opportunities with local government to support agriculture and increase local awareness

Threats

- Decline in number of farms and decrease of local workforce including an aging demographic
- Global warming / changing weather trends, disease (BSE and Avian Flu)
- Urban expansion and gridlock found throughout Southern Ontario
- Bio-terrorism threats to water, food and agriculture resources
- Decline of available oil and nature gas
- Rising production cost combined with low returns for products
- Reduction in government support programs and funding
- New stringent Federal and Provincial legislations/regulations
- Global stresses including policies of World Trade Organization
STRATEGIC FOCUS FOR IMMEDIATE IMPLEMENTATION:

Establishing Hamilton as the major Food and Beverage manufacturing center in Ontario

A competitive and innovative sector

- A business climate in local agriculture that facilitates innovation, an entrepreneurial culture and provides a more competitive playing field
- A sector that is equipped with the information, knowledge and capacities necessary to succeed in an increasingly demanding and complex business environment
- A sector with a strong focus on strategic market opportunities built through value chain cooperation and a shared understanding of Hamilton’s agricultural strengths
- A sector that seeks out higher value markets for niche and unique products

A sector that contributes to the community and society’s priorities

- To enhance sector capabilities in meeting market demand to reflect the community’s priorities relating to food safety, environmental stewardship and health and wellness including the tools and capabilities to meet demands for enhanced food safety
- The capability to meet the need for strong environmental stewardship and to deliver ecological goods and services
- The capability to meeting the growing demand for healthy local food

A sector vision of prosperous farms through business management practices, cooperation and innovation

- To raise the profile and adoption of business management practices in the agriculture industry
- To enhances farmers ability to manage risk through the development of business risk management programs
- To support programs that provide greater stability of local producers incomes
Targeted Opportunities

- Food Processing, Food Service and Food Manufacturing Companies
- New product opportunities including the establishment of local agriculturally related processing facilities to support these new products
- High value agriculture production industries such as Greenhouse, Nursery and Supply Managed Agriculture Production
- Local supply firms to support Agriculture such as seed, fertilizer and equipment dealers, accountants, bankers, lawyers and industry consultants
- Consumer Market Demands for value added product including the promotion and targeting of opportunities such as: eat local, buy local, farmers markets, niche markets, processed food, safe food and the healthy impacts of food
- Agro-Tourism

Short Term Deliverables (less than four years)

- Secure a minimum of two major food and/or beverage manufacturers over the next five years
- Develop a program that encompasses a local food strategy including the continued partnership with the "Eat Local Program" and Public Health Department to promote the consumption of local food and retention of local food productions as a positive contribution to healthy living.
- Develop a Resource Guide/Industry Profile for the agriculture sector that includes a sector overview, infrastructure information, new business, opportunities, industry resources, business and supplier profiles, business directory and employer incentives and opportunities.
- Create an education and marketing strategy for agriculture to educate the public and to raise awareness about the contribution of agriculture to the economy, environment, local character and quality of life in Hamilton.
- Work with the educational institutions at all levels to include agricultural programming in the curriculum and encourage the provision of education support and programs for farmers.
- In dealing with agriculturally-related development applications, institute a system specific to the agricultural sector, a one stop shopping for all applications that includes specific staff expertise relating to the agriculture industry.
Work with City departments to continue the policy of maintaining large contiguous agricultural areas prohibiting non-farm development. Address agricultural requirements in development capital plans for Hamilton long-term infrastructure improvements and enhancements. Ensure local policies, fees and by-laws reflect the needs of the agriculture and rural community.

Encourage the articulation of a strong, well publicized provincial and federal vision for agriculture by working with all levels of government and other abutting upper tier municipalities to implement support programs for agriculture.

Create tools to address pressure associated with rigorous environmental programs placed on farmers.

Support the continuation and expansion of local farmers’ markets across Hamilton in support of both local farmers and consumers.

Formation of a cluster advisory group

Work with surrounding municipalities on common concerns and issues and related policy development

**Long Term Deliverables (greater than four years)**

- Establishment of Red Hill Business Park as the premium location for Food and Beverage manufacturers and related companies
- Increase the viability and sustainability of local agricultural operations through value-added agricultural opportunities
- Strategic marketing and awareness campaign (both internal and external) for Agri-Business industry group
- Post-secondary education programs specifically oriented to Agri-Business, Biomedical and Bioproducts development
- Establishment of a local food distribution mechanism/facility or local network
Clean Technology
(Business and the Environment)

Cluster of Innovation

Vision

The City of Hamilton is recognized as a global centre of excellence for Manufacturing, Training, Research and Product Development in the “Clean-Tech” Industry.

Stakeholder Focus Group

Introduction

The clean technology (Clean-Tech) industry is a rapidly growing and emerging sector. A combination of increased public concern towards environmental issues, resource depletion and policy and regulations has catalyzed the recent growth of the industry. Many regions tout the development of clean-tech industry as an emerging industry sector that will support existing industries, provide high quality employment and improve the environment. National and provincial policies and incentives are helping to create a favourable environment for the clean-tech industry. It is now an opportune time for Hamilton to capitalize on the growth of this industry and the economic, environmental and community benefits that will follow.

The following research has been compiled to assist us in determining our competitive position and identify where the opportunities are for us to develop a Clean-Tech Sector strategy for Hamilton.

Definition

Clean-Tech industries are companies which design, develop or manufacture products or services that reduce negative environmental impacts. Clean-Tech companies represent a wide spectrum of industries including alternative energy generation, energy efficiency, manufacturing, water and wastewater, waste and recycling and materials. By encompassing a broad span of industries, the Clean-Tech industry’s growth is largely tied in with the development of traditional industry sectors such as Advance Manufacturing, Goods Movement and Biotechnology/Life Sciences. Growth of the industry also relies on a combination of a highly intellectual and skilled labour force.
The Clean-Tech Industry

The demand for clean technologies is rising globally and in Canada. To keep pace with this demand, investment towards clean technology has grown significantly. In 2008, global venture capital (VC) investments towards clean technologies were approximately $8.4 billion USD, up 38 per cent from $6.1 billion USD in 2007. These numbers represent the seventh consecutive year of growth in global venture capital investment towards clean technology. Nationally, VC investment towards clean technology follows the global trend as well. VC investment in clean technologies totalled $379 million CDN in 2007, more than doubled the $155 million CDN invested in 2004.

Although still a small and emerging market in Canada, the growth of the clean technology industry is influential in the development of other key industry sectors. A fully developed clean technology market requires products and services of other industry sectors. For example, the production of renewable energy systems, such as wind turbines, requires a developed advance manufacturing industry to sustain production. Spin-off companies supporting the growth of the clean technology industry in turn will generate new employment and draw more companies to invest in the area.

The industry landscape for clean technology in Canada and Ontario is favourable. There is an estimated 530,414 employees working in the environmental industry across 13 industrial classes in 2007. In Ontario alone, there were over 2,600 companies in the environmental industry, generating approximately $7 billion CDN in revenue and employing over 65,000 people in 2008. These companies represent several industry sectors and rely on the use of advanced technologies, which include clean technologies. While most of these companies are users of technology, projected growth in the environmental industry will result in a demand for companies supplying clean technologies.

When it comes to our future workforce, the “Green-Collar” jobs of the future will be new and generated from highly technical R & D innovations, on the high end of the spectrum; other new jobs will involve the design and installation of renewable energy systems (i.e. solar Photovoltaics, wind turbines and/or geothermal systems) on the application end of the spectrum. The City is starting to see the transformation of the existing jobs in the workforce being retrained in green processes and techniques – construction workers who learn to install solar panels; manufacturing workers who learn to build component parts for wind

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8 OCETA SDTC, The Clean Technology Report 2009, pg 21
9 ECO Canada, Profile of Canadian Environmental Employment 2007, pg iv
10 OCETA SDTC, The Clean Technology Report 2009, pg 23
turbines; or architects, planners and designers who learn to incorporate energy-efficient building criteria into their work. 11

The City is also seeing this shift within Ontario’s 44 colleges and universities as there are thousands of students enrolled in environment-related degree and certificate programs. The Province is rich in its offering of a highly educated workforce that is amongst the best in the world and is waiting to work within the Clean-Tech industry.

**Hamilton’s New Clean-Tech Focus**

In recognition of the overall emerging environmental issues like climate change, deteriorating air quality, high energy prices and resource depletion. Hamilton, over the past year, has worked hard in its quest to turn over a new leaf and move the City forward into the green economy - Hamilton can boast having one of the largest hybrid municipal fleets in Canada and recently has passed an anti-idling by-law to help make the City’s air cleaner. Hamilton is the first city to become a member of the H2O HWY and introducing a Light Rail Transit System has become a focus for the City’s future.

In 2008, for the first time in the City’s history, Hamilton has a Corporate Energy Policy that aims to lower the energy-intensity at all City-owned facilities by 20% by 2020. The clean up of Randle Reef and our water-shed also continue to be priorities. The City and the Economic Development Office continue to encourage and support the Hamilton Port Authority on their “Clean Marine” Program for the recreational front, the Remedial Action Plan for the cleanup of Hamilton Harbour and the Hamilton Waterfront Trust.

Through the efforts of City staff and the Economic Development Office, the City has benefited significantly from our Environmental Remediation and Site Enhancement (ERASE) Brownfield Redevelopment Program - three significant re-development ERASE grant applications were approved last year along with a value of $76 million in construction expenditures were received. Not only has Hamilton been recognized as a leading community on Brownfields but has recently developed further offerings in way of financial incentives that encourages Leadership in Energy and Environmental Design (LEED) building designs on all future development within the City’s designated Industrial Business Parks.

By August 2010, Hamilton will be home to the largest and most energy efficient community health care centre in the Province. The Hamilton Community Health Care Centre’s new facility will be state-of-the-art and LEEDs certified - reducing

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11 IEDC Report, National Economic Development Functions to Seize Green Opportunities Article
the Health Centre’s footprint in the north end. It will make this North Hamilton Community Health Centre one of the most energy efficient buildings in Hamilton and the most energy efficient community health centre in Ontario.

Forterra Inc., the leading North American developer, producer and marketer of premium quality, organic enrichment products specifically for use in the commercial turf, horticulture and specialty agriculture markets, chose Hamilton for its new home in 2008. Within their new 51,000 square foot facility they have been able to double their business and provide more favourable conditions for worm breeding and have improved their loading and storage capacity.

BIOX Canada is adding its second plant in Hamilton’s industrial north end. This new facility will surpass the existing operations as the largest biodiesel production plant in Canada. Biodiesel is a biodegradable, non-toxic and sulphur free replacement for petroleum diesel. It is made from a variety of renewable sources such as any seed oil or animal fat. Per recent federal government regulations requiring an increase to 12% in the ethanol component to gasoline, there will be a large demand for this product in the immediate and future markets.

More recently, Siemens, as part of their corporate transition into the green economy, offers a green product to service the growing demand from their customers. Siemens has positioned itself as a leader in the turbine and power generation equipment (e.g. windmill production). In 2008, the company invested $25 million in new technology and equipment, expanded by 68,000 square feet and hired 50 new engineers in their Hamilton plant. The unexpected announcement of the closure of this gas turbine manufacturing facility in 2011 provides the opportunity to convince Siemens (or attract another large manufacturer) to establish green product manufacturing in the Hamilton facility. This is a Council directed mandate to City staff to secure other related business to this plant.

The transition into a greener economy is also very evident in the growing number of new Clean-Tech investment inquiries that have been received over the past year. Out of the 88 inquires, the Economic Development Office is currently working on over 20 that have a Clean-Tech focus - typically, the companies who have been looking at investing in Hamilton are producers of a Clean-Tech product (e.g. solar power, windmill, light-rail, alternative energy, biomass and recycling of one product to produce another).

**Targeting Opportunities**

In order to commit to developing and then maintaining a Clean-Tech Sector, the City needs to establish the right environment. The City needs to identify what the challenges are, ensure the provision of a cost competitive environment, and that
there are tools to help nurture growth, foster innovation through research and development; and promote a strong Clean-Tech community to retain and attract new investment.

**SWOT Analysis (Source: Clean-Tech Stakeholders Focus Group)**

**Strengths**

- Ontario *Green Energy Act* and “Feed in Tariff” program and strong working relationship with Horizon Utilities
- Local success stories - established manufacturing and new investment in clean technologies - manufacturing capabilities close to home
- Local partners such as Horizon Utilities, Mohawk College and McMaster University
- Rich in R & D Resources - access to word class university/college R & D facilities and expertise - McMaster, CCIW
- Access to local resources: Hamilton has an abundant water supply, waste, renewable energy hubs and the telecommunication networks are great
- A skilled labour force and large catchment area for labour - over 1 million people
- McMaster, Redeemer, Brock and Mohawk - abundant supply of post-secondary institutions for labour force and training
- Mohawk is the largest trainer of apprentices in Ontario
- Strategic location: A major transportation hub with Port, Airport, highway infrastructure, close proximity to US Border and easy access to markets with 9.2 million people
- A City of Hamilton mandate: there is willingness and strong support from municipal leaders for a “Greener Hamilton”
- Local incentive programs in place - ERASE, LEED
- Quality of life/cost of living/ cost of doing business
- Support for local industry such as Excellence in Manufacturing Consortium (EMC) - encourage lean principles, energy efficiency programs

**Weaknesses**

- Relatively new industry - there is a lack of awareness, still see a lack support and vision in both the private and public sectors. Hamilton needs a champion in this sector and we need to do a better job in educating and showcasing the current technology and industry that work within this sector
There is a negative perception of certain Green Industries e.g. recycling, waste

Hamilton does not have an industry association or network to create outreach - there is not a strong established lobby organization

Perception of Hamilton (image): The former Steel Town image still exists and Hamilton is initially perceived as a mature industrial focussed, labour dominated market

Availability of Green workforce - we need to identify what educational programs and training that are available and fill in the gaps

Facilitate stronger linkages between industry and education to ensure that those graduating students are aware of the opportunities that exist within the community - retain one of our biggest/most important resources - youth

Lack of large parcels of serviced land for large manufacturers e.g. windmill

Cost of Brownfield remediation and challenging process

The development and approval process can be challenging (e.g. Gaps in the Zoning By-law with respect to the recycling industry, the by-law only applies to certain business parks - the rules are inconsistent)

Growth of Third World economies and globalization of trade

Cost of doing business in Canada

Access to capital

High industrial tax rates

Opportunities

Build upon existing businesses’ strengths to facilitate expansions and introduce new technologies and innovation. Communicate and showcase Hamilton’s Clean-Tech focussed success stories along with the support and service they provide to all industry sectors

New industry’s unlimited potential for growth

Rich in resources to tap into and develop (e.g. Canadian Centre for Inland Waters, McMaster University, Mohawk College)

Opportunity for Hamilton to increase its reputation and become known as the Demonstration Site. This will allow us to increase our reputation through out the world - e.g. recognized as the City where you can easily get your product developed and/or showcased in order to bring these products to market

Increase in government incentive programs - Next Generation Job Fund, Innovation Demonstration Fund and Ontario Research Excellence Program and Green Energy Act
Strengthen and promote incentive for green building and Brownfield re-development - LEED standards (e.g. City's LEED grant program) and continue to promote, encourage Brownfield remediation and ERASE Program

Increased energy/fuel costs - make a stronger case and need for alternative resources making the global markets less competitive

Increase the marketing of our Industrial Business Parks - focus on bringing sites to shovel ready status and easily identify where the opportunities exist

As an active partner and stakeholder, work with our existing community partners on Green Procurement Marketplace/Event - help promote community focused conservation initiatives

Work with our community partners to improve the negative image of Hamilton and work towards the redevelopment and clean up of the north end, The Port and Harbour

Better access to transit and multiple transportation modes - work with city on light rail and transit initiatives

Threats

Competition is growing faster globally - e.g. the US has heavily invested in Green technology along with other markets in Europe. These markets are stronger and are well positioned for new investment in this sector and it is easy to get incentives specifically in the US

Hamilton has had a lack in vision for the future within the global context and sector. The City must determine our competitive edge within the province in order to take a leadership role and be prepared to move ourselves forward

The manufacturing sector is still very strong in Hamilton. Clean-tech is a very small part of our manufacturing industry so there is a need for a shift in the collective mindset and we need to encourage increased opportunities in this area

Energy Sector is controlled by government and crown corporations, therefore, our local utilities need to be quick in their responses

Soaring energy/fuel costs - oil debate

Regulatory environment and processes are too slow and many times very costly (e.g. certificates of approval; development of new home grown technology not recognized here but marketed and sold elsewhere in the world)

High costs associated to LEED standards in new buildings and retrofitting existing facilities

Tightened credit conditions
Existing Industry in Hamilton

The Clean-Tech sector spans many industry sectors. The following list is based on Hamilton’s current inventory of companies (Appendix 1) and resources (Appendix 2), as well those inquiries looking to invest in our community over the past year:

- Agriculture - Bio-based materials; farm efficiency technologies, micro-irrigation systems, bio-remediation; non-toxic cleaners and natural pesticides
- Air and Environment - air purification products and filtration systems, energy efficient HVAC and gas detectors
- Alternative Energy Equipment and Systems Manufacturers
- Alternative Energy from Recycling Industries
- Energy Conservation and Demand Management
- Energy Generation, Wind, Solar, Hydro/Marine, Biofuels
- Environmental Software and Consulting Services
- Industrial Waste Treatment
- Instrumentation and Monitoring Equipment
- Manufacturing - Advanced Packaging, Monitoring and Control, Smart Production
- Power Generation
- Recycling and Waste Management
- Research and Development Water Technologies
- Site and Brownfield Remediation
- Transportation - Vehicles, Logistics and Structures
- Water and Wastewater Treatment

For the purposes of Business Retention and Expansion or what the Economic Development Strategy refer to as “Hamilton Calling”, the Economic Development staff have a role to play by assisting or better encouraging those companies who have not been engaged in the areas of renewable energy, energy efficiency and environmental technologies, staff need to help them assess and develop the capacity to become component parts suppliers to emerging renewable energy developers and manufacturers. Most companies have the capacity to retrofit and expand to become players in the Clean-Tech economy.

Economic Development can also assist by identifying programs and resources that can help companies save money with energy efficiency assessments and upgrades to the core and shell of buildings, as well as in production processes and the operational and administrative aspects of the business.
In our **Business Attraction** efforts, our inherited strengths and over-all competitiveness will have much to do with our progress. It is important that Hamilton’s key position is that it has a credible, “green” development infrastructure, culture, climate and environment as part of our economic development practice. Staff need to know who their prospects are, how to connect with them, identify their needs and use all our resources to interest them.

Based on the research and supporting resources that currently exist within Hamilton, along with the increasing number of investment opportunities to attract major renewable energy developers and investors to our community, staff has identified two Clean-Tech clusters that represent the greatest potential for growth in Hamilton.

### Power Generation

The **Power Generation** sector offers a great opportunity for Hamilton particularly in wind and solar energy related industries. This sector is composed of companies engaged in the development and sale or the development and use of proprietary technologies to generate power from renewable resources, such as wind, solar, hydro, geothermal, co-generation or fuel cells.

There are strong centres of activity developing in and around the Golden Horseshoe, which includes Hamilton, with companies who are involved in the development of materials and components used in integrated power generation systems. There is strong institutional support from universities like McMaster as well as new technical training programs that have evolved in several colleges including Mohawk College.

Gaining insight into the supply chain opportunities within the Power Generation Sector will identify the significance and potential for expansion of this sector within the local economy. For example, a transitioning skilled industrial base within Hamilton already enjoys strong sectoral linkages and well-developed infrastructure which serve as a surrogate for the growth of the wind sector. A strategy to exploit such vigorous demand within this sector is considered a timely and essential tool.

Related industries that fall within the Power Generation Sector that are well suited for Hamilton include: advanced materials for power generation technologies, components of power generation systems or integrated systems that generate power from renewable resources, such as solar panels, wind turbines and high-efficiency combustion generators.
**Water and Wastewater**

Strong institutional expertise at the National Water Research Institute, Wastewater Technology Centre, Canadian Water Network and Great Lakes Institute for Environmental Research located within Hamilton, along with the current inventory of companies who fall within this sector are just a few reasons to support staff’s recommendation that **Water and Wastewater** be a target sector for investment in our Clean-Tech business attraction efforts.

Clean-Tech companies who operate within the Water and Wastewater sector that offer the greatest potential for investment in Hamilton, are predominantly engaged in the following activities: Advanced Water Purification Technologies (e.g. membrane technologies involving micro-filtration, ultra-filtration and reverse osmosis and other related separation technologies); Wastewater Treatment Technologies that treat grey water or wastewater from residential and industrial consumers and Water Resources Management Technologies that include automated systems and instrumentation that can monitor and control non-point-source pollution, point-source discharges, spills of hazardous materials, bio-toxins and contamination of water supplies. Finally, products that optimize the management and operation of water and wastewater treatment and conveyance infrastructure will also be pursued in this cluster.

**Short-Term Actions (less than four years)**

- “Hamilton Calling”, business retention and expansion - support the growth of existing environmental business
- Location of major solar or wind power manufacturing facility
- Complete and maintain comprehensive clean-tech data base (industry and resources such as services, education and training) through our corporate visitations and networking
- Identify and understand what our educational partners are offering - promote and provide linkages between our educational partners and industry to identify the gaps and help to develop a clean-tech/green-collar labour force
- Develop a stronger communication plan to educate and promote Clean-tech in Hamilton - e.g. publicize our success stories, self promote ourselves and be more aggressive in selling what Hamilton has to offer
- Work with our community partners to encourage and support entrepreneurial activity within this sector
- Promote and encourage our local incentive programs e.g. ERASE, LEEDS
o Start to develop a Canadian and Foreign Investment Strategy - identify global hot-spots and best practices for Clean-Tech e.g. EU (Germany, Sweden and Netherlands) to create linkages and enhance and promote the Clean-Tech Sector within Hamilton in order to strengthen and attract new clean-tech business to the City

o Research and identify the most effective ways to promote Hamilton’s Clean-Tech Cluster e.g. appropriate Trade-Shows and events like CaWEA and Discovery 10

o Market Hamilton’s Clean-Tech sector to the provincial and federal government who also work within and attract new investment in this sector and strengthen these relationships

o Leverage provincial and federal government funding and incentive programs to encourage growth within this sector

o Support green procurement within the City and encourage the practice of green procurement to the wider business community

o Work and support the light rail transit team at the City and other City departments on their green initiatives

o Formalize the Clean-Tech Advisory Group - one of the outcomes from the stakeholder focus group meeting in late May, 2009 was to develop an Advisory Group of Clean-Tech representatives to network and work with the Economic Development and other City staff to develop this sector

o Work with our existing community partners on Green Procurement Marketplace/Event - help promote community focused conservation initiatives as an active partner and stakeholder

o Identify and outreach to local associations and community groups such as the Hamilton Chamber Environment and Energy Committee and Community Energy Collaborative

o Formation of a cluster advisory group

Long Term Actions (greater than four years)

o Create a positive image in terms of being recognized as a centre of Excellence as a Green Community - Build up our credibility, from Brown to Green in five years

o Continue to develop and maintain the database, build on the relationships with industry and resources that fall within this sector through the “Hamilton Calling” Program

o Continue to work with our community partners to encourage and support entrepreneurial activity within this sector - e.g. attract more clean-tech resources to the community like developing a Product Development /Commercialization Centre where an entrepreneur can access all the
resources necessary to develop and test their product and/or provide access to a facility where they can showcase and sell their products to the world - a true centre of excellence

- Continue to strengthen Hamilton’s Canadian and Foreign Investment Strategy as it pertains to new Clean-Tech investment - market and promote our Centre of Excellence for Clean-Tech
- Continue to market and promote Hamilton’s Clean-Tech Industry and our Green Economy at major trade shows and conferences
- Maintain on-going outreach to local associations and community groups such as the Hamilton Chamber Environment and Energy Committee and Community Energy Collaborative
Creative Industries Cluster

A Cluster of Creativity and Innovation

Vision

“Hamilton is an engaging and vibrant community, a national centre of creativity and innovation where people and quality of life come first and creative businesses prosper and flourish.”

Introduction

Hamilton is undergoing a remarkable transition, as the local economy expands from traditional manufacturing to more knowledge-based and creative industries. Between 1991 and 2006, arts and creative jobs grew at a greater pace than the rest of the local labour force, making them a key part of the new Hamilton economy. As this trend progresses, it will help redefine the City’s place on the national stage.

In 2005, City Council adopted an Economic Development Strategy for the City of Hamilton that, for the first time, included a focus on creativity. Specifically, it included a section targeting Film and Culture. At that time, Film was a burgeoning industry in the city with Culture, as an economic development focus, only starting to gain attention. Over the past five years, the understanding of the breadth and contribution of the sector has continued to grow where today, Creative Industries figure much more prominently in this updated strategy. To be clear, this strategy is not a Cultural Plan; it is an Economic Development Strategy. The Culture Division of the City of Hamilton is currently developing a Cultural Master Plan that will work hand in hand with this strategy to move the creative/cultural agenda forward in Hamilton.

However, the combination of the Economic Development Strategy and the Cultural Plan clearly demonstrates Hamilton’s efforts to initiate Quadruple Bottom Line reporting. Jon Hawkes, the recognized authority on this approach, considers culture/creative industries as the fourth pillar of sustainability and the “glue that holds a society together.” From a pure economic development perspective, this approach is seen as a way to nurture innovation/creativity and literally transform neighbourhoods.
Hamilton’s Creative Industries Cluster Defined

Creative industries typically include activities that focus on creating and leveraging value from intellectual property and creating products such as music, books, film and games; or providing business-to-business services including design, architecture, advertising, public relations, broadcasting, printing, computer programming, publishing, multimedia, audio-visual, photographic, digital media and crafts. This sector also includes festivals and visual and performing arts.

Creative Industries add value to content and generate value for individuals and societies. They are knowledge and labour-intensive, create employment and wealth and nurture creativity. The raw material they are made from foster innovation in production and commercialization processes.

Hamilton’s Creative Industries have 6 areas of strength that will be the focus of economic development efforts. Each area of strength is made up of a variety of disciplines, the majority of which are outlined below:
### Film/Video/Broadcasting
- Film/Video
- Radio and Television Broadcasting
- Sound Recording, Film & Video Support
- Agents and Managers

### Design & Digital Media
- Advertising and Related Services
- Architecture
- Graphic Designers
- Publishing Industries
- Digital and Media Studios
- Internet Publishing/Broadcasting/Portals

### Music
- Music Retail
- Musical Groups, Artists & Companies
- Sound Recording Industries
- Art Instruction (Music)
- Promoters (Presenters) Music
- Performing Arts Facilities (Music)

### Festivals & Events
- Cultural Events
- Artists or Artisan/Craft Studio Tours
- Country Fairs
- Festivals (Craft, Film, Literary, Performing Arts, Street)
- Museum/Art Gallery Programs
- Music Festivals/Events

### Performing Arts
- Dance Companies
- Dance Supplies
- Theatre Companies
- Theatres
- Theatrical Supplies
- Agents and Managers
- Performance Art Instruction
- Promoters (Presenters) of Performance Art
- Performing Arts Facilities

### Visual Art
- Art Dealers/Suppliers
- Art Galleries
- Photography
- Craft
- Studio Facilities
- Artists
- Artist Run Centres
- Art Instruction (Visual Art)
Local Scene/Background

As mentioned previously, between 1991 and 2006, arts and creative jobs grew at a greater pace than the rest the local labour force. This growth is a function of many factors including: an increase in indigenous creative businesses and inbound migration of creative workers from the outside of Hamilton, particularly from the Greater Toronto Area. Other factors that have contributed to this growth include the changing demographics of Hamilton, the changing role of the post-secondary institutions in the community, regional tax credits by the Provincial Government for film productions and affordable real estate prices in Hamilton for both commercial and residential properties. Hamilton is a community that is ripe for growth and a celebration of both its roots and its creativity.

Over the past few years the immense potential of Hamilton’s creative and cultural industry has been heralded by researchers and thinkers like Glen Murray and Richard Florida; who have gained the attention of local and national media, and have quickly become a hot topic of local discussion.

Numerous factors have led to revitalizing the conversation about the power of the creative industries as an economic and social engine. Within many cities around the globe, we have witnessed the birth of the creative economy and the shift towards a knowledge-based economy - a stark contrast from our industrial heritage. Nations, Regions, Provinces, States, and municipalities, including Hamilton, have made creativity part of their Economic Development Strategies and have begun fostering a greater understanding and more support systems for these industries.

Hamilton’s History of Creativity

Although the turn towards creative city building and place making where creativity is at the core seems to be a recent development, Hamilton is no stranger to the creative industry and has been a leader in many ways since its inception. From the early beginnings of the Players’ Guild of Hamilton in the 1840s (North America’s oldest community theatre group), the Hamilton Philharmonic in the late 1880’s, Hamilton Musician’s Guild in 1903 and the establishment of the Art Gallery of Hamilton in 1914, our early creative foundation was set firm.

From an industrial standpoint, creativity was at work in the innovation that drove the local economy. The beginnings of a new industrial age came to Hamilton with the railway in 1852 and along with it came a boom in industrial design activity that saw many machinist-inventors take out patents for railway-related design innovations. This environment of creativity and innovation led to the first Canadian-built railway locomotives, passenger and freight cars being produced.
in Hamilton. (Prior to their manufacture in Hamilton, locomotives had been imported from England and the United States). Shortly thereafter, the world’s first sleeping car was designed and manufactured in Hamilton.

Between the 1920s and 1950s Hamilton proved its ability as an early creative engine in broadcasting by the founding of CKOC in 1922, the first radio station in English in Canada, and CHML arising shortly after in 1927. Following the seed of technology, CHCH emerged as Canada’s first independent television station in 1954, and the Skyway Drive-In attracted young and old, being the first of its kind in 1946. Clearly an entrepreneurial spirit was at work here.

Moving into the publicly-funded arts boom of the 1970s, the founding of Hamilton Place, Arts Hamilton, Theatre Aquarius, Creative Arts, Hamilton Artists Inc. and numerous other organizations cemented the base of Hamilton’s non-profit arts infrastructure. This wave of grassroots development would ensure that Hamilton would consistently make cultural development part of its identity for decades to come. Also in the 1970’s, Grant Avenue Studios opened its doors and quickly became a big name in the Canadian recording scene, a reputation which continues today.

Through the 1990s, Hamilton’s creative industries matured as individuals and collectives began to distinguish themselves from the traditional and founding institutions. This brought Hamilton the Boris Brott Festival, Workers Arts and Heritage Centre, Sonic Unyon Records, Gallery on the Bay and the Hamilton Conservatory for the Arts. As well, the Tivoli Theatre was reopened as a theatre venue for a whole new generation. During this period, design and digital media were starting to take root as the knowledge-based creative economy began to take off.

The Contemporary Creative Scene

Currently, Hamilton is approaching the 10-year mark on yet another string of entrepreneurial steps and progressive development in creative industries. The sector has evolved and diversified to include a mix of arts, culture, film, music, design and digital media. There is a more balanced sector with non-profit; and for profit operations and creative industries have developed to the point where they are beginning to physically transform areas of Hamilton that had seen some decline due to shifts from the City’s industrial foundations. James Street North has seen a boom in recent years with a cluster that includes: You Me Gallery, The Print Studio, the relocation of the Hamilton Artists Inc., Mixed Media, The Factory: Hamilton Media Arts Centre, Loose Canon Gallery and Hamilton City Ballet. Moving south you have creative firms around downtown, Gore Park and on James Street South.
Almost simultaneously in other parts of the city, the Imperial Cotton Centre for the Arts has emerged and has transformed a former factory into a creative industrial hotspot. To the West, Locke Street has boomed with a mix of galleries, web design, communications, and digital media firms. In addition, other creative initiatives have emerged with the Pearl Company, Artword, Hammertheatre, BlackBox Fire, the Hamilton Fringe Festival and the Westside Theatre (leading a theatrical revival), This Ain’t Hollywood, the Casbah, International Tour and Tech Academy, Key Music Group, Jazz at Corktown, Hamilton Music Collective and Hamilton Music Awards, among many more, adding to the already legendary music scene.

Also within the last decade, the Film and Television Industry in Canada and the United States has wholeheartedly adopted Hamilton as the place to film in Ontario next to Toronto. Filming in Hamilton has more than doubled year over year. This activity brings other types of growth and opportunities that can be exploited.

**The Hamilton Creative Catalyst Project**

There are examples across Canada and around the world of cities that have embraced their unique culture(s) as a way to attract tourists, create jobs and enjoy a higher quality of life. Hamilton has the basic materials to join their ranks. There is an abundance of creative people living in the City. There are underused buildings and character neighbourhoods in close proximity to the downtown and a promising collection of creative spaces and uses. Through the Hamilton Creative Catalyst Project, the City of Hamilton seeks to harness the potential of the creative sector to boost Hamilton’s economy and transform the urban landscape.

The first phase of the Creative Catalyst Project, funded by the City, and conducted in partnership with the Imperial Cotton Centre for the Arts (ICCA), engaged more than 100 civic leaders, business leaders, educational leaders, artists and community activists. The report recommends that the City embrace and promote Hamilton as a Creative City. The report also recommends that Hamilton develop a physical catalyst that would occupy a large, iconic building (or buildings in a precinct) downtown with an educational or cultural institution as an anchor tenant. This facility could also house contemporary multi-purpose performance/rehearsal space, offices, studios, retail and hospitality uses. Tenants could include established or new businesses defined as creative industries (e.g. music creation, promotion, distribution or film production) or any business that would benefit from co-locating with creative people and businesses, and new enterprises (e.g. graphic design, news media and computer programming).
Our Community Culture Project

In recognizing the required background research work needed to position the City to develop an overall Cultural Plan, the City of Hamilton through the Culture Division has embarked on a first step in the process by engaging in a cultural resource mapping exercise entitled, the Our Community Culture (OCC) Project.

Hamilton joins leading municipalities in Canada such as Vancouver, Saskatoon, Ottawa, Toronto, Montreal and Saint John that are developing municipal cultural plans as tools to support economic development and regeneration.

The overall goal of the Our Community Culture Project is to put cultural planning at the centre of how the City plans for its future. The OCC Project is the most comprehensive approach to the development of a cultural planning to date in Canada and has the potential to establish a new national benchmark for planning practice.

Clearly Hamilton has had a strong history of creative industry since its inception. Our consistent and entrepreneurial drive has enabled us to thrive through depression and recession, to lead during times of technological change and to make bold steps to define and redefine ourselves. With the appropriate stimulus, continued investment, and increased infrastructure, creative industries will continue to grow and prove their strength as a consistent driver in Hamilton’s economic and social fabric.

SWOT Analysis (Source: Creative Industries Stakeholder Focus Group)

Strengths

- Current recognition of culture and creative industries by City Council as an important sector for future economic growth.
- Migration of artists and creative people to Hamilton is already a trend; they are recognizing value of the City
- Strength and talent of the individual artists themselves
- Existing larger profile cultural institutions and destinations (AGH, Hamilton Place/HECFI and Theatre Aquarius)
- Well established and recognized music and film industries
- Provincial/Regional Tax Incentive for filming outside of GTA
- Post-secondary institutions - McMaster University, Mohawk College, Redeemer University College plus specific educational institutions for many disciplines e.g. dance, music etc.
- Strong multidisciplinary creative network: Hamilton Artists’ Inc., Factory, ICCA, Arts Hamilton, venues, festivals and film festivals etc.
- Emerging local government support for creative industries
Brownfields and downtown/BIA programs available to encourage reuse and repurposing of industrial and commercial buildings for creative facilities

Beauty of city, architecture, waterfalls, green space - contributor to Quality of Life

Proximity to Toronto and a significant consumer market

**Weaknesses**

- Lack of financing and funding for individual artists and small businesses
- Lack of cohesion/alignment of goals and action in the creative community – needs an umbrella organization; need for a cohesive marketing campaign and media support
- Limited up and down chain business development connections for creative industries (e.g. film pre and post production businesses) occurring in the City - proximity to Toronto does not encourage market independence
- Barriers to Growth - perception that City Hall does not support creative industries and Zoning/Official Plan does not fit the needs of the creative community - need to promote changes that have been made to correct this
- Perception that creative cluster not valued as highly as other more traditional clusters e.g. manufacturing
- Economic impacts from this cluster may not be immediate and can therefore be undervalued
- Tendency to compare Hamilton to Toronto rather than looking to other examples on an international scale
- Lack of concentrated demand from the consumer market for cultural goods, services and outlets
- Inability to discuss idea of commercialization - profit vs. not-for-profit
- Lack of facilities and appropriately sized venues for both performance (music) and film use - need for a film studio and a mid size (700 to 1,000 seat) performance space
- Film Union Zones add costs to some filming outside of the GTA

**Opportunities**

- Post-secondary institutions have creative graduates - work to integrate the graduates and keep them in Hamilton
- Mohawk College - creating a digital media centre and has a strong music program. Create opportunities for joint ventures and partnerships with these programs and community initiatives
• Capitalize on City’s assets such as the relative low cost and availability of real estate; encourage others to move here and invest in Hamilton
• Exploit the creative buzz that is happening in Hamilton; lots of activity and opportunities
• Create a regional hub for the music and film industries to capitalize on the existing movement
• Create or identify an umbrella organization for all artistic and creative groups in Hamilton to maximize their potential and voice
• Make use of technology and innovation to encourage participation and collaboration in the local creative economy by both the consumers and the suppliers (e.g. internet TV, blogs etc.); find connections between the creative industries, technology and sciences for new product/service opportunities
• Take advantage of federal and provincial funding available for creative industries and initiatives
• Exploit the value chain of Creative Industries by encouraging the growth of suppliers to creative businesses and consumers of their output

Threats

• Economy is still in recovery from global economic crisis; this makes growth of cluster more sluggish
• Extremely rapid technological change adds volatility and risk
• Tendency to take white knight approach rather than looking to grass roots city development as a means to move ahead
• City departments perceived as barriers to development – they need to get out of the way
• Some decision makers do not recognize that there is huge value in the arts for the economy and quality of life of the community
• Perception of danger downtown therefore less desirable city – this is the major centre for artistic activities
• Toronto centric attitude that creativity (arts, film etc.) begins and ends there; film unions, technicians and actors unions charge more when outside Toronto
• Distinction between profit and not for profit artists’ organizations - perception that one is better than the other; not-for-profits in position of extreme dependency on funders; not healthy for sustainability
Strategy

The Creative Industries Cluster is a key cornerstone in developing vibrant, attractive, resilient, competitive and creative communities. This Creative Industry Cluster Strategy will focus on Hamilton's existing strengths and will help us to move forward with tangible goals and actions which will help to achieve the vision of this cluster.

Goal

To build a strong and vibrant Creative Industries Cluster by focusing on the community's strengths where creativity, innovation, arts and culture become a key driving force of the economy and the quality of life of the City of Hamilton.

Approach

While there are the six areas of strength in Hamilton’s Creative Industries Cluster, this strategy divides the approach to supporting the cluster into two categories:

**Business Development:**
Proactive measures to establish the infrastructure and business environment to enable the sector to development and flourish. This approach will be primarily applied to:

- Design and Digital Media
- Film/Video/Broadcasting
- Music

**Organizational Support:**
Supportive measures to help sustain organizations that are important to the City’s Creative Industry goals, but who typically have more challenges from an economic viability standpoint. This approach will be strongly linked to initiatives of the City’s Culture Division and will be primarily applied to:

- Performing Arts
- Visual Arts
- Festivals and Events
Short Term Initiatives (less than four years)

Hamilton Creative Catalyst Project
- Continue with next steps of the Creative Catalyst project as per results of the Consultants’ report in partnership with the ICCA and community

Expand Economic Tools
- Develop a Creative/Cultural Precinct in Hamilton (similar to the Distillery District in Toronto) to help spur the industry forward and to encourage the creative reuse of older underutilized buildings in Hamilton
- To further support and enhance the growth of creative industries in Hamilton and create a Community Improvement Plan. The plan will recognize the unique role that creative industries play and the opportunities and issues that this cluster faces. It will also identify means to support this cluster via policies and programs including financial incentive programs

Marketing and Promotion
- Create and implement an internal and external marketing campaign to alert residents, visitors and businesses to the creative strengths that Hamilton already has
- Develop a Creative Industries Profile that highlights the breadth and depth of the sector as part of the Economic Development Strategy

Expand Business Opportunities
- Support existing Creative Industries and attract new creative business to Hamilton
- Develop a Creative Industries business survey to facilitate corporate calls similar to other sectors identified in the Economic Development Strategy
- Continue to foster relationships with Hamilton’s creative companies and organizations, partners and individuals through networking events, social networking tools, matchmaking and festivals etc.
- Review our planning and approvals processes at City Hall to ensure cohesion with the creative community and individual artists looking to grow in Hamilton and educate the sector on City Hall processes
- Revise City Procurement Policies to help promote the local Creative Industries sector
- Encourage the establishment of a post-secondary institution in the downtown to create synergies with Creative Industries and downtown renewal
Update business services to keep pace with contemporary sector needs and trends

Create a centralized and interactive portal with skills matchmaking and a database geared towards creative industries that will grow to meet the creative community’s needs. This portal should be linked to a new and improved Creative Industries website and to the database developed through the Our Community Culture Project.

Workforce Training and Growth

Reach out to local and regional educational institutions and programs to bring and keep students and graduates in Hamilton. Hamilton can be the location of choice for these graduates. This seed work would help to grow more creative industries from the ground up.

Work more closely with educational institutions to improve access to different types of creative training and related activities e.g. development of specific artistic, new media, music, film and assist the schools with marketing of these programs to the broader public.

Attract new creative workers to Hamilton to help support the growth of Creative Industries.

Support and Coordination

Continue working with the Culture Division to facilitate the implementation of Our Community Culture, the Cultural Master Plan and Cultural Mapping, which will provide the framework for long term, well entrenched growth and enrichment of the Creative Industries in Hamilton.

Coordinate with the Culture Division to establish a sector advisory group.

Liaise with the Culture Division during the update of the community grants process to more effectively achieve sector economic development goals.

Support indigenous creative industries and efforts by providing promotional opportunities and venues to local industries and individuals to showcase their work.

Long Term Initiatives (more than four years)

Encourage the development of appropriate housing and/or live-work space proximal to the Creative Catalyst in coordination with key planning policies.

Explore national and international opportunities to expand the City’s creativity particularly in connection with existing organizations and collectives and educational institutions.
o Promote Hamilton’s Creative Industries during the 2015 Pan Am games as a means of changing the image of the City to an national and international audience

Summary

By recognizing Creative Industries as a driver of our economy we will help to build this cluster and offer great opportunities for jobs and growth in the City. Having creative people and places in our community attracts wealth and improves the overall quality of life. We need to support this sector of our economy and leverage its positive assets to attract and retain other industries and people.

Our central geographic location allows for easy cross fertilization from and with adjacent creative markets such as Toronto. The role of the City’s Economic Development and Real Estate Division; particularly the Film and Television Office is to work with community stakeholders to manage this growth effectively and to market Hamilton as a destination for businesses outside of Hamilton who are considering expansion and/or relocation.

2009/2010 is a transition year in terms of the focus of the Creative Industries Strategy for the Economic Development and Real Estate Division. We are moving towards a more integrated approach towards recognizing all Creative Industries while still focusing on our strengths.
**Goods Movement**

**Cluster of Innovation**

**Vision**

“The City of Hamilton is a North American Gateway for goods movement, logistics and distribution through the presence of partnerships with air, port, trucking, rail and related businesses.

*Stakeholder Focus Group*

**Introduction**

Hamilton has the potential to be a major North American Gateway for goods movement, logistics and distribution operations. The City is strategically located in the middle of Canada’s most populated province, at the heart of the country’s manufacturing sector, and within a one day’s truck drive of 170 million people. In addition, there is no other municipality in Ontario that offers all four modes of transportation – road, rail, port and airport.

Previous versions of the Economic Development Strategy identified the Airport and Port as separate clusters. This new iteration combines both of these sectors and adds road and rail to form a unified Goods Movement Cluster. Not only is the transportation aspect of Goods Movement included in this cluster but also all
of the related forward and backward linkages such as: supply chain management, logistics, warehousing and distribution facilities, communications infrastructure etc.

In 2005, the City of Hamilton undertook the Hamilton Goods Movement Study in 2005 as part of the Growth Related Integrated Development Strategy (GRIDS). The City examined the potential to become an integrated, regional inter-modal transportation centre within the southern Ontario trade corridor. The key recommendations from the study included:

1. Establish on-going public / private collaboration for goods movement
2. Promote Economic Development initiatives related to goods movement
3. Carry out transportation improvements for all modes of transportation
4. Develop Human Resource Skills and a local goods movement workforce

These strategic recommendations for industry, local, provincial and federal governments are intended to enhance economic development activity through goods movement growth while simultaneously developing the required skill sets. The Hamilton Goods Movement Study recommendations were referred to the City’s Transportation Master Plan to ensure their inclusion within the City’s Capital Plan and GRIDS.

Industry Overview

Multi-modal transportation plays a major role in our everyday lives delivering goods and services to and from manufacturers, importers, wholesalers and retailers. There is a major global shift in the goods movement resulting from the explosive population growth in emerging markets such as China, India and Brazil. Combine this population growth with the Wal-Mart effect where the retailer is the driver of the supply chain; the just-in-time delivery for manufactured products, and the globalization of production and goods movement is a sector that will continue to be integrated and experience rapid growth. These are the reasons why the cargo side of the Port and Airport business are constantly expanding to service the world markets. In North America, new inland ports are becoming more popular to move goods because of rising energy costs and new road infrastructure is being planned that include multi-modal links as the principal design feature.

As a result of the trend towards an integrated North American market, Canada’s primary trading partners continue to be the United States and Mexico. This trend has now given rise to an integrated transportation network that represents approximately $1 trillion in commerce between the three partners. Consequently, North American Goods Movement is now focused in two areas; 1) the multimodal
transportation network, and 2) the North American Super Corridor Coalition (NASCO) that runs through the main trade corridors of the US, Canada and Mexico. Further, it should be noted that the Transportation Optimization Pact (TOP) was formed in 2003 with the specific purpose of developing a competitive and secure, service oriented transportation system in Canada in order to improve the overall efficiency of goods movement.

The transportation sector represents approximately 4% of Canada’s Gross Domestic Product (GDP) or $40 billion with a workforce of 830,000 people, including transit. A National Transportation Strategy is now being developed to enhance Canada’s ability to compete and prosper enhancing the continued growth of air, port, rail and trucking.

In Ontario, the Ministry of Transportation undertook the Goods Movement Trends and Issues Technical Study in 2004. The report outlines the importance of goods movement for Ontario while addressing the issues, challenges and infrastructure needs facing the province. Further, on July 30, 2007 the Governments of Canada, Ontario and Quebec announced the development of the Ontario–Quebec Continental Gateway and Trade Corridor to:

- examine global markets and trade opportunities for Canada;
- target key initiatives with significant trade potential that will benefit all Canadians;
- prepare for the future by developing a strategy that responds to new trade patterns and trends and
- address issues linked to transportation, such as protecting the environment, ensuring quality of life and enhancing the security of Canadians.

One of the key recent recommendations from the Ontario Quebec Continental Gateway and Trade Corridor is to support Freight Nodes along the Corridor.

**Metrolinx**

In 2007, the Province of Ontario developed a 25-year plan entitled “Places to Grow” that required an integrated and sustainable transportation system for Ontario. The intent of this Plan is to design a system that moves people and goods efficiently throughout the Southern Ontario region, promote multi-modal opportunities, and better integrate land-use and transportation system planning.
The Metrolinx Big Moves Regional Transportation Plan (a colloquialism for major objectives) includes:

- A fast, frequent and expanded regional rapid transit network
- High-order transit connectivity to the Pearson Airport District from all directions
- An expanded Union Station - the heart of the GTHA’s transportation system
- A complete walking and cycling network with bike-sharing programs
- An information system for travelers, where and when they need it
- A region-wide integrated transit fare system
- A system of connected mobility hubs
- A comprehensive strategy for goods movement
- An Investment Strategy to provide stable and predictable funding

Hamilton is located within the Metrolinx responsibility area thus the aforementioned will affect future related activities within same such as Light Rapid Transit and Bus Rapid Transit etc.

Local Analysis

In 2006, Hamilton was identified as a regional growth node in the Provincial Government’s “Places to Grow” Strategy. As a result, the City’s population is forecasted to grow to 660,000 people in 2031 from the current 504,000 people. Evidence of this growth is witnessed in both the business and population out-migration from the gridlocked Greater Toronto Area (GTA). This exodus of people and companies is following the established trade corridors to US border crossings in Michigan and New York states. Hamilton is the first stop outside the GTA and ideally situated at the confluence of both trade routes. The City of Hamilton is undertaking a review of the City-wide Transportation Master Plan to develop policies and strategies for its transportation network over the next 30 years, including the Goods Movement Policy Paper.
Recently major infrastructure investments have been made in Hamilton’s goods movement cluster in anticipation of this new growth. These include the new Red Hill Creek Expressway, the purchase of employment lands with airside access, opening of the New Hwy #6, CAT2 ILS system and Terminal expansions at John C. Munro Hamilton International Airport (HI), formation of the Southern Ontario Gateway Council (SOGC), Hamilton Port authority (HPA) acquisition of Pier 22 (formerly Stelco lands), new Marine Link Project and HWY H2O initiative. Hamilton is the first Canadian city to become a member of this economic, environmental and social solution, known as HWY H2O.

The McMaster Institute for Transportation and Logistics (MITL) was formed in 2008 through the combined efforts of industry, education and government “to develop a world-class institute for applied research and education in transportation and logistics that will provide a resource to industry and government and will foster economic, social and environmental sustainability.” Its goals include:

- working with industry and government to conduct applied research that address planning and policy issues related to efficient transport and logistics systems
- supporting the development of transportation and logistics educational programs relevant to industry and government
- providing a forum for dialogue and interaction among its members ensuring outcomes that maximize collective benefits for industry and the society

MITL recently undertook the Gateway Study that developed a “Sustainable Strategy for Developing Hamilton as a Gateway”. The key recommendations include:

1. Create a non-profit, transport-focused organization
2. Pursue prudent residential and public transit development to accommodate gateway growth
3. Enhance Hamilton’s image through appropriate marketing
4. Pursue targeted developments near the Airport
5. Develop containerization facilities at the Port
6. Make intelligent use of Hamilton’s business parks
7. Emphasize Brownfield development
8. Adopt sound taxation policies to benefit the Gateway
9. Develop required human capital
10. Continue to maintain and improve Hamilton’s existing transport infrastructure

On June 8, 2009, staff held a Goods Movement Cluster Focus Group with the region’s major private sector air, port, trucking, rail, freight forwarder businesses and local educational institutions. Discussion addressed the strengths, weaknesses, opportunities, threats and actionable items required to develop and realize success in the Goods Movement Cluster. Additionally, one-on-one meetings were held with key representatives from air, port, trucking, freight forwarding and rail businesses to gain insight specific to operating a business in this Goods Movement Cluster. The core group has indicated on-going support in the form of an advisory group with a call to action role and working co-operatively with the City to market Hamilton as the North American Gateway for Goods Movement globally.

There were five major themes for the Goods Movement Cluster that emerged from the private sector focus group. They are as follows:
Goods Movement cluster accomplishments to date:

- Airport Implementation Task Force of Council
- Hamilton Goods Movement Study
- Marketing program with Hamilton International Airport (HI), Tourism Hamilton and Business Development, e.g. WestJet, JetPort
- HI and Master Plan included within the GRIDS process, Official Plan and Zoning By-Law
- Airport Shuttle support
- HWY H2O - first City to be a member
- McMaster Institute for Transportation and Logistics and Translog Conference
- Southern Ontario Gateway Council
- Approval of the Airport Employment Growth District (AEGD)
- Red Hill Creek Expressway completion
- Move On Up - local transportation employment opportunities guide and hands-on tours for secondary school teachers, co-op and guidance counsellors
- DHL Express relocation to Hamilton International
- CargoJet expansion
- Asian Foreign Investment Strategy
- Goods Movement Cluster Business Retention, Expansion and Attraction
- Support for the Aerospace/Aviation Pilot Program at Ancaster High School
- Global awareness of Hamilton as a Goods Movement Hub generated through the Canadian Consulates, Freight Forwarders and Air Carriers.

SWOT Analysis *(Source: Goods Movement Stakeholder Focus Group)*

**Strengths**

- Skilled labour
- Multi-modal Transportation Infrastructure
- 24/7 International Airport
- Global strategic location
- Established transport business community
- World class educational institutions - teaching and training
- Largest Canadian port on Great Lakes system
- Network of services and 24-hour operations
- Lower cost of doing business
• Largest rail transit load
• Fibre wired and telecommunications infrastructure
• Excellent quality of life and affordable cost of living
• Strong presence of Goods Movement related associations e.g. MITL, Metrolinx, SOGC

**Weaknesses**

• Aging workforce
• Lack of passenger air service to HI
• Lack of awareness of multi-modal capabilities
• Lack of resources and marketing to affect positive outcomes internationally
• Lack of large parcels of serviced land
• Perception of Hamilton (image)
• Signage - no way finding
• Land availability next to existing transportation nodes for expansion - capacity issues
• No one responsible for overall Transportation (need Champions at all levels of government)
• Canadian/US border management
• Security measures and associated costs
• Taxes and duties - no single portal to set up foreign trade
• Seasonality of marine transportation

**Opportunities**

• Cost of energy resulting in demand for multi-modal alternatives
• Port expansion - acquisition of Pier 22 by HPA - potential to build (approx. 100 acres)
• Passenger air service to HI
• Short Sea Container Feeder Service at the Port
• Airport terminal expansion
• Airport Employment Growth District serviced lands
• GTA grid lock
• Marine Link - HWY H2O - St. Lawrence Seaway Management Corporation, SOGC, Canadian Airports Council (CAC) leverage partnerships
Leverage port and airport partnerships for goods movement (marine/air/truck/distribution)

Use education resources to promote train-support transportation cluster

Provide land for goods movement opportunities

Infrastructure stimulus funding from senior levels of government

Use air bi-lateral agreements to engage new markets

Bus Rapid Transit and LRT expansion

Threats

- Global trade - shift in manufacturing - China, India and Brazil
- Residential encroachment onto transportation corridors
- Lack of vision for Hamilton in the global context
- Energy/fuel costs - oil debate
- Security costs
- Fierce competitive nature of the goods movement business
- Industry mergers and acquisitions - Steam Ship Lines acquisition
- US border management - road and marine difficulties
- Huge dollar investment is required over the next 20 years
- Can not rely on steel and need to transition into new markets and goods
- Perception exists that funding is going to other geographic areas of Canada

Targeted Opportunities

Distribution Centres/Warehousing Operations/Port and Airport Inter-modal Freight Handling

The continued growth in traffic congestion and resulting gridlock in the GTA will increase the number of major warehousing and distribution companies looking to locate to a more effective and cost efficient location. Hamilton is in a position to capitalize on the GTA’s issues with excellent transportation infrastructure and immediate proximity to the GTA. Relocation of mid-sized and larger facilities designed to store and distribute just-in-time consumer and manufactured goods is an opportunity. However, there is also a shift to ship directly to stores from China and omit the distribution centre altogether. Development of detailed marketing and business attraction plans for goods movement businesses will be an important component of the cluster work plan.
Logistics Companies

The logistics industry includes a variety of companies that provide a number of different services, such as warehousing logistics management, transportation and freight, inbound logistics, outbound logistics and moving and storage. These are businesses that directly support goods movement, distribution and multi-modal business activity and often described by the acronym 3PL which is Third Party Logistics. Hamilton’s Steelcare is an excellent example of this type of company and its primary focus is on steel and fabricated metal products.

Transportation-Related Services/Maintenance-Service Facilities for Cargo-Passenger Operations

Service businesses and research specifically related to transportation and the Goods Movement Cluster may be an opportunity for Hamilton. They include companies like aircraft, trucking and railcar repair and maintenance facilities, flight kitchens, freight forwarders, customs brokers, couriers, messengers and trucking operations as well as MITL.

Short-Term Deliverables (less than four years)

- Corporate Calling Program - top local Goods Movement companies every year
- Assist HI with securing additional passenger carriers (preferably US) for Airport
- Develop a detailed marketing and attraction plan for targeted goods movement businesses
- On-going joint marketing initiatives with the HI, HPA, Tourism Hamilton, Hwy H2O, MITL and Business Development
- 24-hour transit service to Hamilton International Airport
- Attract goods movement related companies
- Securing additional passenger airlines
- Formation of a cluster advisory group

Long-Term Deliverables (greater than four years)

- Maximum utilization of Port lands for assessment and job creation
- Establish a year round Short Sea Container Feeder Service
- 24-hour operations at HI maintained
- Implement future phases of the HI Master Plan
- Implement future phases of the HPA Land Use Plan
- Completion of Niagara to GTA corridor
Life Sciences

Cluster of Innovation

Vision

Hamilton is the home of an intellectual and physical environment for a thriving biosciences cluster that connects researchers, business, healthcare providers and education.

Stakeholder Focus Group

Introduction

Life Sciences cross many different sectors including health, environment, agriculture and manufacturing. Hamilton is globally recognized for its biotechnology strengths in the health sector including drug discovery and validation, gene therapy and clinical trials (e.g. Dr. Yusuf in Cardio-Vascular Medicine, Dr. Bhatia, Stem Cell and Cancer Research Institute and Dr. Anvari in Robotic Surgery). Research in these areas is producing life saving drugs and vaccines, medical devices and solutions to current health issues. With a focus on the commercialization of research and development, Hamilton is poised for growth in this knowledge-based cluster. The City, together with its community partners, (HHSC, St. Joseph’s, McMaster University and Mohawk College) is helping the biotechnology sector achieve its innovative potential by building a supportive business environment, connecting research and business communities and marketing its world-class strengths in the global marketplace.

Industry Overview

Definition

The biosciences are defined by the branches of science that involve living organisms and the use of scientific tools and techniques in research, development and manufacturing activities. Biotechnologies have resulted in the development of products and processes such as disease resistant plants, environmental remediation technologies, as well as novel diagnostic and therapeutic agents. Recent trends reflect a convergence in technologies such as nanotechnologies and information technology.
Economic Impact

Biotechnology engages the intellectual capital of Hamilton’s educational and research institutions that provide high paying jobs for researchers and technical staff. The direct economic impact is realized through start-up companies as products are commercialized as well as the attraction of new companies that need to be in proximity to Hamilton physical and intellectual resources.

Industry Structure

Canadian firms have a small but growing share of the global biotechnology market with 2007 biotech revenues of $2.7 million (USD). With just 404 biotech companies employing over 7,300 people, the size of the Canadian biotechnology market is relatively small; however, the industry is a pipeline to many industry sectors which employ significantly more people.\(^\text{12}\) In fact, Canada’s bio-based economy involves 2,500 life science organizations and over 200,000 jobs across the country and is valued at over $78 billion. At 6.4% of GDP, this footprint is larger than the automotive and aerospace sectors respectively.\(^\text{13}\) Ontario is North America’s third largest regional concentration of biotechnology firms and the sixth largest in revenues earned. Ontario has more than 125 biotechnology companies with strengths in bio-medical, pharmaceutical, medical devices, agricultural-biotechnology and bio-products fields. Most start-up companies (70%) are created from science developed at universities and both provincial and federal governments are promoting commercialization.\(^\text{14}\)

Major Trends and Issues

Human health continues to dominate the biotechnology sector in Canada, accounting for the majority of biotech research in the country. Some of the biotechnology applications under development include cancer therapeutics and vaccines; HIV and AIDS treatments; treatments for heart disease, arthritis and diabetes; stem cell research and infectious disease treatments. It is not surprising that the industry is heavily impacted by economic conditions. The major challenges for Canadian biotechnology companies remain access to capital, product development, attracting and retaining key employees and adoption of innovation. On average, it takes seven to ten years and over $1 billion dollars to bring a product to market. Also, the fact that attracting and retaining key employees continues to be one of the top three indicates that talent is highly valued and that respondents recognize the importance of key

\(^{12}\) Ernst and Young, 2008
\(^{13}\) BIOTECana\da
\(^{14}\) Ernst and Young, 2008
employees during tough economic times. Other challenges include access to strategic partners and development of experienced entrepreneurs.

Local Analysis

Within the Golden Horseshoe (Hamilton, Halton and Niagara), biotechnology activities are predominantly in the health sector. The foundation for Hamilton’s biotechnology cluster is concentrated in the intensity of the faculty of health sciences at McMaster University (one of Canada’s most innovative research institutions), its affiliated hospitals, and in several other research centres and institutes. Hamilton has demonstrated leading edge approaches and success in drug discovery and validation, gene therapy, clinical trials and health economics. In addition, its health research expertise in infectious and respiratory diseases, cancer, cardiovascular diseases and diabetes, puts this community on the world map of health sciences. The presence of a highly skilled and educated workforce, together with a strong network support (GHBN, McMaster Innovation Park etc.) and innovative research, provide excellent opportunities for convergent technologies such as bio-engineering and bio-informatics. The following chart identifies the ranking of cluster factors in the Golden Horseshoe region, relative to the provincial average.15

15 Biotechnology Cluster Innovation Plan, SHI Consulting, July 2004
### Ranking of Regional Strengths

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<tr>
<th>Key Cluster Factors</th>
<th>Advantage</th>
<th>Disadvantage</th>
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<td>Infrastructure</td>
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<td># of Companies /Spin-offs</td>
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<td>Talent – Post Docs, Star</td>
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<td>Venture Capital / Financing</td>
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#### Bioscience Accomplishments

The majority of the short-term deliverables identified in the 2004 update of the Economic Development Strategy have now been accomplished. In fact, the City is ahead of schedule in many respects, with a number of the long-term deliverables now completed.
The Golden Horseshoe Biosciences Network (GHBN)

The Golden Horseshoe Biosciences Network was incorporated in 2005 to execute the strategy in the Golden Horseshoe, with a mandate to identify the commercial potential of initiatives within hospitals, universities and research institutions; develop and entrepreneurial culture; create opportunities for start-ups and put the supports in place to help small businesses grow. GHBN is a not-for-profit corporation with representation from the City of Hamilton, Halton Region, the Region of Niagara, McMaster University and its affiliated research hospitals, as well as various companies in the biotechnology sector. The network promotes the Golden Horseshoe region of Ontario as a globally competitive bioscience cluster for the development and commercialization of innovative products, and a world class provider of services in areas of biotechnology, biopharmaceuticals, health and medicine, bio-manufacturing and bioengineering technologies. The City of Hamilton together with McMaster University played and integral role in the creation of GHBN.

GHBN Mandate

To establish a strong and thriving environment for growth and investment in the region by:

- Providing educational forums and opportunities for networking and dialogue among the biosciences and the associated business community
- Facilitating the implementation of a long term growth strategy related to the business of biosciences
- Promoting awareness of the region’s biotechnology strengths nationally and internationally
- Raising awareness among researchers and potential scientific entrepreneurs of the economic opportunity that their research may offer
- Fostering collaborations with other organizations
- Advocating on behalf of the biotechnology sector in the Golden Horseshoe

Four Years into the Mandate, the GHBN has:

- Established a powerful regional, provincial and international network in support of a growing culture of innovation in the Golden Horseshoe
- Demystified access to:
- Provincial programs that are part of the Ontario Commercialization Strategy including Ontario Centres of Excellence (OCE), Ontario Commercialization Investment Funds (OCIF), Next Generation of Jobs Fund and the Business Mentorship and Entrepreneurship Program (BMEP)

- Federal programs including the Scientific Research and Experimental Development (SR&ED) tax credits, Industrial Research Assistance Program (IRAP) and Sustainable Development Technology Canada (SDTC)

- Demonstrated an accelerated commercialization capacity in the Golden Horseshoe, by helping more than 30 bioscience start-ups and small businesses to grow, through one-on-one business consulting and linkages to knowledge and financial resources

- Embraced the challenge of sector diversity ranging from traditional biotechnology to manufacturing, automotive, horticulture, agri-food and wine, e-health and emergent medical devices, clinical trials and bioenergy by facilitating broader program development and execution through partners

- Set the stage for new commercialization opportunities for entrepreneurs and researchers, through delivery of a business plan for an 80,000 square foot business incubator/accelerator centre in association with McMaster University and McMaster Innovation Park (MIP)

But perhaps the greatest demonstration of success to date is that the GHBN has created an audible buzz in the region, with an increasing number of bioscience entrepreneurs and companies knocking at the door for help in growing their businesses.

**Evolution of GHBN and new focus on Commercialization and Entrepreneurship;**

The Ministry of Research & Innovation continues to be the principal funding partner for the GHBN. Early in 2010, the Province adopted a new strategic direction with the formation of RINs (Regional Innovation Networks) that focused specifically on the development and commercialization of world class research in Ontario. Two of the key components of this new mandate are to dramatically improve the entrepreneurial capacity in Life Sciences and broaden the scope beyond Biotechnology. Consequently, this new model involves winding up the GHBN and transferring the majority of its roles & responsibilities to the newly formed Hamilton Innovation Factory (see **Infrastructure for Innovation component**) and the local Economic Development office.
Over the next three years, the goal is to maintain momentum and help more companies evolve and grow. Extensive networking will be central to the exercise, as the GHBN transitions from a small, biotech focused group toward regional icon for effective life science business development in Hamilton and the surrounding region.

**McMaster Biotechnology Incubation Centre (MBIC)**

MBIC is a 10,000 square foot wet lab incubation centre co-located in the Michael G. DeGroote building at McMaster University with GHBN. The University opened this facility in 2005 in order to provide interim facilities for start-up companies to commercialize their products and services. GHBN serves as a resource to the companies of MBIC.

**West Hamilton Innovation District (WHID)**

As part of a broader effort to transform the economic base in Hamilton, the City approved a by-law in February 2007 to establish a new industrial zone for the 133 acre industrial area bounded by Dundurn, Aberdeen, Hwy 403 and Main Street East. This area includes the McMaster Innovation Park. This new Research and Development Zone provides for a range of uses that will complement the MIP R & D activities in the biosciences and advanced manufacturing sectors. Various City departments will be involved in the implementation of infrastructure and marketing of this area.

In late 2009, the City of Hamilton acquired the former 16.5 acres CP Lands property. This strategic parcel will be remediated and redeveloped for sale to companies that can benefit from the proximity to McMaster Innovation Park and the research facilities contained therein.

**McMaster Innovation Park (MIP)**

In 2005, McMaster University purchased the former Camco property, a 37 acre industrial site located at Hwy 403 and Aberdeen Avenue within WHID. The University has set up an arms-length corporation and hired its founding president, Mr. Zach Douglas, to develop the site into a Research and Development Park that will support the growth of key sectors including biosciences, advanced manufacturing and nanotechnology. This dynamic research destination will offer more than a million square feet of premier laboratories - including an 80,000 s.f. biosciences centre, offices, training and conference facilities that will become home for some 1,500 employees. MIP’s vision is a key driver in the transition of WHID.
Economic Development staff and McMaster University have jointly developed marketing materials for MIP and will continue to partner with McMaster University to undertake business attraction activities for the McMaster Innovation Park, including the CANMET relocation.

**CANMET Materials Technology Lab (MTL)**

CANMET-MTL (the federal government’s materials technology laboratory) held its official groundbreaking ceremony in McMaster’s Innovation Park on December 5, 2008 and is expected to be completed in the fall of 2010. CANMET-MTL is dedicated to developing new materials and processes for Canada’s energy, transportation and metal manufacturing divisions. The lab will be a great asset to the community as it will create over 100 jobs for scientists and technicians who will provide support to existing local industries. This initiative is the first new development at MIP.

**SWOT Analysis (Source: Life Sciences Stakeholders Focus Group)**

**Strengths**

- International reputation in research and education
- Basic research
- Innovative educational and training platforms
- Clinical research
- Integrated healthcare network tightly linked with academic research
- Tradition and expertise in manufacturing, including bio-manufacturing
- Convergent technology capabilities: material science, agri-technology and bioengineering
- Scientific research and experimental development tax credits
- Creation of incubation space
- Community from Halton to Niagara Falls, Buffalo linked into sector
- Proximity to US border

**Weaknesses**

- Pre-clinical capabilities pertaining to the bio-pharma industrial value chain
- Scarcity of biotechnology companies
- University technology transfer efforts require more innovative approaches to foster growth of spin-off companies (but there are not enough receptor companies in the community to create linkages)
- Lack of transformational capital investment and focus funding
- Insufficient space to meet sectors needs
• Image and perception of Hamilton does not align with biotechnology sector

Opportunities

• City site (16.5 acres in WHID adjacent to MIP) for future development
• Momentum of innovation
• Commercialization of qualified high value early research
• Infrastructure, locally trained grads, resources available - McMaster University Hamilton Health Sciences etc.
• Hamilton is a tremendous complement to Toronto (capacity limits, cost per square foot, cost of living)
• Establishing the framework for development capacity
• Transition to a knowledge-based economy
• Reconfiguring utilization of large stakeholder and industry partnering
• Establishing import opportunities from other parts of the world to get validated here in Canada
• Become a leader in fresh water based industries and industrial core based competencies
• Biotechnology industry has unmet needs in translational research, manufacturing and clinical research
• Receptor industry has increased dependence on outsourcing of manufacturing and R & D

Threats

• Research results may be commercialized in other parts of North America and world unless action is taken to build capacity locally
• Retention of talent both new grads and existing scientists
• Costs to get pharmaceuticals and other Bio-Tech products to market (+$80M)
• Potential change in priorities of public funding and public policy
• Challenges in the financing environment
• Lack of knowledge and education in the community for future growth opportunities in the region
• Collapse in the markets and their future growth and recovery - are they sustainable to accept future growth in biotechnology

STRATEGIC INITIATIVES

Approval of provincial funding for the Regional Innovation Network is contingent on the development of a Life Sciences strategy for Hamilton and the strategic initiatives identified below.
Strengthening Existing Incubator Space

Upon inception of the GHBN in 2005, business incubator facilities in the Golden Horseshoe were extremely limited. Recognizing a growing entrepreneurial appetite, the commercialization potential of various research initiatives, and the value of co-location for convergence of ideas and technologies. The GHBN played a lead role in fortifying the McMaster Bioscience Incubation Centre (MBIC) in the Michael G. DeGroote Centre for Learning and Discovery, where the network is currently housed. MBIC provides entrepreneurial researchers and start-up companies in the life sciences sector with resources to develop commercially successful products and services. Resources include laboratories, scientific equipment and research requirements as well as business mentoring and support services. In addition, MBIC offers shared administrative facilities and office equipment, executive meeting space, business advice and referral services, networking opportunities and programs for off-site clients.

Creating Capacity to Absorb Overflow

Further to MBIC, a need was also identified for expanded physical infrastructure to accommodate the divergent needs of the broader biotech community. As a result, the GHBN took on a catalyst role in developing the Bioscience Incubator/Accelerator at the McMaster Innovation Park delivering the business plan in association with Economic Development staff, McMaster University and McMaster Innovation Park in 2007. Government funding is now being pursued with groundbreaking for the proposed 80,000 square foot facility targeted for 2009. The proposed facility offers entrepreneurs the most comprehensive convergence/synergy centre opportunities in the region. As such, the GHBN plans to relocate to the facility within three years to better serve the needs of clients and to most effectively expand its own offering of events and workshops applicable across bio-related fields.

Medical Devices

An innovative approach to accelerating the entry of new medical device products was conceived through an informal partnership between GHBN and the Health Technology Exchange (HTX). The concept is to create a prototype testing program for medical device clinical trials that would be delivered through the Hamilton Health Sciences’ hospitals. This initiative will meet a need in the market for clinical trials facilities as well as providing credibility from a reputable testing environment. A business plan, now in the development stage, will include input from McMaster University on the marketability of the devices.
Clinical Trials

Creating low cost access to clinical trials for small-medium sized employers (SMEs) has been a key priority for the GHBN from the outset in order to advance the commercialization potential particularly in emerging sectors including medical devices. In partnership with The Health Technology Exchange (HTX), Hamilton Health Sciences Centre and McMaster University, the GHBN has helped secure over $300K for medical device clinical trials to take place between 2008 and 2010. The first companies to be funded include:

- AtreoMedical Inc. (CPRGlove™)
- TakeControl Cosmedix®
- Golden Horseshoe Life Sciences Inc. (formerly Venowave Inc.)

Henderson Redevelopment Project

As Hamilton Health Sciences’ largest hospital redevelopment project, this modern medical facility will include approximately 425,000 square feet of new construction and 35,000 square feet of renovated space. A total of 50,000 cubic meters of rock was excavated from the site in order to build the new portion of the hospital, which will stand approximately 85 feet high and 442 feet long.

The construction will result in the expansion and improvement of inpatient and outpatient services to provide acute care support for the Juravinski Cancer Centre, the Arthroplasty Program (joint replacement) and general hospital services.

The new facility will house a state-of-the-art emergency department, an expanded intensive care unit and cardiac care unit as well as 90 inpatient beds for cancer care, eight new operating rooms and an additional cancer therapy suite that can also be used as alternative operating space. The construction will include 14 negative pressure rooms purposefully built to manage the treatment of infectious diseases safely and efficiently.

Construction began in late 2007 and the project is expected to be complete in the spring of 2012.

Hamilton General Hospital - Regional Rehabilitation and Acquired Brain Injury Facility

This three-storey, 106,000 square foot building scheduled for completion in the summer of 2009, will consolidate most of the rehabilitation and acquired brain injury services that are currently located in 14 buildings across the City into one spectacular building.
This purpose-built facility is custom designed to meet the needs of its unique patient population by incorporating principles of the Ontarians with Disabilities Act. The building will be fully accessible to wheelchair users and it will connect to the main hospital by a second level bridge that will further enhance accessibility and patient flow between the two buildings.

Some of the building’s unique features include indoor and outdoor exercise and practice facilities, a therapeutic pool, therapy gardens and a full range of specialized consultative resources. The building will also house 149 patient beds as well as transitional apartments, that will allow patients to practice daily living skills and gain the confidence to successfully integrate back into society after overcoming the barriers of their physical injuries.

**Hamilton General Hospital - David Braley Cardiac Vascular and Stroke Research Institute**

The new David Braley Cardiac, Vascular and Stroke Research Institute (DBCVSRI) is nothing short of breathtaking. The building’s sleek architectural design and use of natural light through a glass front exterior make this facility first class both in terms of its design and the programs that it will house.

This is the second largest public infrastructure project in Hamilton and is ranked among the top 100 in the country. The project’s value is approximately $90 million.

The DBCVSRI will be home to two world-class research groups: the Population Health Research Institute and the Henderson Research Centre.

The new six-storey infrastructure will provide 197,700 square feet of research space, of which 90,000 square feet will be new laboratory areas and a mix of research offices.

Housed within several large meeting rooms is advanced real-time video conferencing technology that allows researchers and scientists to connect and collaborate in real-time with other research professionals located in 80 countries around the world.

It is anticipated that the building will bring more than 300 new jobs to Hamilton’s core, many of which will specialize in cardiac, vascular and stroke research. The construction of this building has also provided employment opportunities for many skilled trade workers. It is estimated there is an average of 120 workers on the construction site daily.

The DBCVSRI symbolizes the innovation and progress that is being made by the many talented research professionals whose work is making significant
contributions to the global research community. Once complete, this magnificent building will become a catalyst for the revitalization of Hamilton’s core and will help further solidify our City as an epicentre of health care and research excellence.

Occupancy of this building will occur in two phases beginning in the spring and will be fully occupied by December 2009.

The DBCVSRI will become one of the top medical research facilities in the world, contributing to the health of Canadians and international populations by conducting life-saving research studies.

**Targeted Companies**
- Biotech start-ups in the health sector including diagnostics, therapeutics, medical devices and information technology
- R & D and related manufacturing companies
- Medical device companies
- Provincial Forensics Lab

**Expansion and Attraction Locations**
- Medical Campuses: St Joseph’s Healthcare, Hamilton Psychiatric Hospital, Hamilton Health Sciences (Hamilton General Hospital, Chedoke Hospital, Henderson Hospital, Juravinski Cancer Centre, McMaster Children’s Hospital, McMaster University Medical Centre and St. Peter’s Hospital)
- McMaster Innovation Park and West Hamilton Innovation District
- Industrial Business Parks: Ancaster, Airport and Glanbrook

**DELIVERABLES**

**Focus for the Life Sciences Sector**

The Innovation Factory and the Hamilton Economic Development Office will continue to deliver programs that focus on entrepreneurship and innovation. From the Innovation Café, Peer to Peer to the Research to Receptor Forums, opportunities for learning and networking abound. The City will continue to work closely with McMaster University to complete the business plan for a wet lab incubator at the McMaster Innovation Park that will provide quality laboratory space for start-up companies. The incubator will have programming and links to community resources to help the companies commercialize their products. Plans for a clinical trials testing facility for medical devices will provide a much needed resource for companies that will shorten the time to get their product to market.
Over the last few years, we have been building the environment for the Life Sciences sector in Hamilton through the development of GHBN; the construction of incubation facilities and an Innovation Park and connecting the various resources in the business and research communities. With the foundation well established, the City will ramp up its business attraction efforts in conjunction with McMaster and the Innovation Park, to bring new Life Sciences companies to the area.

**Short-Term Deliverables (less than four years)**

- Three major and 24 minor life sciences companies established and functioning in the area
- Five spin off companies from the University
- Establish commercialization infrastructure - incubator/accelerator at MIP
- Creation of the Regional Innovation Centre (RIC)
- Continue the Clinical Trials Strategy in conjunction with the Provincial initiative
- Expand the CIP for LEED certification in the West Hamilton Innovation District
- Develop incentives and marketing material for West Hamilton Innovation District and the McMaster Innovation Park
- Implement Prototype Testing Program for Medical Device Clinical Trials at HHS
- Continue to partner with McMaster University, McMaster Innovation Park and the new Innovation Factory to represent Hamilton at the International BIO conference in the United States.
- Establishment of more business knowledge services (leveraging assistance to assist in IP assessment, regulatory practices, demonstration and commercialization resources etc.)
- Have affordable space for companies coming out of incubators
- Formation of a cluster advisory group

**Long-Term Deliverables (greater than four years)**

- Transformation and intensification of the West Hamilton Innovation District into employment lands which focus on biosciences and advanced manufacturing sectors.
- Attract a major bioscience R & D company such as a pharmaceutical company or vaccine manufacturing plant.
- Creation of a local investment fund or angel network for seeding early stage opportunities, focused on local opportunities, solidified linkage with international investment arms
Implementation & Delivery

Marketing Strategy & Action Plan

The more people hear about Hamilton and the more recognizable the Hamilton brand becomes, the quicker our city will reach its potential. The tactic of marketing our city at every opportunity is critically important to the overall strategy of enhancing Hamilton’s prosperity.

P.J. Mercanti, President, Carmen’s Inc.
The City of Hamilton retained the marketing firm Yfactor and the economic development firm Millier Dickinson Blais to assist the City in the development of a comprehensive marketing strategy and related implementation plan that will support, complement and enhance the objectives of the City’s Economic Development Strategy. The City sought to achieve a number of specific goals through this marketing effort, including:

1. Expanded promotion of a positive and supportive “Open for Business” approach to working with both internal and external businesses
2. Increased awareness of investment opportunities within the City
3. Enhanced interest in securing business expansion investment from existing local businesses
4. Improved techniques and approaches for supporting new investment attraction efforts
5. Heightened effectiveness of efforts to communicate Hamilton’s high quality of life and high quality of business environment

These objectives must be accomplished in a particular and challenging economic development environment. The global economic crisis and the restructuring of the international economy have changed the rules of economic development. The old solutions are no longer relevant, the old approaches no longer valid. Instead, the project team for this initiative must identify tools, tactics and targets that are valid and relevant in the emerging economy of the 21st Century. As a five-year strategy, Hamilton’s new marketing direction must look five years forward, and not five years back. It must position the City for ongoing success in the new economic reality.

The project team undertook a review of the City’s past and present marketing strategies and approaches, both to understand the rationale behind past strategic directions, and to understand where gaps or inadequacies exist within the current marketing structure. To a significant extent, the focus of these efforts was on understanding and documenting what has worked for the City of Hamilton and what has not. In addition, current key performance indicators were examined along with statistics used for tracking the success of past marketing initiatives for the purpose of establishing metrics for forecasting.

Particular attention was paid to key issues underlying the economic development function, including environment and sustainability issues, heritage assets, cultural and creative agendas, and broader economic issues.
The project team also undertook a thorough review of existing economic development activities and the strategy that underlies them. This was accomplished in part through documentary review, and in part through consultations and interviews with City staff and relevant community partners. In particular, care was taken to understand the particular goals and targets of the economic development strategy, in order to position the marketing strategy to best support these key objectives of the City.

To achieve these goals, the project team conducted research of both a qualitative and quantitative nature. The team undertook a range of primary qualitative research efforts, including facilitated focus groups, one-on-one interviews and on-line consultations using social networking tools and websites. Particular care was taken to incorporate and support the participation of key community stakeholders including local Chambers of Commerce and other business associations, representatives of key industry clusters, local institutions involved in R&D and related technology transfer efforts for commercialization purposes (e.g. McMaster Innovation Park), and local economic development advocacy groups such as the Jobs Prosperity Collaborative.

At the same time, the project team also engaged a range of quantitative research efforts. The primary tool in this element of the project was online surveying and polling. Millier Dickinson Blais has conducted this kind of survey as a component of economic development initiatives in dozens of communities across Canada, generating significant response rates and high quality data from thousands of business and community leaders.

The present report represents an interim draft of research results to date, and will help to shape the discussions between the project team partners and the City as the project begins to shift its overall focus from research and information-gathering to strategy and visioning activities. As such, this report does not present final research results; indeed, some aspects of research are ongoing. It does, however, provide an indication of progress within the broader scope of the entire workplan.

1. Quantitative Research

1.1 Online Survey of Hamilton Businesses

The project Team also developed and delivered an online survey of City businesses. The survey was created using a tool called “Survey Monkey”, in which respondents reply to a series of predetermined questions – both multiple choice and narrative in nature – and in which results are anonymously aggregated. To encourage participation in the survey, the project team reached out through City staff to a range of local business networks and organizations (including the City’s various Chambers of Commerce), in order to make their membership aware of the opportunity for input.
Business Characteristics

The following graph illustrates the business backgrounds of each of the respondents, with nearly half (47.7%) indicating they were business owners.

Figure 1 – Business Characteristics

The majority of respondents identified the following as their primary type of business:

- 29.2% Manufacturing
- 10.3% Transportation and Logistics
- 10.3% Other Services (except Public Administration)
- 8.1% Professional, Scientific and Technical Services; and
- 7.0% Arts and Culture

A number (122 or 65.9%) of respondents cited that their businesses have been operating in Hamilton for more than 10 years. While nearly 20.7% (38 respondents) identified their companies as employing more than 100 full time workers. However, a greater percentage of businesses stated that their companies as currently employ less than 20 employees (46.7%), suggesting a strong entrepreneurial drive.

Location Characteristics

Over half of all respondents (55.4%) cited their business was only located in Hamilton, 21.5% have more than one location with headquarters in Hamilton and 23.1% have more than one location with headquarters not in Hamilton.

Figure 2 – Business Location
Locational factors are essential to both the attraction and retention of business within the city limits of Hamilton. When asked, “What is the primary reason your business located/selected Hamilton?”

- Majority of the respondents cited that they lived in Hamilton
- Others cited its central location and access to transportation routes and the US market
- Some responses included the fact their business has been there for nearly 100 years and continues to meet the needs of the respondents

The top four primary reasons for businesses to locate/select Hamilton as the location for their business included the following:

- The owners and/or founder are or were area residents
- Proximity to steel industry
- Geographic location in terms of proximity to other cities
- Transportation and infrastructure
- McMaster University

According to the results presented in the figure below, the greatest advantage to guaranteeing growth in the City of Hamilton is to ensure accessibility to transportation infrastructure is strong. Nearly 29.8% or 39 respondents identified this option as a top advantage to facilitate growth.
### Figure 3 – Major Advantages to Ensuring Growth

<table>
<thead>
<tr>
<th>Answer Options</th>
<th>Rating Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to transportation infrastructure</td>
<td>7.92</td>
</tr>
<tr>
<td>Availability and quality of high-speed telecommunications</td>
<td>7.78</td>
</tr>
<tr>
<td>Quality of life amenities</td>
<td>7.68</td>
</tr>
<tr>
<td>Availability of a skilled and semi-skilled workforce</td>
<td>7.63</td>
</tr>
<tr>
<td>Access customers</td>
<td>7.44</td>
</tr>
<tr>
<td>Access to suppliers</td>
<td>7.09</td>
</tr>
<tr>
<td>Availability of land or buildings</td>
<td>6.76</td>
</tr>
<tr>
<td>Affordable energy costs</td>
<td>6.64</td>
</tr>
<tr>
<td>Low cost facilities in which to start-up businesses</td>
<td>6.63</td>
</tr>
<tr>
<td>Access to business services</td>
<td>6.48</td>
</tr>
<tr>
<td>Spousal employment opportunities</td>
<td>6.42</td>
</tr>
<tr>
<td>Cost of housing</td>
<td>6.37</td>
</tr>
<tr>
<td>Access to financing</td>
<td>6.34</td>
</tr>
<tr>
<td>Support activities for small businesses</td>
<td>6.21</td>
</tr>
<tr>
<td>Affordable and efficient waste management</td>
<td>6.10</td>
</tr>
<tr>
<td>Availability of economic development services</td>
<td>5.99</td>
</tr>
<tr>
<td>Availability of workforce training programs</td>
<td>5.92</td>
</tr>
<tr>
<td>Efficient development approvals environment (for expansion approvals, new development, etc.)</td>
<td>5.73</td>
</tr>
<tr>
<td>Promotion of community to prospective investors</td>
<td>5.64</td>
</tr>
<tr>
<td>Municipal tax rates</td>
<td>5.21</td>
</tr>
<tr>
<td>Municipal development charges</td>
<td>5.08</td>
</tr>
</tbody>
</table>

Respondents were also asked to provide any additional factors of business growth criteria. While there were no overarching themes that presented themselves within this category, there were a few comments worth identifying. These included: access to McMaster/universities for Research and Development, the need for deeper support/appreciation of the arts and the lack of strong environmental policy.

In order to encourage other business owners to relocate to Hamilton, respondents suggested the following:

- Affordable housing,
- Quality of life and great people
- Location and amenities
- Large skilled workforce
- Transportation, access to a number of highways
- However, a number of references cited that the local government does make it easy for businesses to grow

Each respondent was asked to identify three key strengths the City of Hamilton should capitalize on throughout its marketing and promotional efforts. The most common assets identified included:

- Transportation links/Good road infrastructure
• Proximity to GTA/US
• Availability of skilled/semi-skilled labour

Marketing Efforts

The most effective type of marketing efforts in which respondents would like to see Hamilton Economic Development & Real Estate Division involved with that would support your business growth are illustrated in the graph below.¹

The dominant choice among respondents was the use of sector specific promotional material (54.8%) to promote business growth within the City. This was followed by event hosting (47.6%) and an electronic economic development newsletter (37.3%).

Figure 4 – Marketing Efforts

A number of social networking tools have been used in the past 12 months, demonstrating that Hamilton business respondents are linked to online networking services.

¹ Multiple responses were provided, resulting in a higher number of answers than respondents
When asked to review the image of Hamilton, 61.6% felt the image was weak and 35.5% felt it was average. A smaller amount of business respondents (2.9%) indicated Hamilton’s image was strong. However, over half of the respondents (58.5%) agreed that Hamilton is a community that is welcoming to newcomers.

**Tools to Improve**

At times, it is often most effective to review the experiences and practices of communities outside of your own community. Respondents were asked to list three communities they felt Hamilton could study to learn the best practice techniques from an industrial town to a modern city. Examples included:

<table>
<thead>
<tr>
<th>City</th>
<th>Number of Responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pittsburgh</td>
<td>30</td>
</tr>
<tr>
<td>Vancouver</td>
<td>21</td>
</tr>
<tr>
<td>Burlington</td>
<td>16</td>
</tr>
<tr>
<td>Mississauga</td>
<td>14</td>
</tr>
<tr>
<td>Halifax</td>
<td>13</td>
</tr>
<tr>
<td>Calgary</td>
<td>11</td>
</tr>
<tr>
<td>New York</td>
<td>11</td>
</tr>
<tr>
<td>Toronto</td>
<td>11</td>
</tr>
<tr>
<td>Montréal</td>
<td>10</td>
</tr>
<tr>
<td>Brantford</td>
<td>9</td>
</tr>
<tr>
<td>Saskatoon</td>
<td>7</td>
</tr>
<tr>
<td>Waterloo</td>
<td>7</td>
</tr>
<tr>
<td>Edmonton</td>
<td>6</td>
</tr>
<tr>
<td>Kitchener</td>
<td>6</td>
</tr>
<tr>
<td>Michigan</td>
<td>6</td>
</tr>
<tr>
<td>Portland</td>
<td>6</td>
</tr>
<tr>
<td>Atlanta</td>
<td>5</td>
</tr>
<tr>
<td>Chicago</td>
<td>5</td>
</tr>
<tr>
<td>Cleveland</td>
<td>5</td>
</tr>
<tr>
<td>Kingston</td>
<td>5</td>
</tr>
<tr>
<td>Ottawa</td>
<td>5</td>
</tr>
</tbody>
</table>
Respondents were asked to specify any tools that have been used such as the internet, to support business growth in the last 12 months (i.e. contact to suppliers, information on relocation, these tools included:

- Internet, email blasts, email, websites, newsletters, brochures, trade publications, sponsorship of local events, chamber of commerce, twitter, trade associations, phone calls, workshops, conventions and job fairs.

Many respondents felt the City of Hamilton should focus business development/attraction efforts over the next 5 years in the following areas:

- Continue to build the Hamilton brand,
- On immigrants with the financial resources to set up small businesses and invest in the City's industries. Improved services and tax advantages, plus the amenities of Hamilton may encourage some relocation out of a more expensive Toronto,
- Invest in the airport and the brownfields, because these areas are already serviced,
- Improve the arts and culture scene, and
- The development of future initiatives ie. new energy projects, technology, education

When were asked to create one sentence that would promote the City of Hamilton to the outside business community, respondents were provided with a range of answers:

- “I would stress our diversity, great location for access to highways, rail service, the harbour and our strong combination of industries.”
- “Not just steel”
- “Hamilton is a hidden jewel that is booming with potential and bargains!”

Additional comments were provided at the end of the survey, which ranged from:

- Asking the consultants & the city to be “Be creative, be dramatic, perhaps even drastic. Spend money to make money - but let's really target the major foreign investment. Build a strong new economy that will enable the city to finance the redevelopment projects we need. In some ways, the downtown redevelopment of Grand Rapids, Michigan may even hold some lessons…”
- Others were more technical:
  - “we have so many brownfield sites in the old core that that should be one area of focus. We need to get our density back up. put people, living or working in those areas. Incent investors to do re-develop old sites.”
  - “Reduce taxes, provide jobs, provide tax incentives to start self-employed businesses”
- Some were positive, “I think Hamilton is on the right track. Conducting this market research alone tells me Hamilton is on the right track. Keep up the good work.”
1.2 City Survey of Downtown Marketing

A city-wide survey was conducted to inform a comprehensive marketing review by the City of Hamilton’s Downtown and Community Renewal Division. A large survey sample of nearly 1,000 respondents participated in the survey and provided their opinion of Hamilton’s downtown renewal efforts. The exercise focussed primarily on the marketing techniques and possible improvements to the downtown core’s atmosphere, leisure experiences and safety levels. The results of this survey help to inform the overall marketing strategy for the city, as this exercise was successful in reaching a large number of diverse respondents across the city.

The chart below illustrates a summary of the respondent’s overall current attitude towards the downtown. While 32.0 percent of respondents currently hold a negative attitude towards the downtown, they were later asked “What is your attitude towards the future of Hamilton’s downtown?” and more favourable responses were provided. Over 360 respondents or 37.9% felt optimistic about the future of the city’s downtown.

*Figure 6 – Attitudes towards Downtown*
When asked if the respondents felt safe in the downtown 41.5% or 393 respondents revealed they “usually” feel safe.

Figure 7 – Safety Downtown

In addition, 41.1% said they were “somewhat” aware of the progress being made downtown in terms of safety (e.g. more police/cameras/lighting).

Respondents were also asked if they were aware of the investment progress being made downtown (e.g. new businesses/housing projects) while responses varied, a small portion (17.0%) said they were very much aware.

Figure 8 – Investment Progress Downtown
A number of respondents were aware of the building redevelopment activity occurring in the downtown area. Approximately, 37.7% of respondents were very much aware of the variety of international retail/dining destinations downtown. The survey also helped to inform the tools that are most effective on how respondents find out what’s happening in the downtown area. An overwhelming number of respondents (70.9%) use the newspaper to find information about activities in the downtown core, while 38.8% listen to the radio.

1.3 Survey of Economic Development Practitioners

A shortened version of the City of Hamilton’s: Comprehensive Marketing Strategy survey was created to solicit the opinions of professionals within the economic development industry on their perceptions of Hamilton’s current marketing techniques. The survey consisted of a list of six questions, which ranged from providing the best example of economic development marketing to describing key themes of an economic development marketing strategy. At the time of closure (August 2009), the survey had twenty responses. Initially, the shortened survey was posted on the MDB sponsored Facebook site, entitled Economic Development 2.0 and blasted through the firm’s monthly bulletin: This is Not a Newsletter and eventually posted to a wider audience through an e-mail blast to the EDAC/EDCO mailing lists.

The first of six questions asked, “If you were responsible for economic development marketing for the City of Hamilton, what three key themes would you focus on?” The following provides a summary of each of themed response:

Theme #1:
- A centre for health and education
- Downtown development/Improve the downtown core through a pedestrian friendly design
- Develop the arts & culture community

Theme #2:
- Downtown renewal & transformation
- Maintain architectural heritage of buildings & provide incentives to build more
- Provide access and leisure opportunities to the waterfront

Theme #3:
- Life style amenities and entertainment such as pedestrian only zone to promote sidewalk cafes, street entertainment, concerts etc.
- Promote an artist community
- Affordability of buildings and lands
The following words were put forward to respondents, “Transformation,” “Resilience” and “Renewal” the respondents were then asked to describe ways in which these ideas be captured in a marketing campaign. Respondents suggested showcasing what is happening in the present and the potential for Hamilton into the future via slides and artist renderings. Additional ideas included promote the advertising of companies across Hamilton that embody each of these traits and market them to other Canadian, American and European companies for investment. As an expansion of the ‘Ambassador Program’, send delegates out to trade shows in the US and Europe to highlight the strengths and opportunities of Hamilton.

Others offered their opinion and remarked that they were not in favour of these words as they imply previous problems, others said these terms should not be used in marketing, but words that are more dynamic: "Go Hamilton" or "hope and change." Respondents also supported the notion of promoting the previously established ambassador programme.

In order to ensure that local residents were also exposed to or involved in this messaging, the respondents had many creative ideas. These ideas included:

- An overwhelming number cited local media and in particular ads in the Hamilton Spectator as effective ways to promote the message and increase positive perceptions of the city;
- Media (in paid ads and in newspaper & TV features) done outside of Hamilton (eg. Globe and Mail, National Post, CBC) were also recommended as valuable ways for the message to be heard and seen as well as encourage Hamiltonians to look at the city from the outside in and be proud
- The concept of focus groups and online material was also highlighted as an effective means to promote the city’s marketing message.

Respondents cited the following marketing tools as the most effective means to distribute Hamilton’s marketing message, these included:

- CD-ROMS
- Brochures
- Promotional Items & Giveaways
- Social Networking Sites
- Online Advertising
At times, it is often most effective to review the experiences and practices of communities outside of your own community. Respondents were asked to list three communities they felt Hamilton could study to learn the best practice techniques ranging from examples of industrial towns to modern cities. Examples included:

**Canada**
- Barrie
- Burlington
- Calgary
- Fredericton
- Guelph
- Leduc-Nisku (Alberta)
- Mississauga
- Montreal
- Vancouver

**United States**
- Philadelphia
- Portland, Oregon

**International**
- Amsterdam, Netherlands
- Manchester, England
- Melbourne, Australia
- Sheffield, England

The survey wrapped up with a question that asked respondents to pick the best example of economic development marketing they were aware of. Responses ranged from Pittsburgh to Manchester to the state of Michigan. The theme in all responses was the transformation of a once thriving industrial area, turned derelict by an over abundance of brownfield landscapes, to reinvention and movement into up and coming unique and modern cities.
2. Qualitative Research

2.1 Stakeholder Interviews

In order to understand the perspective of local businesses and community leaders on the City of Hamilton’s economic development marketing opportunities and constraints, the project team conducted a series of one-on-one interviews with key stakeholders. For the most part, these stakeholders were prominent business and community leaders, identified by the Project Team in cooperation with City staff for their expert knowledge of the local economy and local community. Some of the interviews were conducted in person, though most were conducted by telephone. In all, 23 stakeholders have been consulted through this process. All answers have been aggregated to preserve individual anonymity.

The ideas and thoughts offered by these stakeholders helped inform our decision on how to effectively create an Economic Development Marketing Strategy that is tailored to the needs of the City of Hamilton. Throughout the interview process we asked probing questions and asked for specific examples to generate comprehensive answers about the quality of economic development services and lifestyle in Hamilton. Stakeholders were assured that their responses would be kept confidential. The following identifies some of the specific comments and suggestions made by the stakeholders:

Why did you choose to live and/or work in Hamilton?

The two primary reasons why people lived and/or worked in Hamilton were they were born in Hamilton, and they came to Hamilton for job opportunities. For those who relocated from outside of Hamilton, the initial impression was not positive, but once they became integrated into the life of the City, it quickly became home. Other reasons included:

- Opportunities at McMaster Innovation Park
- Opportunities at McMaster University
- Good education and health care facilities
- Natural heritage and thriving arts community
- Vibrant business community
- Affordable lifestyle and high quality of life
- Uncongested and easy to get around – unlike Toronto
- Multicultural
- Company invested in Hamilton International Airport
- Hamilton has a world of opportunities and a great lifestyle
When it comes to crafting an economic development marketing strategy for Hamilton, what do you think are the key challenges or obstacles to overcome?

By far, stakeholders felt that the biggest obstacle that Hamilton has to overcome is its lingering image of a ‘lunch bucket town’ which originated from its history with the steel industry. It was felt that the City has an image of not being safe and clean and the current municipal structure mirrors the past. One respondent cited that ‘the steel image was a blessing in the past, but a curse in the future’. Other obstacles were cited as follows:

- Access to skilled workers is limited
- High taxes
- City still has a focus on manufacturing – need to diversify
- Lack of serviced ‘shovel ready’ land for industrial and commercial use
- Lack of opportunities for expansion
- City does not promote itself in the global marketplace—McMaster University promotes the city globally, but needs support from the City
- The City needs a better rapid transportation system
- City needs to reduce red tape and restrictive development and building codes – need a single point of contact; reputation is ‘red tape not red carpet’
- Downtown area gives a very bad impression to new development investors
- Heavy reliance on government i.e. hospital, university
- Develop a strategy and define targets
- City residents and leaders have a lack of confidence in the city

What resources currently exist to support marketing efforts that aren’t being used to their fullest extent today?

It was generally agreed that things have improved somewhat over the past year but there is much to be done to improve the image of Hamilton and promote it as a vibrant community. The most repeated response was to visually show what Hamilton has to offer in the way of its location, affordable housing, quality of life, green belt, waterfront, education, arts and culture, tourism etc., through a targeted media campaign. It was felt that the Ambassador Program is a positive step but may need expanding; networking was considered extremely important to ‘spread the word’ about Hamilton. Concern was also expressed that municipal officials need to be more committed to promoting the City and changing the City’s image with a focused economic development strategy.

Opportunities are being missed to promote Hamilton ‘globally’ and efforts should be made to make use of its international links. The Chamber of Commerce is not being used effectively and receives 1100 hits each day on its website and had a strong network of partner organizations. It was noted that McMaster University could be better utilized for wider spread marketing. Tourism was felt to be under promoted in Hamilton but has very limited resources. It was felt that the local media are not
supportive of positive marketing initiatives and have a tendency to publish negative articles rather than emphasise the positive happenings. Other responses included:

- Encourage residents to be ‘champions’
- Need a business development advisory board
- Partner with the university to use their resources to market jointly
- Promote positive ‘success stories’ – ‘winners’ are not promoted
- Need a national media campaign/make use of global marketing groups
- Enhance website and use internet marketing techniques
- Existing agricultural assets are not being promoted effectively
- Promote emerging industries of the City to show diversity i.e. biotechnology, chemical engineering, environmental
- Need to highlight Hamilton’s location – its proximity to Toronto, London and Buffalo, Lake Erie

**How do you think people outside of Hamilton perceive the community?**

While there is anecdotal evidence that perceptions are changing for the better, it was felt that people who live and work outside of Hamilton have a negative perception of Hamilton fuelled by negative attention still being focused on the City’s manufacturing sector. It is felt that the City is in decline and has a blue collar working class image. This image is reinforced by views from the Skyways Bridge. Access to the city is through a very unattractive corridor which gives a negative impression as well as an unappealing downtown core. It was also strongly felt that the City is not well respected politically. Other comments included:

- Doesn’t appeal to a prestigious business/company
- Economically challenged community
- Bedroom community – affordable housing and good value for money
- Non-green community – poor air/water quality
- Not considered as prominent as other larger urban centres
- Hamilton has a perception of being a ‘union’ town
- Emerging awareness of innovative and creative industries in Hamilton

**How do you think Hamilton residents generally contribute to a shaping of the City’s marketing image and reputation?**

In general it was felt that residents of Hamilton do not have positive self-image as a City and do not take pride in it. It was felt that there is a need to change the mindset which currently seems to be happening slowly. Residents are generally not good ambassadors and are not proud to say that they are from Hamilton. Others felt:

- Those that live in Hamilton feel it is a hidden jewel
- Some people in Hamilton want it to stay as it is and don’t want its assets promoted such as parks, good quality of life etc., in order to keep it from become a larger city without personality
Many people in Hamilton that are very proud of the City – volunteerism is very high
There are two distinct areas of Hamilton – the downtown area (urban thinkers) and the amalgamated rural areas (suburban mindset)
Hamilton residents need time to build up their confidence in the City and what it has to offer

If you were developing a new marketing strategy for the City, what would your key messages be?

Stakeholders felt that Hamilton’s location and quality of life are the primary selling points of the City including education, health systems and a diversified economic base for employment opportunities. It was felt that Hamilton is a transportation hub with its airport, rail access, waterway, major highways, close to major centres including Toronto and is close to the US market. It was felt that taxes were high and this issue needs to be addressed. Other specific comments included:

- Ready access to skilled labour
- Welcoming community with a balanced lifestyle – great place to raise children
- Diverse ethnic community
- Natural settings and amenities
- Vibrant arts and culture scene
- Access to world class educational institutions
- Open for businesses – it is easy to do business in Hamilton
- City has a high number of entrepreneurs – 75% of people in Hamilton work for companies of less than 20 employees
- Affordable place to live and operate a business
- Promote high tech and innovative industries – create business profiles
- Green city with a balanced lifestyle
- Promote the creative economy in Hamilton
- Don’t address the issue of past images – move forward to a new tomorrow
- Economic development is about breaking the cycle of poverty – not just about attracting new businesses
- Good things are happening – we need to maintain the momentum

Thinking of the key messages that you’ve just identified, how would you relate them to economic development opportunities specifically?

Many stakeholders felt that it is important to market globally for international opportunities who want access to the North American market and to capitalize on the Waterloo/Toronto/US border triangle. It was felt important to retain existing businesses and to encourage the return of those businesses that have left Hamilton for other centres in the past by promoting the City’s quality of life. Redevelopment of ‘brownfields’ would provide a source of land and building sites, while cleaning up unattractive areas that discourage investment. A suggestion was made to encourage
entrepreneurship through the school system. It was also suggested that attracting **people** was more important than attracting companies.

Sectors identified for target marketing were:

- Biosciences and health sciences
- Advanced manufacturing
- Small business
- High tech companies
- Medical community and private sector R&D
- Health science and health care
- Education
- Financial institutions
- Green Industries
- Agriculture

**What vehicles or tools - in other words, how - should we communicate these economic development marketing messages to business leaders and investors outside of the City?**

Respondents felt that a strong person-to-person targeted approach utilizing all mediums would be the best way to promote Hamilton utilizing an integrated in/outside city campaign. Involvement in trade events and conferences will help to spread the word about the City. It was felt that the Ambassador Program is a positive tool and could be expanded for more reach by utilizing success stories and promoting winners. Other comments included:

- Need more serviced land to promote
- Need a new brand/image
- Need a Welcome Centre off the highway to provide information
- Promote through professional business organizations
- Provide financial incentives – tax base, mill rate
- Engage and involve local media to deliver positive messages and success stories
- Use a web-based approach with sector linkages for more global reach, including efforts using social media
- Promote the City’s interest in the creative economy
- Involve the university and utilize its international contacts
What vehicles or tools should we use to communicate these economic development marketing messages to business leaders and investors inside the City?

The direct, face to face, personal contact method was favoured for communicating economic development marketing message inside the City of Hamilton. The Ambassador Program could also be a great asset in an internal marketing campaign as are events that encourage peer communication and networking. It was further felt that the Chamber of Commerce and business industry associations can be ambassadors for the City.

Stakeholders felt the City must take the lead in staying engaged with the business community and informing them of the strategy goals through information dissemination as well as business visitations. Other suggestions included:

- Include stakeholders in international investing trips
- Hold more events like the Hamilton Economic Summit
- Have awards and recognition programs
- Work with local media – good news stories with a personal touch
- Promote local events to create pride and involvement
- Include all areas of the City and the region in marketing efforts
- Keep residents of the City informed
- Economic Development Department must be proactive – they are making great strides in engaging businesses and working with them to go forward

What vehicles or tools should we use to communicate these economic development marketing messages to residents of the City?

It was felt that the City residents need to adopt a positive attitude and buy into a new image campaign. A suggestion was made to get new people involved who may have a more positive attitude about the City – those who are working for progressive companies with higher paying jobs and hold a higher level of satisfaction for the City. Hold more festivals and events to create civic pride. Information has to get out to the residents through various means suggested below:

- Open house events at City Hall
- Diversification of the economy will lead to renewed hope and confidence in the economy
- Local media – Spectator; full page information ads have proven very effective
- Electronic information available through the website and social media sites such as Facebook and Twitter
- Local media should carry good news stories as part of a positive image campaign – i.e. ongoing work at McMaster University
- Use young people are they key to attracting new business and people to the City
What communities do you see that are doing a good job in their economic development marketing?

Most respondents felt that Mississauga is doing a good job in their economic development efforts, followed by Halifax, Ottawa, Brantford, Toronto, London, Kitchener-Waterloo and Niagara on the Lake. American cities of note were Buffalo, Pittsburgh, Portland, Baltimore, Cleveland, and Rochester. International cities of note were Sheffield, Glasgow and Manchester in the United Kingdom, Barcelona in Spain (city of entrepreneurs) and Dortmund in Germany. It was also noted that Saskatchewan has changed its image of late through positive marketing.

Other cities noted were:

- Brampton
- Burlington
- Canmore
- Montreal
- Oakville
- Oshawa
- Vaughan
- Winnipeg

What communities do you think Hamilton should study or emulate as it considers new economic development marketing strategies?

It was felt that a focus needs to be adopted before selecting a City to emulate. Most stakeholders cited Halifax, Mississauga, Burlington, Brantford and Kitchener-Waterloo. Other Canadian cities included Toronto and Montreal. Pittsburgh was recommended as a city to emulate as was European cities in East Germany and the UK. It was suggested that Glasgow, Scotland would be a good model as it was a former industrial centre that had a bad image to overcome.

If you had to sum up Hamilton’s ideal economic development marketing focus in one word or one idea, what would it be?

Stakeholder felt that the focus of economic development marketing efforts should be lively, and directed toward positive and progressive messages that are focused and targeted. Some of the suggested directions and concepts for marketing efforts included:

- City of innovation
- Creative City
- Sustainability
- Friendly and affordable
- Promising
- Quality within reach
• Action, renewal and moving forward
• Moving from horsepower to brainpower
• Communicate!
• Focus on business to relocate from big cities
• Transformational, energetic, confident, motivating, balanced
• Focus on the new economy – we are a secret story

3. Economic Development Strategic Planning Workshops

3.1 Advanced Manufacturing Sector

Representatives of the Advanced Manufacturing Sector met on June 1, 2009 to discuss opportunities in their sector. The first key idea to come out of the advanced manufacturing focus group was that the existing businesses need to get more involved in furthering the idea that Hamilton is a good destination for advanced manufacturing, and business in general. As part of engaging the community, one participant felt that it was necessary for businesses to enter the schools and get the youth excited about manufacturing, and working in Hamilton. This was seen as a larger initiative tied to retaining the young workforce and changing the perception of both advanced manufacturing and the city of Hamilton. Manufacturers want people to know that technology has come a long way, and manufacturing occupations should be held in a higher regard.

Other key ideas were tied to the local media, and the perceptions that it creates. First, some businesses were concerned that the local media was largely inaccessible, and was unwilling to recognize some of the good news stories coming out of Hamilton businesses. Some participants felt that the city could take a more active role in engaging the media on the business’ behalf. Most notably though, the manufacturers felt the media was assisting in giving them a negative image, which was not helpful for either their business or the city at large.

When identifying strengths, the manufacturers were focused on logistics, workforce, and affordability. Perhaps the most notable idea was that Hamilton was a “diamond in the rough” in terms of easily being able to access and ship across borders. Some of the other key strengths of the city included:

• Location, transportation links, and infrastructure
• Highly skilled-educated workforce
• A core of large manufacturers that span a wide range of sectors
• Comparative affordability (business and housing costs)

When looking at the other clusters in the city, the manufacturers felt that there was a lack of a unified voice. The clusters were not working together towards a common goal, but instead competing, or trying to fragment the city into its former constituent municipalities. Instead they suggested a unified message about Hamilton be developed, that all clusters can market to Canada and the globe. Regarding
manufacturing, the participants thought that there should be a clearer connection between manufacturing and innovation.

3.2 **Agriculture, Agri-Food and Agri-Based Products Sector**

The agribusiness sector was the focus of a small group consultation held with industry leaders on June 1, 2009. One of the first ideas to come out of the agri-business focus group was concerning the “buy local” initiatives that are gaining momentum around Canada. The participants felt that, although there is a perception that these initiatives are gaining momentum, the prices are still acting as a barrier. The idea was that with the correct marketing of the benefits of local food and the assets within Hamilton, this might gain more traction. The problem was that small agri-businesses often lacked the money necessary to make this happen.

Regarding the customers of agri-businesses (especially agritourism) the participants felt that customers were starting to become more informed and sophisticated. They felt that the majority of research people were doing about agri-business opportunities activities was increasingly available through the web, and information sharing/social networking sites. They felt that a strength of this was the diversity of agricultural activity in Hamilton, in that, there were opportunities for a large target population. They also felt that the large local market was a resource not being tapped.

Concerning Hamilton’s identity, the participants felt that agriculture had a very big part to play. They felt that the current image as a steel city needed to change, and that farming, agri-business, and agritourism could start to give the city a more “green” identity.

When looking at the strengths of the cluster in Hamilton, participants identified:

- Quality products grown locally
- Market access to a huge and diverse demographic
- Local access to air, land transport, and water transport
- The local media was still willing to carry stories about local agri-businesses

On the opportunity side, the participants identified where they thought the sector had the potential to go. First, the participants felt that there was going to be an increase in agritourism in the next few years, to offset production losses. Next, the participants felt that they needed a better presence in the new online social networking environment, to reach a youthful target population. And lastly, the participants felt that there was a good opportunity to market the area to the day-trip population. There were enough local opportunities that tourists could find several activities to fill a full day in Hamilton.
3.3 Life Sciences Sector

Approximately two dozen participants in the City’s Bio Sciences sector gathered at Liuna Station on June 22 to discuss opportunities and challenges in their area of focus. While the primary goal of their discussion was to articulate strategies for the City to assist in the growth of the sector, many marketing-oriented discussions occurred within that broader context. Key themes in these discussions focused on concepts like innovation, newness, science and research excellence, discovery and achievement. Given these perspectives and concepts, the group felt relatively unconstrained by past labels and past industrial identities. Indeed, within this sector at the global level, the group suggested that Hamilton had a positive and vibrant reputation quite distinct from the identities described by other focus groups in the strategic planning process.

Among the marketing-oriented or image-related concepts discussed were the following:

- The changing nature of the local economy means that the sector’s momentum is increasing, and that there are new opportunities for more momentum
- We’re at a stage now where we can be a little bit bolder... we need to recognize that we’re in a position of strength and be bold.
- Everything is within 45 minutes of Hamilton
- The cluster of knowledge and people in this sector is the product and the marketing advantage
- We have a strong and vibrant community here that wants to see change
- We shouldn’t underestimate the degree to which “McMaster University” is a global brand
- We have a great momentum of innovation – we’re close to the tipping point – and this is producing a positive spirit. This is partly a change in the community, and partly a new way of doing things. Perhaps, out of desperation, an entrepreneurial spirit is emerging.
- We don’t advertise ourselves well
- We don’t have landmarks and symbols

Participants also identified some key targets for future marketing and economic development efforts through their comments, including:

- Knowledge workers in this sector are looking for Quality of Life, and the City has this
- Retention of great scientists is a key issue
- There is a growing recognition that Hamilton is a really attractive alternative to Toronto for activity in this sector. Toronto is hitting its capacity limits in terms of traffic, affordability, ease of business and quality of life
- We need to educate the residents of the City about the presence, role and size of the Bio Life Sciences sector
International conferences in this sector represent a good marketing opportunity

Sector participants also identified who some of their competitors in the broader marketplace were:

- Primarily other countries, though we shouldn’t dismiss Toronto and the province of Quebec

### 3.4 Clean Tech Sector

Approximately 20 “Green Tech” or “Clean Tech” sector representatives met at the Crowne Plaza Hotel in downtown Hamilton on May 25 to discuss economic development opportunities within their sector. Discussion centred on the notion of Hamilton as a “knowledge transformation/renewal centre” with environmental practices and technologies being the obvious showcase for this transformation. Participants also felt that success in this sector could underpin or support success in a number of other sectors within the City’s economy.

Among the marketing-oriented ideas and suggestions generated through the group’s discussion were the following notions:

- Credibility is a key phrase for this sector, and the Philips Environmental experience of the City on the 1990s has made this even more challenging
- Hamilton is not a “sexy” location to launch a business from
- Hamilton should be portrayed as a problem-solver for the world
- Hamilton is a diamond in the rough with great logistical access
- We are not good at showcasing our technologies
- We have a reputation as “Steeltown” or “The Hammer” to overcome
- We’ve been doing things for a long time in this sector like cogeneration and district heating that everyone wants to do now, but nobody knows that we’re doing it
- We have an image as a dirty city – but we could convert our brownfields into an asset, and use the dirty reputation as an anchor – “Brown to Green in 5 Years”
- Hamilton is the best place in Canada to raise a child
- Change must be visible, and Hamilton must demonstrate its leadership in this sector visibly
- Hamilton should become the Portland, Oregon of the central rust belt
- Potential slogan – “We practice what we preach.”
Some reference was also made to potential target markets for economic development in this sector. These included:

- It’s unclear whether this sector will grow by attracting new businesses or by growing existing businesses
- Hamilton should be the place where innovators can come to do cool stuff

Finally, the group also discussed potential competitors in the sector, including the following discussion concepts:

- We need to figure out who our competitors are and what they are doing, how we measure up and then figure out how we can be better than them
- Investment is causing this sector to move and grow very rapidly in the United States
- Denmark is a model in the green energy sector

### 3.5 Creative Industries

Representatives of the arts and cultural communities came together on May 26, 2009 to discuss economic development opportunities related to their sector. The most prevalent idea to come from the arts and culture focus group was that the residents of Hamilton do not have a full understanding of the arts and culture opportunities in Hamilton. This was based on either being indifferent to, or afraid of going to the downtown areas (where the arts are concentrated), or based on a general perception that the quality of the arts and cultural attractions in Hamilton were not as good as in Toronto. Participants felt that the external image of Hamilton as a “Steel Town” was acting as a detriment to attracting people from outside the community.

Tied to this as well, was the idea that Hamilton’s greatest rival, is the city and it’s residents themselves. The participants identified that there was a significant fragmentation of the city’s residents (suburbs vs. the former city of Hamilton) that was being cultivated by a downtown that is seen as largely unliveable.

When looking at the strengths of the arts and culture sector, participants echoed some of the other clusters (diversity of the sector, longevity of the artists, cost advantages, location, post-secondary institutions), but also identified a few strengths more specific to the sector:

- Existing large institutions, including the Art Gallery of Hamilton, and the Hamilton Entertainment and Cultural Facilities Organization (Hamilton Place, Copps Coliseum)
- A network of brownfields and derelict areas to serve as very distinct areas for filming
• The diversity of the sector was starting to attract artists from outside the community to live here

In terms of weaknesses, the participants felt that the most notable one was the complete lack of marketing outside the city, of the arts and cultural sector. Others felt that the marketing that was done was too heavily weighted towards film and television. Still others felt that the loss of larger industries in the city was affecting the levels of funding that artists were receiving; there was not as much money to go around.

Participants saw opportunities around the large and generally untapped audience in Hamilton. They felt that it was waiting to be engaged by something. As well, the participants felt that the large amount of real-estate available at a comparatively cheaper rate was a significant advantage for cultivation of the arts, but also felt that city policies were generally too restrictive about what could be done with the space. Overall, participants felt that the sector was well below capacity, and there was room for expansion.

As a final activity, the participants were taken through a brief visioning exercise, regarding how to market the arts in Hamilton. Several ideas emerged:

• “Hamilton has heART”
• “Culture is the oxygen of the city”
• “Collection of cities, Collection of Dreams”
• “Hamilton is a beautiful city, that deserves beautiful art”
• “Hamilton should be a city that artists are proud to live in”
• “Hamilton as an art-obsessed community”

3.6 Goods Movement Sector

Representatives of the Goods Movement Sector met at Liuna Station on June 8 to discuss opportunities within their area of activity. In general, participants voice the perspective that Hamilton had significant advantages in the area of transportation, cargo and logistics. They also felt that this strength underlay and enabled many of the City’s other economic sectors to flourish. Overall, the felt that Hamilton had enormous strengths in the goods movement sector, but that other communities across Canada – and in particular across southern Ontario – had been more adept at marketing lesser strength, and were luring investment away from Hamilton.

Among the marketing-oriented suggestions and discussion topics were the following ideas:

• The appearance of the City from the Skyway Bridge represents a marketing and image challenge
• “Hamilton: Not What You’d Expect” was suggested as a marketing theme
• Hamilton doesn’t project a business-friendly demeanour at the political level
• We’ve had lots of internal fighting in the community and we need to break down the silos
• Lower costs are a key attractor – lower cost of living for employees, lower operating costs, lower land costs
• Elsewhere, the environment and the economy are cats as competitors, but Hamilton is the place where they can come together
• Hamilton should position itself as a global connector of goods and services with a diversified and multilingual workforce
• Hamilton should promote itself as “Canada’s Logistics City”
• We shouldn’t promote ourselves as “the greatest place to raise a child” – this is the wrong message at this time

The group did not explicitly identify any potential marketing targets during the course of their conversations, but did feel that Chicago was a potential competitor in this space.

3.7  Focus Group Discussion with Hamilton BIAs

Members of the project team met with Hamilton Association of Business Improvement Areas (HABIA) on July 14 for a one-hour focus group discussion. Focus Group Participants included:

• Judy Boswell, Dundas Business Improvement Area
• Lisa Browett, Downtown & Community Renewal Division with the City of Hamilton
• Patti Despinic, Ottawa Street Business Improvement Area
• Kathy Drewitt, Downtown Hamilton Business Improvement Area
• Tony Greco, Locke Street Business Improvement Area
• Lorne Lozinski, Concession Street Business Improvement Area
• Ron Marini, Director of Downtown & Community Renewal with the City of Hamilton
• Linda Naccarato, Waterdown Business Improvement Area
• Jim Panoff, Ancaster Business Improvement Area
• Mary Pocius, International Village Business Improvement Area
• Shelly Wonch, Barton Village Business Improvement Area
• Dave Zimmer, Downtown & Community Renewal with the City of Hamilton

When asked about key themes and ideas that should be explored through marketing activities, the H.A.B.I.A. participants identified a number of ideas:

• Longevity and tradition in the Commercial Areas, as well as stability of the commercial tenants in some areas
• Traditional, old fashioned service from the small businesses in the BIAs
• Natural heritage features that separate the city, including the escarpment and the number of waterfalls in Hamilton
Opportunity was a key word used by several participants, in that the City had many opportunities that it might not be taking advantage of. Strong diversity in the city was mentioned, as a look back at the fact that the city was built by hardworking, dedicated immigrants.

The prevailing theme about past marketing efforts was that they were currently out of date. Several BIAs mentioned that they were looking to redefine themselves away from Hamilton’s traditional identity.

For example:

- The industrial downtown is moving away from traditional heavy industry identity towards small businesses and arts/culture
- The image must adapt, because only a shadow of what was once here is still here. The major employers are now Knowledge-based industries

Overall, participants felt that the best way to reach the widest audience was through social media. There was a feeling that the best marketing tools are the social networking sites that exist now. However, some participants felt that traditional media (radio, television) was also a possible vehicle.

The H.A.B.I.A. also identified several assets that should be focused on when looking at Hamilton as a business location. These included:

- Affordability vs. Toronto and other municipalities in the greater Toronto Area
- The central location of the city provides great transportation logistics, as well as great access to markets
- One participant felt that Hamilton was a complete community

As a final question, the members of the H.A.B.I.A. were asked about the key idea that should be part of marketing Hamilton. There were two ideas presented here. Hamilton should first work to change the identity of being obstructive to small business, and try to project business friendliness. As well, respondents felt that a necessary component of the marketing should be to give Hamiltonians a sense of pride in their city.

3.8 **Focus Group Discussion with JPC Image Committee**

The Jobs Prosperity Collaborative (JPC) is a membership-based group “committed to promoting Hamilton’s prosperity through job creation and retention.” Members come from all areas of the City’s life, and have identified seven priority areas for collaborative work, one of which is Hamilton’s image. To this end, they have formed an “Image Committee” which meets regularly to discuss imaging and marketing-related issues as they relate to economic development and job creation or retention opportunities.
On July 16, members of the project team met with the JPC Image Committee for a two-hour focus group discussion looking at economic development marketing in the City.

JPC participants included:

- David Adames, Executive Director of Tourism Hamilton
- Philip Christoff, Manager of Patient Relations and Risk Management with Hamilton Health Sciences
- Grace Diffey, Hamilton Community Foundation
- John Dolbec, CEO of the Hamilton Chamber of Commerce
- Carolyn Milne, President and CEO of the Hamilton Community Foundation
- Sue McMaster, community volunteer
- Steve Thurlow, Principal of Thurlow Consulting Ltd.

When asked about ideas or key phrases that should be central to the overall marketing efforts in Hamilton, the most common theme was one of change. Participants highlighted the theme as resiliency, but went one step further, classifying Hamilton as an area that is not fighting to stay afloat (based on the negative connotation of the word), but an area that is instead always moving forwards. Two ideas corresponded to this, in that Hamilton’s image is changing from a single “steel town” identity, to a more multi-faceted one. One participant put it simply, that Hamilton is “happening”, and on many different fronts at that.

The other idea was centred on innovation. Based on numerous changes in the development of social capital, one participant classified the area as a laboratory of social innovation; while another said a key to the strategy would be leveraging the innovative capacity of the population. Simply put, there was a consensus that Hamilton was at a “tipping point”, in that the number of activities going on were about to lead to a massive social and economic change in the city. A catalyst to this was seen to be the scale of the city, in that it is an appropriate size to allow effective and efficient collaboration and networking that actually gets things done. One participant put forward the idea that “you can make a difference in Hamilton.”

The group has currently not reached a consensus on the form or feel that future marketing efforts should take, but was able to offer some insight nonetheless. Overall, participants had a sense that Hamilton was too modest. The city was not doing a good enough job of celebrating the successes, where other cities would be promoting themselves and celebrating the same successes. The group felt that this would also go a long way in giving the residents of Hamilton something to be proud of, if they actually knew the amount of success the city is having.
In terms of assets to build on, the group identified the following ideas and concepts:

- Location, transportation logistics, market access
- The completeness of the community, with an advantage in work-life, urban-rural opportunities
- Educational institutions
- The Arts and cultural community
- Environmental sustainability (based on transportation and logistics)

Overall, the group felt that all of the necessary assets were there, but there was a lack of strategic direction on how to effectively disseminate a co-ordinated message.

The group also identified several target markets, as well as limitations and strategies around engaging the correct people. Targets for marketing efforts included:

- Student retention
- The entrepreneurial community, especially young entrepreneurs
- Small businesses (which now account for a majority of employment in Hamilton’s private sector)
- The general knowledge-based workforce

An integral part of this target marketing seemed to be relationship building. The group saw a significant asset in Hamilton to be the number of academics, professionals (doctors, scientists), and post-secondary alumni, including Canadian/Hamilton expatriates that could be informal ambassadors for the city. The group thought that building relationships with this target market, and engaging them with a unified voice could begin to get them excited, and on the same page, about Hamilton as a business location, and a place to live.

As well, the group saw an opportunity to engage decision makers and opinion shapers in Toronto. To some extent, the external perception of Hamilton is being developed externally, and there was a notion that perception makers in Toronto should be engaged. Examples included the editorial boards of Toronto’s newspapers, and the Toronto Board of Trade.

When asked about what will drive investment in the community, opinions differed. Some participants felt that young entrepreneurs that had the potential to buy into and invest in the community would be an important part. Others felt that investment would be driven by scientific development, and the development of intellectual property. Related to this, a recent success identified was the movement of the CANMET labs to Hamilton. Lastly, some felt that agriculture would play an integral part of investment in the community, both from the growing “buy local” movement, as well as assisting in redeveloping Hamilton’s image.
When looking at competitors, the group identified several specific jurisdictions, as well as described potential general competitors. On the specific side, the most obvious competitor was Toronto. The group felt the challenge was to use the advantage of having Toronto close (spill-over), but come out from under its shadow. On a smaller scale, the group felt Kitchener-Waterloo was a competitor, as they can offer the quality of life advantages of Hamilton to some extent, as well as a diverse business community. On the general side, one participant identified that Hamilton’s competition is any mid-sized city looking to reinvent itself in a knowledge-based economy, on a global scale.

Jurisdictions to emulate offered both Canadian and international examples. In Canada, the group felt K/W and Calgary were good examples. Calgary was mentioned as it is in a similar position as Hamilton: a large city in close proximity to the provincial capital. On the international side, the group identified Pittsburgh, Barcelona, Manchester, and Glasgow. The latter two examples from the U.K. present examples of historical manufacturing centres that are also not capital cities, and are leveraging their strengths to form new knowledge-based economies.

When asked about final key marketing messages, the group identified:

• Social innovation
• Transitioning out from under the negative image
• Identifying real, genuine strengths
• Quality of life in Hamilton is a “hidden gem”
• The completeness of the community

4. Review of Model Communities

A review of model communities was conducted to identify projects that exhibit innovative concepts and practical strategies that address the need for reinvention from traditional industrial cities to diversified communities with a variety of new initiatives to invest in infrastructure and economic development.

The following communities were included in this review:

• Pittsburgh, Pennsylvania
• Cleveland, Ohio
• Sheffield, England
• Manchester, England
• Birmingham, England
• Glasgow, Scotland
• Bremen, Germany

Please see Appendix B to review the analysis.
5. Marketing Strategy Purpose

The purpose of Economic Development marketing is to generate business investment and sustained growth of the economic base in the City of Hamilton.

Sustained growth in turn provides jobs, increases residents, increases the tax base and provides the City of Hamilton with economic prosperity.

Economic Growth can be achieved by:

- Increasing the number of business start ups
- Retention and expansion of existing local businesses
- Attraction of external businesses to Hamilton
- Attraction of people that impact innovation and start businesses, ie: “Creative Class”

The purpose of the marketing strategy is to provide a road map that can be implemented in a structured manner by Economic Development staff over a 5 year period so as to follow a focused vision and a clearly structured plan in the ongoing effort to increase the economic base in Hamilton.

The strategy is comprised of:

- Marketing Objectives
- Key Messaging
- General Marketing
- Market Segmentation
- Your Backyard
- Canada and the World
- Tactics
- Key Performance Indicators

To ensure consistency in messaging and image, the marketing and public relations for Economic Development, Downtown and Community Renewal, the Small Business Enterprise Centre and the Film and Television Office must be led by the marketing coordinator, with other participants, when required, following the coordinator’s lead.
6. Marketing Objectives

5 goals are identified at the beginning of this document. These 5 goals are:

- Expanded promotion of a positive and supportive “Open for Business” approach to working with both internal and external businesses
- Increased awareness of investment opportunities within the City
- Enhanced interest in securing business expansion investment from existing local businesses
- Improved techniques and approaches for supporting new investment attraction efforts
- Heightened effectiveness of efforts to communicate Hamilton’s high quality of life and high quality of business environment.

When analysed and taken as a whole, the research conducted to date points to a clarified and simplified set of two primary objectives to attain the 5 goals previously identified. We will focus on achieving these two objectives in the development of the marketing tactics and implementation plan.

These two objectives are:

6.1 Promote Opportunity

This objective will work to attain goals A, B and C. Repeatedly during the research process it became apparent that Hamilton is simply not considered to be a place in which opportunity for business, for expansion, for entrepreneurs and for non-manufacturing sectors exists.

The primary objective, therefore, must be to promote opportunity.

The tactics put in place to promote opportunity, will address goal D, which deals with marketing techniques.

6.2 Promote “New” Hamilton image

This objective will work to attain goal E. Likely the single most critical obstacle was consistently identified as being the current perceived image of Hamilton - from all perspectives: resident, internal and external business.

Running in parallel with the promotion of opportunity, the promotion of the image must be given consistent and ongoing importance throughout all marketing campaigns.

The tactics put in place to promote the “new” Hamilton image, will address goal D, which deals with marketing techniques.
7. Key Messaging

There has been much philosophizing about what Hamilton is becoming and what kind of messaging should be developed to form the future vision of Hamilton. Each sector has its own ideas and its own approach to this vision, resulting in many different visions. Since nobody knows what the future will exactly look like, for the purpose of marketing, let’s focus on the present.

We are suggesting that it is time to stop thinking about a transformation or a change or what Hamilton will become. It is time to be proud of what Hamilton IS and actively promote all the excellent assets that Hamilton can proudly promote IMMEDIATELY.

There are many ideas for economic development and redevelopment of brownfields and improvements of the downtown areas, and these ideas must continue to be nurtured. Each improvement will add to the allure of Hamilton and will attract new businesses and new people. In the meantime, Hamilton should not wait to market itself proudly.

We suggest a very simple paradigm shift. Instead of “We’re changing”, Hamilton can boldly state “We’ve changed”. Period.

As a result of this paradigm shift, the marketing messaging can be very SIMPLE AND POWERFUL, such as:

“Hamilton IS Happening!”
“Hamilton IS Vibrant!”
“Hamilton IS Innovative!”
“Hamilton IS Proud!”
“Hamilton IS Beautiful!”

Up to a dozen appropriate phrases are to be developed. They should be supplemented with excellent photography to prove that the statement is true.

Due to the inherent simplicity these key messages can easily be grasped and understood by residents, internal and external businesses, organizations and stakeholders.

We recommend avoiding phrases that deal with being affordable, cheaper or other attributes that are difficult to compete on; difficult to prove and reduce the quality perception that is being established through this simple messaging.

That does not mean that these attributes should not be identified, supported with comparisons, statistics and testimonials and promoted in the content of advertising, websites or within press releases, announcements or success stories; they should just not be the main message.
8. Common Marketing

Survey responses and workshop feedback consistently re-iterated the need for promotion and marketing of the business opportunities and quality of life available in Hamilton.

Integrated Marketing
Best practices in marketing mesh with the suggestions for using all mediums, in other words, the development of an integrated marketing strategy.

The integrated marketing strategy will be comprised of common messaging and a common look and feel, with tactics, advertising channels and content messaging being adjusted for different target audiences.

Common Marketing
Common marketing tools refer to those that will stretch across all sectors and all target audiences. Further detail with respect to sector specific marketing strategies follows. Common marketing includes the:

- General Internet Program,
- General Attraction Program, and
- Stakeholder Communications Program.

Look and Feel
It is critical that the implementers of this strategy understand the importance of the impact that the look and feel of the new marketing materials will have on the impression and image perception of Hamilton.

As image has consistently been described as a top priority and is one of the two objectives of this strategy, the look and feel must be at the heart of each marketing tool and each item that is produced, from printed materials to web to advertising.

The most immediate, prevalent impact on the perception of the image of Hamilton will be achieved by developing a modern, edgy and bold look and feel for all marketing materials and then carrying that look consistently through all applications.
**General Internet Program**

Recent studies, reports and anecdotal references all indicate the critical importance of the Economic Development internet strategy. Site selectors and business people alike are conducting extensive research online before ever contacting an Economic Development Officer.

Many hundreds of websites are reviewed in any typical site selection search. A process of elimination follows. Weak websites that don’t provide the necessary content and don’t make the right impression quickly contribute to elimination. In today’s competitive investment attraction world, the website has to become the number one sales person.

Many sector-specific internet strategies are also recommended later in this document. This section addresses those components of the website that universally apply to general promotion and marketing of doing business in Hamilton.

**Website**

At the heart of the Internet program is the necessity to have a competitive website including interactive features, search features, directories, GIS mapping, calculators, site selector tools, lots of sector specific content and interactive features to build community. Ongoing evaluation, comparison, improvements and expansion of website content, interactivity and connectedness must be a core focus.

**Outreach**

To increase targeted traffic, it is critical to put in place a series of outreach programs that include regular targeted email, online advertising and participation in relevant social media forums or platforms.

Many of these programs have been discussed in more detail in the sector-specific programs. The content generated for those programs should be leveraged for the general attraction of businesses that don’t necessarily fit neatly into one of the target sector categories.

**Statistics**

Goals for key measurable targets, such as number of visitors or number of downloads should be identified and website statistics should be reviewed weekly to compare actual numbers to goals. Tracking of what works and what doesn’t, most popular pages and use of tools provides intelligence for ongoing decision making and website upgrades.

**Online Properties**

Wikipedia, Google Earth and InvestinOntario are just some sites that need to be watched to make sure that they represent the image and content that Hamilton
wants the world to see. As sector terminology and focus shifts, these sites need to be updated to be accurate.

YouTube
As video content is generated for sector-based promotion, a City of Hamilton YouTube channel should be established and videos displayed on it as well as on the Hamilton website. This presents an alternative channel for increasing video views and generating interest. YouTube videos are often easier to locate due to this websites search engine ranking.

Linking Strategy
Reverse links are invaluable for a strong website presence. They work to help a website in many ways. Not only do they provide a direct link to your website from another, they also impact your search engine ranking. Extensive linking work should be done for Hamilton in general but also for each sector. Linking strategies are a largely manual process that involve researching potential websites that can be linked from, contacting the relevant website owners and working with them to ensure that links are placed correctly and work correctly.

Search Engine and Social Media Optimization
Every search begins with Google or Yahoo, making it necessary for successful websites to implements search engine best practices on an ongoing basis. Search engine optimization revolves around the implementation of a range of tactics including keyword review, keyword density, meta tags, title tags, alt tags and more. Creating search engine optimization strategies with a focus on specifically desired search terms, such as sector specific terminology, will have the biggest impact.

As a related best practice, social media optimization consists of a set of tactics that make the content of your web pages more highly visible to users of social-media websites and increase links from these sites back to your website.

Online Advertising
As the internet is the primary channel utilized for research of potential locations, online advertising, in the right place, at the right time, can have a positive impact on the increase of website traffic. Online advertising should include Google Adwords and an evaluation of opportunities for banners, links or sponsorships of specific online properties.
General Attraction Program

Professional Photography

“A picture says a thousand words” and a professional photograph has an immense impact on the immediate first impression that a marketing or communications tool makes on the viewer.

We recommend the ongoing build and maintenance of a library of professional quality photographs that represent target sectors, key successes and quality of life in Hamilton. Photographs should be shot with an emphasis on building on key messaging and supporting key messaging by providing the visual proof and thereby beginning to change social perceptions.

Photos can be used throughout the marketing program, including on the website, in profiles, sector profiles, advertisements, tradeshow materials and in video productions. Photos can also be used to expand Hamilton’s profile Google Earth and other internet properties such as Flickr.

Printed Materials

As prospects can be sent to the website, less printed material is necessary. However some printed marketing tools still help to provide an impression and are useful for hand-outs at events and conference. Further printed materials are discussed in sector-specific marketing sections.

- Glossy, Edgy Profile
  To begin to change image perception, We recommended the creation of a glossy profile designed in a modern, edgy style that describes business opportunities in Hamilton with a brief introduction to each of the target sectors.

- Website Promo Handout
  A business card size, fold-out can be produced as a hand-out. The fold-out acts as a guide to all the information on the website with quick-links (ie HamiltonMfg.com) to key content areas.
Digital Presentations

USBs provide an excellent method for the dissemination of information including links to key content on the website, PDF files, videos and other documents. At the time of the writing of this strategy, USBs are still a popular promotional item. As each year presents many changes in technology and marketing, the appropriate method of dissemination may well change by 2011 or 2012.

Tradeshow Materials

Conferences and tradeshows were identified as a recommended tactic through stakeholder sessions. These events continue to provide an excellent venue for lead generation and networking for Hamilton Economic Development.

Detailed conference participation is discussed in the sector-specific marketing tactics, however some generic tradeshow materials will need to be created:

- **Tradeshow booth**
  A modular booth that can be adjusted to fit various sizes of space and that can have flexible panels needs to be available for conference participation.

- **Promotional Items**
  A variety of promotional items will need to be created. Depending on budget and target audience, promotional items may include pens, shirts or more creative, innovative items.

General Advertising

Most advertising and outreach will be sector specific, but some over-arching advertising opportunities are available, such as:

- **EDCO Annual Directory**
  With a wide and targeted circulation to site selection professionals, the EDCO Directory provides a practical, affordable method of promoting Hamilton.

A general direct mail post-card campaign should be run to reach all the businesses that don’t fall into sector specific categories yet are represented on Hamilton’s CRM database as potential prospects. The purpose of the direct mail post-card campaign is to stay top of mind and to inform business about new programs that are being launched and new information that is available on the website. This campaign also provides an opportunity to present the new image of Hamilton.

Memberships

Hamilton should maintain memberships in economic development organizations and in sector specific organization where networking and professional development opportunities are available.
Media and PR

A media and PR strategy needs to be developed by the Marketing Coordinator. The core practices to be implemented include:

- Formalized release process
- Local media partnerships
- Messaging development
- Development of external journalist list
- Process for keeping journalists informed
- Media tours and events
- Media kit made available on website

As the media strategy is implemented, media monitoring becomes necessary to track the effectiveness of the media strategy. Media monitoring must be conducted North America wide and include analysis of tone, image, quantity, trending of articles and cover the following channels:

- TV
- Print publications
- Online/Social media

Both the marketing and public relations for Economic Development, Downtown and Community Renewal, the Small Business Enterprise Centre and the Film and Television Office must be led by the marketing coordinator, with other participants, when required, following the coordinator’s lead.

CRM Database

As new leads are generated, it becomes vital to keep track of contacts and to effectively use the CRM database to send targeted communications and to conduct analysis on prospect numbers, stages and successful locations.

Partner Communications Program

Hamilton has established a powerful, strong and collaborative network of businesses, academia, government and non-profit organizations. Ongoing communication with these stakeholders is essential to the success of this Marketing Strategy and the Economic Development Strategy. As such a formalized program should be established to keep partners and stakeholders informed.

News and Status Updates

Regular email newsletters and announcements provide an effective tactic for keeping top of mind and keeping partners informed about progress that is being achieved and programs that are being implemented. They also serve as a method for delivering the new tone of messaging and new look and feel, promoting the transition in image perception.
A more comprehensive annual review in printed and online format provides an opportunity to present accomplishments and statistics in a format that is easily referenced by partners, businesses and stakeholders alike.

Meetings and Events
The federal and provincial government will always provide a source of leads. As such it is important to maintain relations through face-to-face meetings for the purpose of informing sector representatives about the work that Hamilton is doing and for sharing marketing and promotional materials.

Joint events with the Chamber of Commerce, Innovation Café’s and other local organizations were also identified as being valued by vision session participants and should be continued and expanded on where possible.
9. Market Segmentation

Identification of distinct groups of target audiences further enables Hamilton Economic Development to deliver distinct and relevant messaging to each target group.

Appropriate channels, tactics and tools can be identified, selected and implemented based on what is most effective for reaching each unique audience.

An analysis of the research conducted to date identifies two major target audience groups, each of which breaks down into further segments:

9.1 Your Backyard

A large number of Hamilton’s businesses were started by people living in Hamilton. Target audience segments in this group include:
- Existing business and employees
- Residents
- Students

9.2 Canada and The World

In identified clusters Hamilton has clear world-class advantages that provide the necessary basis for successful investment attraction marketing. Target audience segmentation in this group divides along sector lines:
- Agriculture, Agri-Food and Agri-Based Products
- Biosciences
- Clean-Tech
- Creative Industries
- Advanced Manufacturing
- Goods Movement

Further details, goals, messaging and programs to reach these target audience segments follows:
10. **Your Backyard**

The majority of the businesses located in Hamilton are located in Hamilton because the owners live here or moved here to take on employment and then stayed. This fact represents a “gift” for Hamilton Economic Development marketing. A gift in the form of a reachable target audience for the promotion of both opportunity and image so as to increase business start ups, business retention and business expansion.

Marketing activities geared at this target group must be focused on achieving the following goals:

- Increasing new business starts,
- Increasing business retention, and
- Retaining local businesses when they expand.

Three target audiences form this market segment:

- Hamilton Existing Businesses and Employees
- Hamilton Residents
- Hamilton Students
10.1 Hamilton Existing Businesses and Employees

There are approximately 19,000 businesses operating in Hamilton with an employed workforce of over 380,000.

This represents a fertile, active community that can and must be leveraged for ongoing growth.

Existing businesses need to hear the following messages:

1. There are many diverse, successful businesses in Hamilton today.
2. There is a lot of opportunity for business growth in Hamilton today.
3. Resources and business support services are widely available for Hamilton businesses.

Each communication piece needs to communicate opportunity and a positive image; it needs to be confident, in the present and of value to the recipient.

Hamilton Businesses and Employees can be reached by expanding on and implementing the following programs:

- Business Visitation Program
- Business Briefs Program
- Business Connections Program
- Employee Energizers
- Buy Hamilton Program
Business Visitation Program

The purpose of the Business Visitation Program is to establish and nurture close ties with the business community, keep a pulse on business challenges and opportunities, create relationships that enable retention or expansion support of businesses at key times, to collect data and track changes in the economic structure of Hamilton and to create connections between businesses, organizations and academia.

Each visit presents the occasion to inform the business about success and opportunities in Hamilton and to impact the perception of the image of Hamilton.

Hamilton Economic Development has implemented an excellent Retention and Expansion program managed by a number of sector specialists that regularly visit businesses, survey businesses and track data. These efforts should be continued as they provide a direct connection to the pulse of the local economy and provide opportunity for the City to step in and help a business as required.

The data collected about local businesses is also extremely valuable, not only for internal analysis, but also as content to be used for the generation of communications back to the business community.

Salesforce CRM has been implemented by Hamilton and should continue to be used to track visits, track histories and to generate reports so as to analyse trends and create new statistics on an ongoing basis.

Business Briefs Program

The purpose of the Business Briefs Program is to inform the community about the high level of business activity, which will begin changing the perception of Hamilton business opportunity and image. Continually sharing information about successes, positive stories and testimonials, activities, events and resources will begin to increase engagement and generate excitement.

Communications Program

We recommend the implementation of a formalized communications program delivered to local business, media, associations and other relevant stakeholders. In this program very brief announcements are delivered with links to more information using multiple digital channels including:

- Email
- Twitter
- Website (RSS enabled)
- SMS
- Fax (?)
Multi-Stream, Multi-Channel

Recipients should be able to select to receive information about their sector only, resulting in multiple streams of content briefs being generated and disseminated about each sector on an ongoing basis.

Each stream should result in brief information, announcements and links to further information. Content should be pushed out 1-2x per week per stream, covering topics such as:

- Key aggregate statistic of survey data collected
- Local Success Stories
- Business Announcements
- Programs and Support for Local Business
- Business Testimonials
- A sector event that may be of interest
- Focus on a business resource with a “Did You Know”

Content Sources

To create or locate content for dissemination, the following channels can be used:

- Track business, organization, academia twitter feeds, press releases and announcements & re-use with Hamilton angle
- Track key association, academic events and feed back to businesses,

Promotion

As businesses are visited, the business management should be informed about the Hamilton Business Briefs program and asked which channel and stream they would like to subscribe to. Email addresses of business owners/managers should be collected to build up the database on a continuous basis.

The program should be promoted through local media, business publications, the Chamber of Commerce, partner organizations, at the time of business registrations, and through an annual direct mail campaign.

Business Connections Program

The purpose of the Business Connections Program is to provide a series of tools and activities to increase connections among local businesses. Increased connections form strong linkages inside the local economy, resulting in an increase to the level of commitment that each business has to the local community.

Hamilton Business Group on Linked-In

The internet provides an ideal platform for the creation of an online community. Tools that enable online matchmaking and networking, topical discussions should be made available and promoted as a Hamilton business benefit. As a first step, a Hamilton Business Group can be established on Linked-In. Hamilton Economic
Development can use this platform to disseminate business briefs, ask questions and begin to create discussion. Monitoring and adjustments will be required on an ongoing basis as social media platforms continue to evolve.

**Workshops**
In addition to online tools, live events such as workshops on topics of interest to local business, such as getting investment, buying/selling a business, buying a franchise, growth stages, sales compensation, human resource management, etc., can be offered in partnership with local consultants or service providers with expertise in the respective subject matter.

**Annual Think-Tank**
An annual “Think-tank” workshop, such as the Hamilton Economic Summit, should be held with business leaders, organization leaders and academic leaders. This workshop can be used to change the perception of Hamilton, to showcase local successes and to generate grass-roots ideas for growing the local economy.

**Employee Energizers**
The purpose of the Employee Energizers is two-fold: To engage and support local businesses and to enable Hamilton Economic Development to reach down to the employee level, collecting email addresses and engaging employees to participate more actively in business events and social media channels.

**e-Learning**
We recommend that a series of generic affordable, e-learning skills development programs are offered online for business management and employees. Generic topics that are applicable across the entire workforce are to be the focus such as:
- Time management
- Setting and achieving goals
- Introduction to doing business in Hamilton

As the programs are offered through the website, participating employees would be exposed to other services offered by the City and provided with ways to initiate direct contact and locate resources that can be of benefit to their business and to their individual effectiveness within their business.

**Promotion**
This program should be promoted on website, during one-on-one business visits, with the Business Briefs Program and with brochures made available at the Chamber, the City and other appropriate events and venues.
Buy Hamilton Program

The purpose of the Buy Hamilton Program is to further strengthen the local economy by making businesses aware of the opportunity to increase local business to business deals and by making it easier to find local product and service providers.

Interactive Campaign
The Buy Hamilton Program can take the form of a fun, interactive campaign run in partnership with the Chamber and other relevant organizations. Promoting the concept of buying local, the campaign would include an online interactive “passport” that is signed/stamped by local businesses as purchases are made and then submitted by the company for an award either as part of the Chamber awards program or at another appropriate occasion.

Business Map
To support the campaign, a series of tools should be made available to make it easier for local businesses to find each other, such as the development of a “Hamilton Biz Map”, targeted at businesses & employees in the downtown area, featuring listing of merchants, restaurants and local business services. Advertising opportunities and arts/culture listings & information can be used to provide further value to the map and it should be available online, at retail merchants, libraries, recreation centres, public buildings and transit stations. The map itself doubles as a promotional tool for the program.

Special Directory Listings
The existing online business directory should also be promoted as part of this effort and special pages created on topics such as ideas for staff/team building with listing to local restaurants for celebrations, bowling alleys, paintball etc.

Promotion
The Buy Hamilton Program should be promoted using Business Briefs, media channels and partner communications channels.
10.2 Residents

Strategically communicating with residents will provide another method for informing people about business opportunity and changing the perception of Hamilton as a thriving business centre.

Messaging to residents should be focused on success stories, events and quality of life themes with dissemination through internet and media channels.

Hamilton has over 500,000 residents with a wide variety of education levels and skills. The over age 15 work-force consists of 407,590 workers whose skills break down as follows:

<table>
<thead>
<tr>
<th>Educational Background</th>
<th>Hamilton</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>No postsecondary certificate, diploma or degree</td>
<td>52%</td>
<td>49%</td>
</tr>
<tr>
<td>Education</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Visual and performing arts, and communications technologies</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Humanities</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Social and behavioural sciences and law</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Business, management and public administration</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>Physical and life sciences and technologies</td>
<td>2%</td>
<td>2%</td>
</tr>
<tr>
<td>Mathematics, computer and information sciences</td>
<td>2%</td>
<td>3%</td>
</tr>
<tr>
<td>Architecture, engineering, and related technologies</td>
<td>12%</td>
<td>11%</td>
</tr>
<tr>
<td>Agriculture, natural resources and conservation</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Health, parks, recreation and fitness</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Personal, protective and transportation services</td>
<td>3%</td>
<td>3%</td>
</tr>
<tr>
<td>Other</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

Source: Statistics Canada, 2006 Census
Of note is that Hamilton has a larger unskilled labour force on a per capita basis than the rest of the province. Hamilton also exceeds the provincial average in architecture, engineering and related technologies as well as in the health, parks, recreation and fitness category.

To best communicate with the residential make-up of Hamilton, marketing messages to residents should be clear, logical and concise.

Resident Communication Program

The primary goal of resident marketing must be information transfer combined with inspirational testimonials and success stories:

- Make residents aware of the many places of employment that are available in Hamilton
- Make residents aware of the leading edge technology and innovation that is happening right now in Hamilton
- Make residents aware of the many business start up services available in Hamilton
- Inspire residents to start a business in Hamilton

Local, Real Life Stories

The emphasis when communicating with residents should be on local successes, local start ups and real-life stories about Hamilton entrepreneurs. A heavy emphasis on testimonials, videos, and web-based dissemination of stories selected to inspire will have the largest impact.

It will be important to select stories that the majority of residents can relate to, for example entrepreneurs that do not have a college education, but became very successful anyways and entrepreneurs with a background in architecture, engineering, technology, health, recreation or fitness.

Channels

Residents can be reached through the following channels:

- Media channels
- Advertising in local publications (parks & rec guide)
- Online
- Booth at Canada Day celebrations and other festivals
- Information package made available at public buildings including city hall, libraries, recreation centres.
10.3 Students

Stakeholders in all clusters commented on the necessity of retaining students in Hamilton.

This can be achieved by informing students about local opportunities, providing linkages to business and working with select media to deliver key messages.

Student retention activities can be delivered through two programs:

High School Program

At any given time there are over 30,000 high school students in Hamilton. To strengthen Hamilton’s talent pool, these students need to be encouraged to stay in Hamilton as they complete high school. They need to be informed about the opportunities that exist in Hamilton.

The purpose of the High School Program is to get in touch with high school students and let them know that excellent opportunities for both work and for world-class education exist for them right here in Hamilton.

Partnerships

The High School Program is to be operated in partnership between the schoolboards and high school counsellors, local businesses interested in offering co-op opportunities and volunteer high school ambassadors that are interested in giving presentations at high schools and helping to make connections between businesses and students. Other partners in this program may also include representatives from the Small Business Enterprise Centre and Jobs Prosperity Collaborative, Mohawk College and McMaster University.

Visitation Program

Grade 12 students are often visited by a range of Colleges and Universities, it may be appropriate to coordinate the high school program with these visits.

Online Component

The program would also have an online component that includes a website geared at high school students introducing them to the various sectors and opportunities available in Hamilton and providing links to job information, resources and student programs.
Post Secondary Program

With a combined student population of over 70,000 Hamilton’s post secondary institutes provide an excellent resource for Hamilton’s workforce and for fostering new entrepreneurs.

McMaster University
Committed to helping its students establish commercializable business ideas through its innovation labs and incubator programs, McMaster attracts some of Canada’s brightest minds.

Mohawk College
Offering a full range of academic and vocational training programs, Mohawk College provides full and part-time studies to gain and enhance skills to meet workforce needs for Hamilton businesses.

The purpose of the Post Secondary Program is to enable the City of Hamilton to keep graduates in Hamilton. The program will enable outreach to students to promote information dissemination about local jobs, inform students about local programs and encourage start-ups while fostering relations with the institutes themselves.

The most effective tactic is to become a part of the transition process that a graduate embarks on when shifting from being a student to being in the workforce.

This can be achieved in the following ways:

1. Create linkages with businesses that result in students having access to job opportunities in the summer months between years and immediately upon graduation. Government supported student employment programs may be available to increase the benefit to the partner business.

2. Connect potential student entrepreneurs with mentors in Hamilton businesses through an online matching and progress report program.

McMaster University’s beautiful, tree-lined campus bustles with more than 20,000 full-time and 3,500 part-time students and boasts some of the best facilities in Canada, including a research nuclear reactor, an extensive library system and one of the finest public art galleries in the country.

These facilities support a rich variety of programs that have made McMaster one of the top teaching and research institutions in Canada with innovations that include the first medical school to train doctors using small-group, problem-based learning; unique limited enrolment programs in arts and science and health sciences; and programs that stress critical thinking and problem-solving skills.

Source: http://www.aucc.ca/can_uni/our_universities/mcmaster_e.html
3. Develop or support a student entrepreneur organization at both McMaster and Mohawk. The organization should offer regular meetings with networking, information sharing, guest speakers and access to Hamilton business people, Chamber representatives, ambassadors or other relevant Hamilton business representatives.

4. Develop a marketing program to inform the student population about the Small Business Enterprise Centre (SBEC), ways to connect with business in Hamilton and ideas for finding jobs in Hamilton. This program should involve a series of partners including the Chamber of Commerce, SBEC and the Jobs Prosperity Collaborative.
   - Flyers posted in schools
   - School or targeted local radio ads
   - Ads in school agendas

5. Work with both post secondary institutes to identify courses that are likely to produce entrepreneurs and invite City Ambassadors in to be guest speakers.

6. Once each semester, in each school, hold a “Hamilton Is Happening” information session to inform students about programs, services and business linkages. Advertise widely with fliers, email, social media marketing and draw on relations with program heads or professors to increase viral marketing.

7. Create a website specifically for post secondary students, providing links, start-up information, resources, contacts, discussion groups, co-op postings, job postings and mentoring application forms.

8. Within select clusters, such as biotech, invite students to participate in social media strategies designed to generate discussion and user generated content, building awareness of Hamilton opportunities, events, activity levels and innovation both in and outside of the City.

With over 50,000 students, the Mohawk College of Applied Arts and Technology offers a full range of post-secondary academic and vocational training programs leading to degrees, diplomas, and certificates, along with personal and professional interest continuing education courses.

The College’s areas of expertise are in Applied Arts, Business, Co-operative Education, Health Sciences, Media Studies, and Technology. Collaborative bachelor degrees in Medical Radiation Sciences, with McMaster University, and in Nursing, with Conestoga College and McMaster University are offered at Mohawk College. Eighteen apprenticeship programs are also available.

The College also carries tuition-free programs, funded by the Ministry of Training, Colleges and Universities.

Source: www.canadian-universities.net
11. Canada and the World: Investment Attraction

Within each cluster, Hamilton has world-class advantages that can be leveraged to promote opportunity and attract companies from outside of Hamilton.

As external marketing is costly, difficult to measure and difficult to track, clear focus and priority must be given to those sectors that present the best opportunity for success in external markets.

Each of Hamilton’s sectors is at a different stage of development, faces unique challenges and offers a different set of opportunities. As such it becomes necessary to develop sector specific marketing strategies and tactics.

11.1 Sector Summary of Economic Development Goals

<table>
<thead>
<tr>
<th>Sector</th>
<th>Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>All Sectors Business Attraction</strong></td>
<td>Communicate opportunity</td>
</tr>
<tr>
<td></td>
<td>Impact positive image creation</td>
</tr>
<tr>
<td><strong>Advanced Manufacturing</strong></td>
<td>Attract advanced manufacturing to McMaster Innovation Park</td>
</tr>
<tr>
<td></td>
<td>Attract advanced manufacturing to West Hamilton Innovation District</td>
</tr>
<tr>
<td><strong>Agriculture, Agri-Food and Agri-Based Products</strong></td>
<td>Attract 1 food processing plant</td>
</tr>
<tr>
<td><strong>Biosciences</strong></td>
<td>Establish 27 Life sciences companies</td>
</tr>
<tr>
<td></td>
<td>Establish 5 University spin-off companies</td>
</tr>
<tr>
<td></td>
<td>Attract 1 major biosciences R&amp;D, pharmaceutical or vaccine manufacturer</td>
</tr>
<tr>
<td><strong>Clean-Tech</strong></td>
<td>Position Hamilton as ideal location for Clean-Tech</td>
</tr>
<tr>
<td><strong>Cultural Industries &amp; Film</strong></td>
<td>Growth of production and new media companies</td>
</tr>
<tr>
<td></td>
<td>Attraction of productions to Hamilton</td>
</tr>
<tr>
<td></td>
<td>Attraction of film studio and/or pre and post production facility</td>
</tr>
<tr>
<td><strong>Goods Movement</strong></td>
<td>Attract three major cargo/goods movement related companies</td>
</tr>
</tbody>
</table>

As described in the Economic Development Strategy, each of these sectors is at a very different stage of development and presents unique challenges and unique opportunities. As such, strategies for marketing to these sectors must be tailored to each one individually.
11.2 Advanced Manufacturing

Unlike traditional manufacturing, Advanced Manufacturing involves new techniques and machinery combined with information technology, microelectronics and new practices that improve the manufacturing process itself. As a result, companies that integrate advanced manufacturing techniques are able to meet global demands for productivity, quality and pricing.

With a long history in traditional manufacturing, a strong skilled labour base, excellent transportation infrastructure, central North-Eastern location, a collaborative network in the form of post-secondary institutions, non-profit organizations and local businesses, Hamilton is in an excellent position to grow this sector.

Key Messaging
- The availability of a highly-skilled workforce.
- Availability of land and buildings to accommodate expansion.
- Transportation infrastructure - highways/rail/public transit/port/airport.
- Geographic location access to markets and proximity to the U.S. Border
- Quality of life and cost of living compared to GTA
- Established industrial base
- Support of local industry support groups such as Excellence in Manufacturing Consortium (EMC) and Canadian Manufacturers and Exporters (CME)

Advanced Manufacturing Program
- Marketing Tools
  A sector summary and a sector profile will need to be developed in print and online. The profile should highlight the success stories of businesses in this sector that are already located in Hamilton and clearly re-iterate why those companies chose to locate in Hamilton. Video profiles should be created and put on website and YouTube. In addition, Hamilton’s Wikipedia entry needs to be updated to reflect the current sector focus and to present consistent terminology.
Partners

To ensure that both the provincial and federal government are aware of Hamilton’s strengths in the advanced manufacturing cluster, it will be important to share announcements and to meet with government representatives in person to give a presentation.

Partnerships should further be enhanced in this sector by working with CANMET Materials Technology Laboratory, McMaster Manufacturing Research Institute (MMRI), Mohawk College’s Skilled Trades and Apprenticeship Research, Resources and Training (STARRT) Institute, Excellence in Manufacturing Consortium (EMC), the Golden Horseshoe Materials Manufacturing Association and the TRRA (Toronto Region Research Alliance).

Lead Generation

Using online and/or traditional advertising, combined with the generation of lists and direct email outreach, leads for potential prospects will need to be generated on an ongoing basis.

Parameters for ideal targeted business should be reviewed and applied to leads to determine which ones should be pursued with one-on-one follow up calls and meetings.

Conference Participation

The following conferences have been selected due to their focus on manufacturing automation and as they fit well with the goals identified in the Economic Development Strategy. Further evaluation as to size of conference, target audience fit and participation costs will need to be conducted to determine which conferences offer the best opportunities for Hamilton.

In 2007, CMTS attracted over 8,000 manufacturing professionals. Reach these professionals from several key industries including aerospace, automotive, defence, energy, medical, pharmaceutical, and transportation. CMTS—Canada’s Definitive Event for Manufacturing Technology and Innovation—attracts every industry looking for the latest technologies.

Source: http://www.sme.org
April 13-15, 2010, Detroit, MI

**Ecollaboration**

"SAE World Congress is planned with a dramatic focus on new technology and networking in a shorter, smaller, and smarter environment. Most notably among these changes is a maximum of 100 companies on the exhibit floor approved through an application process reviewed by a panel of OEM executives. Source: [http://www.sae.org/congress/exhibition/](http://www.sae.org/congress/exhibition/)

March 2011, Montreal (held once every two years)

**Pan-American Environmental Technology Trade Show and Conference**

With a focus on clean energies, renewable energies, environmental protection, waste management, recycling, water management and treatment, this conference brings together business, government and non-profit organizations in the environmental and manufacturing sectors, presenting an opportunity for Hamilton to promote both Advanced Manufacturing and Clean Tech Industries.

May 18, 2010 to May 20, 2010, Anaheim CA USA

**RAPID**

With a focus on industrial controllers, robotics, quality & maintenance, applied computer & industrial engineering, the RAPID conference attracts over 1000 attendees. For 20 years, RAPID has attracted top manufacturers searching for the latest in product development technologies, including design, prototyping, tooling and direct manufacturing.
11.3 Agriculture, Agri-Food and Agri-Based Products

As described in the Economic Development Strategy, Hamilton’s agricultural sector has grown to a 1.26 billion a year local industry and has great potential for continued growth.

This sector is evolving at a rapid pace as new opportunities emerge due to social changes in awareness of health and the advantages of locally grown produce. New opportunities are also emerging due to increased automation of agricultural activities and consumer demand for prepared foods. The location of Hamilton with access to a multi-modal transportation network, combined with access to labour and agricultural land creates a sector in transition with a tremendous amount of opportunity.

Educate Public and Agribusiness Operators

In the short term, it is of primary importance to educate the local agribusiness community and local residents. Educational efforts must include promotion and build-out of the Buy Local program, promotion of farmers markets and the creation of local resident communications to inform them about the availability and health benefits of locally grown produce.

Attract Food Processing Plant

The long term goal for this sector is identified as being the attraction of a major primary or secondary food processing plant. Investment attraction will need to begin with a sector study and resource/industry guide to be used to begin marketing Hamilton to suitable food processors. The agricultural sector is broad and large, it will be critical for the sector study to identify the rationale for why a food processing plant would locate in Hamilton and to gather the data that a site selection search for a food processing plant would require. While a number of investment attraction tactics can be implemented immediately, we anticipate that when the sector study is complete, additional ideas for targeted marketing will emerge.

A balanced 2-prong approach, including both local education and long term investment attraction, will need to be implemented.

Agri-Tourism Opportunities

An Agri-tourism study should also be conducted to evaluate the opportunity of building out this sector further and to identify operator readiness and interest.
Key Messaging

Key messaging in marketing materials must be based on the primary advantages for agricultural businesses in Hamilton, which have been identified as follows:

- Diversity of products
- Prime Farming Land
- Proximity to quality water
- Good climate
- Multi-modal transportation network
- Access to markets

Ag Education Program

Public Education

To increase knowledge about why, where and how to buy local foods, a printed “Farm Fresh” consumer guide and associated website should be produced and disseminated. It should include information on:

- Health benefits of buying local foods,
- Where and when to buy fresh foods,
- Event listings,
- General information about agriculture in Hamilton,
- Local character and quality of life due to proximity to rural regions.

The website should also include links to vendors, event calendar, locations of farmers markets and information that connects the urban community to the rural community through facilitation of school field trips and outings.

Distribution

With a focus on the health benefits of buying local, the consumer guide can be distributed through health clinics waiting rooms and doctors’ offices as well as libraries, recreation centres and other public buildings. A Canada Post mail out or insert with newspaper provides an additional channel for public distribution.

Media

As this is a topic of interest to all residents of Hamilton, a partnership with local media should be established to broadcast this information to the public through a series of columns or articles.

Agribusiness Operator Education

While consumer education is critical, so is the education of the operators themselves. Agribusiness operators are challenged by the economic transition in their sector and need to be thoroughly informed about new opportunities. A series of workshops and extensive information made available online will help them to adjust their business to thrive in the new reality. Topics for workshops should include:

- New product opportunities including bio-medical, bio-products, bio-fuels
Innovation, business environment, opportunities for niche and unique products
How to participate in farmers markets or the “Buy Local” program

**Food Processor Attraction Program**

**Core Marketing Materials**
The investment attraction program for a food processing plant needs to start with the creation of core marketing materials that address the benefits of locating in Hamilton. This should include a printed sector profile as well as an extensive build out of the information presented on the website, all with a focus on food processing in particular.

**Conference Participation**
The next step is to promote the opportunity by building lists and selectively attending conferences that reach food processing professionals. We recommend attending the following annual conference:

IFT Food Expo, July 17-21, 2010, Chicago, IL

Participation in this conference is of particular interest to because of the combination of advanced manufacturing technologies, biosciences and the emphasis on food processing, in effect leveraging three of Hamilton’s target sectors. In addition, this is a large conference which will result in being able to build a large list of prospects for the attraction of a food processing plant.

**IFT Follow Up**
Follow up from this conference must include regular contact via email and e-blasts at least once every 2 months, as well as appropriate, gradual participation in social media platforms frequented by this sector.

“Tens of thousands of food professionals from around the globe make their way each year to the IFT Food Expo. Why? To see the latest products, technologies, tools, techniques, and services at the most highly regarded new product forum in the industry.

The IFT Food Expo brings together buyers and sellers from all corners of the food science and technology world. With more than 1,000 exhibitors and 500 ingredient companies, the potential for great ideas, professional connections, new opportunities, and profitable relationships is nearly endless.”

Source: [http://www.am-fe.ift.org](http://www.am-fe.ift.org)
11.4 Life Sciences

Hamilton is recognized globally for its strengths in biosciences including drug discovery and validation, gene therapy and clinical trials.

A Strong Network
The Biosciences sector in Hamilton has been built up through partnerships and collaboration between the City, HHSC, St. Josephs, McMaster University and Mohawk College.

A strong network including GHBN, the McMaster Innovation Park, McMaster Biotechnology Incubation Centre, CANMET Materials Technology Lab and the West Hamilton Innovation District further serves to strengthen this dynamic sector.

Ready for Growth
With land and space, labour force and record of commercialization available, this sector is now at a stage in which it is ripe and ready for extensive investment attraction marketing so as to increase the size of the cluster and build on the work that has been done to date.

This sector represents one of the most likely to provide a significant return on marketing investments. As such, the Hamilton Economic Development marketing effort is weighted heavily to the attraction of individuals and firms in the Biosciences cluster.

Aggressive Goals
Equally aggressive are the goals defined for this sector which include the establishment of 27 Life Sciences companies, 5 University spin-off companies and the attraction of 1 major biosciences, R&D, pharmaceutical or vaccine manufacturer.

Ideal targets for marketing include incubator companies, small and midsize bio-engineering, bio-informatics and life sciences firms, as well as midsize and large pharmaceutical firms.
West Hamilton Innovation District

The West Hamilton Innovation District which houses the McMaster Innovation Park presents an excellent location for biosciences firms and start-ups and should be marketed and promoted extensively in print and online profiles.

Key Messaging

Key messaging for this sector needs to be focused on these core strengths:

- Large, strong and active cluster
- Available skilled labour
- Intelligent, successful and interesting people in sector
- Proven record of innovation and commercialization
- Network of collaborative academic, non-profit and business partners
- International reputation in research and education
- Incubation space and many other available space options
- Quality of life
- Location

Bio Creative Economy Program

A shift is occurring in economic development marketing where the focus is moving from working on the attraction of companies to working on the attraction of people.

Creative Class

People that represent what is referred to as the “Creative Class” and are considered to be the next generation of young professionals that will innovate, start businesses, commercialize products and impact economic growth.

Placemaking

The attraction of people means shifting the strategic focus for investment attraction to placemaking, creating and promoting Hamilton as a City with a distinct character, amazing network of people, healthy lifestyles and a high quality of life.

"Our goal must be to harness and use our full creative talents, to grow the businesses and industries of the future, to use our openness, tolerance, and diversity to gain economic advantage, and to invest in the infrastructure of the future in ways that enable more innovation and economic growth...

Our economy is shifting away from jobs based largely on physical skills or repetitive tasks to ones that require analytical skills and judgment. This shift is also evident in the long-term trend away from employment in goods-producing to service industries, from occupations that depended on physical work to produce goods to ones that provide service and rely on creativity. The change is inexorable... We must embrace it and act in ways that create a distinctive advantage for the province and ensure our long-term prosperity.”

Source: Richard Florida, "Ontario in the Creative Age" February 2009
Social Media Strategy

For young professionals today, a high quality of life means, in part, living in a place with a strong sense of community and with vibrant social interaction. For that they depend on social software.

For this sector, more than any other, the development of a social media strategy to attract the creative class is a perfect fit.

Social Media Types

- Social networking — Facebook and LinkedIn are examples of services that give people social profiles and the tools to manage them;

- Social collaboration — It is increasingly vital to internet savvy professionals to be able to consult and collaborate with each other through tools such as wikis, blogs and instant messaging;

- Social media — These technologies can assist you build content repositories and share them among a network of identifiable interested parties. YouTube and Flickr are examples;

- Social validation – Use social rating and bookmarking sites such as Digg and del.icio.us to track participation, assessment and feedback on programs

- User-generated content – Creation of 2-way and group-wide conversations that generates valuable content by users and for users, continually widening the network of participants

Goals

To engage the local Biosciences Community and to attract interest amongst Biosciences professionals everywhere.

Actions

1. Register unique URL such as: www.HAMILTONISBIO.com
2. Create two-way conversation by providing a range of social media tools for existing bio sector to network online
3. Focus on building and encouraging user-generated content
4. Tap into existing social media networks for dissemination (Twitter, Facebook, YouTube, Digg, Bookmarking sites, etc)
5. Mobile enabled
6. Reach out to other bio professionals with promotions and teasers about content to attract new visitors and spread the word about the engaged community
7. Promote as a stand-alone benefit to all potential bio companies, promote at tradeshows and as part of every benefit listing, promote on website, through news releases and feature in articles, reprint or republish user-generated content where-ever possible
8. Engage biosciences professors or professionals to volunteer to blog or review content to validate that content is powerful, valuable and new content is generated continuously, generate discussion about new ventures, access to capital, access to support, mentoring and incubator programs, innovation programs, tax credits and all other benefits associated with Biosciences in Hamilton,
9. Ensure plenty of quality of life content and weave in Hamilton activities, culture, parks, festivals and so forth.
10. Participate in relevant social media platforms, ie linked in forums, for the publication of stories, articles, successes, relevant news releases and for further promotion of the network.

Bio Attraction Program

A structured, active sales and marketing process will need to be implemented and managed on an ongoing basis:

Marketing Tools

- Develop information kit: Summary 1 Pager and 30-40 page Biosciences Sector Profile, online profile (not PDF) with at least 3 video stories
- Develop a standard powerpoint
- Build-out Biosciences sector information on website (not PDF)
- Showcase at least 3 video stories on website and You Tube

Partner Leverage

- Identify partner marketing roles and opportunities for joint marketing, joint programs and dissemination methods, access to partners for dissemination to their email lists,
- Leverage existing businesses and partner relations to gain access to C-level executives at similar firms that are currently located outside Hamilton,

Niche & Sub-Sector

Sub-sector including bio-engineering and bio-informatics can be reached through participation with niche associations such as:
• **American Medical Informatics Association**

  "AMIA is dedicated to promoting the effective organization, analysis, management, and use of information in health care in support of patient care, public health, teaching, research, administration, and related policy. AMIA’s 4,000 members advance the use of health information and communications technology in clinical care and clinical research, personal health management, public health/population, and translational science with the ultimate objective of improving health.”

  Source: [http://www.amia.org](http://www.amia.org)

  The organization holds an annual conference attended by over 2000 bioinformatics professionals.

• **Biomedical Engineering Society**

  "BMES members are leaders in biomedical research and development. Members are leading researchers from major universities, government agencies and BME corporations worldwide as well as doctors and industry leaders in pharmaceuticals and prosthetic devices among others”

  Source: [http://www.bmes.org](http://www.bmes.org)

  Niche sectors and associations often provide ways to reach target prospects through email or advertising in relevant American and Canadian life sciences publications.

  Other target audiences include site selectors for Life Sciences firms, realtors and venture capitalists.

**Business Attraction Campaign**

1. Get list of prospective businesses,
2. Identify 200 top prospective companies according to ideal target prospect parameters,
3. Run a targeted advertising campaign:
   - 3 postcard teaser direct mail,
   - follow up phone call after first card,
   - If there is interest, send Sector Profile by mail or email
   - Follow up phone call,
   - If there is interest, conduct personal or web-based presentation,
   - Continue process as per normal attraction effort
Activities to Keep Top of Mind

- Create and publish value-add articles or case studies with emphasis on relevant testimonials, include video and publish them on both the website and YouTube where possible,
- Post articles to relevant social media platforms and send out by email
- Engage local and niche association media to reprint where possible
- Organize a networking event at or around a key conference,

Personalize

For key prospects, consider providing a customized, password protected, website with their logo and name and featuring documents, images, and links to all relevant information they would be interested in or need to refer to throughout their decision making process,

Drive Targeted Traffic

Increase targeted traffic through online marketing, ongoing search engine optimization, link-back strategies and Google Adwords campaigns.

Conference Participation

Participation in the following conferences is recommended:

Bio International Convention, May 3-6, 2010, Chicago, IL
15,000 – 17,000 industry experts from 60 countries are expected to attend the 2010 conference. Source: http://convention.bio.org

AMIA 2009
SAN FRANCISCO November 14-18

“The AMIA Annual Symposium is the world’s most comprehensive annual meeting on biomedical and health informatics. Each year, the meeting brings together over 2,000 professionals and students from an array of occupational settings—academic institutions, community-based organizations, government agencies and the military, health care facilities, industry, international health, private practice and research facilities.”
Source: http://symposium2009.amia.org/
11.5 Clean-Tech

A rapidly growing and emerging sector, Clean-Tech presents many opportunities for Hamilton.

As identified in the Economic Development Strategy, Clean-Tech companies cover an array of industries including alternative energy generation, energy efficiency, manufacturing, water and wastewater, waste and recycling and materials.

In response to demand, the sector is growing globally, venture capital interest is high and many students are now enrolled in programs with an environmental focus.

Subsectors identified to be of particular interest for Hamilton include Power Generation and Water and Wastewater.

New Focus
As this is a new and emerging sector, the primary marketing goal is to develop marketing tools and begin to promote Hamilton as a Clean-Tech business location. Immediately following, investment attraction activities can begin through conference participation and promotional activities.

Key Messaging
- Success stories including North Hamilton Community Health Centre and Cleanfield Energy, Forterra, Siemens
- Skilled labour force and students enrolled in relevant programs
- Strategic location
- Quality of life
- Support for local manufacturing industry
Clean-Tech Program

Marketing Tools
A sector summary and a sector profile will need to be developed in print and online. The profile should highlight the success stories of businesses in this sector that are already located in Hamilton and clearly re-iterate why those companies chose to locate in Hamilton. Video profiles should be created and put on website and YouTube. In addition, Hamilton’s Wikipedia entry needs to be updated to reflect the current sector focus and to present consistent terminology.

Communications Plan
Success stories, local opportunities and programs such as ERASE and LEEDS need to be promoted to establish that Hamilton is a Clean-Tech location. Media, email and the Business Briefs program can be utilized. To increase the “Green” image, a communications plan should be established to ensure that focus, tone and frequency of information dissemination is well planned and executed through traditional and online channels as well as sector-specific media.

Partners and Networks
To ensure that both the provincial and federal government are aware of Hamilton’s strengths in Clean-Tech, it will be important to share announcements and to meet with government representatives in person to give a presentation.

Networks should further be established in this sector through association participation and conference exhibition. Wherever possible, it would be ideal to partner with local firms for conference attendance.

As this is a new and emerging sector it will be critical to ensure that Ambassadors are educated about the Clean Tech sector.

• Conferences
We recommend participation in the following two conferences for the purpose of evaluation and beginning to promote in this sector:

APPrO 2009 - 21st Annual Canadian Power Conference and Networking Centre attracts over 1,000 attendees from across Ontario, Canada, the US and Internationally.

“As the leading event of its kind in Canada, almost all of the key players in Ontario’s power generation industry will attend APPrO 2009. APPrO Delegates and Speakers set the policy agenda, forecast supply needs, determine supply mix, evaluate investment opportunities, direct procurement, negotiate contracts, shape prices,
influence market mechanisms, and regulate the industry. They own titles like Chair, CEO, President, Partner, QC, Minister, Deputy Minister, Investor, Financier and Vice President. If you want to increase your profile, or nurture existing business relationships in the power generation business, you need to exhibit at APPrO 2009.” Source: http://conference.appro.org

Hamilton is already a “Utility Member” of the Canadian Water and Wastewater Association. This association is involved in a number of events including the World Water Congress and Exhibition, which will be held in Montréal, September 19 to 24, 2010.

“This event attracts 3,000 researchers, academics, utility managers and water technology suppliers and provides a unique opportunity to learn of the latest research findings and operational practices from around the world through a series of scientific sessions and workshops. Although most utilities face similar problems, it is exciting to learn of the different solutions that have been found and implemented in other parts of the world.

The International Water Association (IWA) World Water Congress & Exhibition is a high profile international event attracting thousands of water professionals and organizations from across the globe. It is a biennial event organised by the IWA and previously hosted in Vienna, Beijing, Marrakech, Melbourne, Berlin and Paris. In 2012, it will take place in Korea. Features of the Congress include scientific sessions, posters, workshops and meetings of the IWA specialty groups. Also featured are the Utility Leaders’ Forum, and the Mayors’ Forum which take place within the Congress, but the forums address topics of specific interest to utility leaders and elected officials. CWWA is specifically involved in planning the Utility Leaders’ Forum.” Source: http://www.cwwa.ca/IWA%20World%20Water%20Congress_e.asp
11.6 Creative Industries

An and important contributor to urban growth and quality of life, Hamilton’s vibrant film and culture cluster has grown tremendously over the past years and continues to grow.

As described in the Economic Development Strategy, this cluster is considered an economic driver, creating not only jobs but also increasing quality of life and local pride of place.

Cultural Industries
Cultural industries include crafts, dance, literature, music, theatre, media and visual arts. Marketing for cultural industries should include active promotion of events and artists on the City of Hamilton website, including an event calendar that can be searched based on date and category.

Film
Film, refers to all forms of media including film, television, mixed and new or digital media from script to post production, marketing and distribution.

Marketing goals for film include:
- Growth of production and new media companies
- Increase awareness of studio space in Hamilton
- Attraction of productions to Hamilton
- Attraction of film studio and/or pre and post production facility

Key Messaging
- Proximity to Toronto
- Affordable Housing Stock
- Quality of Life and Amenities
- Film Friendly Community
- Diverse locations
- Skilled local labour and facilities
**Film Program**

A number of successful marketing programs have been implemented for this sector and should be continued. These include advertising campaigns to promote Hamilton as a location for shooting and participation at the Locations Trade Show and the Banff International Television Festival.

A recently completed film sector profile provides a tool for marketing.

**Attraction Advertising**

Attraction activities include the attraction of firms to come into Hamilton to shoot and the attraction of a studio or pre and post production firm.

We recommend the continuation of the Hamilton campaign for location shooting and an increased focus on building a list of film producers for direct marketing and announcement dissemination so as to begin to promote the opportunities that exist in Hamilton for this sector.

The Canadian Film & Television Production Association is one source of film producers, additional lists can be generated from Internet searches, including Wikipedia.

As part of all advertisements and communications it will be important to raise the profile of Hamilton as a full-service, high quality location for shooting. This can be achieved through carefully crafted advertising, messaging and quality photography.

**Film Friendly Community Campaign**

A separate local campaign needs to be established to remind the community about the benefit of film shooting so as to build local support. Residents have a tremendous impact on a shooting crew and can easily influence the decision of that production company to shoot in Hamilton again or not.

The campaign can be run through a series of ads in media such as the recreation guide or local newspapers.

**Promotion of Local Talent**

During the initial promotion of Hamilton as a shooting location, the availability of skilled local talent for all aspects of pre and post production should be included in the messaging. Once crews express an interest in shooting, they should receive an information kit about shooting in Hamilton that includes a directory of local talent and local businesses that cater to the film industry. Coupons or specials could be offered by the respective business to further entice the production company to try their services.
Promote Film Industry Opportunities

On the flip side, local businesses exist that don’t currently know that they could service the film industry. Broader promotion about the opportunities for working with film crews while they are here will be of benefit to all parties. Informing businesses about the production guide directory and respective advertising opportunities in the guide will begin to create a more informed business community.

Interactive Portal

To promote the growth of the sector a website with skills matching database will increase the ability for people to quickly find where to get the talent, tools or services that they need. The website can also become a central portal for finding out about what’s happening and feature links to all relevant local websites.
11.7 **Goods Movement**

With an ideal, central location for the movement of goods, logistics and distribution operations, the City of Hamilton is the only municipality in Ontario to offer all four modes of transportation: road, rail, port and airport.

Transportation, supply chain management, logistics, warehousing and distribution facilities and communications infrastructure are included in this cluster.

**Growing Sector**

As discussed in the Economic Development Strategy, a global shift in the goods movement sector is occurring due to international production and “just-in-time” delivery requirements. This sector is experiencing rapid growth.

**McMaster Institute for Transportation and Logistics**

In 2008 the McMaster Institute for Transportation and Logistics was formed, providing a valuable resource to this industry through the development of transportation and logistics educational programs and activities targeted at growing and enhancing the sector in Hamilton.

**Marketing Goals**

The key requirements for marketing in this sector revolve around building awareness of Hamilton’s strengths in the Goods Movement sector and promoting the availability of serviced industrial land in proximity to transportation modes.

During the stakeholder sessions, the concept to position Hamilton as “Canada’s Logistics City” was identified. This is a powerful idea that should be further explored and can be integrated into messaging.

The goal is to attract three major cargo/goods movement related companies in the next four years.
Key Messaging

- Multi-modal transportation infrastructure
- Largest Canadian port on Great Lakes
- 24/7 Airport
- Largest rail transit load
- Highway
- Global strategic location
- Skilled labour and world class educational institutes
- Quality of Life
- “Canada’s Logistics City”

Goods Movement Program

Marketing Tools

A sector summary and a sector profile will need to be developed in print and online. The profile should highlight the success stories of businesses in this sector that are already located in Hamilton and clearly re-iterate why those companies chose to locate in Hamilton. Video profiles should be created and put on website and YouTube. In addition, Hamilton's Wikipedia entry needs to be updated to reflect the current sector focus and to present consistent terminology.

Partners

To ensure that both the provincial and federal government are aware of Hamilton’s strengths in the Goods Movement cluster, it will be important to share announcements and to meet with government representatives in person to give a presentation.

Partners should further be maintained in this sector through joint marketing with HI, HPA, Tourism Hamilton and Business Development.

Lead Generation

Using online and/or traditional advertising, combined with the generation of lists and direct email outreach, leads for potential prospects will need to be generated.

Parameters for ideal targeted business should be reviewed and applied to leads to determine which ones should be pursued with one-on-one follow up calls and meetings.
Sources for lead generation in this sector include:

**LogisticsTODAY**

http://logisticstoday.com

This online publication provides a useful compilation of industry events as well as a wide range of online advertising options. Further inquiries will need to be made to determine if the target audience they reach would be useful for Hamilton.

"Canadian Transportation & Logistics is written for transportation, logistics and purchasing professionals involved with supply chain management, distribution, storage and enterprise resource planning (ERP)."

Source: http://www.ctl.ca

**Canadian Transportation & Logistics**

http://www.canadianmanufacturing.com/mmd/index.jsp

This publication provides a channel for reaching the supply chain industry in Canada. Further investigation will be required to determine if this magazine provides an appropriate channel for reaching Hamilton’s target audience.

This industry association provides a connection the businesses and people that operate in this sector. Joining the organization will open up a network to members and provide opportunities for reaching those members through event participation or advertising through association publications.

"CITT is Canada’s foremost professional development association in the supply chain and logistics sector. Our programs and services promote excellence and career path development for transportation logisticians by offering."

Source: http://www.citt.ca

**CITT**

Conferences

Attendance and exhibitor participation at industry conferences will provide an opportunity to promote Hamilton’s strengths in the Goods Movement sector as well as establishing relationships and expanding on lead lists.
Ongoing communication with prospects through disciplined follow up strategies must be implemented to ensure top of mind at the time that a company makes a location decision.

Many conferences are available in this sector. We recommend tracking them and evaluating them in years 1 and 2 of this strategy and then narrowing down 2-3 to attend regularly based on results achieved.

**The National Symposium for Supply Chain and Logistics Professionals**

November 4 - 6, 2009
Niagara-on-the-Lake, Ontario

This conference attracts a large number of supply chain and logistics professionals. It is important for Hamilton to be represented in this forum, to build relations and to source leads for investment attraction.

**IFDA Distributions Solutions**

"The Foodservice Distribution Conference & Expo... is the premier industry-wide conference addressing operational issues including transportation, distribution, technology, and human resources as well as supply chain.

Foodservice distributor member companies represent more than 1,100 distribution centers operating across North America and internationally.”

Source: [http://www.ifdaonline.org](http://www.ifdaonline.org)

**NITL/IANA Joint Conference**

November 15-18, 2009, Anaheim, CA

"This co-located trade show attracts thousands of the top transportation and logistics professionals from around the world. These industry decision makers are responsible for the movement of all types of commodities by all modes of transportation, both domestically and globally.”

Source: [http://www.nitl.org/annual.htm](http://www.nitl.org/annual.htm)
12. Human Resources

Integrated Marketing Management

It will be critical for the Marketing Coordinator to effectively police the ongoing consistency in the look and feel of the materials that are designed and distributed. First impression, recognition and consistent messaging when applied time and again multiply the impact of all marketing activities. Shifting from message and theme will have the opposite effect. We recommend that skills for managing integrated marketing and brands be upgraded by existing personnel. Further, both the marketing and public relations for Economic Development, Downtown and Community Renewal, the Small Business Enterprise Centre and the Film and Television Office must be led by the marketing coordinator, with other participants, when required, following the coordinator’s lead.

Online Community Management

It is our recommendation that a full-time Online Community Officer be hired by the City of Hamilton. The Online Community Officer is dedicated to the ongoing management of social media, e-mail management and website updates and analysis. Due to the heavy shift from traditional to online media, this role is critical.

This role is described as follows:

"An online community officer is a voice of the company externally and a voice of the customers internally. The value lies in the online community officer serving as a hub & having the ability to personally connect with the customers (humanize the company), & providing feedback to many departments internally (development, PR, marketing, customer service, tech support, etc).

Responsibilities:

- Serve as the initial point of contact for inbound requests
- Transfer the information to the appropriate departments
  - bugs to quality assurance
  - new ideas to product development
  - messaging effectiveness to marketing
  - frequently asked questions noted
  - identifying user generated content
- Author blog posts, articles, podcasts, videos and screencasts
- Establish metrics & report on them, including recommendations
- Communicate issues, opportunities and insights to the company at large.
- Stay up to date on new social media tools, best practices and how other organizations and companies are using them, so that the company can continue to be an early adopter of these technologies.
- Participate in professional networking by following the prominent bloggers and online writers & attending events."
14. **Key Performance Indicators**

**Marketing Data Tracking**

- For each tradeshow: How many attendees, how many leads generated, ratio
- For each eblast: how many sent, how many opened, how many click throughs
- For all leads: sales stage tracking and conversion ratio tracking

The following key performance indicators should be tracked to evaluate the success of this initiative on an ongoing basis. Once the first set of indicators has been gathered, they are to be used as benchmarks for ongoing measurement and goal setting.

**Key Performance Indicators**

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<th>KPI</th>
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<td><strong>Common Marketing</strong></td>
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15. **Review**

All elements of this plan should be reviewed every six months with consideration of current economic opportunities or priorities. The tactics, budgets and strategies should then be re-aligned as required to best meet current conditions.

16. **Recommendation**

The City of Hamilton has an exceptional opportunity to focus its marketing efforts on key sectors, take advantage of existing and new communications channels and become known as a City that “is happening” now!

This plan provides a guide for the City of Hamilton Economic Development department to begin this work.

17. **Foreign Direct Investment (FDI)**

*FDI Magazine*, the most recognized global publication on Foreign Direct Investment, ranks municipalities/cities for Foreign Direct Investment on the following seven criteria:

1. Economic Potential
2. Cost Effectiveness
3. Human Resources/ Labour force
4. Quality of Life
5. Infrastructure
6. Business Friendliness
7. Development and Investment promotion

These are also the same factors that investors use in evaluating locations during the screening process used to decide which are suitable for capital investment projects. It is no coincidence then that all of these criteria are represented in specific sections within Hamilton’s new 5 year Economic Development strategy.

The *FDI* magazine assessment of a city is based on specific indicators that businesses use in respect to each of these seven criteria. For the “Development & Investment Promotion” criteria, the experts consider the following five areas to be the most important:

1. Sectors targeted for inward investment
2. Financial support available for investors
3. Non-financial investment support available for investors
4. Major infrastructure and urban planning projects
5. Environmental strategies and grants

The Business Development Component of the new Economic Development strategy
has already defined targeted sectors for inward investment in the **Key Industry Groups** segment (page 14) and the **Attraction** segment (page 4) has focused on the geographic locations (both nationally and internationally) of these sectors.

Hamilton’s Foreign Direct Investment (FDI) Strategy/Action Plan is a priority Short Term deliverable in the Marketing & Outreach component. Indicative of this entire new Economic Development Strategy, partnering with other levels of government, public institutions, and the private sector will be critical to the effectiveness of this strategy and the realization of new jobs and assessment. Initially, it is contemplated that there will be four major sections for this FDI strategy/action plan. They include:

- **Research** - extensive research leading to the identification of 5 targeted companies (per year) in each of the key industry groups, including “lead” generation from local companies/entrepreneurs.
- **Product Development** - “customized” investment package based on the established FDI/industry recognized criteria.
- **The “Sales” Pitch** - Direct Corporate Calling program to those targeted companies of greatest interest. This will include professional presentations by Politicians, local Ambassadors and Senior Staff.
- **Follow-Up, Evaluation & Alternatives** – In-coming investment/familiarization mission by targeted company(s) to Hamilton. Development of performances measures for FDI strategy and exploration of other marketing alternatives to identify, reach and attract direct investment.

**Short-term Deliverables**
- Identify three major geographic areas for FDI
- Identify networks into those areas

**Long-term Deliverables**
- Two major investments per year from each of the geographically targeted areas
18. Downtown Community Engagement Plan

Background

Since the inception of the city itself, the City of Hamilton’s downtown core (herein defined as bounded by Queen Street to the West, Victoria Avenue to the East, Hunter Street to the South and Cannon Street to the North along with the spine of James Street from St. Joseph’s Hospital to Liuna Station) has been a focal point for the community. There were years of great growth, then prosperity, then decline and now a growing sense of renewal; renewal consistent yet slower than the general populace would hope for.

Regardless, since 2001 there has been a greater focus on revitalizing the downtown through a mixture of municipal incentive programs and an administrative division (Downtown and Community Renewal Division - herein referred to as DCR) dedicated solely to this endeavor. The results: since 2002, the division has assisted in the creation of 755 dwelling units in the downtown and has leveraged over $14 million in loans (which ultimately will be paid back through the completion of various downtown projects) into $126 million in property value.

Although tangible results are being witnessed and tracked, the popular sentiment remains that the downtown core is not a safe or clean place, that the existing businesses only cater to the lower end of the income spectrum and the core is lacking as a “people place” after 5:00pm.

This document is called a community engagement plan rather than a “marketing plan” to illustrate that the renewal of the downtown will be a community effort rather than a “marketing exercise”). This document will lay out the strategies and tactics to move forward. The goal is to build the downtown core into a “people place;” a place where the creative class is welcome and both residents and visitors are fully informed as to what is happening downtown. Ultimately, the plan will identify the ways that everyone can participate in making Hamilton’s downtown core the positive focal point of the city once again.

Organizational Goal:
The organizational goal (City of Hamilton Goal) is to see more people live, work, shop and visit the Hamilton’s downtown core to build the tax base, bolster the economy though the support of local merchants and fill available office space with new jobs.

Communications Goal:
To use two-way symmetrical communication to raise awareness of the opportunities that exist downtown (e.g., real estate investments, living space, commercial space) and highlight the positive activities in the core that are slowly changing the core’s image for the better and create new media and community relations channels to share the positive changes that are happening in the downtown core.

Research

As the renewal of the downtown core will be a community effort, there were a number of research methods employed to solicit the opinions and attitudes of the community. This took the form of both primary and secondary research and yielded a wealth of information.
that reflects the prevailing attitudes of the citizens of Hamilton as well as neighbours outside of its municipal borders.

**Research Methodology Employed**

*Primary Research*

*(Qualitative)*

- Focus group with downtown merchants (10-12 individuals per group, 1 hour) to glean more information about their requirements for future communications.
- Focus group with property owners in the downtown core to understand their information/concepts of Hamilton’s downtown.
- Focus group with individuals representing neighbourhood groups/condominium corporations:
  - Durand
  - Beasley
  - Corktown
  - Central
  - Stinson
  - North End
- One-on-one interview with representatives from the Social Planning and Research Council and Wesley Urban Ministries
- Focus group with the Street Youth Involvement Committee (collection of current and former street involved youth) (Social Planning and Research Council)
- One-on-one interview with the Hamilton Police Services
- Individual interviews with members of Hamilton City Council who have a part of “downtown” in their ward, to identify communication gaps (Councillors Bratina, McHattie, Morelli identified)

*(Quantitative)*

- Online survey to measure Hamiltonians’ understanding of the “downtown” and identify information gaps (goal is to attain a cross-section of the citizenry) (carried out through Survey Monkey).

*Secondary Research*

- Google search of municipal best practices in “downtown communications” in part through the International DOWNTOWNS Association
• Review of the 2006 Statistics Canada Census Data for Downtown Hamilton

**Research Staging**

<table>
<thead>
<tr>
<th>Stage</th>
<th>Timing</th>
<th>Method</th>
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<td>City-wide survey</td>
<td>Primary (Quantitative)</td>
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<td>Two</td>
<td>July 2009</td>
<td>Focus group with Merchants, Property Owners and Neighbourhood Groups</td>
<td>Primary (Qualitative)</td>
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<td>Three</td>
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<td>One-on-one interviews with the “downtown councillors”</td>
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<td>One-on-one interview with the Hamilton Police Services</td>
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<td>Primary (Qualitative)</td>
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<td>Six</td>
<td>August 2009</td>
<td>Focus group with Street Youth Involvement Committee (through the Social Planning and Research Council)</td>
<td>Primary (Qualitative)</td>
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<tr>
<td>Seven</td>
<td>August 2009</td>
<td>Review of best practices in downtown communications and downtown associations and 2006 Census data.</td>
<td>Secondary</td>
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Research Results

City-wide Survey

There were no real surprises in the city-wide survey (1,050 respondents—public made aware through no cost PR efforts i.e., media interviews/social media—rather than paid advertising) as many of the prevailing popular attitudes regarding the downtown came through loud and clear. Overall, the impression of the downtown core was that for starters it is viewed as a “dirty” area (i.e., garbage on the sidewalks, derelict buildings, places in need of power washing, etc.), that there is a distinct element in the core that through the acts of loitering and panhandling has discouraged many to come downtown and that the lack of foot traffic in the core after 5:00pm raises feelings of insecurity.

In generalities, the majority of respondents frequented the downtown often and most come down more than once a week to shop, dine, work and frequent government services. 32.1 per cent had a “negative” attitude towards the downtown (many for the reasons stated above), yet the interesting statistic is that 38.2 per cent felt “optimistic” (almost 50 per cent if combining “optimistic” and “very optimistic”) about the future of the downtown. This is important because it shows that the citizenry have not given up on the downtown and indeed hope for better days ahead and that at least the City will be met with an open-minded audience for future community engagement initiatives.

In terms of the safety element of the downtown, 41.8 per cent of respondents “usually” felt safe downtown and 41.1 per cent were “somewhat aware” of the progress being made downtown in terms of safety. These point to the fact that the increased police activity in the core is slowly making headway in the minds of the populace, but more outreach efforts are needed through greater partnerships with the City and the Hamilton Police Services.

However, in the area of cleanliness, 54.85 per cent of respondents did not find the downtown clean and 37 per cent were not aware of the progress being made downtown in terms of cleanliness. This points to the fact that there needs to be a greater Public Works Department presence in the downtown, much like the effort put in by the Hamilton Police Services and suggests that Public Works Department marketing/communications must start to target the downtown in a greater capacity.

In terms of what the Downtown and Community Renewal Division is achieving, most of the respondents were “somewhat aware” of the building progress downtown. Despite the fact that the Downtown and Community Renewal Division has not really had a budget to market its successes, this statistic points to the fact that the downtown is an issue that will keep people engaged void of any particular marketing or communications efforts. Therefore, it is anticipated that a collaborative and structured marketing effort will only increase awareness.
Through the survey it was also made clear that international restaurants and the heritage buildings in the downtown are well known to the respondents and should be part of future marketing efforts and that overwhelmingly 85.5 per cent of respondents were aware of events at HECFI; showing a possible new avenue of collaboration in terms of downtown marketing.

Finally, the main sources for downtown information for the respondents were as follows:

- 71 per cent- newspapers
- 38.6 per cent- radio
- 34.7 per cent- television
- 30.7 per cent- community websites

The survey also came with the option to provide comments on the various questions. Most respondents were certainly forthcoming with opinions about the downtown. When looking at the themes of the responses and what people really identified with the downtown it was clear that the downtown is:

- A centre for socializing
- A major area for education and culture
- A major centre for finance and governance.

However, again the issues of safety and cleanliness were reported as a impediment to respondents coming to the core.

Focus Group with Merchants

- Little awareness regarding DCR incentive programs and need to have greater communication between DCR and the merchants through the Downtown Hamilton and International Village BIAs (e.g., education package/brochure regarding DCR and given to BIA merchants to share with the members)

- Little awareness of cleanliness efforts (mainly during summer season) and a suggestion to bolster the powers of the Downtown Cleanliness and Safety Task Force (efforts during the Grey Cup in 1996 and the World Cycling Championships in 2003 should be everyday standard efforts from the Public Works Department)

- Agreement that there needed to be a central site to house information about cultural events/building progress/capital improvements etc. and that the URL must be short and to the point.
• Some participants pointed out that rumours through social media were tainting the true information regarding downtown progress, so it was again suggested to have a website where up-to-date information can be found.

• Suggestion to market to young people in the core to attract them to stay post-graduation.

• More statistics needed in marketing materials to prove progress through numbers.

• The key message should be “Hamilton is”, not “Hamilton will be” or “hope to be”. Need to tell people what is actually happening in the core, because there are many good news stories that are not getting out.

Focus Group with Downtown Property Owners

• Marketing piece for all of DCR’s incentive programs needed

• Little awareness of cleanliness efforts (mainly in summer season). A greater effort needs to be made to clean up the north side of King Street between James and Catharine Street

• General agreement amongst the group that they were unaware of the culture/building activities in the core

• Group agreed they were aware of their own personal building stories but not about what is going on in the core in general

• Need to attract young people to live in the downtown

• Majority of the group rarely or never use the City’s downtown site for information about what is going on downtown

• City needs to support (marketing wise) the major projects that are being undertaken in the downtown core

• City needs to have stronger by-laws to enforce property standards and ensure that development of a building occurs within a certain timeframe so as to reduce the number of vacant buildings

• Utilize more marketing opportunities in the Hamilton Spectator and on Cable 14

Focus Group with Downtown Neighbourhood Groups

• Group aware of James Street North as an arts district, the capital improvements on Bay, the turnaround of the International Village BIA and that the two-way street systems on James and John have slowed down traffic, made neighbourhoods safer and tourist-friendly
• Generally aware of cleanliness activities, but more cigarette receptacles are needed
• Hamilton Spectator identified as an information source, but a website for all downtown information is needed
• Greater effort needed on getting more grocery and children stores in the downtown and filling the vacant office space

One-on-One Interview with Councillor Bob Bratina

• Clean up “anti-social” behavior on King Street between James Street and Catharine Street
• Need more officers in the core
• Can’t market anything until the core is safe and clean
• Need an “artery strategy” where the Hamilton Police and Public Works Department efforts are focused (James Street, John Street and King Street- between James Street and Catharine Street)

One-on-One Interview with Councillor Brian McHattie

• Not aware of how we currently market
• Focus more of the marketing efforts in the Toronto area and surrounding GTA showing the dichotomy of prices between Toronto and Hamilton
• Information presentations to major Toronto organizations (e.g., Toronto Chamber of Commerce)
• More effort on assisting those with mental health issues in the core and a security presence at the corner of King and James and in front of the Sheraton Hotel where many of the visitors to the core stay.
• Focus on key areas to focus safety and cleanliness efforts
• More communication about the downtown successes between staff and Council
• Reduce size of signage on buildings in the core
• Hamilton Calling program expanded greatly throughout the downtown core

One-on-One Interview with Hamilton Police Services (Staff Sergeant Mark Cox)

• There is a dedicated “core” patrol in downtown Hamilton
• More cameras in the core have had an effect on curbing crime in those areas
- More prominent police identification (e.g., brightly coloured jackets)

- Issue is when an arrest is made in the core, the officer has to go back and do the paperwork in the station for 1-1.5 hours, taking them off the streets for that time

- Cannot just arrest those loitering in Gore Park or even tell them to keep moving as they are not breaking any crimes nor violating any city by-laws. Need to have stronger by-laws as a basis for keeping people moving.

One-on-one Interview with Representatives of the Social Planning and Research Council (Jenny Vengris) and Wesley Urban Ministries (Denise Scott)

- Majority of the street youth in the downtown core are escaping extremely abusive home life

- The choice they have to make everyday is whether to go home and most likely be subjected to one form or many forms of abuse or stay on the streets (or shelter when space is available)

- Key to getting the street youth out of the downtown core and away from the corner of King and James is to have a 24-7 drop-in centre somewhere in the downtown (but not necessarily in the core)- Hamilton had one, but lost it due to budget cuts; now an anomaly as one of the only major cities in Canada without one

- Niagara doesn’t have a lot of youth services so they are coming to Hamilton

- Need to coordinate the efforts of the outreach workers with the Downtown Cleanliness and Safety Task Force and the BIAs in the area

- Perhaps making the south leg of the Gore (slated to close in 2010) an arts area for street youth once a month

- Greater partnerships with the Home Depot, Lowe’s to provide the tools needed to clean up the core and provide the “bored” street youth with an honorarium to keep the core clean

Focus Group with Street Youth Involvement Committee (Social Planning and Research Council)

- Need a 24-7 drop-in centre for street youth. Because many cannot get into Notre Dame House, Living Rock or Wesley Urban Ministries they hang out in Gore Park. A new drop-in centre would provide a new hang-out area for the street involved youth.

- They will move out of the Gore if the drop-in centre is available

- When Hamilton did have the drop-in centre, the youth could do their laundry, eat, watch tv, get their mail and talk to Ontario Works staff; most importantly there was a level of trust with drop-in staff
• Lack of services makes all the kids go to the Gore

• Keep the downtown clean, pick up cigarette butts, garbage, etc.

• Gore Park is the place where anything goes. Get your drugs there and can sell them there and no one does anything about it.

• Clean up the top of Jackson Square, not safe

• Because there’s nothing to do (i.e., no services) kids in Gore Park are bored and “looking for victims” (e.g. robberies, physical assaults)

• Get rid of businesses that encourage criminal activity

• More police in the core

• More cafes to socialize in the core

• Don’t like coming downtown because of those addicted to crack cocaine; not safe

• Better landlords needed in the core and more affordable rents

**Secondary Research**

Downtown Best Practices

This consisted of looking at the websites (and thereby activities) of some of the more notable downtowns in Canada and the United States. Cleveland, Pittsburgh, Winnipeg, Halifax and Baltimore were all examined and throughout there are common features that Hamilton could learn from:

• A central site where all downtown information is housed (including professionally produced summary documents of key programs)

• Interactivity on these sites to allow the community to “share the news” and post their information as well

• A recurring source of information (e.g periodic newsletter)

• Interactive maps

• Mobile browser applications

• Photos/videos

• Cleanliness and Safety programs

• Calendars
Some have downtown ambassador programs

### 2006 Statistics Canada Census Data

- Ward 2 population has grown 5 per cent from 1986 to 2006
- Central neighbourhoods up 10.8 per cent (Beasley, Central, Corktown, Durand)
- Compared to Hamilton as a whole, downtown has a greater proportion of residents in household forming years (20-34), fewer children and a similar proportion of seniors
- Overwhelming majority live as renters in duplexes and multiples
- 79 per cent of downtown’s recent immigrants are from Africa and Asia, and contains 7 per cent of city’s recent immigrants
- 64 per cent of downtown residents aged 15 years and over have incomes below $20,000 per year, compared to 43 per cent of the city
- One quarter of downtown residents (aged 25-64) have been to university, nearly half have finished high school or less
- Over 20,000 people work downtown and one quarter in Public Administration
- One quarter of downtown workers use public transit, walk or bike to work

### Analysis

Arising out of the research, the following analysis was developed:

**SWOT** – A SWOT analysis is a tool for auditing an organization and its environment. It is the first stage of planning and helps marketers to focus on key issues. **SWOT** stands for strengths, weaknesses, opportunities, and threats. Strengths and weaknesses are **internal** factors. Opportunities and threats are **external** factors.

#### Strengths

- Downtown Hamilton recognized as the central area of the city
- Walkable, rich in heritage buildings
- General interest from citizenry/media re: state of the downtown
- Transportation hub
- Established and strong incentive programs to foster investment
- Established and growing police camera program
- Established and growing Business Improvement Areas
- Strong culture sector (cuisine/theatres/galleries)
- Hospitality industry clustered in downtown
- Defined social services area (assists in planning location for possible drop-in center)
Weaknesses
- Deteriorating Physical state of buildings
- Infrequency of street/sidewalk maintenance
- Loitering persons/panhandlers/unlicensed street performers
- Concentration of social services
- Lack of street youth amenities
- Lack of central information sources (either on the street or on the web- e.g. poster board)
- No comprehensive marketing effort
- Downtown Cleanliness and Safety Task Force not effective

Opportunities
- Pan Am Games, burgeoning waterfront affords opportunity to tie the waterfront and the downtown together
- Arts community growing in downtown core which may lend itself to more events in the core and more public engagement pieces that bring more people to the downtown core
- Growing immigrant base in the core can lead to new shops/restaurants/festivals in the core
- Expanded Brownfield program can remediate old properties in the core
- Targeting of student population whether in school or post-graduation can bring more people downtown
- Still cheaper to work and live in Hamilton’s downtown (with great access to major transportation hubs) than Toronto
- Ample office space available
- New ways of communicating (e.g. greater web presence/social media) brings new, low to no cost mediums to reach intended audiences
- Improvements in transportation modes (LRT, GO Service) can be used as large marketing tool

Threats
- Unbalanced media attention on negative downtown items which works to erase downtown progress in the minds of various audiences
- Growing crack cocaine problem that threatens safety of streets and private property
- Reduction in municipal revenues could mean reduced effort in cleanliness/safety and communications with the public regarding the downtown
- Speculation makes for inflated property values leading to no development

Communication Objectives
- To ensure that through this plan, Hamilton residents’ awareness of the progress of the downtown is raised by 10 per cent at the end of the first year of the plan’s implementation.
- To ensure that through this plan there is a 25 per cent increase of Hamiltonians who view the downtown as clean and safe within two years of the plan’s implementation.
- To raise the number of positive media stories about the downtown by 5 per cent within six months of the plan’s implementation.
• To ensure that through this plan, the office vacancy rate decreases by 25 per cent within two years of the plan’s implementation.
• To ensure that through this plan, there is one major tenant from a post-secondary institution locating in the downtown within 5 years of the plan’s implementation.

Communications

As a consequence of the research and analysis, a program of tactics emerges as follows:

Audiences

Primary Audience:
• Hamilton City Council
• Downtown merchants and businesses
• Downtown property owners
• Downtown neighbourhood groups (including community centres- e.g., YWCA/YMCA)
• Commercial/Industrial/Investment realtors
• McMaster University, Mohawk College, Redeemer University

Secondary Audience:
• Media
• Arts groups
• Hamilton Chamber of Commerce
• Jobs Prosperity Collaborative
• SISO
• Hamilton Small Business Enterprise Centre
• Post-Secondary students
• Tourism Hamilton
• Social Planning and Research Council
• Hamilton Roundtable on Poverty Reduction
• Faith-based groups/institutions
• Hamilton Community Foundation

Key Messages:
• There are a number of investment opportunities in the downtown
• Downtown Hamilton is going through a process of revitalization
• Creativity, community and connections are elements of a new Hamilton downtown
• Respect the elements that give downtown its special sense of place

Outreach Efforts

The following are some general concepts to focus on with future marketing activities:

Look and Feel
It is critical that the implementers of this strategy understand the importance of the impact that the look and feel of the new outreach materials will have on the impression and image perception of Hamilton’s downtown.
As image has consistently been described as a top priority and is one of the two objectives of this plan, the look and feel must be at the heart of each outreach tool and each item that is produced, from printed materials to web to advertising.

**General Internet Program**
Recent studies, reports and anecdotal references all indicate the critical importance of a downtown’s internet strategy. Site selectors, realtors, entrepreneurs and the creative class are conducting extensive research online before ever contacting the Downtown and Community Renewal Division.

Weak websites that don’t provide the necessary content and don’t make the right impression quickly contribute to elimination. In today’s competitive investment attraction world, the website has to become the number one sales person.

**Website**
At the heart of the Internet program is the necessity to have a competitive website including interactive features, search features, directories, site selector tools, lots of sector specific content and interactive features to build a community. Ongoing evaluation, comparison, improvements and expansion of website content, interactivity and connectedness must be core focuses.

**Proactive E-Marketing Measures**
To increase targeted traffic, it is critical to put in place a series of outreach programs that include regular targeted e-mail, online advertising and participation in relevant social media forums or platforms.

**Statistics**
Goals for key measurable targets, such as number of visitors or number of downloads should be identified and website statistics should be reviewed weekly to compare actual numbers to goals. Tracking of what works and what doesn’t, most popular pages and use of tools provides intelligence for ongoing decision making and website upgrades.
Online Properties
Wikipedia, Google Earth and InvestinOntario are just some sites that need to be watched to make sure that they represent the image that Hamilton wants the world to see regarding the downtown.

YouTube
As video content is generated for sector-based promotion, a downtown Hamilton You Tube channel should be established. This presents an alternative channel for increasing video views and generating interest. YouTube videos are often easier to locate due to this website’s search engine ranking.

Linking Strategy
Reverse links are invaluable for a strong website presence. They work to help a website in many ways. Not only do they provide a direct link to your website from another, they also impact your search engine ranking. Extensive linking work should be done for Hamilton’s Downtown and Community Renewal Division in general but also for each identified sector. Linking strategies are a largely manual process that involves researching potential websites that can be linked from, contacting the relevant website owners and working with them to ensure that links are placed correctly and work correctly.

Search Engine and Social Media Optimization
Every search begins with Google or Yahoo, making it necessary for successful websites to implements search engine best practices on an ongoing basis. Search engine optimization revolves around the implementation of a range of tactics including keyword review, keyword density, meta tags, title tags, alt tags and more. Creating search engine optimization strategies with a focus on specifically desired search terms, such as sector specific terminology will have the biggest impact.

As a related best practice, social media optimization make the content of your web pages more highly visible to users of social websites and increase links from these sites back to your website.

Online Advertising
As the internet is the primary channel utilized for research of potential locations, online advertising, in the right place, at the right time, can have a positive impact on the increase
of website traffic. Online advertising should include Google Adwords and an evaluation of opportunities for banners, links or properties.

**General Attraction Program**

*Professional Photography*
“A picture says a thousand words” and a professional photograph has an immense impact on the immediate first impression that a marketing or communications tool makes on the viewer.

It is recommended that the division continuously build and maintain a library of professional quality photographs that represents target sectors, key successes and quality of life in Hamilton’s downtown. Photographs should be shot with an emphasis on building on key messaging and supporting key messaging by providing the visual proof and thereby beginning to change social perceptions. Photos can be used throughout the marketing program, including on the website, in profiles, sector profiles, advertisements, tradeshow materials and in video productions. Photos can also be used to expand downtown Hamilton’s profile on Google Earth and other internet properties such as Flickr.

*Printed Materials*
As prospects can be sent to the website, less printed material is necessary. However, some printed marketing tools still help to provide an impression and are useful for hand-outs at events and conferences and will include:

- **Glossy, Edgy Profile**
  To begin to change image perception, glossy profile designed in a modern, edgy style that describes business opportunities in downtown Hamilton with sectors.

- **Website Promo**
  A business card size, fold can be produced as a handout and acts as a guide to all the information on the website with quick links to key content areas.

*Digital Presentations*
USBs provide an excellent method for the dissemination of information including links to key content on the website, PDF files, videos and other documents. At the time of the writing of this strategy, USBs are still a popular promotional item. As each year presents many changes in technology and marketing, the appropriate method of dissemination may well change by 2011 or 2012.
Tradeshow Materials
Conferences and tradeshows were identified as a recommended tactic through stakeholder sessions. These events continue to provide an excellent venue for lead generation and networking for Hamilton’s Downtown and Community Renewal Division. Detailed conference participation is discussed in the sector however some generic tradeshow materials will need to be created:

- Tradeshow booth
  A modular booth that can be adjusted to fit various sizes of space and that have flexible panels.

- Promotional Items
  A variety of promotional items will need to be created. Depending on budget and target audience, promotional items may include pens, shirts or more creative, innovative items.

General Advertising
Most advertising and outreach will be sector specific, but some overarching advertising opportunities are available, such as:

- Downtown and International Village BIA advertising to a targeted circulation of real estate professionals.

- A general direct mail post to Downtown Hamilton and International Village BIA merchants to stay top of mind and to inform launched and new information that is available on the website. This campaign also provides an opportunity to present the new image of Hamilton.

Memberships
Hamilton should maintain memberships in downtown specific organizations where networking and professional development opportunities are available.

Media and PR
A media and PR strategy needs to be developed by the Marketing Coordinator. The core practices to be implemented include:

- Formalized release process
- Local media partnerships
- Messaging development
- Development of external journalist list
• Process for keeping journalists informed
• Media tours and events
• Media kit made available on website

As the media strategy is implemented, media monitoring becomes necessary to track the effectiveness of the media strategy. Media monitoring must be conducted North America wide and include analysis of tone, image, quantity, trending of articles and cover the following channels:

• TV
• Print publications (including downtown neighbourhood newsletters)
• Online/Social media (including financial investment in investinhamilton.ca TV)

CRM Database
As new leads are generated, it becomes vital to keep track of contacts and to effectively use the CRM database to send targeted communications and to conduct analysis on prospect numbers, stages and successful locations.

Partner Communications Program
Hamilton has established a powerful, strong and collaborative network of businesses, academia, government and non-profit organizations. Ongoing communication with these stakeholders essential to the success of this outreach plan. As such a formalized program should be established to keep partners and stakeholders informed.

➢ News and Status Updates
   Regular email newsletters and announcements provide an effective tactic for keeping top of mind and keeping partners informed about progress that is being achieved and programs that are being implemented. They also serve as a method for delivering the new tone of messaging and new look and feel, promoting the transition in image perception.

➢ A more comprehensive annual review in printed and online format provides an opportunity to present accomplishments and statistics in a format that is easily referenced by partners, businesses and stakeholders alike.

➢ Expansion of a corporate calling program into the downtown

➢ Expansion of open houses for downtown merchants/community groups/neighbourhood groups
Meetings and Events
The federal and provincial government will always provide a source for leads. As such, it is important to maintain relations through face-to-face meetings for the purpose of informing sector representatives about the work that Hamilton is doing and for sharing marketing and promotional items. As well, DCR should be involved in joint events with the Chamber of Commerce, Innovation Café’s and other local organizations where creativity is placed as paramount.

Grassroots Component for Consideration

- Police/DCR staff introduce themselves to business owners to familiarize themselves with the business concerns and build relationships
- Block captain for a street that will be provided with information regarding policing, City communications, event information that they can share with the other shop owners on the street
- Monday morning clean up (or another day of the week) where the business owners go outside their door and pick up garbage/wash down sidewalk, etc. Possible partnership with the Home Depot/Lowe’s to provide tools needed.
- Lunch and learn for merchants/public with the Downtown and Community Renewal Office and the Chairs of the Downtown Hamilton and International Village BIAs about what is going on in the downtown and the information the businesses owners can share with their customers/friends/family
- South leg of Gore to be used for events when closed to traffic (however, need a programmer to work with the arts community/BIA)
- Assistance from summer Tourism Ambassadors in cleaning up the "arteries" as referenced earlier in the document
- Spotlight from bell tower of City Centre during Art Crawl with messaging about what is going on downtown/quick facts
- Projection on public buildings during the year featuring different artists
- Major government announcements to be made at Gore Park
Tactics

The following marketing tactics can be classified in short (within one year), medium (within three years) and long-term (within five years):

Short-term (within one year):

- Launch of the online application system
  - To include a media release and PR effort to raise awareness with local media
- Graphic design of new downtown financial incentive program ads and creative industry ads
- Print media buy re: quality of life and financial incentive program ads (The Hamilton Spectator, View Magazine, H Magazine, McMaster University’s The Silhouette, Mohawk College’s The Satellite, Redeemer University’s The Crown, Downtown Hamilton and International Village BIA publications, Biz Magazine)
- Radio media buy (K-Lite FM/AM900 CHML, Wave 94.3)
- Create database for downtown information and mail outs and from that an online newsletter and e-blasts monthly
- Initiating stories on hamiltonrenewal TV
- Quarterly editorial board meetings with both the Hamilton Spectator and the Hamilton Community News
- Creation of an investment portfolio for DCR
  - To include information on availability of properties, price per square foot, amenities in a two block radius, highly skilled workforce and quality of life features/housing prices
- Professional photography library of downtown sites
- Creation of an interactive downtown online map (to include interactive map showing cultural amenities, shopping districts, dining establishments, arts enclaves, where to park, social media sharing features and videos of the various locations/establishments in the downtown)

Medium-term (within three years):

- Revamp of the Downtown and Community Renewal Annual Report
- Revision of the investinhamilton/hamiltonrenewal websites (to be in conjunction with Economic Development web strategy)
- Regular open houses to explain incentive programs with business community
- Greater partnership with Tourism Hamilton to promote the downtown
- Greater partnership with HECFI to promote the downtown
Long-term (within five years):

- Regular PR meetings with Business Editors and Arts and Culture Editors of Toronto newspapers
- Work with BIAs for Gore Clean-Ups
- Use of the Gore for major announcements
- Animation of the Gore in the summer months for festivals/cultural events

**Evaluation**

Again, we will use two-way symmetrical communication to raise awareness of the issues amongst the stakeholders and create community relations channels to understand if the outreach measures have been effective.

Evaluation Measures:
- Internet survey on hamiltonrenewal.ca (one year after start of program)
- Follow up focus groups with those listed above (one year after start of program)
- Measure of number of positive media stories (one year after start of program)

**Conclusion and Next Steps**

Overall, people judge a city by its downtown. As such, this plan must bear in mind the overall economic development marketing strategy that has been produced through the Economic Development and Real Estate Division and therefore must work in unison with that overall marketing plan. In turn, this plan has three overarching goals:

1. Highlight opportunities that exist in the downtown
2. Improve the image of the downtown core
3. Generate interest to create a positive climate for further investment and development in the downtown core

To that end, the following must be prime initiatives with such an engagement plan:

1) Absolute and complete support from Hamilton City Council and the City Administration on turning the downtown around through a greater dedication of staff and financial resources. There needs to be an ongoing and unified commitment permeating throughout the entire civic administration with a culture of renewal as the principal focus. As well, this work would be greatly advanced through the addition of one e-marketing staff person to ensure the website (including key statistics in real time) and social media content is kept up to date and relevant.

2) A dedicated downtown Hamilton Public Works crew that focuses on cleanliness in the downtown area on a daily basis and works to create a welcoming public space; more specifically the area bounded by James Street to the West, Cannon Street to the North, Wellington Street to the East and Main Street to the South.

3) A reinvigorated Downtown Cleanliness and Safety Task Force to be renamed the Downtown Renewal Sub-Committee of Hamilton City Council comprised of two neighbourhood representatives, two downtown merchants, the Chairs of both the Downtown Hamilton and International Village BIA, two property owners, the Ward 2 Councillor and the Mayor. This sub-committee will
be assisted by at least one assigned staff person from the Hamilton Police Services, the Public Works Department, the Planning and Economic Development Department and the Community Services Department. The Sub-Committee will be responsible for meeting monthly and reporting directly to the Committee of the Whole with a mandate for helping to promote the various investment opportunities that exist in the core and to assist in the promotion of the core’s image.

4) A downtown core policing strategy to work towards the elimination of the image of an unsafe core.

5) An overall strategy to accommodate street involved persons across the city and address their living needs.

6) Establishment of anti-loitering by-law in Gore Park.

7) Greater enforcement of property standards/signage standards within the area of the downtown secondary plan.

8) Greater external marketing efforts specifically for the arts in downtown Hamilton not only with the visual arts, but graphic arts and media arts as well.

9) Increase or create sector specific incentives that accelerate investment.
19. Community Outreach

As a result of the comprehensive marketing strategy prepared by Millier, Dickenson, Blais, that outlines the business attraction, retention and expansion marketing plan specifically for the City of Hamilton, there also exists a requirement for a broader based community outreach component. This is an initiative that will not be led by the City of Hamilton, but instead be the responsibility of the community itself. It calls for both the City’s political and staff representatives to work jointly with the community to transform the image of Hamilton by changing the internal and external perceptions of the city.

The thrust of this effort will come from a cooperative effort between the City of Hamilton, Jobs Prosperity Collaborative (JPC) and the Chambers of Commerce. The JPC is a community-based organization that represents a wide spectrum of interests in Hamilton’s prosperity agenda. The JPC along with all its partners and community members have officially embraced the City’s vision to be the best city in Canada to raise a child, promote innovation, engage citizens and provide diverse economic opportunities.

In consultation with the JPC and the Chambers of Commerce, the following areas have been identified as the focus for the community outreach section of the Economic Development Strategy’s Marketing & Outreach Component:

1. Hamilton Business Ambassador Program
2. Coordinated Talent Recruitment Efforts
3. The JPC “Proud Hamilton” Initiative
4. A Greater Use of Technology to Raise Awareness and Maximize Marketing Dollars

1. Hamilton Business Ambassador Program

In September 2008, the City of Hamilton and the Jobs Prosperity Collaborative launched the Hamilton Business Ambassador Program. The Ambassadors are a network of local leaders with a passion for promoting growth and investment in Hamilton. The Hamilton Business Ambassador Program is comprised of ambassadors from different sectors that will be able to utilize their national and international networks to promote Hamilton as a premiere location for business.

The mandate of the program involves actively promoting the city, cultivating leads and supporting business recruitment efforts. To maximize effectiveness, this program was developed and launched in partnership with the Jobs Prosperity Collaborative. This collaborative approach was taken to ensure that all segments of the Hamilton community were aware of the program, and played a role in improving Hamilton’s economy.

To raise awareness for the program and persuade individuals to participate in the program, the Hamilton Business Ambassador Smart Drive (a USB stick - contains powerpoint presentations, photo gallery, videos and other information products), is a state-of-the-art marketing tool that was introduced as a information conduit for
potential investors. With the USB device being directly linked to the internet, there is tremendous value in the fact that information on the drive is constantly kept up to date via internet based updates every time the drive is plugged in the USB port.

The most important feature of the Ambassador USB stick is that it drives all interests/enquiries directly to Hamilton’s Economic Development’s award winning “investinhamilton.ca” website. This website provides all the information and research needed to make an informed site location decision. Further, the City has the capability to track where the drives are being used anywhere in the world and can obtain analytics on the use of the drives, making the measurement of this marketing tool very effective. Finally, the drives also allow the user to create their own photo/video gallery with their own images of Hamilton, to tell their personal “Hamilton story” to potential investors.

To date, there are over 150 ambassadors in the City of Hamilton and the smart drive has been used in countries from across the globe.

**Short-term Deliverables**

- Revision of the smart drive to include up to date investment information, new videos and new skin
- Annual reviews and updates of the USB stick content
- The program continue to be marketed at various JPC, Chamber and community events
- Program information to be hosted on investinhamilton.ca, on the JPC website and the Hamilton Chamber of Commerce website

**Long-term Deliverables**

- Increase number of ambassadors by 5 per cent each year
- Revision of the smart drive to be translatable in Mandarin and German
- Creation of a database for instant e-blasts
- Online ambassador newsletter be sent out quarterly to the ambassadors

2. **Coordinated Talent Recruitment Efforts**

The recruitment of skilled labour and professional talent to Hamilton is a team effort and should not be just the responsibility of the local employer. For example, recruiting doctors to Hamilton may require the combined efforts of McMaster University, Hamilton Health Sciences/St. Joseph’s Healthcare and the City of Hamilton (Doctor Recruitment, Public Health, Economic Development, Tourism Hamilton). It is clear that the more information that can be presented to a new recruit about the advantages of living and working in Hamilton the better the chances are of securing that talent.

These efforts not only require consolidated information from various sources, but also a “sales team” consisting of community and political leaders. Therefore, what is recommended in this section is the creation of a database for each of the Business Development Key Industry groups that identifies “champions” in each of these
industry groups that can be summoned to participate in talent recruitment. This data base will list all relevant contact information and the areas of expertise for each of the “champions”.

**Short-term Deliverables**
- Identification of “champions” in various recruitment areas
- Creation of a database for instant e-blasts to “champions”

**Long-term Deliverables**
- Two successful recruitment initiatives per year

3. **The JPC “Proud Hamilton” Initiative**

The Proud Hamilton campaign is a 15-week event which will share and showcase the pride Hamiltonian have for their city. The ultimate goal of the campaign is for all Hamiltonians to become ambassadors. The objectives of this program are to create a positive outlook about the future of Hamilton to tell the rest of the world why Hamilton needs more recognition. This type of mindset can only contribute to the city’s economic and social prosperity, as engaged and motivated citizens become the drivers of new partnerships, innovation, entrepreneurship, collaboration, and attracting economic investment.

The “Proud Hamilton” Campaign was initiated by the Jobs Prosperity Collaborative (JPC) to excite Hamiltonians and bring them together to found and grow grassroots pride in and for the city of Hamilton. For more information about the JPC please visit http://www.jpchamilton.ca/.

The core of this campaign is stories. Through citizen’s articles, essays, videos and pictures Hamiltonians together can share what makes them proud to be a part of this amazing city.

**Short-term Deliverables**
- City participation with JPC in this Community Outreach initiative

4. **A Greater Use of Technology to Raise Awareness and Maximize Marketing Dollars**

A common theme amongst the City of Hamilton and its community partners in the Jobs Prosperity Collaborative is the use of technology. This not only includes the use of the internet, but also the extensive use of social media to share information with the public. However, the outstanding shortcoming is that there lacks common linkages between these social networks.
Short-term Deliverables
- Identify the major institutions and top employers in Hamilton
- Identify those that are currently utilizing social media and in turn link existing social media accounts together (e.g., Facebook, LinkedIn, Twitter, You Tube, etc.)
- Create opportunities for “guest blogs” on each other’s sites.

Long-term Deliverables
- Each of the major institutions and employers in the city should be hosting investinhamilton TV- Economic Development’s on-line news channel that features economic good news stories. This will be a large part of the “social” awareness building exercise and will be given greater credibility when each of the partners is displaying these clips.
20. Appendix A: Website Analysis

20.1 Qualitative Website Review

The City of Hamilton has recently launched a new and restructured economic development website. The project team contacted 12 economic development, site selection and urban development specialists across the country to provide comment on this new site, and to share initial reaction to the site’s look, feel and content. Those who have responded to date include:

- **Craig Astfalck**, CEO of the UK-based economic development consultancy 2Swans Ltd.
- **Ron Atkinson**, Economic Development Officer for the City of Charlottetown
- **David Emerson**, Director of Government Relations for the University of New Brunswick at Saint John (UNBSJ), and member of the Board of Directors of the Economic Developers Association of Canada (EDAC)
- **Sam Harling**, Executive Director, Terrace Economic Development Authority
- **Kris Hodgson**, Senior Manager of Business Development, Economic Development Lethbridge
- **Gregg Wassmansdorff**, Vice-President, Brokerage and Manager, Location Advisory & Incentives Practice, Colliers International
- **Dale Wheeldon**, Executive Director of the Economic Developers Association of British Columbia

While the feedback received is only anecdotal, it does speak to the informed perspective of professionals who must work with and in an economic development marketing context on a daily basis. Responses have been kept anonymous, and may have been edited for clarity, but have not been filtered or edited for content.

**Perceived Strengths of Website:**

- I found it to be very user friendly and appealing... if first impressions count it was very high
- I think the look of this one for Hamilton is very professional and clean.
- Lots of menu options and the drop down items all look to make sense.
- The photo in the homepage banner is very good. I like to see what a community looks like when I go to an ec. dev. site.
- The layout of the homepage is good. Looks fairly straightforward, with easy navigation. Having “home” and then “contact us” immediately next to it in the top left corner is very good. People who look up websites are often searching for a phone number or contact and get frustrated when they have to dig very far....especially those searching on their cell phones or blackberries, which is another reason to have it top left corner (that’s what is shown first on the phones).
- The content development and navigation tasks are clearly well in hand.
Perceived Weaknesses of Website:

- Don’t describe the section/page i.e. “On this page....” but rather describe why to invest in Hamilton – the “elevator pitch” in a paragraph. Ditto for “locate & expand”, “Incentives & Programs”, etc.
- Have fewer subsections/ pages per section and more information on the section page as this looks like you are padding the site to make it look bigger, rather than giving just the facts. An example of this is to bring the location advantage, key sectors, etc. up onto the “Why Hamilton” main page.
- Weather: Is it wise to show that it is raining in Hamilton? I would not have the weather on the pages – rather, replace with physical contact details (telephone, address, map, e-mail) so it is common on all pages
- Share: Take this out, as this takes the user away from the site. This type of information is static and so not very “shareable” in the social network world.
- In the Utility Rates section, the links didn’t open a new tab but exited the Invest in Hamilton website and went to the utility’s website (not good).
- In the Development Charges section, there is information on industrial DCs, but not other classes of real estate. Also, there needs to be some preamble about what DCs are, what they are used for, and how they compare to other municipalities.
- In the Development Charges section, and elsewhere, it is not clear what the non-Hamilton locations are (Stoney Creek, Glanbrook, etc.).

Suggested Improvements to the Website:

- Video: This is a great idea but practically it needs to only run once per user session instead of every page that you load. Also the actor says thanks for investing in Hamilton at the end of the script – this may be a bit premature.
- Contact info: Who uses a fax number these days? I would not have it as it is redundant. Also be careful of putting people’s e-mail addresses on the page – spambots love them and they become a pain. Rather, have a generic e-mail address or people’s names and a specific telephone number.
- Optimisation: In the <head> section of the front page source code, the <keywords> and <description> meta tags are not being used correctly. This will affect the ranking of the site.
- If I had to identify opportunities to improve, my only suggestion would be that while there’s a lot of information is imparted on the site, I did not gain a strong sense of the image and reputation that the community wants to project to its audience. Not that I mean you’d want ‘boosterism’; just that there needs to be a brand proposition that has some coherence and consistency. I suspect this is a challenge for Hamilton, given its mythology. Does it know what it wants to be?
- There’s a *lot* of text, and significant 'busy-ness’... You might want to consider some better and more prominent photography to create a deeper resonance and capture the imagination of people hitting the site for the first time. We all think we know Hamilton (steel, Sheila, kind of tired) but some
great imagery that challenges our assumptions would be an asset in encouraging exploration.

- Don’t auto-play the welcome recording. It’s jarring to have the voice come “at you” when you’re not expecting it. Instead, put a photograph of the person speaking, with title, and a link to “Play” the welcome/introduction.
- The Universities & Colleges section should also reference that within a 45 minute drive you access Waterloo, WLU, Toronto, York, Ryerson, etc.
- The Workforce section should have information/data tables, not just links into other government websites, which are, mostly, difficult to navigate and take you away from a Hamilton focus.
- For the Zoning & Permits section (and maybe others), you’ve got to tell me on the website if a link is going to send me somewhere else, and why.

**General Comments:**

- Overall the main areas that a user/possible investor would like to see are present.
- I personally thought the site looked great.
- This will be a very good reference site.
- Overall, I think the Hamilton website looks great.
- Very impressive, very comprehensive. A strong start - and better than most of what I see already implemented elsewhere.
- It looked great!
- It’s a good website, for sure.

### 20.2 Quantitative Analysis

Over 100 elements were compared on 12 selected websites, including Hamilton. The Hamilton website stood up well in most categories although there are opportunities for improvement in all categories reviewed.

**Websites Reviewed**

The following twelve Economic Development sites were compared based on a standard matrix that included:

- a. Content
- b. Interactive Features
- c. Social Media Features
- d. Search Engine Optimization
- e. Design
- f. Communication
- g. User Scenarios
- h. Overall Impression
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### Evaluation Key
0 = Not there at all  
1 = Incomplete/poor  
2 = Satisfactory  
3 = Very good  
4 = Excellent  

*Note: Yellow highlights refer to gaps in the Hamilton Economic Development website.*

#### Parameter 1: Content

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**Out of a possible 48 points**

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## Parameter 5: Design

| Design                                                          | Windsor Essex | Calgary | London | Greater Omaha | Virginia | Baltimore | Edmonton | Pittsburgh | New York | San Diego | Halifax | Nevada | Hamilton |
|                                                               |               |         |        |              |          |           |          |            |          |           |         |        |         |
| Are links appropriately named and identified?                  | 3             | 2       | 1      | 4            | 4        | 2         | 1        | 1          | 1        | 2         | 2       | 4      | 3       |
| Can the user easily find their way back to the homepage?       | 2             | 2       | 2      | 2            | 1        | 2         | 0        | 1          | 1        | 2         | 2       | 2      | 2       |
| Does the design aid in the use of the web site?                | 2             | 3       | 1      | 3            | 1        | 2         | 2        | 1          | 3        | 3         | 2       | 2      | 3       |
| Is the loading speed acceptable?                               | 4             | 1       | 2      | 2            | 2        | 4         | 2        | 2          | 0        | 2         | 3       | 2      | 2       |
| Is the navigation system easy to use?                          | 3             | 4       | 2      | 2            | 2        | 4         | 2        | 1          | 2        | 1         | 2       | 2      | 1       |
| Is the site accessible to all types of users?                  | 1             | 1       | 0      | 1            | 1        | 1         | 2        | 1          | 2        | 1         | 3       | 1      | 3       |
| Is the site layout and function consistent?                    | 3             | 3       | 3      | 3            | 3        | 3         | 1        | 3          | 2        | 2         | 3       | 3      | 1       |
| Does the site look current and inviting?                       | 1             | 3       | 2      | 2            | 1        | 2         | 4        | 4          | 1        | 4         | 1       | 3      | 4       |
| Is there a clear brand?                                        | 2             | 3       | 2      | 2            | 1        | 2         | 3        | 1          | 2        | 1         | 2       | 1      | 3       |
| Is the site aesthetically appealing?                           | 2             | 3       | 1      | 2            | 1        | 2         | 4        | 1          | 3        | 2         | 3       | 3      | 4       |
| Out of a possible 40 points                                    | 23            | 27      | 16     | 20           | 17       | 26        | 24       | 11         | 21       | 15        | 25      | 25     | 23      |
### Parameter 6: Communication

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### Parameter 6a: User Scenario - Site Selector researching for a large plant

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### Parameter 6b: User Scenario - A SME is researching expansion locations

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<td><strong>Out of a possible 40 points</strong></td>
<td>26</td>
<td>21</td>
<td>14</td>
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<td>24</td>
<td>9</td>
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<td>13</td>
<td>14</td>
<td>15</td>
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</table>

### Parameter 6c: User Scenarios - An entrepreneur researching a location

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Windsor Essex</th>
<th>Calgary</th>
<th>London</th>
<th>Greater Omaha</th>
<th>Virginia</th>
<th>Baltimore</th>
<th>Edmonton</th>
<th>Pittsburgh</th>
<th>New York</th>
<th>San Diego</th>
<th>Halifax</th>
<th>Nevada</th>
<th>Hamilton</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the site have business start up support?</td>
<td>2</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>4</td>
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<td>1</td>
<td>1</td>
<td>1</td>
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<td>2</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>Does the site have space for lease or purchase?</td>
<td>2</td>
<td>0</td>
<td>0</td>
<td>2</td>
<td>3</td>
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<td>0</td>
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<td>0</td>
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</tr>
<tr>
<td>Does the site have access to labour pool?</td>
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<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>1</td>
<td>3</td>
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<tr>
<td>Does the site have transportation routes?</td>
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<td>3</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>1</td>
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<td>1</td>
<td>0</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Does the site have cost of operations (tax, utilities)?</td>
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<td>2</td>
<td>2</td>
<td>3</td>
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<td>2</td>
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<td><strong>Out of a possible 20 points</strong></td>
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<td>6</td>
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## Parameter 7 Overall Impression

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<th>London</th>
<th>Greater Omaha</th>
<th>Baltimore</th>
<th>Edmonton</th>
<th>Pittsburgh</th>
<th>New York</th>
<th>San Diego</th>
<th>Halifax</th>
<th>Nevada</th>
<th>Hamilton</th>
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<tr>
<td>Look and Feel</td>
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<td>3</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>2</td>
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<td>1</td>
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<tr>
<td>Breadth of Information</td>
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<td>3</td>
<td>2</td>
<td>1</td>
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<td>1</td>
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<td>Completeness of Information</td>
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<td>1</td>
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<tr>
<td>General Ease of Use</td>
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<td>2</td>
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<td>1</td>
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<tr>
<td>Marketability/Flashiness</td>
<td>2</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Organization of Information</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>2</td>
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<td>2</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Quality of Graphics</td>
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<td>2</td>
<td>1</td>
<td>0</td>
<td>4</td>
<td>2</td>
<td>3</td>
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<td>3</td>
<td>0</td>
</tr>
<tr>
<td>Quality of Photography</td>
<td>3</td>
<td>2</td>
<td>1</td>
<td>3</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>1</td>
<td>4</td>
<td>1</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Sense of Trust</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
<td>2</td>
<td>3</td>
<td>3</td>
<td>1</td>
<td>3</td>
<td>2</td>
<td>3</td>
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</tr>
</tbody>
</table>

### 20.3 Summary of Website Pros and Cons

<table>
<thead>
<tr>
<th>Site</th>
<th>Pros</th>
<th>Cons</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windsor</td>
<td>GIS Tools</td>
<td>Demographics are complete but hidden in a PDF</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No site search</td>
</tr>
<tr>
<td></td>
<td></td>
<td>News items are not searchable</td>
</tr>
<tr>
<td></td>
<td></td>
<td>No newsletter signup (just an email address)</td>
</tr>
<tr>
<td>Calgary</td>
<td>eBrochure feature is interesting</td>
<td>Site was down for a full day</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Site search only returns press releases</td>
</tr>
<tr>
<td>London</td>
<td>Lots of related links on each page</td>
<td>WMP plug-in warning on homepage</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Search does not work well (e.g. search “award” returns all news items – none even have the word on the page)</td>
</tr>
<tr>
<td>Omaha</td>
<td>Well organized</td>
<td>Demographic info by sector not available because of server error and not available in aggregate form</td>
</tr>
<tr>
<td>Virginia</td>
<td>Very good comparison tool for various demographic data</td>
<td>Poor aesthetics</td>
</tr>
<tr>
<td>City</td>
<td>Feature</td>
<td>Issues</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Baltimore</td>
<td>Concise and to-the-point site</td>
<td>No search function&lt;br&gt;Very little information on “Baltimore”.&lt;br&gt;Focus is only on Economic Development in the narrowest sense</td>
</tr>
<tr>
<td>Edmonton</td>
<td>Good design but the header is a little too large</td>
<td>Header too large&lt;br&gt;Lacks detailed information</td>
</tr>
<tr>
<td>Pittsburgh</td>
<td>GIS Planning – linked to external site</td>
<td>Site is run out of another site which can be confusing</td>
</tr>
<tr>
<td>NY</td>
<td>Great local interactive map for displaying business districts and initiatives</td>
<td>Slow page loading&lt;br&gt;Map is local only (no regional perspective)</td>
</tr>
<tr>
<td>San Diego</td>
<td>Well organized</td>
<td>Data is not displayed well (large tables in a restricted design)</td>
</tr>
<tr>
<td>Halifax</td>
<td>Inviting design</td>
<td>Lacks in depth data</td>
</tr>
<tr>
<td>Nevada</td>
<td>GIS Tools</td>
<td>Demographic data only at the County level – no aggregate data</td>
</tr>
<tr>
<td>Hamilton</td>
<td>Good health care info&lt;br&gt;Good overall design</td>
<td>Navigation doesn’t work in some sub-pages (fly-outs and links). Situation is made worse by lack of sub menus or breadcrumb&lt;br&gt;JavaScript errors on most pages&lt;br&gt;Location maps are OK but buried.&lt;br&gt;Demographic data is buried in a PDF&lt;br&gt;No income by sector info found&lt;br&gt;Search results return blank pages (e.g. “Find out about permits &amp; taxes”)&lt;br&gt;Lots of spelling mistakes (e.g. Top 10 page)&lt;br&gt;No info on safety or emergency services&lt;br&gt;META Keywords are “Joomla” and “joomla”&lt;br&gt;Description is “&quot;Joomla! - the dynamic portal engine and content management system&quot;”</td>
</tr>
</tbody>
</table>
21. Appendix B: Review of Model Communities

The following examples of case studies seek to identify projects that exhibit innovative concepts and practical strategies that address the need for reinvention from traditional industrial cities to diversified communities with a variety of new initiatives to invest in infrastructure and economic development.

21.1 Pittsburgh, Pennsylvania

The city of Pittsburgh has been traditionally known as one of the heaviest manufacturing centres in the world. From the early 1800s until recently in the 1980s, Pittsburgh’s economy was captured through the ‘Age of Industry.’ The widely known U.S. Steel Corporation was formed in 1901, which enabled the city to produce between 30 - 50% of the nation’s steel at that time. Expansion of the city’s industrial base continued through to the 1960s, but the following decades began to see the demise of the steel industry with major layoffs and mills closures. From the 1970s onwards, Pittsburgh has lost 146,000 manufacturing jobs along with a population loss of 300,000 residents.²

A shift in the city’s economy occurred beginning in the 1980s, with a focus on education, tourism, and services, largely based on healthcare, medicine, and high technology such as robotics, which have generated nearly 168,000 new jobs.

A Desire to Transform

Pittsburgh’s transformation from a traditional manufacturing city began initially, after the Second World War with the city-wide launch of a clean air and civic revitalization project known as the "Renaissance." This project was followed by the "Renaissance II" project, which began in the late 1970s.³ The city’s recent transformation has been sparked by the appeal to gain a regional identity and to identify itself as a well-known centre for health services and bio-science, related to the presence of two large academic centres: University of Pittsburgh Medical Centre and Carnegie Mellon University.⁴

² City of Pittsburgh: http://pittsburgh.about.com/od/history/
³ Ibid.
Challenges

A number of hurdles were initially faced by Pittsburgh before the transition into a creative economy began. These challenges ranged from a large stock of contaminated brownfield sites, a general public sentiment to continue to invest in steel mills rather than transitioning into the knowledge economy, a rapidly declining population and a city with an overall low morale.

Pittsburgh’s Success

By the early 1990s, the city’s leaders partnered with the Urban Redevelopment Authority (URA) [http://www.ura.org/index.html] geared up to launch a program that would not only beautify existing polluted natural areas, but identify attractive nodes for retail development along with the creation of new neighbourhoods located within the city limits.

Examples of Success

South Side Works Community
A multi-use development, constructed on one of the largest former steel mills sites in the city. The site spans across 330 00 sq. ft of retail, restaurants, condominiums, a hotel, training facilities for the NFL and university football teams and additional Class ‘A’ office space.

The URA was a key player along with the city to coordinate much needed financing and partnership for the $300 million project, with only $60 million in public funding and $23 million from URA and the City.

- Jobs (Projected) Created: 5,400
- Taxes (to be) Realized Annually: $9,583,735
- Units Constructed: 400 rental apartment units to date5

Summerset at Frick Park
Formerly known as a brownfield site, Summerset at Frick Park – is a successful redevelopment of a contaminated site for dump slag from steel mills in the 1920s. The reuse of this land has reclaimed sensitive environmental areas and lost park land. Once the project reaches completion, 710 new high standard multi-type housing units with Energy Star certification will be constructed.

The URA initiated this project in 1995 with the aid of the city, by collaborating and creating a remediation and redevelopment plan. The site has been designated primarily for single family and semi-detached residential homes.

5 Urban Redevelopment Authority Of Pittsburgh www.ura.org
• Jobs (Projected) Created: N/A
• Taxes (to be) Realized Annually: $2.9 million currently, projected $18 million at completion
• Square Footage: 42 acres
• Units Planned: 710 new high standard multi-type housing units

Regional Destination Financing Plan
Over an eight year period, $1 billion in infrastructure for the downtown core was designated. The revitalization of the baseball stadium, the creation of a new convention centre (certified LEED Gold building) and additional investment for the arts and culture, along with investment into the water and wastewater treatment plants has caused a flurry of extra development in the once vacant downtown core.

Lessons Learned
The efforts placed by the city and the URA have transformed Pittsburgh into an attractive place with new condo development in the downtown, the transformation of brownfields into living environments and the creation of new communities within the inner city limits. Much of this development was instigated by the awareness that risk taking, cooperation between developers and stakeholders was essential in the successful delivery of each project.

21.2 Cleveland, Ohio

The City of Cleveland thrived in the late nineteenth century as an important industrial city, due to its strategic location along numerous transportation routes as well as near large deposits of coal and iron ore. As of 1880, nearly 28% of Cleveland’s labour force was employed in the steel mills, but by the 1930s many steel businesses endured financial difficulty and subsequently laid off many of its employees. The city has not fully recovered and continues to hold on to a Rust-Belt image.

Solar panel roof on this 1918 bank building
Source: Ohio City neighbourhood, photograph by David Beach

6 Ibid.
Reinvention

Often referred to as the “Great Turning,” Cleveland city officials and residents have the desire to change and are at the beginning stages of a reinvention to become one of the most ecological cities in America. Much of the changes occurring in Cleveland are of the actions of local grassroots organizations such as EcoCity Cleveland and Entrepreneurs for Sustainability. Examples of Cleveland’s commitment to the transformation of the city into green friendly environment are illustrated in the following:

Adam Joseph Lewis Cleveland Environmental Center

The revitalization of an ailing 1918 bank into a commercial green building retrofit was one of Ohio’s first distinct signs of environmental stewardship. The building underwent a complete overhaul to increase its environmental efficiency, which included:

- efficient geothermal heating and cooling, abundant day lighting, waterless urinals, a green roof, and many other high-performance features
- This building proves to be an example of how both historic preservation and neighbourhood revitalization can occur through the efforts of sustainable redevelopment

Great Lakes Brewing Company

This zero-waste microbrewery that produces beer using sustainable manufacturing efforts, such as:

- Efficient energy systems are used during the brewing and cooling of the beer
- A by-product of grain that is used during the brewing process is used to create bread and pretzels for the company owned restaurant
- Excess grains are passed on to local farmers for the production of organic mushrooms
- Additional waste is either recycled or placed into vericomposting, which is the process of decomposing vegetable or food waste, bedding materials. The end product of this process is Vermicast, similarly known as worm castings.
- Vegetable oil waste is used to power a shuttle van, which transports customers to and from downtown sporting events.
- The brewing company also takes on a leadership role by holding monthly meetings for the following stakeholders:
  - Entrepreneurs for Sustainability, an organization of green entrepreneurs, investors, government, and non-profit leaders making sustainability and a local living economy the development drivers for the region.

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9 Yes Magazine – “Cleveland Community Action Turns the Rust Belt Green, http://www.yesmagazine.org/issues/  
10 Yes Magazine – “Cleveland Community Action Turns the Rust Belt Green, http://www.yesmagazine.org/issues/  
11 Ibid.
Cleveland EcoVillage

This residential development site, which has been strategically designed around a transit stop on an existing rail line connecting downtown with the airport.

- Square Footage: 22 acres
- Units Planned: 20 town houses with a focus on high energy efficient design elements and indoor air quality
- Twenty-unit, $4.1 million housing development
- Designed by Building Science Corporation

This project was initiated by EcoCity Cleveland and Detroit Shoreway Community Development Organization, which are non-profit organizations that promote sustainable living in Northeast Ohio. EcoCity Cleveland recently (2007) merged with The Cleveland Museum of Natural History, to form the Green City Blue Lake Institute with a partnership focus towards Northeast Ohio sustainability. The advantage of creating such a partnership is the ability to work together and make the region more environmentally competitive.

Lessons Learned

The sustainability effort led by Cleveland’s desire to become a green community is not restricted to physical redevelopment. Leaders of the movement recognize that the need to promote a ‘sustainability mindset’ on both an individual and government level for the transformation to succeed. The promotion of this mindset has been further ignited by the continued loss of industrial jobs further realizing the importance of areas such as alternative energy.

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12 EcoCity Cleveland: http://www.ecocitycleveland.org/
13 Ibid.
21.3 Sheffield, England

Sheffield, England had established itself as a steel driven manufacturing town during World War II. By the 1960s, the modernization of the steel industry along with the increased competition from abroad brought about many closures of steel mills across the city. The steel industry of the 1980s continued to reflect the demise of the overall manufacturing sector that was being felt across the UK. In 1991, in order to combat the devastating effects of Sheffield’s ailing steel mill industry, Europe’s largest shopping mall Meadowhall Shopping Centre was built on the former Steelworks site. Further attempts to revitalize the city included: the 1991 World Student Games, WSG, which saw the construction of new sporting facilities such as the Sheffield Arena, Don Valley Stadium and the Ponds Forge complex.14

More recently, an urban redevelopment company, Sheffield One, was created to restore activity within the city’s inner centre. In 2007, a merger occurred with Creative Sheffield to create a city economic development company, which facilitates urban regeneration projects.

Challenges

There were a number of economic, political, cultural and organizational challenges after the creation of Sheffield One in 2001, which included:

**Economic Challenges:**
- Sheffield was dealing with the long term decline of a one industry economy
- There was a lack of major private sector leaders
- Levels of skilled labour force were low

**Political Challenges:**
- There was difficulty encouraging the process of partnerships among city officials
- Lack of interest in investment into the city centre

**Cultural Challenges:**
- Overall moral of residents about the revitalization of the city centre was low

**Organizational Challenges:**
- Lack of overall strategy and vision among many small investors15

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14 Creative Sheffield: http://www.creativesheffield.co.uk/
15 Sheffield One Evaluation Report: European Institute for Urban Affairs, 2007
Marketing Sheffield

Through the city’s urban regeneration strategy and the city’s economic masterplan, Sheffield has attempted to reinvent itself through the following:

High Value Manufacturing

A portion of Sheffield’s manufacturing base has remained located within the city’s boundaries. While this sector has seen a decrease in labour force, the investment of new technologies and innovation has lead to the introduction of new consumer markets. The “Made in Sheffield” branding image was created to promote Sheffield’s manufacturing talent. 16

- The masterplan has been designed to support the relationship between Sheffield’s two universities and local companies. This type of collaboration is exemplified through the joint venture between the University of Sheffield and Boeing, which created the Advanced Manufacturing Research Centre, and subsequently, the Advanced Manufacturing Park.

- Sheffield Digital Campus is example of the physical interconnectedness between Sheffield Hallam University campus, the mainline railway station and the City centre, which provides a meeting point for the city’s Creative and Digital industry.17

Major Projects

Major projects throughout the city have been created to revitalize many of the derelict areas. A few of these projects include:

Castlegate

A combination of head offices, retail and leisure space located in the Sheffield city centre is an attractive location for locals and visitors to experience the city.

- The Square already offers a 114 bed Travelodge Hotel
- Six-storey office building offers a further 43,000sq.ft. of flexible Grade A office space18

New Retail Quarter

This development will place emphasis on the city centre as a regional shopping centre, while encouraging the location of high quality and niche retailers to locate within the existing central business district.

16 Creative Sheffield: http://www.creativesheffield.co.uk/
17 Creative Sheffield: http://www.creativesheffield.co.uk/
18 Ibid.
Additional developments have included the remodelling of both Sheaf Square and the adjacent railway station. The new square also includes The Cutting Edge a sculpture designed by Si Applied Ltd using Sheffield steel.

Lessons Learned

Sheffield One attributes much of its success to the masterplan, which provided a detail framework for the implementation and financial planning of many of the projects included in the regeneration. An important lesson learned throughout the process was to build effective relationships with local social agencies and furthering existing partnerships. Good leadership was also an essential aspect to the continued success of Sheffield One’s initiatives as the chief executive of the organization kept much of the process going. Sheffield acknowledges while it has succeeded in a short period of time, there is still work to do and the process continues to be ongoing to drive the city centre’s economy, cultural diversity and innovation.

21.4 Manchester, England

At the time of the industrial revolution, the success of east Manchester’s economy was centred on the manufacturing industry. Fast forward to the 1970s and the economy was in major decline along with extensive social and physical decay as a result of the disappearance of many traditional manufacturing industries. The area was littered with vacant housing, desolate open spaces and poor quality industrial sites. This area of the city was quickly characterized ‘as one of the most deprived areas in the county’ and held onto this designation through the 1990s.

New East Manchester Ltd – Urban Regeneration Company

New East Manchester (NEM) Ltd. is known as one of the first Urban Regeneration Companies of England and is a partnership initiative between Manchester City Council, The Homes and Communities Agency, the North West Development Agency and the communities of east Manchester. The purpose of NEM is to support the physical renewal of the area, while promoting social and economic initiatives of community members. NEM also strives to market the area to outside businesses and residents as community with a sustainable future.
The Role of New East Manchester

NEM has assumed the role as leader of many programs, which a few of are listed below:

- Develop and implement the Regeneration Framework
- Lead the physical regeneration of East Manchester
- Market and promote the area
- Co-ordinate and integrate social/community and economic programmes and initiatives
- Education Action Zone (Now New East Manchester Education Team)
- Health Action Zone
- Sports Action Zone
- Ancoats Urban Village
- Housing Market Renewal Fund
- Secure public and private sector resources to deliver the comprehensive program

Challenges

There are a number of associated community challenges that face the success and ability of projects to either be initiated or maintained throughout the regeneration process, these include:

- Traditional manufacturing base - 60% employment loss 1975-85
- 13% population loss in 1990s
- Collapse in housing market
- 20% vacant properties, negative equity
- Low skills base, high crime/ poor health/ poor community and retail facilities
- Fragile economic base
- 52% households receive benefit
- 12% unemployment
- Poor infrastructure and environment

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Major Projects

**SportCity Development**

Originally built for the 2002 Commonwealth Games, SportCity has developed into a multi-complex sporting venue that invites both professional athletes and amateurs to utilize a range of sporting facilities. The complex is located in the Medlock Valley of east Manchester (3 km away from the city centre) and is known as the largest concentration of sporting facilities in all of Europe. These facilities range from a 48,000 seat stadium home to the Manchester City Football Club, to the National Squash Centre, the 6,500 seat Manchester Regional Arena, English Institute of Sport, Manchester Velodrome and the Tennis Centre as well as a state-of-the-art gymnasium.  

The successful reuse of previously contaminated land, which underwent a series of environmental remediation, can be measured through the 400 + events booked at the venue and the 4.5 million visitors in attendance on a yearly basis.  

**Ancoats Urban Village**

The Ancoats Urban Village (AUV) Company recently joined NEM to encourage and facilitate the mixed used development of Ancoats. This unique community strategically located adjacent to the city centre, boasts architectural and historical heritage elements. AUV was established at the world’s first industrial suburb and has a building inventory dominated by the large concentration of industrial grade buildings. 

Through regeneration and renewal, many of the mills are being redeveloped and converted into apartments and commercial space. AUV was the recipient of the top regeneration award for Area Based Regeneration in the Annual Waterways Renaissance Awards. The awards are handed out by the British Urban Regeneration Association and The Waterways Trust. 

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20 SportCity – Manchester: http://www.sportcity-manchester.com/
21 Ibid.
22 Ancoats Urban Village: http://www.arup.com/sitedevelopmentandregeneration/project.cfm?pageid=8783
23 Ancoats Urban Village Company: http://www.auvc.co.uk/
The centrepiece of east Manchester’s development is the SportCity development, but NEM has also made a large attempt to change not only the physical attributes of the community, but also aims to deliver on projects such as Business Support and Jobs, Training and Skills all which support the ongoing development of New East Manchester as the place to live work and visit.

Lessons Learned

While NEM has championed many initiatives, with SportCity being one of the most successful, it continues to face both social and economic challenges. Many of these issues are centred on low levels of gainful employment opportunities and quality of life. Despite the challenges, a lot of optimism is held among government officials and local residents that believe Manchester’s economy has the potential to flourish and become a leader in economic development activity on the regional level.

21.5 Birmingham, England

The city of Birmingham was integral aspect to the growth of the Industrial Revolution in England and was often regarded as “the workshop of the world.” The city’s access to iron ore and coal allowed it to become dominated by metalworking industries and by the 17th century had become an important manufacturing town. While the city’s industrial strength has been in decline for many decades, Birmingham has developed into a national commercial centre. 24

Major Projects

Eastside

The redevelopment of Birmingham’s eastside is a key aspect to the city’s Big City Plan, a twenty - year proposed vision strategy for the future of Birmingham's greater city centre. It is the city’s largest ‘physical regeneration project’ and is lead by the Birmingham City Council Development Directorate's Planning and Regeneration Service. The main objective of the redevelopment of the area is to spark economic and cultural growth through the construction of new residential communities, new investment, new businesses and job creation.

- Area: 170 hectares/420 acres
- Jobs (Projected) Created: 12,000 new jobs being created during the lifetime of the initiative
- Multi-billion pound investment by a wide range of organizations and businesses25

24 Eastside: http://www.birmingham.gov.uk/eastside.bcc
Through major investment and redevelopment, the city council and its partners are committed to developing as an example of best practice in sustainability, while preserving its historic past and existing vibrant communities.

**Birmingham City University**

With a focus on cultural and creativity, the proposed £150 million city centre campus will be a central aspect of the regeneration of the Eastside. The university aims to excel in both learning and teaching along with world class research and knowledge facilities. The campus will incorporate strong technological aspects into the design of each building and will include design elements such as, operational television studios, a library, performance theatre, lecture theatres and a resource centre.\(^{26}\)

**Masshouse**

This mixed use development, which incorporates class ‘A’ office space with high end apartments and retail.

- Area: 1.1 million sq. ft
- Jobs (Projected) Created: 12,000 new jobs being created during the lifetime of the initiative
- £600 million development project
- Number of Units: 550 high end apartments and 550,000 sq. ft of office space
- Developed by – A joint venture partnership between Nikal and the Royal Bank of Scotland \(^ {27} \)

An interesting aspect of this multi-use complex is the development of a new Magistrates’ court for Birmingham city. It will span across 221 737 sq. ft and will accommodate 24 court rooms over 13 storeys high. The concept is regarded by the Planning Committee as innovative and modern and the most interesting plans they have reviewed in decades.\(^ {28} \)

**Challenges**

A wide range of challenges have generated from the development of Birmingham’s eastside. The renewal of a derelict intercity environment is full of complexities, however the knowledge gained from each issue will aid in the project team’s ability to move forward.

\(^{26}\) EastSide Birmingham - http://www.eastsidebirmingham.co.uk/
\(^{27}\) Ibid.
\(^{28}\) EastSide Birmingham - http://www.eastsidebirmingham.co.uk/
The challenges faced by the project team included:

- **Investor Confidence**: The difficulty associated with generating investment into a once known rundown area and the ability to improve the area to attract the desired market of the population to the area was difficult.
- **A Clear Vision**: Identifying the community’s economic role and linking it back to existing inner city communities in close proximity to the development.
- **Transition from Industrial to High-Tech**: The movement of a traditional industrial mindset into a focus on the creative and cultural sectors, while maintaining the existing quality of place.
- **Improving transportation linkages**: Improving existing road networks to increase transportation linkages.
- **Managing between the inherent differences**: Key organizations and stakeholders (e.g. City Council, developers, post-secondary institutions) and joining their opinions together into a holistic view.
- **Incorporate the views** of ailing businesses and disjointed local communities into the community consultation process.  

**Lessons Learned**

One of the most important lessons learned by the project team of the on-going Eastside Regeneration project is the importance of “holistic regeneration planning.” By soliciting a holistic viewpoint, the project team has been able to identify the diverging needs of all stakeholders.

Additional lessons learned included:

- Due to the large scale of the regeneration project, many of the initial project elements set out changed over time. The plans to regenerate the industrial area of Eastside originated in 1999 and while not complete, by 2008 many of the key areas had been completed while others experienced major delays or abolished altogether.
- **Incorporating a sound leadership structure** that includes representatives from both economic and social interests from the beginning to achieve an end result of ‘holistic regeneration.’
- Lastly, enforcing coordination through formal organization such as an overarching development agency that is well equipped with both policy and financial tools.  

29 “What lessons should be learned from the challenges of urban regeneration?” - http://showcase.hcaacademy.co.uk/case-study/birmingham-eastside.html#the-impact

30 Ibid.
21.6 Glasgow, Scotland

During the Industrial Revolution, the City of Glasgow was most famous for its ever-expanding manufacturing base. The city’s economy was primarily focused on the creation of soap-making, distilling, glass-making, sugar and textiles. A strong textile industry emerged powered by coal and in the steam-driven factories of bleaching, dyeing and fabric printing and cotton mills. The cotton industry was one of the main contributors of employment, which employed nearly one third of Glasgow’s massive workforce. Subsequently, it was detrimentally affected by external factors such as the American Civil War of 1861 and the competition of cities such as Manchester, England. As a result, Glasgow turned to heavy industries such as shipbuilding, locomotive construction, and engineering, which were supported by the large supply of iron ore.

Glasgow’s economy changed dramatically after the First World War, with signs of major industrial decline being felt most prominently in the shipbuilding and locomotive sectors. By the 1950s, the demand for merchant and navy ships had declined significantly. A tremendous transformation from a strong industrial base to an entirely new economic base centred on the service sector occurred during the time that followed.

Glasgow + Urban Regeneration

In 1986, the first Local Development Companies (LDCs) were created across the city, with a focus to create an extensive economic development community. The collaborative LDCs created a significant number of economic development programmes on behalf of the Council and Scottish Enterprise Glasgow within Glasgow’s most disadvantaged areas (40% of the city). In 2007, the LDCs were renamed Local Regeneration Agencies (LRAs) and re-configured to incorporate Community Health and Care Partnership (CHCP) and Community Planning Partnership (CPP) boundaries. There are now five LRAs operating across all of Glasgow, which include:

- Glasgow Southwest Regeneration Agency,
- Glasgow Southeast Regeneration Agency,
- Glasgow East Regeneration Agency,
- Glasgow North Regeneration Agency and,
- Glasgow West Regeneration Agency

Clyde Gateway Urban Regeneration Company

As a nation-wide regeneration priority, the Clyde Gateway covers an area of more than 2,000 acres and includes the East End of Glasgow, including Bridgeton, Dalmarnock and Parkhead along with Rutherglen and Shawfield in South Lanarkshire. In 2007, Council gave permission for the Clyde Gateway Urban Regeneration Company (URC) to be established. It is a partnership between Glasgow City Council, South Lanarkshire Council, Scottish Enterprise, with funding from the Scottish Government. The purpose of the newly devised URC is to lead the initiative for the massive investment programme that will take place in the area over a 20 year period. Clyde Gateway is a partnership between Glasgow City Council, South Lanarkshire Council, Scottish Enterprise, with funding from the Scottish Government. It will be the responsibility of the URC to lead the transformation in the social, economic and physical change of the area.33

The River Clyde + Challenges

Over the last 50 years, nearly all of the companies that were an integral part of the shipbuilding, textiles and heavy engineering industries have disappeared. For the most part, the communities located within the Clyde Gateway have either been neglected or all together forgotten about by rest of Scotland.

As a result, much of the population in these communities has declined dramatically and left a number of social and economic challenges. Much of the neglect was a result of the scale of the complex problems associated with the contaminated & polluted land on the rounds of the old industries.

The River Clyde + Opportunities

The Clyde Gateway project is designed to provide a new and innovative approach to regeneration that focuses on partnership, a shared vision and support from the local community. Opportunities are possible through the investment of public and private sectors, which will help to create new infrastructure, new offices and workspaces, new jobs, new houses. Once the improvement to infrastructure and the community occur, it is expected a reverse in the decline in population will occur.

33Clyde Gateway: http://www.clydegateway.com/pages/about_clyde_gateway.php
Major Projects

Over the next five years, over £1billion of investment will be guaranteed to support activity along Clyde River communities. These projects range from:

- The extension of the M74 highway, by an additional 5 miles
  - Due for completion in late 2011
- A link between the M8 and an extension of the M74 created the East End Regeneration Route
- A range of facilities for the 2014 Commonwealth Games, including:
  - Glasgow has won the right to host the 2014 Commonwealth Games
  - It is proposed that a new National Indoor Sports Arena and Cycling Velodrome will be constructed in the declining communities of Dalmarnock and Parkhead
  - An estimated £120 million has been budgeted for the cost of this project
  - In addition the community of Dalmarnock has been selected to be the site of the Athletes Village, with 1000 new homes proposed to be constructed. Once the game is over, the village will be converted to private sale residences along with social housing opportunities. The proposed cost of the Athletes Village is estimated at £245 million

Lessons Learned

While the projects surrounding the River Clyde are still on-going, there are lessons to be learned stemming out of each of the Urban Regeneration projects throughout Glasgow.

Each of the pilot Urban Regeneration Companies (URCs) continue to contribute to significant projects throughout the regeneration areas. The implementation of strategies by URCs have helped to focus investment decisions both on in the public and private sectors. The sheer presence of URCs in a regeneration area has caused private sector confidence to rise. In order to sustain this level of confidence, it has been suggested by the Office of the Deputy Minister that URCs need to promote an investment friendly environment for the private sectors through public funding in the early stages and a commitment from key stakeholders and decision makers.

It is also important to promote strong partnerships in each of the URCs. These partnerships need to be customized to suit the needs of each local regeneration area and the use of a standard model should be avoided. It is also suggested that URCs be a formal partnership, which operates distantly from the local authority. This will help to facilitate full engagement of the private sector into projects.
The use of base line data to define and monitor progress is important in the contribution of URCs to regeneration projects. A baseline analysis incorporated into a regeneration project already underway is should focus on the roles and skills of the existing agencies and partnerships.34

21.7 Bremen, Germany

In 1984, after major economic decline was experienced across the region of Bremen Germany, city-state- state officials shifted the local economy’s focus from traditional manufacturing and port activity to a ‘modern city-state of science.’35 This was completed by focusing on the research efforts of the local university and making the institution the central focus of the newly implemented policy. Additional focus of the policy was to link the university with research organizations and attracting high-tech businesses, to form a competitive economy in the technology sector.

Challenges

In a recent report completed by the Academy for Sustainable Communities (2008) a number of challenges were cited. These challenges range from an enormous debt load and high unemployment to the presence of a new economy, which is not inclusive of low-skilled workers. This has left the under-educated population on an unequal level with those benefiting from a science and technological based economy.

Major Projects

The implementation of the innovation policy led to two well funded programs, which include:

Economic Policy Action Programme (WAP)

A shift occurred in the university away from social sciences and humanities studies towards high-skill technologies, engineering and natural sciences. As a result, technology sectors took interest in the community and relationships were created between the higher education institutions and local companies in the high-tech sector.36

36 Bremen’s Innovation Policy, http://showcase.hcaacademy.co.uk/case-study/bremens-innovation-policy.html#
Special Investment Programme (ISP)

The city-state received compensation from the federal government in 1992 in the amount of €8.5 billion in special federal aid for taking on the financial burden of local infrastructure costs, which supports technology research and business while benefitting the wider region and the country as a whole.\(^{37}\)

The government has also created a program entitled “Innovision 2010” which has been established to place Bremen as one of the Top Ten German cities for technology, along with the construction of a Technology Park on campus to help graduates set up their own businesses.

Successes

Bremen’s ability to persuade the university to transition from the study of social science to the natural science, gained recognition with the designation “Centre of Excellence in Education” for the outstanding performance of its 6 higher education institutions. This has attracted many outside research institutes e.g. Fraunhofer and Max-Planck to relocate to Bremen and has created a linkage between the academic world and the local economy.\(^{38}\) Additional success has been felt in the increase of employment levels among several high tech and highly skilled job sectors across the city-state.

\(^{37}\) Ibid.

\(^{38}\) Bremen’s Innovation Policy, http://showcase.hcaacademy.co.uk/case-study/bremens-innovation-policy.html#
Lessons Learned

While the high-tech and highly skilled job sector across Bremen has felt the success of the city-state’s efforts to transform the community from an ailing traditional manufacturing economy into a technologically advanced city-state, the employment prospects have proved to be prosperous for only the educated middle classes. This has left the overall unemployment high with special concern in the community of Bremerhaven.

In addition, while many agree the funding programs of WAP and ISP have helped in the development of Bremen, the city-state is once again heavily in debt with a record of € 12 billion.\(^\text{39}\) The city-state is now on record for the highest debts per capita in all of Germany and faces bankruptcy if new financial aid is not sought out.

\(^{39}\) Ibid.