

Water, Rocks and Trees

BUILDING UPON OUR RICH RESOURCES:

The Creative Economy in Muskoka



Water, Rocks and Trees ... Building Upon our Rich Resources
THE CREATIVE ECONOMY IN MUSKOKA

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Cover by Carolyne Wagland, Gravity Art and Design (www.gravityartanddesign.com) – many thanks!

Foreword

Over three years ago, a group of community leaders first came together to explore the potential role culture might play in stimulating economic development in Muskoka. The result was the formation of a platform for collaboration called Creative Muskoka that has since attracted approximately 25 organizational, municipal and business supporters. What became crystal clear as the group clarified its purpose and vision was that Muskoka was joining a much larger international movement recognizing the significant impact the creative economy can have not only on large urban centres but small town and rural communities. It also became evident that Muskoka is well positioned to become a leader among creative communities but it would take the shared commitment of government, business and community organizations to transform the local economy.

A critical first step in developing strategies and actions to foster growth of the creative economy is to understand the current status of Muskoka's economy. What are our strengths? Where are the opportunities for development? What needs to be done? The University of Toronto and its research and business affiliates are recognized as leaders in the field. We were thus delighted to have the opportunity to work with a University of Toronto Master's in Planning researcher Robyn Shyllit and her supervisor Dr. Greg Spencer. Through this report they have provided a baseline of data upon which we can build to track changes in jobs and business development. They have compiled current related research and trends. They have interviewed key people from across the District to gain insight and ideas into ways of nurturing creative industries. And finally, they have crafted concrete recommendations for action.

Many thanks go to the community leaders who so generously contributed their time and ideas through in depth interviews. Their names are listed in Appendix C.

This study wouldn't have been possible without the financial contributions of the District of Muskoka and Muskoka Futures Development Corporation. In addition to funding the project, representatives from the District and Muskoka Futures joined the Executive Committee of Creative Muskoka to form a project advisory committee. The advisory committee members included David Brushey, Kareen Burns, Larry Curley, Gayle Dempsey, Cheryl Forth, Margaret French, Fred Landry, Rob McPhee, Peter Rickard, Mary Robertson Lacroix, Jennifer Schnier, Juris Svistunenko, Sandra Turnbull, Marguerite Urban, and Bill Warren. You have provided invaluable support and direction to this project.

Creative Muskoka
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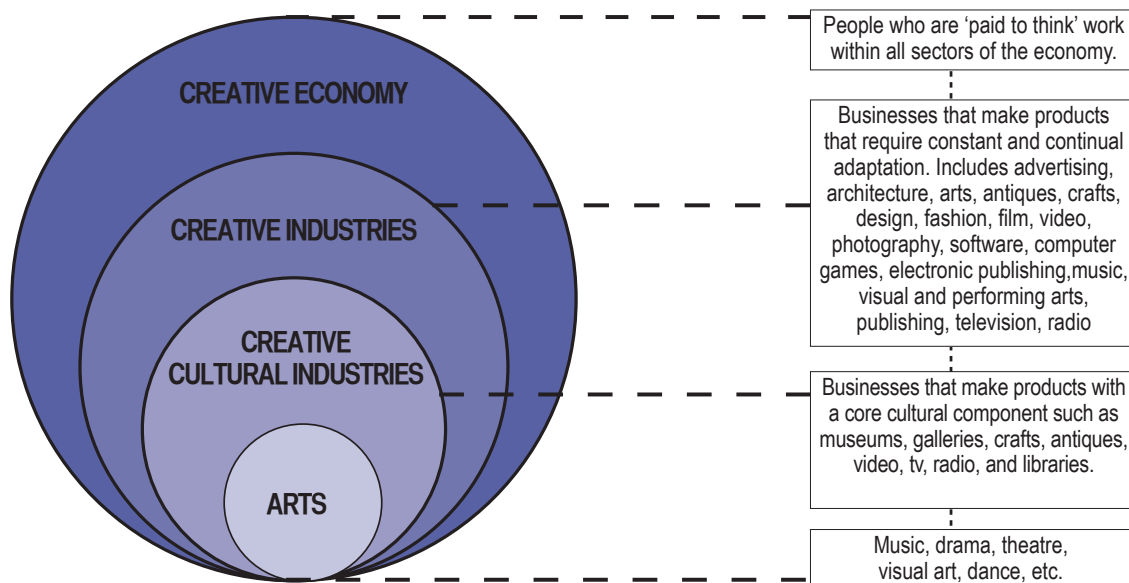
Executive Summary

The creative economy is based on a new way of thinking and doing. The primary inputs are our individual talent or skill... In some sectors the output value depends on their uniqueness; in others, on how easily it can be copied and sold to large numbers of people. The creative economy brings together ideas about the creative industries, the cultural industries, creative cities, clusters and the creative class.

- Howkins, J., creativeeconomy.com

Over the past decade, urban and rural communities in Canada and around the world have begun to encourage a creative economy as a mechanism to use local assets and human capital to address socioeconomic issues, and improve internal and external conditions, investment, and collaborations. The creative economy encompasses creative industries, occupations, arts, culture and heritage, with success dependent upon the attraction and retention of talent and knowledge-based workers: “people employed in science and engineering, architecture and design, education, arts, music and entertainment occupations. Creative occupations (creative class) cross all sectors and industries, and relate to the nature of the job itself, not the industry in which an individual is employed. The primary economic function of the Creative Class is to generate new ideas, new technology and/or new creative content” (Stolarick et al., 2010: 3).

Scales of the Creative Economy



The creative economy is a place-based approach to economic development. It emphasizes local resources, entrepreneurship, talent, skills, and production, as well as collective goals and actions. In turn, the recognition and value derived from these assets allow a community to be

less concerned by what is produced elsewhere to foster prosperity locally. While other rural creative economies can provide inspiration, issues and opportunities are place specific, and in developing creative economy initiatives communities must not simply duplicate or borrow what has been done elsewhere. Once local traits and contributors have been identified it is then up to champions within the community at large to move a creative agenda forward.

With growing support, federal and provincial governments across Canada have already recognized the benefits of investing in the creative economy. Rural communities in Ontario are studying and employing creative economic development in recognition of global economic trends, and issues posed by declining manufacturing and export-based industries. In Ontario, creative job opportunities are the fastest growing segment of employment, and increased by 22% from 1996 to 2006. These jobs employ 35% of the workforce but pay 51% of wages and salaries (AuthentiCity et al., 2009: 7).

Rural areas face challenges in supporting the creative economy due to vast geographies and dispersed populations. As a result, they require cooperation among government, civic organizations, institutions and the private sector to share leadership initiatives and promote networking and collaboration. Quality of place and abundance of resources (human and natural) drive rural creative economies, and research shows that the same features that attract tourists are also important to the creative class.

Muskoka has energy and interest, a well-known and historic natural environment, strong arts community, technology infrastructure, post-secondary network, and emerging creative food sector – all of which are driving the regions creative economy. Despite these assets, work is needed to bring together residents, businesses, governments, institutions, and organizations with a collective goal to further develop and support talent and innovation locally. Creative economy stakeholders across Muskoka must work together to maximize what is clearly an emerging creative economy that holds significant potential to enhance the region economically, socially, and culturally. Over time, aligning these efforts and developing clear and intentional strategies can position Muskoka as a rural creative economy leader in Ontario, Canada, and around the world.

This report uncovers the attributes, strengths, challenges, and opportunities associated with Muskoka's creative economy to recommend actions for further development and support. The most current information available has been used, and the report can be updated as new data is released to establish clear trends related to the creative economy. Research was conducted between October 2010 and February 2011 using primary and secondary analysis including literature review, statistical data, regions of comparison, and key-informant interviews.

"[The] creative economy doesn't have to be our only thrust, but understanding it and recognizing it could make a significant difference to our communities"

- (Key-Informant 3)

Research Findings

Key Statistics

CREATIVE OCCUPATIONS

- Between 2001 and 2006, 25.8% of the population were engaged in creative occupations which grew by 20.9% during this period, a significantly faster growth rate than similar established creative areas studied. Despite this growth, working and service occupations remained high and represent 71% of workers in Muskoka.
- The top six categories of creative occupations in Muskoka grew by 53% from 2001 to 2006 and added over 1000 jobs in this period. These are senior management, art & culture, finance and insurance administration, specialist managers, health professionals and technical natural & applied science professions.
- Within the super creative core, employment growth was led by professional occupations in art and culture, and visual arts occupations grew by 125%, well above the provincial average of 24.7%. This represents a strong foundation for Muskoka's arts community.

CREATIVE INDUSTRIES

- Creative industries represented 7.2% percent of total industry share in 2006, half the provincial average. Relatively low concentrations of creative industries may result from proportionally high volumes of businesses in Muskoka that create service related outputs for the seasonal economy.
- While Muskoka Arts and Crafts boasts over 380 practitioners, in 2006 there were only 28 artistic registered businesses. The general lack of a quantified artistic presence in Muskoka suggests further support may be needed for creative populations.

DEMOGRAPHICS

- Between 2001 and 2006 Muskoka's population grew faster than the provincial rate, however the proportion of residents under 20 years of age decreased and a significant population dip was seen for residents aged 20 to 39. While normal for young residents of rural communities to move away for university, challenges arise in northern communities with limited employment opportunities, leading to youth out-migration, higher proportions of seniors, and a relatively homogenous population (Hall & Donald, 2009:15).
- Muskoka placed 10% behind the provincial average for university-educated resident's suggesting additional investment is needed to gain youth and entrepreneurial talent. Low concentrations of youth and educated residents has economic implications with reduced human capital, talent pools and thus energy for entrepreneurial ventures.

Muskoka has a great deal of promise in developing a highly prosperous creative economy but it is not without its challenges. The creative economy is emerging, but not in a consistent way, and employment is still dominated by service/working jobs that require less education, are lower paying, seasonal, and susceptible to economic downturns. In order to keep adding creative jobs Muskoka must be able to support knowledge-driven business and industry strategies through investments in digital infrastructure, connections to higher learning institutions, and the promotion of entrepreneurship. Many of the creative businesses and industries are still relatively young but this means that they are at a crucial stage of development.

Opportunities

ENVIRONMENT – Environmental assets are fundamental to Muskoka’s creative economy and attract both residents and visitors. Environmentally focused knowledge-based assets such as green technologies, skilled wood manufacturing, and advanced construction expertise present an opportunity for further growth.

TOURISM – The significant tourism economy in Muskoka provides residents with recreational amenities otherwise not available to a rural community of its size. Further study is needed to explore how tourism marketing can be used to recruit creative businesses and residents to Muskoka.

ARTS, CULTURE & HERITAGE – Muskoka has a strong and diverse artistic community, however statistics showcased few artistic registered businesses and informants noted misconceptions regarding the value and economic reach of local artists. With recognition of Muskoka as a Designated Arts Community potential exists for arts based community economic development.

TECHNOLOGY – Eighty percent of Muskoka residents now have high-speed access thanks to improved technology infrastructure. This significant investment has increased opportunities for seasonal residents and year-round home based businesses. Combination of technology and lifestyle amenities in Muskoka offers a strong foundation to grow the creative economy.

CREATIVE FOOD ECONOMY – Muskoka is well positioned geographically for culinary tourism and has untapped farming potential for niche agriculture; experimental farming; and diversified and expanded crops. Informants discussed a need to leverage local products to cater to an emerging creative class and seasonal populations who will begin to demand the quality of product accessible in larger centres.

POST SECONDARY & LIFELONG LEARNING – Presence of post-secondary institutions in Muskoka is an emerging creative economic strength with opportunity for local research and development, as well as economic stimulus. Focused investment in post-secondary institutions will provide skills and training to respond to labour market needs and also generate new economic engines in Muskoka

Challenges

COMMUNICATION – Federal and provincial governments are supporting the creative economy through a range of funding programs. While some jurisdictions in Muskoka have fully embraced the creative economy and are successfully tapping into these funding sources, others are seeking assurance of its value. Muskoka’s two-tier government structure poses barriers to coordinate and fund creative economy initiatives. This requires innovative structures and processes to share leadership between municipal and volunteer organizations.

LACK OF SUPPORT FOR YOUTH, ENTREPRENEURS, AND DIVERSE POPULATIONS – Lack of support for these groups limits the generation of new ideas, local skills, and cultural vibrancy. Informants stated a lack of skilled employment opportunities in Muskoka, while others stated

that due to lack of local talent many businesses are forced to hire individuals that meet qualifications for knowledge-based creative jobs from outside the District. Furthermore, informants identified a lack of programs and partnerships focused on economic and skill deficiencies, and that Muskoka's geographic expanse limits the availability of entrepreneurial resources across the region. Finally, demographics showcased a homogenous population, and informants stated that little is done to make newcomers or diverse populations feel welcome across Muskoka. This combination of issues depletes diversity in skill, talent and entrepreneurial energy, all of which are critical to the success of the creative economy.

SOCIAL SUPPORTS: TRANSPORTATION & HOUSING – While a creative economy presents many opportunities, it is also an obstacle to “those who do not have the skills and opportunities to participate fully” and new social safety nets are needed to offset polarization (Martin Prosperity Institute, 2009: 2). Muskoka lacks a public transportation strategy for residents to travel internally. Not only does this limit the ability of some residents to fully participate in the wealth of events and activities available locally, but also limits the movement of information, resources, ideas, and talent throughout Muskoka. Additionally, lack of attainable housing options is a barrier not only to young families and low-income workers, but to those entering the workforce including knowledge/creative workers.

SEASONALITY – Lack of communication across the District and to neighbouring communities to generate activity and attendance at events challenges the off-season creative economy. Further exacerbating this challenge is economic division between seasonal and year round populations. Conversely, substantial seasonal populations across Muskoka present opportunity to bring outside investment, knowledge and networks to the region, and require further study to determine how to best involve the resource of Muskoka's seasonal community.

Summary of Recommendations (See page 44 for details)

Recommendations provide opportunity for collective stewardship and require collaboration among lower-tier municipalities, the District, businesses, organizations, artists, youth, entrepreneurs, creative professionals, and institutions.

1) COMMUNICATION | Develop a common understanding regarding the role of Muskoka's creative economy, and promote and steward this (understanding) among all stakeholders and in the region as a whole.

- Creative Muskoka to continue to advocate on behalf of the creative economy
- Increase networking and knowledge sharing within and outside Muskoka
- Municipalities to work cooperatively to support and attract talent in Muskoka
- Connect seasonal and year-round populations, as well as residents across the six lower-tier municipalities
- Improve online platforms to properly reflect and promote the quality of Muskoka products

2) ORGANIZATIONAL INFRASTRUCTURE | Create a unified entity to connect municipalities, innovators, businesspersons, organizations, and firms that comprise the creative economy in Muskoka.

- Membership could include businesses, entrepreneurs, municipal economic development officers, and representatives from key stakeholders communities and sectors: arts, youth, first nations, technology, education, tourism, food, and environment occupations.
- Potential roles of the entity emerging from the study relate to planning, communication, networking, research, entrepreneurship support, education and training, leadership, and policy development

3) ENTREPRENEURSHIP | Support and connect local producers, small businesses, and entrepreneurs.

- Strengthen community-based incubation and business service resources
- Implement a district wide ‘Buy Local Strategy’ for all local services and producers such as food, agriculture, wood, design, textiles, arts, antiques, crafts, etc.

4) ARTS, CULTURE & HERITAGE | Further support, promote, and recognize arts, culture, and heritage across Muskoka.

- Further develop Muskoka’s reputation as a ‘designated arts community’
- Provide artist training programs in business management, new technology, and other skills to improve sector stability and relevance to outside markets
- Collaborate on District-wide cultural mapping to identify the total reach and expanse of Muskoka’s cultural assets

5) EDUCATION AND TRAINING | Foster talent and skill building by increasing and improving local training and education opportunities.

- Further establish formal and informal high-quality education and training
- Establish institutions or programs focused on local skill deficiencies and industries of direct value to sectors of Muskoka’s economy.
- Establish linkages between post-secondary institutions and entrepreneurial opportunities

6) YOUTH OUTREACH | Encourage youth participation throughout Muskoka in the creative economy.

- Establish partnerships between schools and organizations to recruit and bring young people together across Muskoka
- Establish space for youth representation, on non-profit boards, events, and other organizations
- Establish a district wide youth council to promote and develop ideas and events that respond to youth issues, concerns, and needs, to establish a professional and respected youth presence in Muskoka

7) FURTHER STUDY | Establish specific goals, further study, and collect additional creative economy data and information.

- Establish easy to measure targets that relate to specific creative economy goals
- Further study creative economy opportunities
- Develop relationships and nurture connections to internal and external research institutions

Conclusion

The creative economy holds promise for Muskoka. Relative to other rural communities across Ontario it is well positioned to tap into this new economy through its iconic environment; established arts, cultural, and heritage community; human resources in the seasonal population; internationally recognized brand and image; and accessible location. This study indicates that Muskoka already has an emerging creative economy – in some aspects comparable to other jurisdictions that have already made a significant investment in creative economy strategies.

The creative economy in Muskoka is growing, even without District-wide targeted plans. The potential to further leverage these resources will be significant if energies, resources, and ideas become aligned with full effort and attention. Interviews clearly revealed a community eager to grasp the opportunities afforded by a creative approach to economic development in Muskoka. Recommendations in this report provide a guide to move the creative economy forward. Acting upon them is crucial to ensure Muskoka remains well positioned as a rural community responsive to contemporary issues; community needs; and filled with the conditions that allow residents and businesses to thrive locally.

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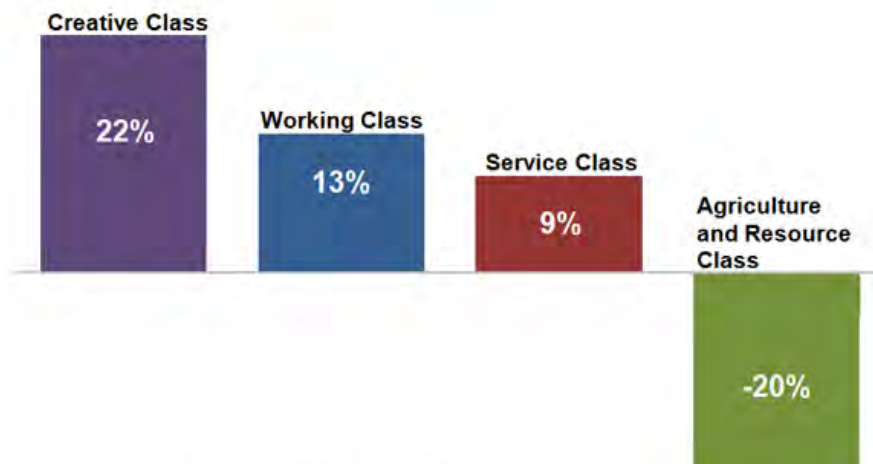
1.0 Introduction and Methodology

1.1 Introduction

With support and investment from the Provincial government the *Ontario in the Creative Age* report analyzed current economic trends and recommended action to encourage prosperity and innovation across occupations and industries through investment in skills, talent pools, regional connectivity and social safety nets (Martin Prosperity Institute, 2009: 3).

Acknowledging both urban and rural communities, this report showcased a global economic transformation to a creative economy, predicting that “competitive advantage and prosperity will go to those jurisdictions that can best prepare themselves and adapt to this long-run trend” (Martin Prosperity Institute, 2009: 1). Highlighting this shift, between 1996 and 2006 creative class job growth in rural Ontario exceeded working, service, and agriculture occupations (**Figure 1**).

Figure 1: Ontario Rural Job Growth 1996 - 2006



Source: Martin Prosperity Institute Analysis based on Statistics Canada, Population Census. 1996-2006

Within the creative economy, creative occupations (the creative class) cross all sectors and industries and include “people employed in science and engineering, architecture and design, education, arts, music and entertainment occupations. The primary economic function of the Creative Class is to generate new ideas, new technology and/or new creative content” (Stolarick et al., 2010: 3). Creative industries refer specifically to what a business produces. **Section 2.1** further explains the creative economy, occupations, and industries.

A key question for the economic development of Canada is how “to create the conditions to stimulate innovativeness and consequently competitiveness” (Holbrook & Wolfe, 2002:9). Responding to this inquiry over the past ten years, creative city theory (Florida, 2002; Landry, 2000;) has provided ideas to address modern economic issues. Different from earlier regional development theories that are reliant upon outside investment and exports such as growth

pole, staples, and dependency approaches (Higgins & Savoie, 1995), a creative economy approach uses existing community assets and talent pools to respond to socioeconomic issues. Creative and innovation led economic development strategies raise the value of what is produced locally by adding knowledge to goods and services. They are an alternative to cost-based approaches that attempt to win over investment by positioning a community as an affordable option for industry to locate. As a result, cost-based approaches also end up lowering wages, working conditions, and weaken public institutions through lowered tax rates. Creative and innovation led economic development identifies the actual strengths and contributors that distinguish one place from its peers, and lead to a stronger economy that benefits quality of life year round.

Though creative city research originally focused upon large urban centres, many smaller cities and towns have begun exploring their local creative climate, including communities in the United States, the United Kingdom, Australia, and Canada. Conscious of trends and interest from the Federal and Provincial government, rural communities across Ontario such as St. Jacobs, Niagara, and most famously Prince Edward County, have taken active steps to promote a creative economy. Disadvantaged in comparison to urban areas, rural areas require stronger actions to build and maintain networks to connect to outside regions, and compensate for lack of density and diversity locally (Spencer, 2010: 14). Acknowledging the inadequacy of a one-size-fits-all approach to economic development, in a creative rural economy the unique attributes of place are celebrated and capitalized on to respond to common issues such as declining primary industries, unemployment, and seasonality (Jayne, Gibson, Waitt & Bell, 2010; Micoo & Vinodrai, 2010).

Context

Building upon global trends, provincial interest, and the comparative success of other rural municipalities in Ontario, individuals from various organizations, businesses, and municipalities in Muskoka have become interested in the merit and enhancement of their own creative economy. Located at the base of the Canadian Shield, Muskoka is an aesthetically rich region with deep roots connecting south and to Toronto, abundant outdoor amenities and a historic natural environment enjoyed by year-round, seasonal, and tourist populations. The quality of life available in Muskoka is fundamental to attracting and maintaining residents and business, as championed by the philosophy “our economy is our environment” (Muskoka Watershed Council, 2008). Despite this innate advantage, Muskoka is not without distinct challenges that have been outlined in reports by the District and six lower-tier municipalities [Towns of Gravenhurst, Bracebridge, and Huntsville; Townships of Muskoka Lakes, Lake of Bays, and Georgian Bay] and are discussed in **Section 3.4**.

Theories vary on how best to support and promote rural creative economies, however research suggests that an abundance of high quality natural amenities and successful tourism markets can attract and retain the creative class (AuthentiCity, Martin Prosperity Institute,

Millier Dickenson Blais, 2009; McGranahan, Wojan & Lambert, 2010; Stolarick, Denstedt, Donald & Spencer, 2010). Satisfying these criteria, the Muskoka region exhibits rich natural amenities supported by a presence of creative occupations and strong tourism industries. Muskoka “has recognized it’s a creative community. The question is now: Does that mean anything? And, are they going to actively pursue it?” (KI-14¹). While all communities have aspects of a creative economy, studying and understanding specific traits allows stakeholders to identify and choose how to proceed in further development.

This report examines the current state of Muskoka’s creative economy. Challenges and opportunities are identified to suggest ways to further cultivate and support creativity and innovation in Muskoka.

1.2 Research Questions

1. What are the current characteristics of Muskoka’s creative economy?
2. What are Muskoka’s challenges, weaknesses, strengths, and opportunities?
3. How does Muskoka compare to other creative rural communities in Ontario?
4. How can this information be applied to the development of the creative economy?

1.3 Research Methods

Research was conducted between October 2010 and February 2011 as a regional case study including: literature review, statistical analysis, key-informant interviews, and benchmarking against regions of comparison.

Literature Review (Section 2)

The literature review explores academic literature, and documents related to Muskoka’s creative economy such as: government policy, business retention and expansion plans, and news media.

Statistical Analysis (Section 4)

Data from Statistics Canada, North American Industry Classification System (NAICS), National Occupations Code Categories (NOC), and the Ontario Ministry of Agriculture Food & Rural Affairs (OMAFRA) was analyzed to explore the creative economy through: occupational categories, industrial structure, population, employment, education, and income levels.

Key-Informant Interviews (Section 5)

Semi-structured interviews were conducted with 21 key informants across the six District lower-tier municipalities, and are coded using the citation (KI-##). Discussions ranged from 30 minutes to one hour in length with representatives in economic development, municipal council, provincial government, tourism, culinary, non-profit, entrepreneurial, artistic,

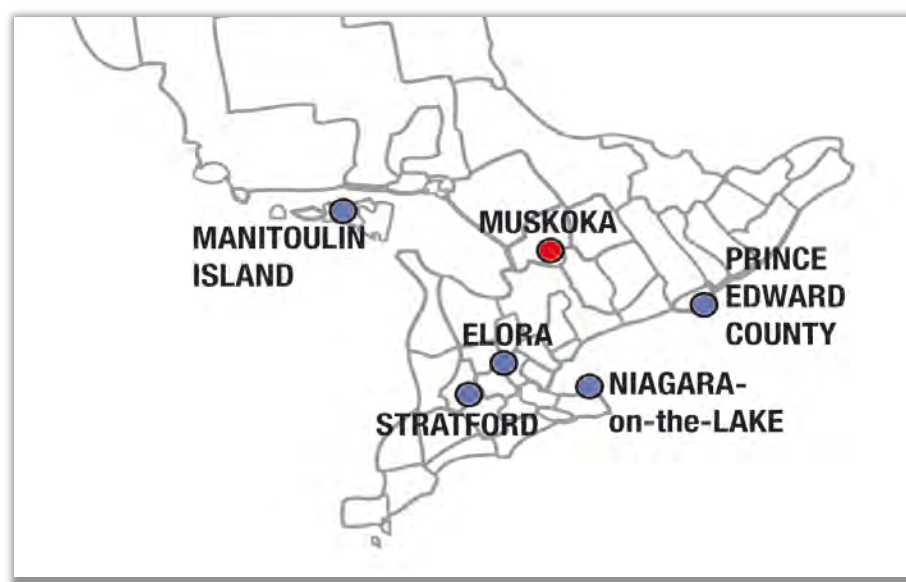
¹ Key-informants identities are coded using the citation (KI-##)

environmental, and technology occupations. **Appendix C** lists informants in alphabetical order.

Regions of Comparison

Regions of comparison shown in **Map 1** situate Muskoka within the larger context of Ontario's rural creative economy. Regions were selected based on the local cultural and creative climate, and through stakeholder discussion. In addition to the province of Ontario, data was analyzed to benchmark Muskoka against Stratford, Manitoulin Island, Prince Edward County, Elora², and Niagara-on-the-Lake. While working within distinct challenges and opportunities, all regions have commonalities posed by seasonality and tourism, and attributes of a creative economy are showcased by each place. These ideas are further explored throughout **Section 4.0**.

Map 1: Province of Ontario, Regions of Comparison



1.4 Research Constraints and Limitations

The time frame and geographic expanse of Muskoka made it challenging to exhaustively consult with stakeholders representative of all municipalities and sectors. The large scope of this project made it impossible to complete detailed case studies for regions of comparison, and thoroughly explore economic strategies, challenges, and similarities between each place. As a result, regions of comparison are used only as benchmarks.

A final constraint was presented by statistical information being from the 2006 Census. It would be beneficial to amend this report when the 2011 Statistics Canada census data becomes available using figures that closely correspond to the year research was conducted.

² Town of Centre Wellington used in statistical analysis

2.0 Literature Review

2.1 Creative Economies

Gaining momentum over the past 10 years, creative city theory (Florida, 2002; Landry, 2000) has been adopted by both big and small cities as a strategy to encourage economic development. Popular in the U.K., U.S., Australia, and Canada, these ideas suggest that in a creative economy, knowledge based ‘creativity-oriented’ workers typically receive higher wages (**Figure 2**), have greater mobility, and are not reliant upon routine-oriented jobs in a single industry (Martin Prosperity Institute, 2009: 17).

Ontario’s Creative Economy (the creative class) employs “35% of the work force and pays 51% of wages” (AuthentiCity et al., 2009: 7). Members of the creative class are well educated (**Figure 3**), and in positions that require analytical and social intelligence skills (Martin Prosperity Institute, 2009: 14). Encouraging creativity in service and physical jobs can also heighten the quality of work by valuing relevant skills and distributing management responsibilities among workers at different employment levels (AuthentiCity et al., 2009: 15).

Figure 2:
Ontario Occupation Income Levels, 2006

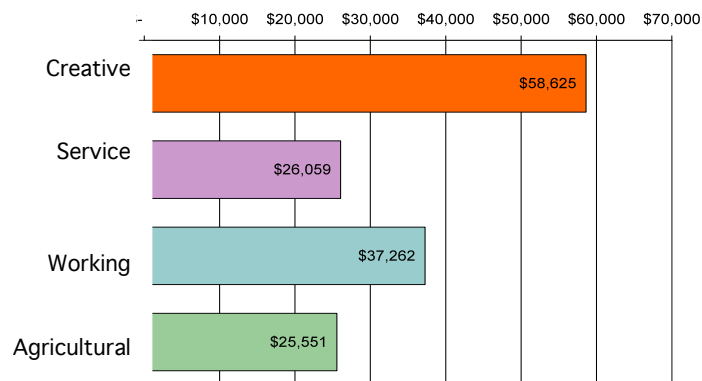
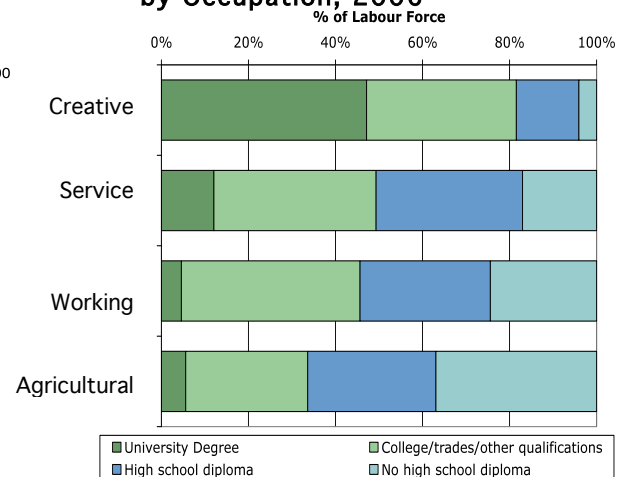


Figure 3:
Ontario Educational Attainment
by Occupation, 2006



Source: AuthentiCity et al. (2009) *Canada's Creative Corridor*

The success of a creative economy is dependent upon the attraction and retention of the talent present in the creative class, knowledge-based “people employed in science and engineering, architecture and design, education, arts, music and entertainment occupations. Creative occupations (the creative class) cross all sectors and industries, and relate to the nature of the job itself, not the industry in which an individual is employed. The primary economic function of the Creative Class is to generate new ideas, new technology and/or new creative content” (Stolarick et al., 2010: 3). Within the creative class, the super creative core includes occupations in architecture, engineering, computer programming, education, arts,

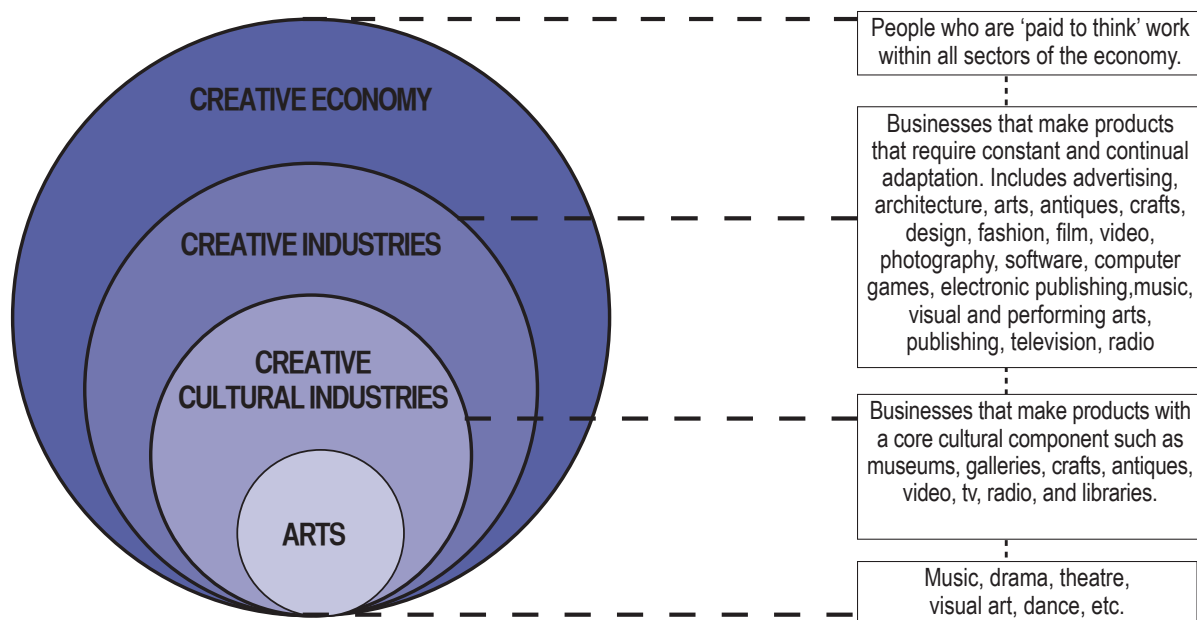
design, entertainment, sports, and media. **Appendix B** further elaborates on the creative class and super creative core.

While definitions of creativity can become watered down in attempts to encompass all sectors of the economy (Spencer, 2010: 2), Florida credits the initial concept of a *creative economy* to John Howkins. According to Howkins, the creative economy includes diverse inputs from copyright, patent, trademark, and design industries (Howkins, 2001:xiii). He states:

“The creative economy is based on a new way of thinking and doing. The primary inputs are our individual talent or skill... In some sectors the output value depends on their uniqueness; in others, on how easily it can be copied and sold to large numbers of people. The creative economy brings together ideas about the creative industries, the cultural industries, creative cities, clusters and the creative class” (Creative Economy, n.d)

Though Florida’s description has been adopted by many cities, definitions of a creative economy are not conclusive and vary from place to place (Howkins, 2001:xiii). **Figure 4** simplifies how sectors are nested within a creative economy.

Figure 4: Scales of the Creative Economy



Source: AuthentiCity et al. (2009) Canada's Creative Corridor; British Council. (2011) Creative Industries/Economy

Demonstrated in **Figure 4**, arts and culture are integral to the success of the creative economy, and cultural planning refers to the practice of evaluating existing community cultural assets to identify how they can be used to address local priorities and needs. In this approach, cultural activity is seen as a resource “for human and community development” (Creative City Network of Canada, 2010: 1). With ideas dating back to the 1960s and 70s, culture is used as the fourth pillar of building healthy and sustainable communities, of equal value to social, economic, and environmental planning.

2.2 Creative Rural Economies

Though creative city research originally focused upon major urban centres like Silicon Valley and Toronto, many smaller cities and towns both in Canada and internationally have since looked to these ideas to respond to changes locally and in relation to the global economy. Though the creative class “normally congregate in cities [they] are by nature highly mobile and will relocate to places offering a high quality of life, as long as such places offer the basic infrastructure needed for running a knowledge-based business or agency” (Bray 2011). Using case studies and academic discussion, researchers have studied ideas behind creative economic theory and its relevance to rural communities.

Supportive research agrees that encouraging economic stability through local assets, diversified inputs, and promoting culture are important drivers of prosperity in creative rural communities (Bell & Jayne, 2010; Hagblade et al., 2009; Macdonald & Joliffe, 2003). In regards to the movement of knowledge-based workers to rural communities, research on counter-urbanization movements suggests towns within commutable distance to major centres are successful in attracting and retaining former urbanites and the creative class, and thus are also more likely to foster creative economies (Dahms & McComb, 1999; Lewis & Donald, 2010; Stolarick et al., 2010; Taylor & Baeker, 2008).

Through a case study of Prince Edward County, Stolarick et al. (2010) discuss major research behind rural creative economies. In reference to typical strategies of rural economic development they cite Lambe and Freyer (2009) who discuss place-based development, increasing local business capacity, tourism, and cultivating creativity and talent. With detail on the pros and cons of each strategy, Stolarick et al. suggest that rural regions must carefully choose which method to employ, as “strategies target very specific components of the local economy” (5).

Despite lacking urban characteristics typically necessary to attract the creative class such as technology and demographic diversity, rural communities attract residents who desire a heightened quality of place gained in the natural environment, cultural heritage, and recreational amenities (Stolarick et al., 2010: 4). In order to benefit from this potential interest, Stolarick et al. cite Murray and Dunn (1995) stating that “building local capacity to

manage economic change is important in rural communities in helping them to connect valuable ideas, resources and opportunities to achieve prosperity” (10).

Research on economic development in rural communities states new governance models and entrepreneurial support add to economic stability (Drabenstott, Novack, Weiler, 2004; Macke & Markley, 2006). Rural areas are often small and sparse and “are not accustomed to working with their neighbours to solve common problems” (Drabenstott et al. 2004: 60). This obstacle can be overcome through cooperation between the government, civic organizations, institutions, and the private sector to identify issues, goals and create shared leadership strategies. Within this collaboration, rural communities must “reach across old boundaries...overcome old mind-sets, and build and sustain leadership capacity” (Drabenstott et al. 2004: 67).

Lack of critical mass and local networking and learning opportunities are of disadvantage to creative rural economies, and require compensation to connect people and bring together knowledge and markets. These networks can be encouraged and built through the public sector and “need to be directly addressed by local policy makers” to support critical features such as transportation infrastructure and communications technology (Spencer, 2010: 13). Additionally, research on rural-urban dynamics and government interdependencies in rural areas suggests “benefits exist from working together to make decisions related to common interests, to gain critical mass, create regional growth clusters for economic development, better manage natural resources, provide government services and so on – to govern regionally” (Hall, 2010: 9).

Criticism regarding the development of rural creative economies includes failure to capture rural characteristics such as environmental features, employment availability, emotional attachment to place, and active citizenship (Gibson & Waitt, 2009; Lewis & Donald, 2010; McBeth, 1995), and fears of gentrification through imposing urban ideals not sensitive to rural complexities (Gibson et al., 2009; 2010; Gillis, 2004; Phillips, n.d). Additionally, some critics believe the original indicators used to study creativity in urban regions - talent, technology and tolerance [3-T analysis] - are not appropriate to a rural context, and evaluating livability and sustainability should instead be used as indicators supportive of innovation and creativity (Lewis & Donald, 2008: 37).

Along the same train of thought, Jayne, Gibson, Waitt and Bell (2010) suggest that “a great deal is at stake when small cities seek to replicate creative city strategies of larger places, a continuing point geographers have sought to make both in critical research and through engaged projects with policy makers” (1411). This skepticism is further supported by researchers who believe the application of a creative economy to rural places lacks a collective methodology or best practice framework (Agarwal, Rahman, & Errington, 2009; Markusen & Gadwa, 2010; Reese & Sands, 2008).

Understanding these complexities, McGranahan and Wojan's (2010) 'Rural Growth Trifecta' highlights the necessity of outdoor amenities to foster entrepreneurship and the creative class. Through spatial regression modeling that analyzed U.S based rural communities in the 1990s, they suggest that "creative capital provides the knowledge and ideas required for growth, but the incorporation of these assets into the local economy is contingent on local entrepreneurial context" (21). They conclude that the quality and abundance of natural amenities are most important to attract the creative class who provide the skills and energy to foster an entrepreneurial climate that as a result supports economic growth. Additionally, they believe the rural creative class is more likely to be married and older than in urban populations, and thus investment in quality of schools is critical to attract these populations (Hall, 2010: 8).

Through this review it is seen that extensive research has been done on the methodology and applicability of creative rural economies. However within this discussion there is no targeted research on the creative economy in Muskoka, Ontario. Mindful of the aforementioned support and criticism, this paper will depict the current state of Muskoka's creative economy.

2.3 The Creative Economy in Ontario

In Ontario, agencies encouraging the creative economy developed simultaneously to the rising popularity of creative city and creative class theory. In 1997 the Creative City Network of Canada formed "the very first effort in Canada to bring together individuals working in municipal cultural service delivery across the country". Supporting research and innovation in rural communities at a Federal level in May 2000 the Federation for Economic Development in Northern Ontario (FEDNOR) established Community Futures Development Corporations (CFDC) to encourage community economic development and small business growth. Provincially, the Ontario Ministry of Agriculture and Rural Affairs (OMAFRA) developed several initiatives through its Rural Economic Development Program such as support to attract new migrants, business retention and expansion, and broadband investment programs. Additionally OMAFRA has developed creative class data sets for rural communities to help analyze growth within towns and industry sectors.

In 2007 the Ontario Ministry of Culture established the Municipal Cultural Planning Partnership, and in 2009 launched the Creative Community Prosperity Fund (CCPF). CCPF has been an important driver of Ontario's creative economy, financing projects in both urban and rural communities that have the potential and capacity to "realize the benefits [of]: increased cultural tourism; safe, vibrant and renewed downtowns; new business development; and an engaged youth with hopeful futures" (Ontario Ministry of Culture, n.d).

Reports discussing creative city theory have been present in Ontario's metropolitan areas since the early 2000s, however research applying these ideas to a rural context is more

recent. Research in Toronto from consulting firms Authenticity, Millier Dickenson Blais, and the Martin Prosperity Institute at the University of Toronto; Monieson Centre at Queen's University in Kingston; and Harris Centre at Memorial University in Newfoundland, have generated a growing literature on rural creative economies. Specifically, *Ontario in the Creative Age* (Martin Prosperity Institute, 2009) and *Canada's Creative Corridor* (Authenticity, Martin Prosperity Institute, Millier Dickinson Blais, 2009) have become important policy documents in the province.

2.4 The Creative Economy in Muskoka

In 2008 Creative Muskoka was formed as a platform for collaboration among champions of arts and culture, environment and the creative economy in Muskoka, supported by provincial, and local stakeholders including Muskoka Tourism, Muskoka Futures, Muskoka Community Network, OMAFRA, and the Ministry of Culture. The group actively works to engage with the general public and leaders to improve conditions and recognition of how the creative economy is relevant to Muskoka. More information on Creative Muskoka can be found by visiting www.creativemuskoka.ca.

To encourage increased recognition from the province regarding the value of Muskoka's creative community, in 2008 the District declared itself as a *Designated Arts Community* to further promote and stimulate local arts and culture (Arts Directory of Muskoka, 2010). This achievement will be further discussed in **Section 5.2.3**.

Muskoka Assessment Project (2007), *Official Plan* (2008), *Economic Strategy* (2009), and *Growth Strategy* (2009) discuss social and economic challenges and opportunities facing Muskoka, while not exclusive to, ideas raised in these documents point to key opportunities and gaps also relevant to the creative economy. With the support of Muskoka Futures, *Business Retention and Expansion* reports focus upon specific economic development initiatives within the six lower-tier municipalities. More explicitly supporting *Ontario in the Creative Age*, the *Town of Bracebridge Convergence: Community Based Strategic Plan* (2008) acknowledges the need to move beyond traditional manufacturing towards "a strong-knowledge based economy" (48), with the strategic objective "to develop and promote Bracebridge as a creative community" (74). Additionally, the Town of Huntsville *Unity Plan* (2010) states goals to "encourage and foster continual growth of arts, culture, and heritage" (32) and "promote a diverse and prosperous economy by attracting innovation, [and] growing a knowledge-based economy" (34).

Supporting a creative economy at a regional level, Section B of the *Muskoka Official Plan* (2008) states goals "to encourage growth and diversification of the economy" as well as manage development "that maintains the quality of natural and cultural heritage in Muskoka". Finally, the *Muskoka Economic Strategy* (2009) includes recommendations to:

Leverage Muskoka's assets, brand and market position to broaden the region's economic portfolio by building new activity, innovation and diversity in the "green" creative and other industries serving local and broader markets; Build technology, institutional and labour force foundations adaptable to changing economic conditions and attractive to new business; and, reduce hurdles that constrain labour availability and mobility (ii).

Though Muskoka is not as centrally located as other rural creative economies in the southern Ontario mega-region identified in *Canada's Creative Corridor* (Authenticity et al., 2009), investment from and proximity to networks in the Greater Golden Horseshoe and the Greater Toronto Area transmit knowledge and ideas within the District outwards to other parts of the Province. Through careful review, it can be seen that policies in Muskoka acknowledge the value of culture and creativity, however there is no comprehensive report on how to apply these ideas in the District as a whole. Further explored in **Section 5.2**, it is this combination of local assets and interest that highlights a local desire and ability to further develop Muskoka's creative economy.

3.0 Community Profile

3.1 Location

Geographically, Muskoka is the most northwestern district included in Southern Ontario bound by Parry Sound, Haliburton, Simcoe County, and Kawartha Lakes, and located 160 – 210 kilometres north of Toronto (**Map 2**). In size, Muskoka is approximately 3,816 km², boasts over 400 lakes and borders Algonquin Provincial Park (District of Muskoka, 2009c). It is accessible by air and rail, and has good access to Ontario's major provincial highway's connecting to Toronto, Barrie, Sudbury, and North Bay (District of Muskoka, 2009c: 5).

Map 2: District of Muskoka, Ontario Regional Context

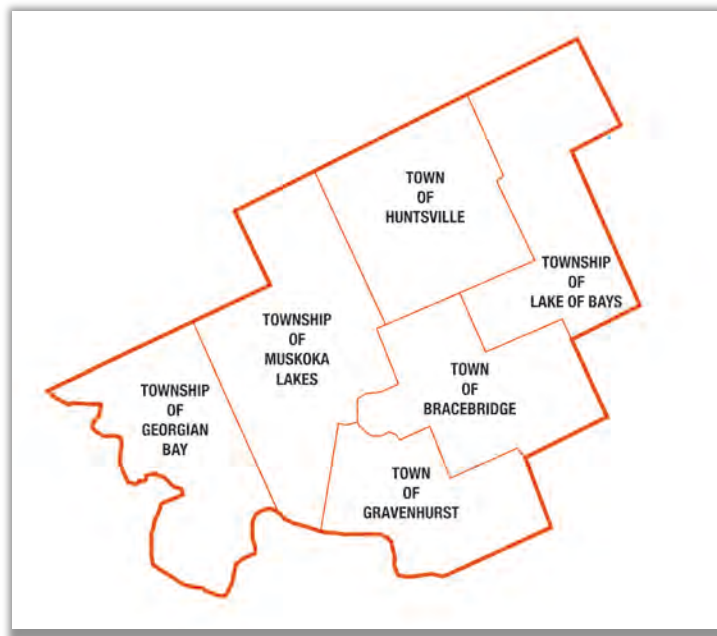


3.2 Governance

The District Municipality of Muskoka functions as a two-tier municipality located in the provincial riding of Parry Sound – Muskoka. Within this structure, the upper-tier [District of Muskoka] is responsible for services such as arterial roads; transit; policing; sewer and water systems; waste disposal; region-wide land use planning and development; as well as health and social services.

The lower tier municipalities seen in **Map 3** are responsible for local roads, fire protection, garbage collection, economic development, recreation and local land use planning needs. As such, economic development for the District as a whole lacks capacity with no full time staff member dedicated to oversee activity across the region (KI-01). This impacts the creative economy: when assets are dispersed over large geographic areas potential economic opportunities can be missed (Stolarick et al., 2010: 5).

Map 3: District of Muskoka, Towns and Townships



3.3 Community

Muskoka is well-known for its natural environment and historically has been a popular destination in Ontario for outdoor activities, leisure, and cottage culture. Over the past century, Muskoka resorts, campgrounds, and Algonquin Park have provided urban and rural dwellers with a peaceful and beautiful refuge to spend time with family, explore, write, paint, and reconnect with a relaxed pace of life (KI-10). Located on the Canadian Shield, Muskoka boasts more than 400 interconnected lakes, and abundant natural amenities conducive to hiking, bird watching, boating, fishing, golfing, canoeing, snowshoeing, cross country skiing and snowmobiling. An abundance of natural amenities such as these are attractive to the creative class (Stolarick et al., 2010: 4).

3.4 Economy

Historically a logging community today forestry represents only 2% of the Muskoka employment base and in 2008, 57% of Muskoka residents were employed in service³ related jobs meeting the needs of tourists and seasonal residents (District of Muskoka, 2009b; 2010b). With several recent closures in the automotive sector, the share of higher wage industrial manufacturing jobs decreased, as the service sector continued to increase its total share of employment (KI-01). Similar to the Province, manufacturing and primary sectors in Muskoka are expected to continue to decline, while tourism, construction, retail, service, real estate and public sectors are expected to grow (District of Muskoka, 2010b). In 2010, the G8

³ “The service class (routine-oriented service occupations) is comprised of occupations in the service sector (e.g., food service workers, janitors, grounds keepers, secretaries, clerks) where workers enjoy lower levels of autonomy than in the creative class.” (Martin Prosperity Institute, n.d)

conference was hosted in Huntsville bringing international attention as well as provincial and federal investment in local infrastructure.

As discussed in **Section 2.4** Business Retention and Expansion plans have been completed for several of Muskoka’s lower-tier municipalities, and the 2009 *Economic Strategy* outlined key issues, gaps, and opportunities facing the District through extensive review of natural resources; manufacturing & transportation; construction, real-estate & business services; trade & personal services; public; second homes; and information, communications & technology sectors.

Challenges caused by declining economic activity in rural communities require them “to respond by searching for alternative strategies” (Stolarick et al., 2010:3). Relevant to the creative economy, challenges identified in Muskoka include: lack of cultural diversity; inconsistent access to mobile and online communications; inconsistent tourism branding; as well as competition between municipalities. Additional factors of importance can be summarized as skill deficiency, the high cost of living, and a seasonal and tourism-dependent economy. Despite these barriers, the Economic Strategy identified opportunities to encourage economic sustainability and prosperity (**Table 1**).

Table 1: Summary of economic challenges & opportunities relevant to Muskoka’s creative economy

Challenges	Opportunities
<p>Skill deficiency: lack of entry-level labour, training facilities, skilled trades people, customer service labour</p> <p>High cost of living: lack of affordable housing, public transit, child care</p> <p>Seasonal and tourism dependent economy: difficult for businesses to operate year-round; misconceptions between full and part-time residents; lack of cultural activities, shopping, dining, and nightlife during winter months</p>	<p>Promote and support new and local business: agricultural, entrepreneurs, start-ups, and youth; facilitate business succession; expand access to mobile and online communications</p> <p>Utilize and support the seasonal population: cottager skill set, provide services for cottage owners to convert seasonal to permanent dwellings; health care for aging population base</p> <p>Create more year-round traffic: additional festivals and events; improve walkability</p> <p>Leverage local assets: Muskoka Airport, CN Rail, post secondary Institutions; encourage additional post secondary</p>

Table 1 highlights specific economic challenges and opportunities relevant to the creative economy identified in the District Economic strategy and also supported in reports from other lower-tier municipalities. While mentioning ideas relevant to a creative economy, the detail provided in the *District Economic Strategy* suggests actions to further all sectors of the economy throughout Muskoka. With no strategy or framework in place to identify or discuss issues pertinent to the creative economy, relevant ideas become lost in a general approach to economic development without a platform to address them in Muskoka.

Research Findings

Using a complementary blend of quantitative and qualitative analysis the remainder of this report discusses limitations, opportunities, and resources critical to a creative economy in Muskoka. This approach brings weight to quantitative data through key-informant interviews with representatives from the local community.

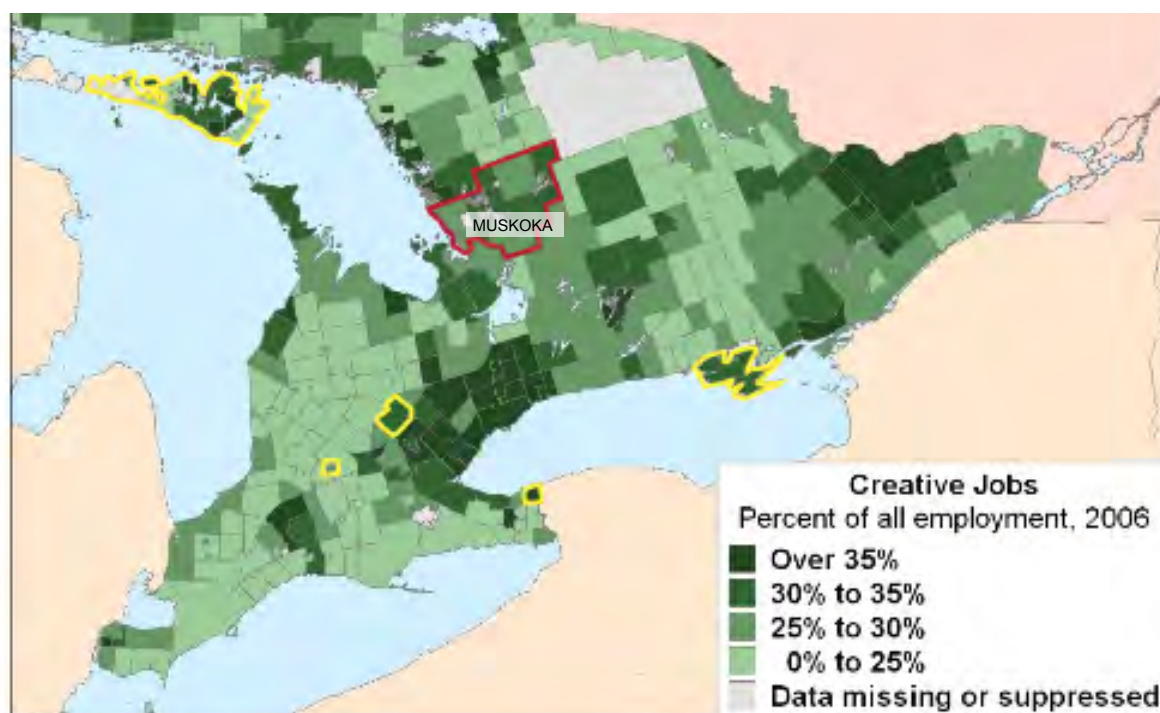
4.0 Quantitative Analysis of the Creative Economy

While ‘creativity’ can be an elusive concept there are generally accepted methods of measuring the level of creative activity within an economy. The most common method involves identifying how many members of the local workforce are engaged in jobs that are deemed to be highly creative in nature. The second way in which creative activity is highlighted in the economy is by measuring the number of companies that make products or provide services that are highly cultural, artistic, or aesthetic in nature. **Appendix A and B** detail categorization and definitions used in this section. In both cases the important concept is that higher value-added goods and services are the key to local economic prosperity – this is achieved through creative thinking and the development of novel ideas and new and better ways of doing things. This kind of economic strategy heavily relies on a healthy and well-educated workforce. While ultimately the goals of such strategies are to increase incomes and spur growth it is always important to remember that the economy is a means to an end – a higher quality of life for all.

4.1 Creative Occupations

Creative workers are generally defined as ‘people who are paid to think’. Most well-known is the methodology developed by Richard Florida and his research team which identifies people working in management, science, health, education, arts and other knowledge intensive jobs as ‘creative’. It is important to note that creative jobs are found in all sectors of the economy and so no industries are excluded from pursuing creative strategies – the key is developing new ideas and knowledge that raise the value-added and productivity of local companies. **Map 4** shows the concentration of creative occupations throughout Southern Ontario. Muskoka is outlined in red, and in 2006 had creative employment between 25% and 35%. While creative occupations are generally more common in urban areas it is important to note that some rural areas are also relatively successful in this area. In this regard Muskoka is faring better than many of its counterparts in rural Ontario.

Map 4: Southern Ontario Geography of Occupations, 2006



Source: AuthentiCity et al. (2009: 43). *Canada's Creative Corridor*

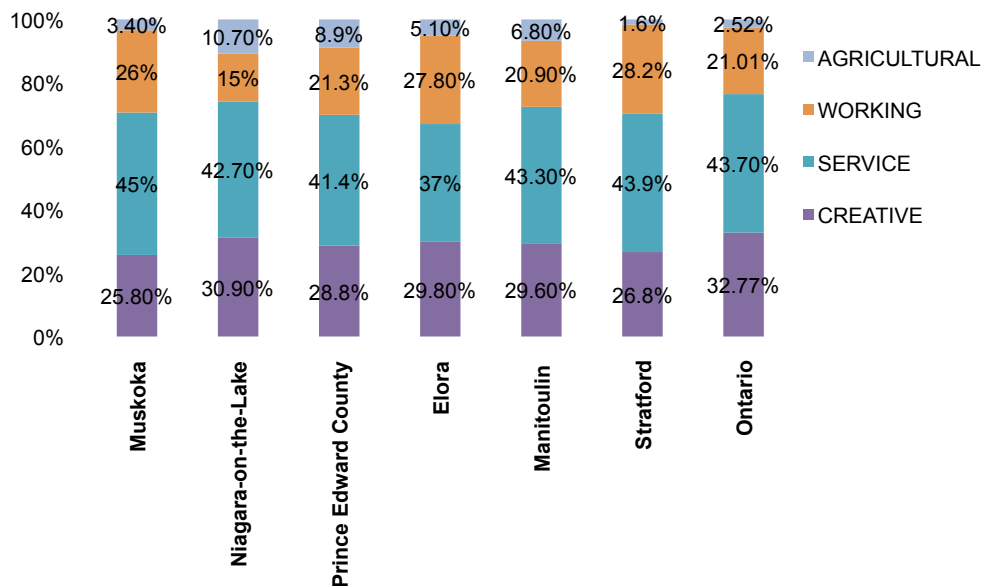
Table 2 displays occupational category percent change between 2001 and 2006. Over this period Muskoka's creative occupations grew by 20.9%, from 6,210 to 7,505 jobs, well above the provincial growth rate of 9.2%. Working class and service occupations also grew, albeit at a lower rate. This trend is nearly ubiquitous across Canada and Ontario in both urban and rural settings. This highlights why it is essential that Muskoka develop a strategy to compete in terms of creativity – the economy in the larger sense is irreversibly changing in this way. Cost driven strategies are no longer viable in places like Canada and Ontario as competition from low wage countries not only impossible to match but is highly undesirable as well.

Table 2: Occupational Categories Percent Change, 2001-2006

	Muskoka	Niagara-on-the-Lake	Prince Edward County	Elora	Manitoulin	Stratford	Ontario
Creative	20.9%	-0.9%	8.1%	10.0%	-7.1%	2.9%	9.2%
Service	12.5%	16.5%	12.5%	16.3%	5.3%	16.0%	9.9%
Working	12.6%	-40.8%	-15.1%	-4.7%	-27.5%	-13.3%	2.9%
Agriculture	24.5%	63.5%	45.8%	43.4%	94.6%	13.0%	0.3%

Source: OMAFRA Workforce 2001-2006 Competitive Advantage Analysis. OCCUPATIONS: Place of Residence (NOC-S)

Graph 1: Employment Occupations, 2006



Source: OMAFRA Workforce 2001-2006 Competitive Advantage Analysis. OCCUPATIONS: Place of Residence (NOC-S)

Although the amount of people employed in creative occupations in Muskoka increased by 20.9% from 2001 to 2006, in 2006 the creative class represented only 25.8% of occupations, 6.9% below the average in Ontario, but in line with an average rate of 26% in non-urban regions (Stolarick et al., 2010:11). As shown in **Graph 2** (pg. 21), creative industries also remained low, and these concentrations were small in comparison to service and working occupation and business populations. Within creative occupations, Lake of Bays surpassed the proportion of creative class workers in non-urban regions by 5% at 30.1%, led by 200% growth for senior managers in goods production, utilities, transportation and construction. Conversely, creative occupations in Georgian Bay fell 10% below the non-urban average at 15.9%, exhibiting significant loss across creative class occupations.

Using National Occupations Codes, **Table 3** displays growth and decline of specific categories within Muskoka's creative class occupations between 2001 and 2006. Greatest increase was seen by senior management occupations rising by 95% from 235 to 460 jobs, with the majority of growth concentrated in Bracebridge. Within this category most growth was shown by financial, communications and other business services senior managers rising by 433% from 30 to 160 workers, with positions added across the District. Growth in these sectors may be a result of high populations of early retirees locating in Muskoka. Conversely, the least amount of growth was exhibited by technical occupations in art, culture, recreation and sport, with overall decline of 10.2% from 440 to 395 workers. Additionally, employment decline was exhibited by managers in retail trade, food and accommodation services with a reduction of 3.8%.

Table 3: Muskoka Creative Occupations Job Growth, 2001-2006

Creative Class	Total '01	Total '06	% Change
A0 - Senior management occupations	235	460	95.74
A1 - Specialist managers	400	585	46.25
A2 - Managers in retail trade, food & accommodation services	1,465	1,410	-3.75
A3 - Other managers	990	1,185	19.70
B0 - Professional occupations in business & finance	290	340	17.24
B1 - Finance and insurance administration occupations	315	490	55.56
CO - Professional occupations in natural & applied sciences [SUPER CREATIVE CORE]	335	400	19.40
C1 - Technical occupations related to natural & applied sciences [SUPER CREATIVE CORE]	530	720	35.85
D0 - Professional occupations in health	230	325	41.30
D1 - Nurse supervisors and registered nurses	315	385	22.22
D2 - Technical and related occupations in health	385	420	9.09
E0 - Judges, lawyers, psychologists, social workers, ministers, policy & program officers	470	495	5.32
E1 - Teachers and professors [SUPER CREATIVE CORE]	855	920	7.60
F0 - Professional occupations in art & culture [SUPER CREATIVE CORE]	180	320	77.78
F1 - Technical occupations in art, culture, recreation & sport [SUPER CREATIVE CORE]	440	395	-10.23

Source: OMAFRA Workforce 2001-2006 Muskoka Competitive Advantage Analysis. OCCUPATIONS: Place of Residence (NOC-S)

Within the super creative core, employment growth was led by professional occupations in art and culture expanding by 77.8% from 180 to 320 jobs, and painters, sculptors and other visual arts occupations grew by 125%, well above the provincial average of 24.7%, from 40 to 90 workers. Specifically, core creative occupations of university professors, producers, directors, choreographers, photographers, mapping technicians, public and environmental health inspectors, deck officers and water transport, and land surveyors increased by 250% or more. It is important to remember that creative occupations can be found in all industries and are not limited to the creative industries. For example, a web designer (creative occupation) may work for a bank (not a creative industry) or an engineer may work for a manufacturer. Therefore, the specific patterns of creative workers and creative businesses are likely to differ somewhat and as noted in **Map 5**, concentrations of businesses that produce creative economy outputs exist across Muskoka. **Appendix D** provides a detailed table of Muskoka creative occupation growth between 2001 and 2006.

Among the regions of comparison [**Map 1**] Muskoka is the only regional municipality with an upper and lower tier municipal structure. Niagara-on-the-lake is a town within the regional municipality of Niagara; Prince Edward County is a single-tier municipality; Elora (Centre Wellington) is a township within Wellington County; Manitoulin is a District in Northern Ontario; and Stratford is a city within Perth County. Unique characteristics influence the creative and cultural economy of each place. Geographically, Manitoulin Island is most isolated while Prince Edward County, Elora, Stratford, and Niagara-on-the-Lake are closer to major centres such as Toronto, Hamilton, Ottawa, Montreal, and the United States. Most densely populated of all

regions benchmarked, Stratford has a large and well known tourism economy resulting from a 50 year heritage linked to the Shakespeare festival. Manitoulin Island is the smallest and most remote of these regions located furthest north, however, is also home to galleries, museums, artists and high concentrations of the creative class. Over the past few years, Prince Edward County (PEC) has become the focus of rural creative economy research and since beginning study has developed strategies to further grow and support its creative economy. Closest to Toronto, Elora's geographic and historic aesthetics attributed to the Elora Gorge, coupled with initiatives like the Elora Sculpture Project, and Music Festival draw talent and tourists. Finally, bordering the United States, Niagara-on-the-Lake's wine industry, Shaw Festival and quaint aesthetics are a tourism attractor with large impact upon the local economy.

Table 4 summarizes creative economy indicators for Muskoka, Niagara-on-the-Lake, Prince Edward County, Elora, Manitoulin Island, Stratford, and Ontario. Percent population with a university degree is assessed for residents aged 25 to 64, of age to have graduated from a post secondary program. Creative occupations are used to identify concentration of the creative class, refer to the nature of a job itself, and can be found across all sectors and industries. Creative industries refer specifically to what is produced by a business.

Table 4: Summarized Creative Economy Indicators – Regions of Comparison, 2006

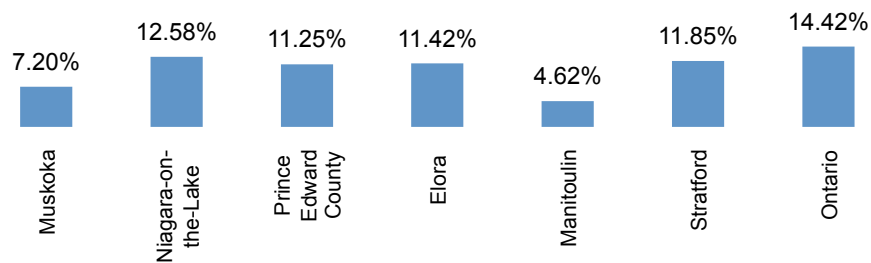
	Muskoka	Niagara-on-the-Lake	Prince Edward County	Elora	Manitoulin Island	Stratford	Ontario
Population	57,563	14,587	25,496	26,049	13,090	30,461	12,160,282
Employment Rate	61.1%	59.4%	55.4%	67.9%	49.9%	65.9%	62.8%
University Degree	16.2%	26.7%	17.2%	18.4%	11.9%	16.7%	26.0%
Creative Occupations (as % of Total)	25.8%	30.9%	28.8%	29.8%	29.6%	26.8%	32.77%
Creative Occupations Employment Change (2001 – 2006)	20.90%	-0.90%	8.10%	10.00%	7.10%	2.90%	9.20%
Creative Employment Wages as a Share of Total (est.)	45.5%	54.9%	45.8%	46.2%	44.6%	42.5%	51.0%
Creative Industries (as % of Total)	7.2%	12.58%	11.25%	11.42%	4.62%	11.85%	14.42%
Average Full Time Employment Income	\$45,744	\$59,485	\$46,092	\$53,828	\$40,149	\$46,992	\$55,626

4.2 Creative Industries

While creative occupations are located across all industries, creative industries refer specifically to the type of goods or services that businesses produce. Each creative industry includes several subsectors, a full list of which can be found in **Appendix A**. In 2006 creative industries in Muskoka represented 386 businesses. This concentration was highest among the regions of comparison, however only amounted to 7.2% of total industry share. This was half of the provincial average and placed Muskoka behind Stratford, Elora, Prince Edward County, and Niagara-on-the-Lake which staggered near 12% creative industries (**Graph 2**). As noted in **Section 4.1**, relatively low concentrations of creative industries may result from

proportionally high volumes of businesses in Muskoka that create service related outputs for the seasonal economy.

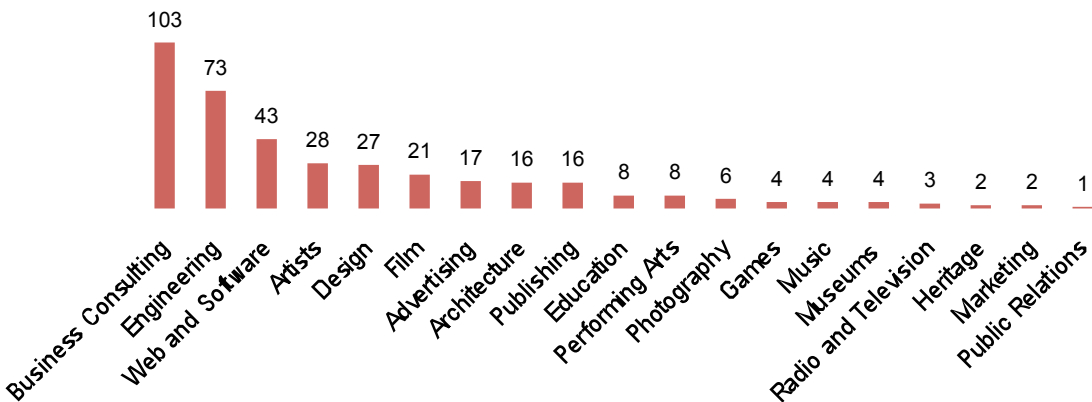
Graph 2: Creative Industry Share, 2006



Source: Source: Statistics Canada. 2006. Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census. Catalogue # 94-581-XCB2006001. Ottawa, ON: Statistics Canada.

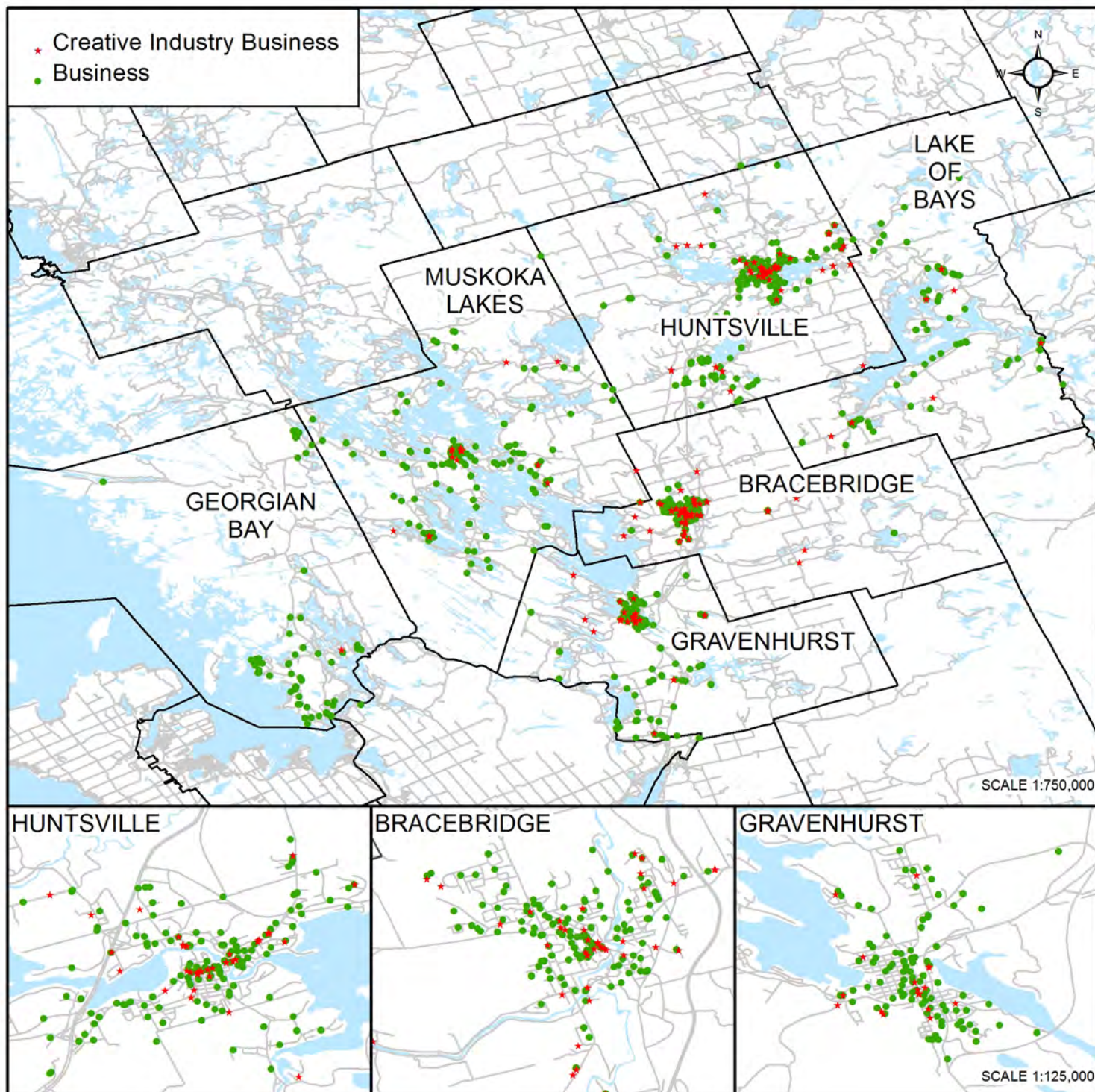
In 2006, Muskoka’s creative industrial structure had greatest concentration of firms in business consulting in Huntsville, Bracebridge, and Muskoka Lakes; engineering in Bracebridge and Huntsville; and web and software in Huntsville. Throughout the District lowest concentrations of creative industries were seen by businesses related to education, performing arts, games, music, museums, radio and television, heritage, marketing, and public relations. While Muskoka Arts and Crafts boasts over 380 practitioners, and 77% growth was seen by professional occupations in arts and culture (**Table 3**), in 2006 there were only 28 artistic (**Graph 3**) registered businesses. This suggests many of Muskoka’s artists participate in informal economic activity through trading services, or freelance work, with income levels less than \$30,000/year, which do not require them to register as businesses. Additionally, while Muskoka’s artisan economy such as furniture makers/refinishers, canning, upholsterers, boat building/repairs, violin repair, cupola-building, and specialty crops/gardens have existed since the 1800s, this work often takes place as a second job. This means such arts-based industries are not included in tax returns or self-employment counts, and are thus may also absent from creative industry statistics.

Graph 3: Muskoka Creative Industries, 2006



Source: Source: Statistics Canada. 2006. Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census. Catalogue # 94-581-XCB2006001. Ottawa, ON: Statistics Canada.

Map 5 – Creative Businesses in Muskoka



Source: Dun & Bradstreet 2011

Note: roughly 10-15% of the business addresses are mapped to general locations such as postal code areas rather than specific addresses due to a lack of specific referencing in the data. For example, a number of businesses are listed as 'General Delivery' and so exact locations cannot be mapped.

Map 5 shows the general pattern of the location of creative businesses in Muskoka. The overall distribution is similar to many other places with creative businesses tending to be spatially concentrated in the largest towns. This presents an opportunity to more easily facilitate the connecting of these enterprises to one another as well as with any wider community organization and programs that may benefit their growth and expansion. The additional benefit is that if they require common infrastructures they can be more efficiently provided.

The general lack of a quantified artistic presence in Muskoka suggests further support may be needed for creative populations, however the economic contributions of artists are difficult to formally assess with official statistics. For example, arts, tourism, and the environment are very closely connected and it is difficult to determine if revenues incurred through the arts are a result of this sector alone, or if visitors are attracted to Muskoka's environment, thus acting as tourists, while also participating in arts and cultural activities. Additional outreach is likely needed to discover and cooperate with the various artistic individuals and communities in Muskoka.

4.3 Population

Research on new governance models states that the relatively lower population densities in rural settings poses problems when it comes to constant face-to-face social interaction with a wide range of local community members. This requires a greater need to formally organize the collaboration between residents, institutions, public, and private agencies that is essential for creativity and innovation to thrive. Seen in **Table 5**, Muskoka has a high population dispersed across a large geography with a low density of 14.8/km². Between 2001 and 2006 Muskoka's population grew by 8.4% from 53,106 to 57,563 residents exceeding the provincial rate by 1.8%.

Table 5: Population and Density Comparison, 2006

	Population	% change (2001-2006)	Land Area (Km²)	Density (population/Km²)
Muskoka	57,375	8.4%	3,890.24	14.8
Niagara-on-the-Lake	14,587	5.4%	132.83	109.8
Prince Edward County	25,496	2.4%	1,050.14	24.3
Elora	26,049	7.4%	407.33	64
Manitoulin Island	13,090	3.2%	4,759.74	2.8
Stratford	30,461	2.3%	25.28	1205.1
Ontario	12,160,282	6.6%	907,573.82	13.4

Source: Statistics Canada. (2006). *Community Profiles*

Table 6 displays permanent and seasonal population throughout the District. While growth took place across all six lower-tier municipalities, between 2001 and 2006 Lake of Bays grew most significantly by 28.27%, from 2,900 residents in 2001, to 3,720 in 2006, and the least amount of relative growth took place in Gravenhurst with a population increase of 5.6%.

Table 6: Muskoka Seasonal and Permanent Population

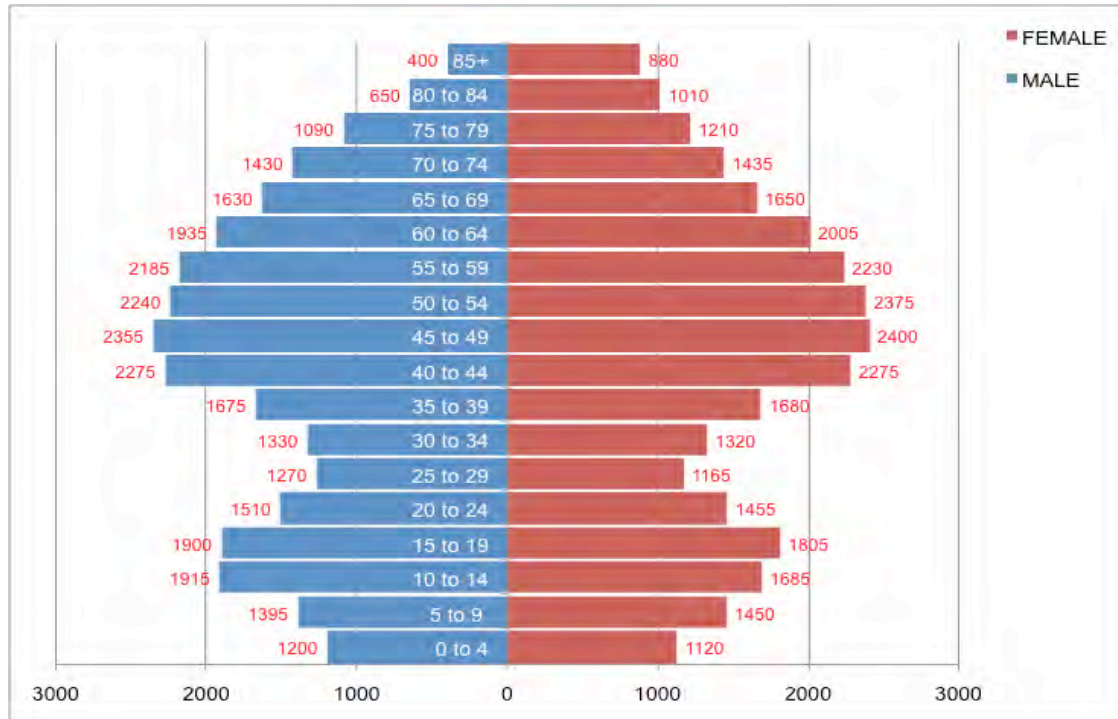
	Permanent Population (2001)	Permanent Population (2006)	% Change (2001- 2006)	(Est) Seasonal Population (2006)	Total Population (2006)
Bracebridge	13,751	16,309	18.6%	7,045	23,354
Gravenhurst	10,899	11,510	5.6%	11,036	17,204
Huntsville	17,338	19,048	9.86%	6,171	22,546
Georgian Bay	1,991	2,438	22.45%	14,766	25,218
Lake of Bays	2,900	3,720	28.27%	11,480	15,200
Muskoka Lakes	6,042	6,739	11.53%	25,129	31,867
Muskoka	53,106	57,375	8.4%	75,626	135,606

Source: Statistics Canada. (2006). *Community Profiles*; District of Muskoka. (2009). *Demographic Profile*.

In 2006 Muskoka's seasonal population exceeded permanent residents by 29.8% for a combined population of 135,606 during the busiest summer months. Of these, 72.4% of seasonal residents are from the Greater Toronto Area (Muskoka Watershed Council, 2008: 3). Further discussed in **Section 5.1.4**, income discrepancies between year round, seasonal, and second home populations create tension in Muskoka. While many seasonal residents come to Muskoka to disperse, they remain well connected to each other and communities outside of Muskoka. This presents an opportunity to further utilize seasonal knowledge and networks in developing and supporting the year round creative economy.

Between 2001 and 2006 Muskoka's population aged 65 and over increased from 9,785 to 11,385 residents, but decreased as a percent of total population from 22.28% to 19.79%. This concentration is 3.8% higher than the non-urban average of 16.1% (Stolarick et al., 2010: 10) but 6% higher than the provincial average of 13.6%. Between 2001 and 2006 population aged 20 and under decreased by 7.3%, from 28.95% to 21.67% of total population. While normal for young residents of rural communities to move away for university, challenges arise in northern communities with limited employment opportunities, leading to youth out-migration, higher proportions of seniors, and a relatively homogenous population (Hall & Donald, 2009:15). Despite a creative economy focus on young talent, strategies to utilize knowledge and skill within retiree populations have been explored in Prince Edward County, and may also present opportunity to Muskoka.

Graph 4: Muskoka Population Pyramid, 2006



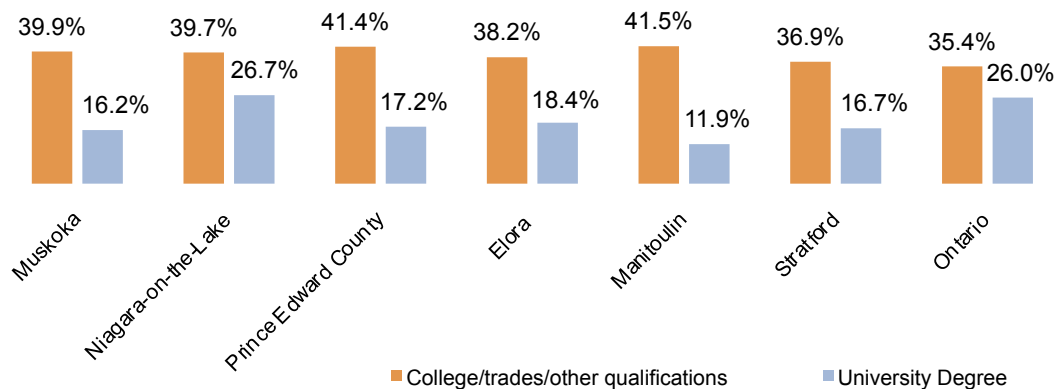
Source: Statistics Canada. (2006). *Community Profile*

Graph 4 displays a dip in population for Muskoka residents 20-39 years of age. A low concentration of this demographic has economic implications with reduced human capital, talent pool and thus energy for entrepreneurial ventures. To this point informants noted a lack of job opportunities, recreational options and lifestyle amenities that cater to residents under 40 years of age such as interesting cafés, bars, restaurants, and shopping (KI-08; KI-09; KI-13). This idea is further discussed in **Section 5.1.2**.

4.4 Education

Higher education is an extremely important facet of the creative economic. Most creative occupations require some form of higher education and most of the job growth in Canada in the next generation will be in such types of work. Within the working age population (25-64), 39.9% of Muskoka residents have a college or trades certificate while only 16.2% have a university degree or higher (**Graph 5**). This is almost 10% behind the provincial average of 26% with a university degree, but above the non-urban average of 12.3% in Ontario (Stolarick et al., 2010: 11).

Graph 5: Educational Attainment, 2006



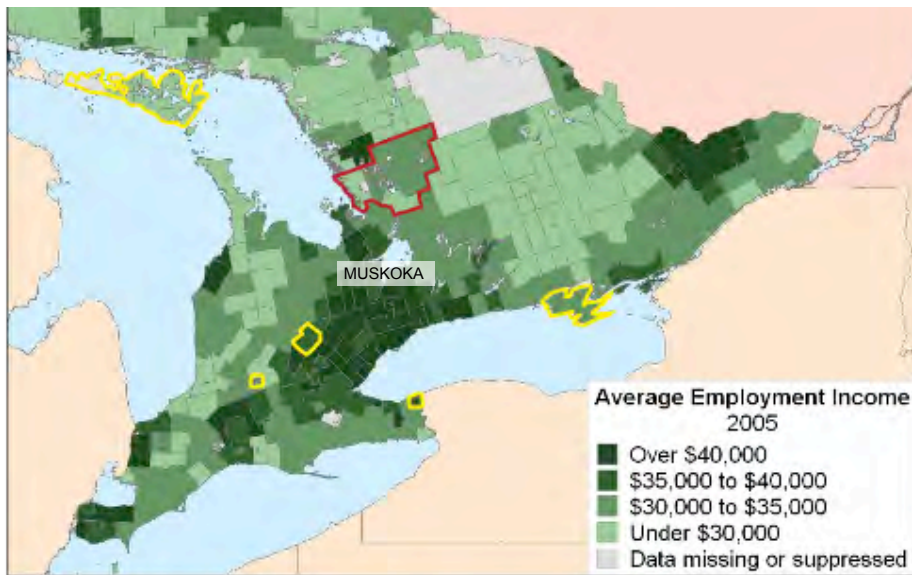
Source: Statistics Canada. 2006. Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions, 2006 Census. Catalogue # 94-581-XCB2006001. Ottawa, ON: Statistics Canada.

As stated by **Figure 3** (pg.5) educational attainment is a defining characteristic of the creative class with over 40% university educated. While a low number of university educated residents is a disadvantage to Muskoka's creative economy, satellite campuses from Georgian College, Nipissing University, and the University of Waterloo pose opportunity for further investment in local talent pools. Specifically, the First Generation Program at Georgian college works to encourage attendance and success amongst learners from families that previously did not have any post-secondary experience. **Section 5.2.6** further explores challenges and opportunities related to post-secondary education in Muskoka.

4.5 Employment Rate and Income Levels

Map 6 showcases how wages are dispersed throughout Southern Ontario, regions of comparison are outlined in yellow, and Muskoka in red. Seen in **Table 4** (pg. 20), between 2001 and 2006 the total number of employed persons in Muskoka increased by 14.9% from 25,285 to 29,040 with an employment rate of 61.1%. This is slightly below the provincial average of 62.8% but matches non-urban regions at 61.2% (Stolarick et al., 2010: 11). In 2006 average full-time yearly employment earnings in Muskoka were \$45,744, 18% below the provincial average of \$55,626 while part-time workers in Muskoka fared closer to the provincial average of \$22,895 earning an average of \$20,007 per year. These figures do not capture the accumulated capital present in retiree populations, and as displayed in Section 4.1, while no longer income earners wealth held by senior residents contributes to Muskoka's economy. A 2008 report by the Labour Market Monitor stated that between December 2008 and December 2009 the unemployment rate in Muskoka-Kawartha Lakes rose "from 4.9 percent to 8.7 percent, the highest increase among all Ontario economic regions" (Steel, 2010).

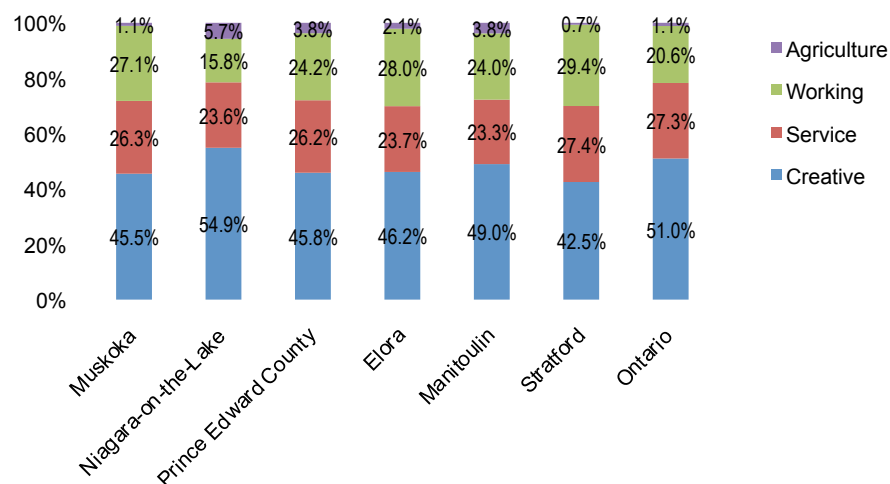
Map 6: Geography of Wages in Ontario, 2006



Source: AuthentiCity et al. (2009: 43). *Canada's Creative Corridor*

Graph 6 shows that while only 25.8% of Muskoka workers are employed in creative occupations, wages paid to this group account for 45.5% of total share. Contrarily, service occupations in Muskoka account for 45% of local jobs but only 26.3% of total wages. As displayed in **Figure 2** (pg. 5) this inverse relationship displays higher income levels and wages earned by creative class occupations, and suggests significantly lower wages paid to routine oriented service and working class jobs. This is further discussed in Section 5.1.4.

Graph 6: Type of Employment by Share of Total Local Wages, 2006



Source: Statistics Canada. 2006. Profile for Canada, Provinces, Territories, Census Divisions and Census Subdivisions. 2006 Census. Catalogue # 94-581-XCB2006001. Ottawa, ON: Statistics Canada.

4.6 Summary

The quantitative analysis shows that Muskoka has a great deal of promise in developing a highly prosperous creative economy but it is not without its challenges. The level of creative jobs in Muskoka is lower than the provincial average but relative to most rural parts of Ontario Muskoka is doing well in this regard. In order to keep adding these kinds of jobs Muskoka must be able to support knowledge-driven business and industry strategies through investments in digital infrastructure, connections to higher learning institutions, and the promotion of entrepreneurship. Mentoring programs also offer much opportunity as the demographics skew older there is a great deal of expertise and experience that needs to be passed on to the younger generations who typically leave for urban settings. Many of the creative businesses and industries are still relatively young but this means that they are at a crucial stage of development. In other jurisdictions small concentrations of creative enterprises have spurred a great deal of growth when they were recognized and nurtured at just the right time. An example is the wine industry in Prince Edward County which generated growth in other industries such as high-value craft food production and the arts. It should be the mission of Muskoka to try and identify such potential high-flyers and start to build a community around them.

In order for Muskoka to distinguish itself as a leader among Ontario's creative rural communities, opportunities for further investment and growth must be identified. **Section 5** further discusses these figures and examines specific features critical to the success of a creative economy.

5.0 Qualitative Analysis of the Creative Economy

Individual semi-structured interviews were conducted with 21 key informants across the six District lower-tier municipalities and included meetings with representatives in economic development, municipal council, provincial government, tourism, culinary, non-profit, entrepreneurial, artistic, environmental, and technology occupations. Discussions ranged from 30 minutes to one hour in length. Information was coded (KI-##), analyzed, and grouped to showcase major themes, and generate a range of perspectives on Muskoka's creative economy.

This investigation identified weaknesses and challenges in Muskoka's creative economy posed by poor cross-sector and cross-district communications; lack of support for entrepreneurs, diverse groups, and youth; investment needed in public transit and affordable housing; and a high saturation of seasonal tourism based industries.

Subsequently, strengths and opportunities to grow and support the creative economy were identified in environmental amenities; tourism built infrastructure; an active arts population; high-speed technology infrastructure; emerging creative food industries; and a growing concentration of post-secondary institutions.

5.1 Challenges

5.1.1 Communication

"We've got to get the municipalities on board, we've got the energy here. We all have got to get on the same page... economic development, the politicians. Creative Economy doesn't have to be our only thrust, but understanding it and recognizing it could make a significant difference to our communities" (KI-03)

Many long-time residents and political figures are uncomfortable with pursuing a creative economy in Muskoka because they do not fully understand the term (KI-03; KI-04; KI-10; KI-18). It would be beneficial to explain that the "creative economy is just one component of a well-rounded community. The results of it really give you an economic head start on some other communities that haven't embraced it" (KI-06). Additionally, informants suggested that more collaboration⁴ is needed because Muskoka's creative economy is currently "in its

⁴ Informants stated: "We have to have recognition that the old ways of creating jobs are gone, we have to look at different ways" (KI-19), "The naysayers are gone. The younger generation of Economic Development officers are using the creative economy to their advantage, and they're trying to stimulate their elected officials to understand what's happening, it's working"(KI-16),"We're trying to get everyone talking to each other, but it's a me against you mentality in everything - rather than looking at it as a huge area that really needs to work together and build"(KI-04), "We've got to get the municipalities on board, we've got the energy here. There's lots of education here, there's lots of interest, it's just how to nurture it and bring it upward" (KI-04)

infancy, it's not an area that's been a focus of too many initiatives" (KI-19). This may be a result of "people who have been here forever don't want things to change at all, then you have the people who've been here 10 to 15 years and they want things to change fast, fast, fast. Then you've got the newcomers who like things just the way it is... at least for a while" (KI-02).

Further, the two-tiered structure of the District poses challenges for coordinating initiatives as some lower-tier municipalities lack staff capacity to undertake economic development while others are further along and have staff in a dedicated role. "It's one of the things that is quite divisive, each urban centre tries to operate independently. I believe more can be accomplished if everyone worked together" (KI-17). Within this challenge, competition exists between certain municipalities, while others are "afraid to step on each other's toes" (KI-10), and spillover effects that positively impact the District's economy as a whole are not understood.

While a number of agencies pursue economic development objectives in Muskoka, no formalized mechanism exists for coordination (Malone Given Parsons, 2009: 11). Second to seasonality cross-district and cross-sector communication was overwhelmingly identified as a limitation to the creative economy. Informants discussed a lack of risk-taking attitudes, big-picture thinking, a conservative council, and NIMBY-ism (KI-02; KI-03; KI-07; KI-14). This issue is not unique to Muskoka as assets in many rural communities are spread over large geographies and it can be difficult to see how they "can be used together to create new successful economic opportunities and ventures" (Stolarick et al., 2010: 5).

Informants stated that the 2009 District Economic Strategy lacked an overarching vision, and was missing implementation strategies (KI-06, KI-07). "We need to make sure that each community isn't 'siloed' into their own political boundaries. When people come to Muskoka there shouldn't be anything that gives indication that they can or cannot participate in a creative economy if they live in one place versus another. This issue requires municipalities in Muskoka to work together to maximize creative economy opportunities.

Increased opportunities for knowledge making, information sharing and networking will support efforts to work together. Informants stated a willingness to collaborate and that "we could all help each other if we worked together and helped support an entrepreneurial spirit, from community members to government" (KI-10).

5.1.2 Support for youth, volunteers, entrepreneurs, and diverse populations

“We haven’t done a good job of reaching out to youth. We know that.”
(KI-14)

Between 2001 and 2006 Muskoka’s population aged 20 and under decreased by 7.3%, from 28.95% to 21.67% of total population. Additionally **Graph 3** (pg. 25) displays a significant dip in population for residents 20 to 39 years of age. Informants noted lack of employment as the primary hindrance to attracting a younger demographic to the District, and also noted a lack of youth presence on non-profit boards, event committees, and in municipal decision-making (KI-03; KI-14; KI-17). Poor communication between young and old demographics may result from different mindsets and priorities, as young people are willing to take greater risks while “those that have been around a while need to take smaller steps and be convinced” (KI-03). Working to improve opportunities for young people in Muskoka, in 2010 Creative Paths hosted a career fair as a non-profit group “committed to empowering Muskoka’s youth by encouraging the development of creative thinking skills that translate into practical working tools for future careers” (Creative Shift Muskoka, 2011).

Youth out-migration has implications for innovation and entrepreneurship. Also supported by the 2009 Muskoka Economic Strategy some business owners identified this challenge as “absence of a talent pool, the resource of creative thinking” (KI-19). This forces hiring and recruitment from outside Muskoka to fill upper level jobs in creative positions such as customer service, public relations, and marketing (KI-08; KI-15). While Muskoka boasts a tourism-focused economy, one informant noted that resorts often look to national talent pools as far away as British Columbia to fill higher-level hospitality and culinary positions (KI-08). This may be a result of no appropriate training facilities as “the District and local businesses need to learn that investment in skill development is critical” (KI-14).

Though post-secondary institutions are located in Muskoka informants identified a lack of programs and partnerships focused upon economic and skill deficiencies (KI-08; KI-11; KI-13). To offset this “council has to be a driving force, one of the mandates has to be about more engagement with youth, businesses, [and] think tanks about how can we collectively become creative, and do things differently” (KI-19). Once additional skill sets and knowledge are available through education and training for youth, “businesses can grow out of knowing that there are trained people [in Muskoka] with certain skills, a lot of those businesses can come here” (KI-20).

Strength in volunteerism is a pride among Muskoka residents, however informants stated that many volunteers undertake what should be paid positions in non-profit organizations (KI-04; KI-09; KI-10; KI-14; KI-17). Additionally, resulting from the seasonal economy many residents supplement underemployment with entrepreneurial ventures, sell goods and services online, or

work from home (KI-11; KI-21). While support exists for entrepreneurs in some of the lower-tier municipalities, geographic expanse and limited funding dictate the availability of resources to the District as a whole, and informants suggested that further support is needed (KI-11; KI-14; KI-15; KI-16). While the Muskoka YWCA, and Muskoka Small Business Centre offer programs to home based workers, informants suggested that public transit, free meeting space, shared access to office equipment, additional business skill training, recognition for volunteer run initiatives, and ‘buy local’⁵ policies could help advance the capacity of individuals trying to supplement a seasonal income (KI-04; KI-10; KI-15; KI-17). Despite this shortfall, it was stated that for entrepreneurs “there is without question opportunity to do well in this town” (KI-08).

Finally, “cities with single homogeneous populations often find it more difficult to be wildly creative” (Landry, 2000: 111). In 2006, 98% of Muskoka residents were not of a visible minority (Statistics Canada, 2007). “There is a bit of a gap between where we would like to go with visible minorities in Muskoka and the readiness of the community to accept visible minorities, we’ve got some work to do in that area” (KI-17). Commenting on residents being unwelcoming to diverse groups, one informant stated “why wouldn’t you want a diverse culture here, why wouldn’t you want to expand your boundaries, get their friends and family coming up here? It just snowballs, we need to plant the seed” (KI-12). Despite the popularity of the Norman Bethune House among Chinese visitors, little is done to make this demographic feel welcome or integrate with the District as a whole (KI-01; KI-12). It was suggested that this is slowly changing, and Muskoka’s wealth of outdoor amenities can attract newcomer urban-based populations not as familiar with the region (KI-18). Aware of this shortfall Parks Canada has made recent initiatives to attract diverse populations to participate in outdoor activities in Northern Ontario. Programs designed to introduce new campers to the Canadian experience include all-inclusive packages that provide equipment, food, and trip planning, as well as ‘learn-to-camp’ and ‘camping 101’ tutorials (Alphonso & Paul, 2010).

5.1.3 Social Supports: Public Transit & Affordable Housing

“A transit system will never make money. It’s like a library or a museum, a skating rink, or curling rink... they will never make money. But it enables the community to survive better, it provides a service, a higher quality of life.” (KI-06)

⁵ Discussing current initiatives to support entrepreneurs and the creative economy through local producers, informants stated “when developers come into our community, we should encourage them to use local supplies first before they farm out or solicit interior decorators, artwork for model homes, paint, lumber, furnishings, pottery, glassware. Buy all that stuff locally, participate in the Muskoka flavour. Use only Savour Muskoka products for your open houses, use a local printer, advertise with Muskoka logos as you sell your homes. Only use our local caterer, buy all your supplies from a local supplier.” (KI-16), “The District and local businesses need to learn that investment in skill development is critical. They need to establish priorities to promote innovation locally: tell people where they can buy green products, local farms, showcase how easy it is to buy locally, attract through showing people high quality of goods produced here” (KI-14)

While a creative economy presents many opportunities, it is also an obstacle to “those who do not have the skills and opportunities to participate fully” and new social safety nets are needed to offset polarization (Martin Prosperity Institute, 2009: 2). Discussing social supports, a final challenge noted by informants was a lack of public transit and affordable housing across Muskoka (KI-01; KI-02; KI-06; KI-10; KI-11; KI-12; KI-13; KI-16). “Employment locations and travel distances present barriers to some residents. There is no public transit or alternative transportation system” (Malone Given Parsons, 2009: 11).

“Distances and the lack of affordable transportation alternatives seriously undermine the creative advantage of peripheral regions” (Hall & Donald, 2009: 16). Though the District employs an Active Transportation Strategy (2010) focused on walking and cycling, and the Town of Huntsville was successful in implementing public transit, lack of District wide transit discourages and impedes residents from attending events and enjoying the full variety of amenities available in Muskoka (KI-06; KI-09; KI-11). Over the summer months, some resorts fill this gap by providing shuttle service for workers coming to and moving around Muskoka. Were additional transportation options available, spillover impacts could diversify the demographic able to access Muskoka. One informant stated “we need to bring [new people] here, provide transit, rent a bus for the day, show them around, ask them what they want” (KI-12).

Muskoka’s geographic location has strong historic and economic ties to Toronto and Southern Ontario. Discussing the economic strength of this region, *Canada’s Creative Corridor* states “geographic position presents tremendous mega-region trading opportunities in the new creative economy” (xi). While within the catchment of Toronto’s creative economy, Muskoka is not as centrally located relative to the mega-region of Toronto-Ottawa-Montreal as other rural communities identified in **Section 4**. Currently, Ontario Northlands operates coach bus service to and from Muskoka several times per day. A train also connects Muskoka to Toronto, however this service only runs once per day, designed for Torontonians leaving the city in the morning, and returning at night. Though Muskoka is promoted for its proximity to Toronto, infrequent transit scheduling limits the ability of Muskokans to take the train to and from Toronto in the same day (KI-07). Additionally, some small businesses face difficulty in moving goods to major centres, and one informant noted difficulties in trucking goods to Toronto if traffic is too heavy to meet delivery times (KI-08).

Identified in the economic strategy, the Muskoka Airport in Bracebridge presents a further opportunity to increase external connectivity to the region. While physical proximity allows goods, ideas, and people to move across regions, knowledge transfer is limited between Muskoka’s lower-tier municipalities that lack a strategy to move residents within the District. Not only is public transit an issue for residents wishing to travel between and throughout the Muskoka’s towns, but it limits visitors to the region as taxis and car rentals are hard to find.

In addition to a lack of public transit, in 2006 Muskoka's full-time employment income was 18% below the provincial average. While a perception exists of multi-million dollar lakeside estates, this lifestyle is not that of year-round residents and the 2010 report *Housing for Everyone* noted this limitation. Resulting from the tourism driven seasonal economy, "there is insufficient housing available to low to medium income earners (Malone Given Parsons, 2009: 11). In 2010 students from Ryerson University studied and developed recommendations to improve housing affordability in their report *Moving Toward Attainable Housing in Muskoka*. Specifically, the District has made efforts to add affordable apartments to the region through planning regulations. The Muskoka Official Plan contains a policy that would permit secondary suites in the community and rural land use designations. A number of the Area Municipalities have amended their plans to include similar policy and have also amended their zoning by-laws to permit these units.

5.1.4 Seasonality

"Employment in Muskoka tends to be cyclical, and the cycle has to be broken, we're wrestling with the ideas now. Are we going to be successful in a year or two? Who knows, this is a long-term thing." (KI-17)

The 2009 District Economic Strategy identified "tourism, seasonal residential and retirement related demands as a key driver for economic and population growth" (7). However this also creates complications for Muskoka's economy and "is at the heart of many...employment problems" (Steel, 2010). Between 2009 and 2010, the unemployment rate in Muskoka increased by 1.8% to reach 8.6%, the highest among all Ontario economic regions (Service Canada, 2010:1). While seasonality is an issue for many Canadian tourism driven economies, informants in Muskoka identified this as a primary challenge to the creative economy as low off season populations stretch the ability of workers and businesses to generate income. This includes hardships caused by declining manufacturing and construction jobs, part-time and short term contract positions, and a small year-round market base. Further exacerbating this challenge is economic division between seasonal and year round populations, "there's the haves and have-nots" (KI-02).

Lack of information and promotion across the District and to neighbouring communities to generate activity and attendance at events challenges the off season creative economy. Even during the summer population spike it can be difficult to get people off their docks and into commercial areas. This obstacle is harder to overcome during the winter with inhospitable weather conditions and it is difficult to generate audiences for performances (KI-09), demonstrated between 2001 and 2006 by stagnant growth of musicians, singers, and dancers, and conductors, composers, arrangers, announcers and other performers declining by 100% from ten to zero residents. Though many festivals and events take place throughout Muskoka, one informant stated that moving events throughout the District each year could

help decrease competition between communities, improve awareness of cultural activities, and help offset challenges posed by a seasonal economy. They explained that “we need anything that is going to introduce and expose [the] community to what is available to them. It’s amazing you’re talking to people who don’t even know what’s going on” (KI-04). Additional challenges are encountered by communities and organizations who wish to use event spaces not available outside tourist season (KI-04). Also supported by the 2009 District Economic strategy, informants identified a general lack of, as well as minimal variety in types of cultural activities, shopping, dining, and events over the winter months (KI-08; KI-09: KI-13).

Despite this significant barrier, work is being done by various organizations such as the Huntsville/Lake of Bays Chamber of Commerce to “retain sport and cultural events during the shoulder seasons” (Muskoka Tourism, 2004). For example the November 2010 Girlfriends Getaway in Huntsville provided the year’s busiest weekend of retail traffic (KI-06). Additionally, the Delta Grandview in partnership with Muskoka Lakes Brewery held a well attended Craft Beer Getaway in October 2010. These recent efforts show innovative partnerships and strategies to encourage off-season traffic and reduce the impacts of what is perhaps the greatest barrier to Muskoka’s creative economy.

Finally, as noted in **Section 4.3**, substantial seasonal populations across Muskoka present opportunity to bring outside investment, knowledge and networks to the region. One informant discussed that his company has grown significantly as a result of a partnership and investment from a seasonal resident (KI-08). Further harnessing seasonal populations and second home owners can be seen as an asset to the creative economy, however ideas surrounding the utility and strength of this group was not frequently expressed in key-informant discussions. In an informal discussion, it was suggested that a primary discrepancy between Muskoka and regions like Niagara-on-the-Lake, Prince Edward County, and Stratford, is that seasonal populations come to Muskoka to disperse, while in these other communities tourists come to embed themselves in community culture. This complex issue requires further study to determine how to best involve the resource of Muskoka’s seasonal residents.

5.2 Opportunities

5.2.1 Environment

“On a per capita basis Muskoka is a little richer with the creative mindset. I think it has to do with geography and environment. The weather and the uniqueness of the natural setting are an automatic filter [for] the creative mind to want to be here...seek inspiration from it.” (KI-20)

Boasting hundreds of lakes, slices of the Canadian Shield, trails, forests, wetlands, and wildlife, historically Muskoka’s natural environment has been key factor driving the economy. “The biggest thing is the lifestyle, it’s the image that’s associated with the term Muskoka” (KI-07). The report Economic Development and Environmental Protection states that “in Muskoka, economic policy and environmental policy are not at odds; they are completely and wholly dependent upon each other” (Muskoka Watershed Council, 2008: 8). This belief is intrinsically linked to Muskoka’s cultural identity and the majority of informants stated the natural environment is a primary attractor for both residents and visitors. “There are a lot of people in Muskoka or who move to Muskoka, and part of their value system is that they want to be here, and they will do anything they can to stay in Muskoka. They are attached to the clean air, the environment, nature. They are trying to figure out how to make that work” (KI-21).

Continuously referenced in various government reports, the value of the environment is regarded as Muskoka’s primary strength. Supporting this, the 2008 Gravenhurst Business Retention and Expansion Survey stated that 80% of respondents noted the natural environment and quality of life as a key advantage (2005: 15). Informants felt policies within the lower-tier municipalities, as well as District wide recognize this asset, and that further development will not threaten the environment (KI-01; KI-02). Conversely, reports also note restrictive environmental planning policies such as zoning and permitting, and costly environmental regulations and logistics that are detrimental to District growth and a barrier to expansion (Muskoka Community Futures Development Corporation, 2003: 40).

Aware of the value as well as the complications this asset provides, environmental amenities present opportunity for Muskoka to grow “green technologies such as the production of renewable energy and green building. Untapped areas of economic growth may include resource-based industries such as value-added wood product manufacturing” (Muskoka Watershed Council, 2008: 6). To this point, informants noted that Muskoka’s high quality lumber is an asset that can be used for furniture design, cabinetry, and fine home building (KI-14). Currently much of this resource is used for firewood in Muskoka, and sent to North Carolina for manufacturing. Encouraging skilled wood manufacturing in Muskoka poses opportunity to support local producers and the creative economy. Additionally, firms in Muskoka’s construction sector are required to work in a difficult setting with challenging conditions presented by the Canadian Shield. Informants stated this demanding environment

has had positive outcomes resulting in builders who possess leading innovative knowledge and advanced geo-tech and construction techniques (KI-02; KI-14; KI-17).

Recognition of environmentally focused knowledge-based assets presents an opportunity for local builders to export talent outside Muskoka. For example, the use of solar panels to provide energy to both year-round and seasonal residents is a growing sector, as local suppliers such as Muskoka Solar are able to provide renewable energy options (Good, 2010). Additionally, some communities within the District are interested to explore green energy parks, wind and solar farms, and change legislation to allow communities to create and sell energy off the grid (KI-17).

5.2.2 Tourism

“We have a range of experiences that simply wouldn’t be available without having a strong vibrant tourism industry. I don’t know of too many other communities in Ontario with a population base of about 60,000 people that have 30 golf courses. The ability to have that infrastructure accessible to year round residents is a significant social plus” (KI-17)

“Fifty-seven percent of Muskoka’s economic base is tied to meeting the needs of tourists and seasonal residents” (District of Muskoka, 2010b). Muskoka’s economy boasts 34 children’s summer camps, 43 resorts, 2,400 camp sites, and many retail stores and related industries servicing this demographic (Muskoka Tourism, 2007). “We are a natural tourist attractor. Muskoka has a rich heritage, and has a name based on it that will never die. There’s nothing that stops people from coming. It’s natural, beautiful, clean, pristine... it’s an oasis. It naturally attracts people and newcomers to come and get the Canadian experience by going no further than two hours from Toronto” (KI-16).

The impacts of tourism are a combination of culture, environment, visitors, and seasonal residents⁶. In “2004 Muskoka had 1,993,792 person visits, which generated over \$234,000,000 dollars in expenditures, benefiting the local economy” (District of Muskoka, 2009b: 24). Of all visitors, 1,880,773 were from Canada, 27,391 from the United States, and 37,628 were from other countries (District of Muskoka, 2009b: 24). Despite this impact, “there is no common recognition of the role that cultural planning and knowledge of the Muskoka’s ‘quality of place’ could play in making the District a more compelling destination for tourists or labour force talent” (Malone Given Parsons, 2009: 12).

⁶ The seasonal population in Muskoka includes both second homeowners who compose a rich cottage culture, as well as tourists who enjoy the volume of resorts and natural amenities for camping and leisure activity. Second homeowners are important as both consumers of products and services, and can also act as resources to the community through their direct involvement, external networks, and opportunities to bring investment and jobs to Muskoka. It should be stated that while seasonal residents in the tourist population may visit Muskoka for a few days or weeks mostly over the summer, while second homeowners spend longer periods of time throughout the year with potential to significantly impact the creative economy.

Even though tourism is a primary driver of Muskoka's economy, as part of the Premier Ranked Tourism Destination study Muskoka did not meet two of the three criteria: 'futurity', and 'performance', but received a moderate score for 'product' (Muskoka Tourism, 2007). This study was intended to measure and benchmark Muskoka's tourism sector using criteria established by the Ontario Ministry of Tourism, to help identify specific challenges and opportunities for investment and improvement. Since this report was released, Muskoka Tourism Marketing Agency (MTMA) has addressed all recommendations with the exception of two key opportunities to examine the feasibility of creating the Muskoka School for the Arts and Muskoka Hospitality Centre (Muskoka Tourism, 2007: 75). Recently, Bracebridge has begun to study the viability of developing a school for the arts, and as a pilot project the Haliburton School of the Arts will offer programming in Huntsville in Summer 2011.

Recognizing the impact of tourism upon the creative economy, research suggests that the same attributes that attract tourists can also appeal to the creative class as evidenced by strategies in Prince Edward County (Stolarick et al., 2010). While attracting permanent residents is not a focus of MTMA, presence at trade shows and other events that showcase the Muskoka lifestyle indirectly support this. The opportunity to explore how tourism marketing can be used to recruit creative businesses and residents to Muskoka presents opportunities for further exploration, and informants suggested this task would be best handled by a District wide entity.

In 2011, funding through the Ministry of Tourism and Culture as a Regional Tourism Organization will provide Muskoka with further opportunity to invest locally and MTMA replaced the need for a tourism-marketing fee to facilitate research and outreach with this revenue. Muskoka is the largest area in Region 12 (Muskoka, Parry Sound, Algonquin Park, Georgian Bay Country, Almaguin Highlands), and a significant amount of investment will thus be focused in the region, some of which will be used to study visitor demographics including information on how to better attract and support diverse groups (KI-18).

Sports tourism has presented another opportunity for the creative economy to thrive on revenues generated in the off-peak season through events such as the Muskoka Triathlon and Duathlon, and recent 2010 Ontario Youth Winter Games (KI-01; KI-05; KI-07). Additionally, resources and venues provided by Muskoka's large-scale resorts created a desirable location for business conferences as exemplified by the 2010 G8 conference held in Huntsville (KI-06; KI-14). Finally, the 2006 opening of the Sportsplex in Bracebridge presented a new state of the art facility capable of hosting large-scale events and also benefiting the year-round community (KI-02; KI-05; KI-15).

5.2.3 Arts, Culture & Heritage

“The landscape has unlimited artistic opportunity for how you want to use it, Muskoka is a breeding ground for artists.” (KI-16)

Though artists often cluster in urban centres and seek communities with an audience large enough to make their production worthwhile, others seek peace and solitude to create outside the city. Following the environment and tourism, informants noted arts as a key strength in Muskoka (KI-02; KI-06; KI-09; KI-16; KI-17). With historic ties to the Group of Seven, Muskoka boasts 130 festivals, events and celebrations, 41 galleries, and approximately 380 artists and craftspeople located in the district (Muskoka Tourism, 2007: 19; Arts Directory of Muskoka, 2010). Despite this recognition, informants noted misconceptions regarding the value and economic reach of local artists. This may result from close ties between arts and tourism, in that it is difficult to separate what revenues are a result of visitors coming to Muskoka for environmental amenities or to attend and participate in local arts and culture. To this point, it is difficult to quantify the economic benefits of Muskoka’s arts community as demonstrated in 2006 by only 28 artists with registered businesses (KI-03; KI-05; KI-10). For example, the Muskoka Assessment Project by Muskoka Tourism Marketing Agency currently provides the most detailed information that collectively accounts for arts and culture in Muskoka such as festivals, studios, and galleries. Engaging in District wide cultural mapping would allow Muskoka’s arts community to properly assess its expanse to also develop specific goals related to sector needs and goals.

One informant suggested the economic impact of Muskoka’s arts community could be improved by coordination between municipal and provincial governments and educational facilities in the District to further skills and training by providing workshops for artists on “entrepreneurship or marketing products, or crossovers for the larger consuming public to use” (KI-20). Additionally, while artists are supported by a variety of events and organizations, informants noted these have limited operating capacity and are mostly volunteer-run, or reliant upon minimal staff members and interns (KI-09; KI-10). Acknowledging District needs, in 2010 Industry Minister Tony Clement pledged \$82,500 to support Muskoka Arts and Crafts, the Arts Council of Muskoka, and the Bracebridge Arts Council. These funds are expected to help further a creative economy, and will be partly used to create youth employment opportunities and foster entrepreneurship (Canadian Press, 2010).

In recognition of Ontario’s declining manufacturing sector Christopher Thorpe, former manager of Muskoka Community Futures stated “growth in the arts, the cultural sector, the knowledge-based economy is really going to be the saving grace” (Longwell, 2009). With the 2008 recognition of Muskoka as a Designated Arts community, credibility has been added by highlighting the historical presence and value of talent in Muskoka. With this designation now in place, opportunities exist to further leverage and explore specific initiatives.

5.2.4 Technology Infrastructure

“Technology will encourage people to stay within their seasonal home for longer periods of time. Only time will tell whether we’ve been successful or not, but I see the change happening already. I see people who used to only spend 2-3 weeks now spending 1-1.5 months [in Muskoka] because they can operate via the computer.” (KI-17)

Communities can foster external relationships through connections created by both physical and technological infrastructure. In a modern creative economy these linkages are crucial and “broadband coverage is an essential element that connects people and business to services and products locally, regionally and globally” (AuthentiCity et al., 2009: 25). Informants noted the presence of high-speed communications technology infrastructure as a strength in Muskoka (KI-04; KI-05; KI-06; KI-07; KI-09; KI-17). With FedNor funding, the Muskoka Community Network has created high-speed broadband, cable, fiber optic, and DSL communications for approximately 80% of Muskoka residents who previously did not have, or had limited access to such technology.

This significant investment has increased economic opportunities for Muskoka seasonal residents and year-round home based businesses. Informants stated that high-speed connectivity will allow the creative economy in Muskoka to thrive and attract workers who desire the Muskoka quality of life but need to remain connected to clients in major centres. This combination of technology and lifestyle amenities will allow Muskoka’s knowledge based sector to grow (KI-04; KI-05; KI-06; KI-09; KI-11; KI-17). To this point, one informant noted that lack of knowledge based occupations in Muskoka may stem from previous lack of connectivity, and that with most of the District connected, more writers, designers and other non-studio creative class occupations may choose to locate in Muskoka (KI-05).

Though technology infrastructure is now available in Muskoka, an active strategy is needed to attract a knowledge-based workforce with the right skills to grow this sector. “Broadening exposure to high-speed connectivity is more than a tool. It becomes basic infrastructure that everyone requires. The growth of connectivity has certainly improved but needs to continue to grow vastly” (KI- 19). This may be aided through partnerships with private sector businesses, and collaborations with post-secondary institutions in Muskoka (KI-05).

5.2.5 Food

“When you talk about [creative economy] potential, [food] is a prime example, there is nothing more creative than working with the land to produce something.” (KI-12)

In February 2011 Sustain Ontario hosted a forum to discuss how communities can use agriculture for economic development (Sustain Ontario 2010). In the last ten years Ontario’s

creative food economy sub-sector (local, organic, specialty, and/or ethnic foods) grew faster than the larger food sector at an estimated rate of 15% to 25% per year (Donald 2009: 1). Despite the challenges faced by farmers and producers, interest in local food, origin of food, and food safety is rising, and food networks can contribute to building strong and resilient communities (Blay-Palmer, Dwyer, Millier, 2010). Supporting these ideas, informants identified efforts by local producers, Savour Muskoka, and the Bala Cranberry Festival⁷ as contributors to Muskoka's emerging creative food economy (KI-06, KI-08; KI-12; KI-13; KI-16;). "Muskoka has got a lot of great local producers, from a produce standpoint, from a farming standpoint, and I think we're all trying to work together" (KI-08).

Within this discussion, informants noted that geographically Muskoka is well positioned for culinary tourism close to major markets. With demonstrated success from taste trails, Prince Edward County (PEC) has utilized its own creative food economy as an engine for community economic development, and both PEC and Niagara-on-the-Lake wineries generate tourism revenue. While Muskoka is not a wine-growing area, Savour Muskoka has a membership of 28 chefs, 50 restaurants and caterers, 38 farmers, and 23 culinary artisans, and a mission to "facilitate the successful development of the Muskoka region as a dynamic culinary tourism destination, by promoting all sectors of the economy with an interest in local food and drink" (Savour Muskoka, 2011). Strength in this sector was credited to collaboration and partnerships between businesses, local producers, and public sector financial support (KI-08; KI-12). To this point, Savour Muskoka is active in developing the creative economy and hosts workshops and other events to educate producers and residents on food, agricultural, and culinary skills and opportunities.

Muskoka's high-end market appeal presents an opportunity to expand the food sector; however, informants noted weaknesses posed by lack of quality and choice in dining destinations outside tourist season, venues that are attractive to younger demographics, and that culinary talent is often hired from outside the District. Also identified in the 2007 Assessment Report, informants suggested these weaknesses could be offset through developing local culinary and hospitality post-secondary training programs (KI-08; KI-09). Informants discussed a need to leverage the advantages of Muskoka through local products and higher-end restaurants to cater to an emerging creative class and seasonal populations who will begin to demand the quality of amenities accessible in larger centre's (KI-06; KI-08; KI-09; KI-13).

⁷ Exemplifying the strength of Muskoka's food crops and producers Bala's Cranberry Festival first started in 1985 when the Wahta First Nation identified an opportunity to turn "the community's long-standing cranberry harvest into an economic-development project" (Carter, 2010). Since inception, this event has grown to provide one of the highest revenue generating weekends of the year for participating vendors with economic benefits for the community at large (Bala Cranberry Festival 2009). Out of a single agricultural asset, this event has grown to attract busloads of tourist traffic, and also gives back to the community through revenues funneled into granting dollars for local initiatives (KI-12).

From this analysis, it is evident that energy and talent exists in Muskoka's creative food industries. Furthermore Muskoka has untapped farming potential and future opportunities include products grown and marketed for ethnic consumers; niche agriculture; experimental farming; diversified and expanded crops such as the shitake mushroom, goat cheese and egg hatcheries (KI-12).

5.2.6 Post-secondary Institutions and Lifelong Learning

“Education creates a different atmosphere. It’s an economic development engine unto itself. It brings creative thinkers, creates jobs, talent pools, affordable housing, transportation initiatives, recreation programming, it validates so many things. The whole prospect of a creative economy cannot be looked at on its own, it has to be an integrated approach by all levels of government, corporations, individuals – it’s a collaboration.” (KI-19)

In rural creative economies, post-secondary education institutions and learning networks created by them contribute to ‘regional innovation systems’ and can help offset talent shortages. At the same time these facilities must be coupled with related job opportunities to prevent skilled individuals having to look elsewhere for employment (Hall & Donald, 2009: 20, 24). In 2006 only 16.2% of Muskoka's population held a university degree or higher, 10% below the provincial average, with a low concentration of residents 20 to 39 years of age. While knowledge and skills are necessary for success in the creative age (Martin Prosperity Institute, 2009: 8) with only 25.8% creative class, in 2006 Muskoka fell 7% below the provincial average, lowest among the rural creative economies compared in **Section 4**.

While young people will always leave rural areas for ‘the bright lights and the big city’, low populations and skill shortages in Muskoka may also be attributed to lack of relevant training opportunities. Noting these gaps District Chair John Klinck discussed benefits of an expanded post-secondary sector by stating

tourists would leave at Labour Day and the students would arrive. I’m not talking about several hundred, I’m talking about 10,000 plus...we could spread a campus throughout Muskoka and leverage our assets. Why not use Torrance Barrens for astronomy, or our rocks and soils for geography or our water and trees for environmental studies? (Driscoll, 29 Dec 2010)

Informants also attributed the expanded presence of post-secondary institutions in Muskoka as an emerging creative economic strength. “You bring a university or college into your community, and you change the dynamic. You’re bringing in educated professionals, educated students [and] they provide an economic stimulus, those people become players in everyday life. It’s a good way to create community” (KI-14). Contributing to this sector are satellite campuses from Georgian College and Nipissing University collectively offering programs in

book keeping, carpentry, arts & science, office administration, personal support worker, pre-health sciences, child and family studies, culture, arts, and education. The most recent addition is the University of Waterloo's Centre for Ecosystem Resilience Adaptation opened in January 2011 which will be used by up to 3,000 students and researchers annually with a focus in ecology, climate change, tourism, land-use planning and local economic development (University of Waterloo, 2009). Other post-secondary related facilities in Muskoka are posts from the Northern Ontario School of Medicine, the Dorset Research Centre⁸, Ontario Fire College, and Muskoka Truck and Heavy Equipment Operator Training.

From this short list, it is evident that an emerging post-secondary sector exists in Muskoka. While still new and relatively small, it presents opportunity for local research and development, as well as economic stimulus. Additionally, informal lifelong learning that utilizes these resources can create knowledge within the broader community and respond to other resident needs. This continuum provides intellectual stimulation for large populations of retirees outside formal post-secondary institutions. Informal lifelong learning programs can generate an educational destination and be supported by smaller populations as evidenced by the Muskoka Chatauqua that delivers cultural activity throughout the region. Informants stated the need for relevant programs for older residents to update skills through continuing education; training programs in agriculture, hospitality, culinary, and fine arts; as well as apprenticeships in the skilled trades (KI-04; KI-08; KI-09; KI-11; KI-12; KI-13).

5.2.7 Summary

While Muskoka faces deficiencies posed by seasonality, communication, supports for youth volunteers, entrepreneurs, diverse populations, affordable housing and public transit, opportunities exist to improve resources and conditions for a creative economy. Specifically, increasing communication across and between lower-tier municipalities and organizations could reduce competition, and also improve attendance at events and community programs. By further supporting youth and entrepreneurs, current deficiencies in educational attainment and local skill sets could be mitigated. Improved public transit could help increase linkages between communities within Muskoka and provide further opportunities for visitors traveling to the region. Additionally advanced technology made possible through online connectivity coupled with Muskoka's natural environment can attract residents who desire a relaxed quality of life but need to remain connected to major markets. Opportunities also exist to study how green technologies can be used locally.

The significant tourism economy in Muskoka provides recreational amenities otherwise not available to a community of its size. Exemplified as successful contributors to communities

⁸ It was expressed that the Dorset Research Centre has a significant impact upon the surrounding community by attracting academic expertise and groups of professors, Master's and PhD level researchers to the region. Discussing the economic benefits of the Dorset Research Centre an informant stated "*A municipality such as this would not have ... this class of people [if the Dorset Research Centre were not here]*" (KI-17)

elsewhere, artists are naturally drawn to Muskoka and the emerging creative food economy poses opportunities to further develop agricultural and culinary tourism. Additionally, educational tourism can be encouraged through expanded lifelong learning opportunities that cater to the retirement community and allow them to engage in local offerings. Finally, investment in post-secondary institutions may respond to several of these shortfalls through providing skills and training to respond to labour market needs and also generate new economic engines in Muskoka (i.e. medical training and upgrading).

Simply put by one informant, to improve Muskoka's creative economy "you have to work at it, doing nothing is wrong. Even if what you do is wrong, it's right" (KI-06).

6.0 Recommendations

The following recommendations support further growth and development of Muskoka's creative economy:

- 1) Develop a common understanding regarding the role of Muskoka's creative economy, and promote and steward this (understanding) among all stakeholders and in the region as a whole.
- 2) Create a unified entity to connect municipalities, innovators, businesspersons, organizations, and firms that comprise the creative economy in Muskoka.
- 3) Support and connect local producers, small businesses, and entrepreneurs.
- 4) Further support, promote, and recognize arts, culture and heritage across Muskoka.
- 5) Foster talent and skill building by increasing and improving local training, lifelong learning, and education opportunities.
- 6) Encourage youth participation throughout Muskoka in the creative economy.
- 7) Establish specific goals, further study, and collect additional creative economy data and information.

These ideas work to improve assets already found in Muskoka, and provide opportunity for collective stewardship and collaboration between creative economy stakeholders including lower-tier municipalities, the District, businesses, organizations, artists, youth, entrepreneurs, creative professionals, and institutions.

1) COMMUNICATION

Develop a common understanding regarding the role of Muskoka's creative economy, and promote and steward this (understanding) among all stakeholders and in the region as a whole.

Muskoka's expansive geography poses challenges for communicating information and ideas regionally, and research demonstrated poor understanding of Muskoka's creative economy. Informants stated knowledge making and sharing is a crucial first step in further developing local innovation. Muskoka must work collaboratively to overcome fragmentation to better align messages, efforts, and activities, as well as physical, virtual, and knowledge-based resources across the District. In addition to the ideas listed below, this recommendation can be supported by subsequent ideas listed in **Section 6.0**.

A) Creative Muskoka to continue to advocate on behalf of the creative economy

- Partner with local firms, institutions, businesspersons, and outside organizations to establish and support new and existing creative economy ideas
- Develop a 'Creative Economy Toolkit' to provide easily accessible information to local stakeholders with actionable ideas and goals regarding their role in developing the creative economy
- Keep track of creative economy events throughout Muskoka
- Create a system for creative economy recognition

- Celebrate and profile local producers, businesses, or projects with an award, online platform, or newsletter to highlight success
- B) Increase networking, knowledge sharing, and education within and outside Muskoka
 - Creative economy stakeholders engage in networking events to connect internally and to outside communities
- C) Municipalities to work cooperatively to support and attract talent in Muskoka
 - Share economic development information and strategies across Muskoka
- D) Connect seasonal and year-round populations, as well as residents across the six lower-tier municipalities
- E) Improve online platforms to properly reflect and promote the quality of Muskoka products

2) ORGANIZATIONAL INFRASTRUCTURE

Create a unified entity to connect municipalities, innovators, businesspersons, organizations, and firms that comprise the creative economy in Muskoka.

Research on creative economies and new governance models states that partnerships are crucial to sustainable economic development in rural areas. With no district-wide entity currently in place, informants stated the necessity of establishing an organization to undertake implementation of creative economy goals across Muskoka. Membership could include businesses, entrepreneurs, municipal economic development officers, and representatives from key stakeholders, communities and sectors: arts, youth, first nations, technology, education, tourism, food, and environment occupations.

As an established organization, Creative Muskoka could steward the creation of this entity to also include representation from Muskoka Futures, Muskoka Tourism Marketing Agency, all lower-tier municipalities, and the District of Muskoka.

Potential roles of the entity emerging from the study relate to:

- A) Planning – work toward the development of a vision for creative economy in Muskoka; set goals and targets, track progress; identify local resource people, experts, ambassadors
- B) Communication – brand Muskoka as a creative economy; promote communication locally among community sectors and levels of government, and externally showcasing Muskoka and attract creative workers, businesses, visitors; providing easily accessible creative economy resources and information
- C) Networking – internally engage local stakeholders, municipalities and externally connect with other creative regions, experts, academics/researchers
- D) Research – identify areas requiring further/detailed research and manage research projects; identify emerging creative sectors and how they can be supported through services, infrastructure etc.; establish a framework for gathering relevant statistics on the local economy and profile to track change and progress
- E) Entrepreneurship support – form reference groups for targeted creative sectors; identifying activities to support growth of the sector; offer access to business services

and investment funds; explore incubator services for emerging sectors/businesses, youth enterprise

- F) Education and Training – liaise with secondary and post secondary institutions to identify training needs and opportunities; connect with post secondary institutions to provide service learning and research opportunities in Muskoka
- G) Leadership development skills – host knowledge making meetings and events
- H) Closing the gap – identify strategies and actions to ensure no local person left behind in the transformation to a creative economy
- I) Inter-generational – target strategies to support youth as well as to engage semi-retired in the context of the creative economy.
- J) Policy – draft/recommend policy areas that impact development of a creative local economy

3) ENTREPRENEURSHIP

Support and connect local producers, small businesses, and entrepreneurs.

It is important to support entrepreneurial culture and innovation to help connect individuals and foster ideas that add to the creative economy. While informal meeting places create opportunities for individuals with different skill sets, expertise, and ideas to bump into each other, entrepreneurs and creative professionals in rural communities face obstacles created by expansive physical space that reduces interaction. The vast geography of Muskoka isolates small businesses, entrepreneurs and poses challenges to establishing connections and understanding the unique skills and talents that are already present in the community. Providing resources to connect and support new business and ideas is critical to the success of the creative economy.

- A) Strengthen community-based incubation and business service resources
 - Build upon existing community business support organizations through enhanced partnerships that connect resources and expertise from local providers including but not limited to organizations such as Muskoka Small Business Centre, YWCA, Muskoka Futures, and the Muskoka Community Network.
 - Develop a partnership model that enables community business support organizations to tailor programs and services to specific economic sectors as needed
 - Provide a local mentor and counselling services to support new businesses and entrepreneurs throughout development and as needed
 - Build a mentor database that makes use of residents, retirees and seasonal population experience and expertise all facets of business development.

B) Implement a district wide ‘Buy Local’⁹ Strategy’ for all local services and producers such as food, agriculture, wood, design, textiles, arts, antiques, crafts, etc. This initiative could be supported by municipal Business Improvements Areas, and will properly account for and promote Muskoka services, retailers, and producers in creative industries internally, and to outside regions.

- Design an easily accessible online platform with listings that are regularly updated
- Make informational brochures with maps, listings, and information available across Muskoka
- Create ‘buy local’ incentives such as a discounted day once per month, or membership card that gives consumers other benefits
- Develop programs to expose local producers to year-round and seasonal residents
- Develop outreach strategies for seasonal residents to use locally produced goods

4) ARTS, CULTURE & HERITAGE

Further support, promote, and recognize arts, culture and heritage across Muskoka.

Arts and culture are at the centre of the creative economy. While the social benefits of creativity are very much felt by creators and participants, they remain difficult to quantify economically. Finding ways to properly recognize, promote, and support arts and culture is critical to the success of the creative economy and to a dynamic and vibrant community culture.

A) Further develop Muskoka’s reputation as a ‘designated arts community’

- Explore membership options in the Creative City Network of Canada that would include all municipalities
- Improve branding and communications materials distributed within and outside the District to properly represent the quality of talent in Muskoka
- Create a one-stop online portal that links to all arts, cultural, and heritage organizations and provides detailed resources on creative producers and locations across Muskoka
- Create exhibition space in public buildings, and encourage local businesses to display and use products created and designed in Muskoka
- Support professional public art, and community beautification projects that utilize local talent and designers
- Enhance the capacity of local arts service organizations to support talent
 - Develop strategies to connect arts and cultural organizations within Muskoka internally and externally
 - Create paid positions at major cultural organizations

⁹ ‘Buy local’ programs support the local economy by buying goods and services from local businesses and producers. Buy local strategies are used in many communities globally, including rural areas such as the Region of Peel in Ontario, and Norfolk County in England.

- Utilize historical ties to the Group of Seven and Chatauqua Movement to capitalize on the resonance of these cultural connections
 - Enhance promotion of festivals and events across Muskoka to attract audiences and make residents aware of what is available locally
 - Move festivals and events throughout the District so that different communities can experience these celebrations
 - Preserve the longevity of these initiatives through hosting smaller scale festivals and events throughout Muskoka, or bringing cultural producers to outside communities
 - Establish an artist residency¹⁰ program. Residency programs have effectively been used in rural communities to stimulate new talent, establish long-term relationships with external well-known post-secondary institutions, and develop new ideas in the community culture.
 - Establish partnerships between internal and external institutions, arts organizations, and for community support
 - Create other responsibilities for the artists-in-residence such as community based projects, and involvement with non-profit agencies
- B) Provide artist training programs in business management, new technology, and other skills to improve sector stability and relevance to outside markets
- C) Municipalities should take a collaborative approach in exploring the advantages of cultural planning and engage in cultural mapping to identify the total reach and expanse of Muskoka’s cultural assets¹¹ through up-to-date identification of creative and cultural industries, festivals and events, natural heritage, cultural heritage, spaces and facilities, and community cultural organizations. This will help tailor funding resources so that they address local goals, priorities, and needs in the arts community. Additionally, cultural mapping may help establish targets and measures to quantify the economic benefits of cultural production, and help elevate the position of arts and culture in Muskoka.

5) EDUCATION AND TRAINING

Foster talent and skill building by increasing and improving local training, life long learning, and education opportunities.

Talent, education, and knowledge are defining characteristics of the creative class, and the success of the creative economy is dependant upon the attraction and retention of highly

¹⁰ In Canada, Lunenburg Nova Scotia is home to an established artist residency in partnership with the Nova Scotia College of Art and Design in Halifax. This two-way exchange benefits both contributing artists and the community, and attracts a variety of students and practitioners as a successful model of creative collaborations between outside institutions and creative rural communities.

¹¹ Cultural planning refers to the practice of evaluating existing community cultural assets to identify how they can be used as an alternate lens to address local priorities and needs. In this approach, cultural activity is seen as a resource “for human and community development” (Creative City Network of Canada, 2010: 1). With ideas dating back to the 1960s, arts, culture and creativity are used as the fourth pillar of building healthy and sustainable communities, of equal value to social, economic, and environmental planning.

skilled individuals to contribute locally. An educated population can reduce the need to recruit for higher paying creative economy positions from outside the District, and can also help Muskoka develop its external reputation, attract young creative professionals and entrepreneurial energy, and offset issues caused by the seasonal economy. Additionally, once individuals are educated in Muskoka, the region may also increase the chance of these professionals maintaining a permanent residence and bringing new energy to the regions creative economy.

By providing training in Muskoka opportunities can be developed for local populations, to advance Muskoka as an educational community, and to attract international learners to experience Muskoka through specialized short-term programs. Muskoka has potential to enhance all types of education and training, and formal programs are a starting point to use current energy to begin this process.

A) Further establish formal and informal high-quality education and training

- Begin roundtable discussions to bring interested parties together to explore opportunities for educational advancement. This may include but is not limited to representation from institutions such as Nipissing University, Georgian College, University of Waterloo, Dorset Research Centre, Northern School of Medicine; and community organizations such as Education Huntsville, Muskoka Futures, Creative Muskoka, Muskoka Lakes Music Festival and area municipalities.
- Attract additional satellite post secondary campuses to Muskoka
 - Distribute campuses across Muskoka
- Establish partnerships between youth, post secondary students, entrepreneurs, institutions and lower-tier municipalities to develop a vision for post-secondary training in Muskoka
 - Map existing programs to determine local deficiencies and gaps in training options
 - Suggest direction to enhance programming at pre-existing institutions to meet community and resident training needs
- Create informal programs to meet resident needs outside of post-secondary training

B) Establish institutions or programs focused on local skill deficiencies and industries of direct value to sectors of Muskoka's economy. This report identified interest to develop educational opportunities in:

- | | | |
|-----------------|-------------|--|
| • Culinary arts | • Fine art | • Retail, restaurant & arts management |
| • Agriculture | • Astronomy | • Tourism & Hospitality |
| • Healthcare | • Trades | |

6) YOUTH OUTREACH

Encourage youth participation throughout Muskoka in the creative economy.

Actively engaging youth populations is a strategy used to enhance rural creative economies by building youth confidence and networks, providing job related training, teaching accountability and responsibility, and also fostering relationships for youth to become engaged in local community issues. Youth can be defined broadly to include anyone approximately 15 to 30 years of age, and outreach can impact low education levels and support entrepreneurship through the growth of new talent and ideas. Through established youth presence and recognition, Muskoka will learn about the needs and talents of this demographic and be better able to support their future involvement in the creative economy.

- A) Establish partnerships between schools and organizations to recruit and bring young people together across Muskoka.
- B) Establish space for youth representation, on non-profit boards, events, and other organizations. These individuals must be given real responsibility with ideas valued equally.
- C) Establish a 'youth council'¹² across Muskoka and/or at the community level, to which youth must apply, be selected, and commit for an extended period of time. These elite groups will increase community value regarding the importance of youth in supporting Muskoka's creative economy, and could be linked through seasonal or annual district wide programming. The roles of the youth council are to promote and develop ideas and events that respond to youth issues, concerns, and needs and establish a professional and respected youth presence in Muskoka. Youth councils would require stewardship from secondary schools, or a non-profit agency.

7) FURTHER STUDY

Establish specific goals, further study, and collect additional creative economy data and information.

Muskoka is in the early stages of studying the local creative economy, several opportunities for further research have been identified. Having a wide variety of stakeholders contribute to innovation in Muskoka, and collectively deciding and agreeing on the objectives and parameters of Muskoka's creative economy is critical to track, identify and recognize future success in the region.

- A) Establish easy to measure targets that relate to specific creative economy goals
 - Decide upon metrics such as newspaper coverage of creative businesses, firm growth, branding, foot traffic, and sales volume
 - Create an accessible 'report card' system for local businesses to track information

¹² For example, Prince Edward County's *Youth Advisory Committee* meets regularly to address youth issues and empower communication between youth and municipal council.

B) Further study creative economy opportunities such as:

- Creative food economy
- Regional outward connectivity and internal communications
- Regional public transportation
- Involvement of seasonal residents in community culture
- Connections between seasonal and year-round residents
- Feasibility of green technologies
- Continue support of technology infrastructure and knowledge
- Integration and support for diverse populations
- Collaborations with first nations communities
- Organizational infrastructure, new governance models and partnerships
- Update *Water, Rocks, and Trees: The Creative Economy in Muskoka* with 2011 Statistics Canada Census data

C) Develop relationships and nurture connections to internal and external research institutions

- Muskoka representatives to attend rural creative economy conferences and events in Canada and elsewhere
- Approach outside institutions to conduct research on specific ideas pertinent to the creative economy
- Share research and ideas across Muskoka through public meetings and online platforms

7.0 Conclusion

The creative economy has become a mechanism in both large and small communities to utilize local assets and talent pools to address socioeconomic issues, and improve internal and external conditions, investment, and collaborations. Acknowledging global economic trends, declining manufacturing and export-based industries, and supported by all levels of government, rural communities in Ontario are studying and employing creative economic development.

Local talent, skills, and production supported by collective creative economy goals allow a community to be less concerned with what is produced in neighbouring regions, and encourages a stronger economy. While all communities have aspects of a creative economy, in assessing place-based characteristics it is possible to uncover specific traits and contributors. Once these have been identified it is then up to local champions and the community at large to choose how to proceed and if a creative economic approach is right for them. While other successful rural creative economies can provide inspiration, socioeconomic issues and opportunities are place specific, and in developing creative economy initiatives communities must not simply duplicate or borrow what has been done elsewhere.

In Muskoka a “creative economy doesn’t have to be our only thrust, but understanding it and recognizing it could make a significant difference to our communities” (KI-03). This report has uncovered the actual contributors to a creative economy in Muskoka, and shown how it compares to other rural communities in Ontario. Investigation identified weaknesses and challenges in Muskoka’s creative economy posed by a high saturation of seasonal tourism based industries; poor cross-sector and cross-district communications; lack of support for entrepreneurs, diverse groups, and youth; and investment needed in public transit and affordable housing. Conversely, strengths and opportunities were forecasted through 20.9% creative class growth between 2001 and 2006; abundant natural amenities; tourism industries; the arts; technology infrastructure; and emerging creative food and post secondary markets.

Through focused attention these attributes can be further supported through a District wide entity to connect innovators, business persons, and firms that comprise the creative economy; establishment of specific goals, and further study on the creative economy; fostering talent and skill building by increasing and improving local training and education opportunities; improving youth outreach and engagement; supporting entrepreneurial innovation and collaboration; and further supporting and promoting arts and cultural activity within the District and to outside visitors. This study clearly demonstrates evidence of an emerging creative economy that exists in Muskoka despite any presence of a coordinated or intentional strategy – the timing is right to move forward. It is critical that leaders across Muskoka recognize and understand creative economy ideas and collaborate on a strategy to transform the region.

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Appendix A – Categorization of Statistical Analysis

Creative Occupations - National Occupations Code Categories (NOC)

Creative (Other Creative)	A0 Senior management occupations, A1 Specialist managers, A2 Managers in retail trade, food and accommodation services, A3 Other managers, B0 Professional occupations in business and finance, B1 Finance and insurance administration occupations, C0 Professional occupations in natural and applied sciences, C1 Technical occupations related to natural and applied sciences, D0 Professional occupations in health, D1 Nurse supervisors and registered nurses, D2 Technical and related occupations in health, E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers, E1 Teachers and professors, F0 Professional occupations in art and culture, F1 Technical occupations in art, culture, recreation and sport
Creative Core (Super)	C0 Professional occupations in natural and applied sciences, C1 Technical occupations related to natural and applied sciences, E1 Teachers and professors, F0 Professional occupations in art and culture, F1 Technical occupations in art, culture, recreation and sport
Service (Routine Labour)	B2 Secretaries, B3 Administrative and regulatory occupations, B4 Clerical supervisors, B5 Clerical occupations, D3 Assisting occupations in support of health services, E2 Paralegals, social services workers and occupations in education and religion, G0 Sales and service supervisors, G1 Wholesale, technical, insurance, real estate sales specialists, and retail, wholesale and grain buyers, G2 Retail salespersons and sales clerks, G3 Cashiers, G4 Chefs and cooks, G5 Occupations in food and beverage service, G6 Occupations in protective services, G7 Occupations in travel and accommodation, including attendants in recreation and sport, G8 Child care and home support workers, G9 Sales and service occupations, n.e.c.
Working (Routine Physical)	H0 Contractors and supervisors in trades and transportation, H1 Construction trades, H2 Stationary engineers, power station operators and electrical trades and telecommunications occupations, H3 Machinists, metal forming, shaping and erecting occupations, H4 Mechanics, H5 Other trades, n.e.c., H6 Heavy equipment and crane operators, including drillers, H7 Transportation equipment operators and related workers, excluding labourers, H8 Trades helpers, construction and transportation labourers and related occupations, I2 Primary production labourers, J0 Supervisors in manufacturing, J1 Machine operators in manufacturing, J2 Assemblers in manufacturing, J3 Labourers in processing, manufacturing and utilities
Agricultural (Fishing, Farming, Forestry)	I0 Occupations unique to agriculture, excluding labourers, I1 Occupations unique to forestry operations, mining, oil and gas extraction and fishing, excluding labourers

Source: OMAFRA Creative Economy Analysis NOCS POR

Creative Industries - North American Industry Classification System (NAICS)

Creative Industries	<p>Architecture: 541310 - Architectural Services, 541320 - Landscape Architectural Services</p> <p>Advertising: 541810 - Advertising Agencies, 541830 - Media Buying Agencies, 541840 - Media Representatives, 541850 - Display Advertising, 541860 - Direct Mail Advertising, 541899 - All Other Services Related to Advertising</p> <p>Marketing: 541910 - Marketing Research and Public Opinion Polling</p> <p>Photography: 541920 - Photographic Services</p> <p>Public Relations: 541820 - Public Relations Services</p> <p>Performing Arts: 711111 - Theatre (except Musical) Companies, 711112 - Musical Theatre and Opera Companies, 711120 - Dance Companies, 711130 - Musical Groups and Artists, 711190 - Other Performing Arts Companies, 711311 - Live Theatres and Other Performing Arts Presenters with Facilities, 711319 - Sports Stadiums and Other Presenters with Facilities, 711321 - Performing Arts Promoters (Presenters) without Facilities, 711322 - Festivals without Facilities, 711329 - Sports Presenters and Other Presenters without Facilities, 711410 - Agents and Managers for Artists, Athletes, Entertainers and Other Public Figures</p> <p>Museums: 712111 - Non-Commercial Art Museums and Galleries, 712115 - History and Science Museums, 712119 - Other Museums, 813210 - Grant-Making and Giving Services</p> <p>Design: 541410 - Interior Design Services, 541420 - Industrial Design Services, 541430 - Graphic Design Services, 541490 - Other Specialized Design Services</p> <p>Web and Software: 511210 - Software Publishers, 517210 - Wireless Telecommunications Carriers (except Satellite), 518210 - Data Processing, Hosting and Related Services, 519130 - Internet Publishing and Broadcasting and Web Search Portal, 519190 - All Other Information Services, 541510 - Computer Systems Design and Related Services</p> <p>Film: 512110 - Motion Picture and Video Production, 512120 - Motion Picture and Video Distribution, 512130 - Motion Picture and Video Exhibition, 512190 - Post-Production and Other Motion Picture and Video Industries</p> <p>Games: 334610 - Manufacturing and Reproducing Magnetic and Optical Media, 339930 - Doll, Toy and Game Manufacturing, 414460 - Toy and Hobby Goods Wholesaler-Distributors</p> <p>Music: 512230 - Music Publishers, 512240 - Sound Recording Studios, 512290 - Other Sound Recording Industries</p> <p>Publishing: 511110 - Newspaper Publishers, 511120 - Periodical Publishers, 511130 - Book Publishers, 511140 - Directory and Mailing List Publishers, 511190 - Other Publishers, 519110 - News Syndicates</p> <p>Radio and Television: 515110 - Radio Broadcasting, 515120 - Television Broadcasting, 515210 - Pay and Specialty Television</p> <p>Business Consulting: 541611 - Administrative Management and General Management Consulting Services, 541612 - Human Resources Consulting Services, 541619 - Other Management Consulting Services</p> <p>Engineering: 541330 - Engineering Services, 541620 - Environmental Consulting Services, 541690 - Other Scientific and Technical Consulting Services, 541710 - Research and Development in the Physical, Engineering and Life Sciences, 541720 - Research and Development in the Social Sciences and Humanities</p> <p>Education: 611210 - Community Colleges and C.E.G.E.P.s, 611310 - Universities, 611410 - Business and Secretarial Schools, 611420 - Computer Training, 611430 - Professional and Management Development Training, 611610 - Fine Arts Schools</p> <p>Heritage: 712120 - Historic and Heritage Sites, 712130 - Zoos and Botanical Gardens, 712190 - Nature Parks and Other Similar Institutions</p> <p>Artists: 453920 - Art Dealers, 711511 - Independent Artists, Visual Arts, 711512 - Independent Actors, Comedians and Performers, 711513 - Independent Writers and Authors</p>
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Source: personal communication, Greg Spencer 2010

Appendix B – Definitions

Source: Martin Prosperity Institute Terminology

<http://www.martinprosperity.org/terminology>

Accessed 5 January 2011

Creativity

Creativity is an act of self-expression resulting in new forms, new techniques and/or new concepts.

Creativity encompasses any act of expressing oneself artistically or inventing new forms and techniques. It is a fundamental component in nearly every area of human improvement.

- Creativity is a renewable resource nested in the human mind. It is improved by continued use, not diminished.
- Creativity is inherent in most people to varying degrees and not just in “creative geniuses” (Florida, 2002:32) or the Creative Class
- Creativity is process-driven. It relies on preparation (studying a problem/task), incubation (mulling a problem/task over), illumination (creating a new synthesis for a task) and verification or revision. Different forms of creativity (artistic, technological, and economic) are interrelated – they rely on this same process.
- Creativity requires real work – usually long periods of intense concentration and creative work that poses huge demands on time and energy.

Creative Class (Creativity-oriented occupations)

Creativity-oriented occupations are high autonomy jobs where workers are paid to think (e.g., artists, doctors, nurses, senior managers, architects).

Creativity-oriented occupations add economic value through the generation of new ideas and forms. The creativity-oriented occupations are defined by two broad characteristics. First and foremost they are a group of workers paid to think – some formulate new solutions and ideas, others solve problems but all have specialized competencies. The definition of the creativity-oriented occupations is not fixed. Richard Florida explains that what defines creativity-oriented occupations will change over time as the complexity of work increases or decreases. He states that:

“As the creative content of other lines of work increases – as the relevant body of knowledge becomes more complex, and people are more valued for their ingenuity in applying it – some now in the Working Class or Service Class may move into the Creative Class and even the Super Creative Core”. (Florida, Rise of the Creative Class , 2002)

The Creative Class is also distinguished by the high level of workplace autonomy that workers have. Autonomy is the ability to translate ideas or knowledge into actions without impediment or the supervision of others. This autonomy extends beyond the work life of the creative workers into their social lives. The extension of the work life highlights the inseparability of economic functions from society and warrants the use of class as an adjective that describes this special group of high value producing workers. Class refers to the hierarchical distinction between individuals or groups in society. People in the creative class are not only paid to think, but also share very specific social preferences and characteristics. Similar class situations mean that members have relatively the same life chance of procuring goods, obtaining life position and obtaining inner satisfaction. Over time there has been a convergence of the bohemian ethic that values individuality, creativity and self expression with the traditional role of an economic agent. Creativity-oriented occupations are composed of two sub-groups: 1) The Super Creative Core and 2) Creative Professionals.

Service Class (Routine-Oriented Service Occupations)

The service class (routine-oriented service occupations) is comprised of occupations in the service sector (e.g., food service workers, janitors, grounds keepers, secretaries, clerks) where workers enjoy lower levels of autonomy than in the creative class.

It is important to differentiate between the meaning of “routine-oriented service occupations” in Creative Class literature and in wider economic and sociological discussions over the last 30 years. The service (tertiary) sector of the economy describes industries that do not produce goods. It is a nonmaterial, non-tangible sector dependent on the interaction of ‘employee’ and customer. The two former characteristics of the service sector make it difficult to quantify. The services that are provided are nondurable and are available for direct consumption. For example, business services such as finance and advertising do not actually produce material goods but rather bring about a change in the way that the consumer views and understands material objects. Service workers provide a helping hand to close information asymmetries between buyer and seller so as to facilitate exchange of goods. This facilitation can take many shapes but essentially all service work can be understood as reducing information costs and the promotion of more efficient market activity.

Service worker is an un-descriptive term that includes a range of employees from the cashier at McDonalds to the lawyer that runs their own private practice. While both provide services, they differ substantially in that the latter is paid to offer solutions, while the former is paid to implement protocol. A lawyer receives a wage substantially above that of the cashier not because their service is of a better quality but because they possess knowledge that is costly to obtain and is therefore heavily valued by consumers. This distinction explains why the creativity-oriented occupations such as lawyers are differentiated from the routine-oriented service occupations.

The service sector’s two occupational groups (creative and service class) share in common the fact that to perform their work they must directly interact with the consumer to create value. In routine-oriented service occupations there is a continuous drive towards greater and greater routine. For service class workers this routinization is to be dominated by forms of standardization and control which prevent the expression of individual creativity.

Working Class (Routine-Oriented Physical Occupations)

The working class is comprised of occupations that depend on physical skills and repetitive tasks. (e.g., construction trades, mechanics, crane operators, and assembly line workers).

Routine-oriented physical occupations are wage earners who produce material commodities. They engage in labour that depends highly on physical skills and repetitive tasks. Typically this group works in manufacturing and physical labour occupations requiring little in the way of formal education.

In their leisure time routine-oriented physical workers prefer activities that are relaxing compared to people in creativity-oriented occupations who look for physical activity due to the sedentary nature of their occupations.

The importance of manufacturing jobs has decreased in industrialized nations as they transition into the creative economy. Routine-oriented physical occupations have been declining steadily in the United States and Canada over the last one hundred years, while the service and creative occupations have increased. The working class does and will continue to have an important function in the creative economy.

Appendix C – Informants

Informant	Affiliation
Boivin, B.	Chair, Sustainable Economy Committee, Township of Lake of Bays; Chair, Muskoka Watershed Management Advisory
Copfer, S.	Membership Sales, Savour Muskoka
Curley, L.	Regional Advisor, Ministry of Culture
Dempsey, G.	Cofounder, Muskoka Cultural Impresarios; CAO, Muskoka Lakes Music Festival
Finley, J.	Economic Development Officer, Town of Huntsville
Hastings, S.	Director of Policy and Programs, District of Muskoka
Hutt, L.	Employment Programs Coordinator, YWCA of Muskoka
Kelly, C.	Director of Economic Development, Town of Bracebridge
Klinck, J.	District Chair, District of Muskoka
Laba, M.	Marketing Manager, Muskoka Cottage Brewery
Lawley, M.	Executive Director, Muskoka Tourism Marketing Agency
Lin, H.	Youth Programs Coordinator, YWCA of Muskoka
McPhee, R.	Executive Director, Muskoka Community Network
Milligan, R.	Chair, Muskoka Watershed Council
Morgan, J.	Arts & Aboriginal Education Coordinator, Muskoka Lakes Music Festival; Kaleidoscope Arts and Education
Murphy, J.	Executive Director, Savour Muskoka
Rigby, P.	Economic Development Officer, Town of Gravenhurst
Turnbull, S.	Chair, Muskoka Arts Council
Schnier, J.	Economic Development Officer, Township of Georgian Bay
Skinner, D.	CEO, Six Degrees; Skinner Properties
Vandertass, H.	President, Northern Air Solutions

Appendix D – Muskoka Creative Occupations 2001 - 2006

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
A011 Legislators	15	10	-33.3%	-5	0.0
A012 Senior government managers and officials	50	0	-100.0%	-50	0.0
A013 Senior managers - Financial, communications and other business services	30	160	433.3%	130	0.6
A014 Senior managers - Health, education, social and community services and membership organizations	10	30	200.0%	20	0.1
A015 Senior managers - Trade, broadcasting and other services, n.e.c.	50	95	90.0%	45	0.3
A016 Senior managers - Goods production, utilities, transportation and construction	80	165	106.3%	85	0.6
A111 Financial managers	80	120	50.0%	40	0.4
A112 Human resources managers	35	65	85.7%	30	0.2
A113 Purchasing managers	0	10	na	10	0.0
A114 Other administrative services managers	25	75	200.0%	50	0.3
A121 Engineering managers	20	15	-25.0%	-5	0.1
A122 Computer and information systems managers	40	35	-12.5%	-5	0.1
A123 Architecture and science managers	0	0	na	0	0.0
A131 Sales, marketing and advertising managers	110	140	27.3%	30	0.5
A141 Facility operation and maintenance managers	90	125	38.9%	35	0.4
A211 Retail trade managers	910	900	-1.1%	-10	3.1
A221 Restaurant and food service managers	290	275	-5.2%	-15	0.9
A222 Accommodation service managers	265	235	-11.3%	-30	0.8
A301 Insurance, real estate and financial brokerage managers	45	85	88.9%	40	0.3
A302 Banking, credit and other investment managers	30	60	100.0%	30	0.2
A303 Other business services managers	20	10	-50.0%	-10	0.0
A311 Telecommunication carriers managers	10	0	-100.0%	-10	0.0
A312 Postal and courier services managers	0	0	na	0	0.0
A321 Managers in health care	55	20	-63.6%	-35	0.1
A322 Administrators, post-secondary education and vocational training	10	10	0.0%	0	0.0
A323 School principals and administrators of elementary and secondary education	85	80	-5.9%	-5	0.3
A324 Managers in social, community and correctional services	15	30	100.0%	15	0.1
A331 Government managers, health and social policy development and program administration	0	0	na	0	0.0
A332 Government managers, economic analysis, policy development and program administration	0	15	na	15	0.1
A333 Government managers, education policy development and program administration	0	0	na	0	0.0
A334 Other managers in public administration	0	0	na	0	0.0
A341 Library, archive, museum and art gallery managers	0	0	na	0	0.0
A342 Managers, publishing, motion pictures, broadcasting and performing arts	10	20	100.0%	10	0.1
A343 Recreation and sports program and service directors	30	20	-33.3%	-10	0.1
A351 Commissioned police officers	10	10	0.0%	0	0.0
A352 Fire chiefs and senior fire-fighting officers	10	10	0.0%	0	0.0
A353 Commissioned officers, armed forces	0	10	na	10	0.0

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
A361 Other services managers	75	80	6.7%	5	0.3
A371 Construction managers	330	255	-22.7%	-75	0.9
A372 Residential home builders and renovators	90	250	177.8%	160	0.9
A373 Transportation managers	40	15	-62.5%	-25	0.1
A381 Primary production managers (except agriculture)	10	0	-100.0%	-10	0.0
A391 Manufacturing managers	95	175	84.2%	80	0.6
A392 Utilities managers	20	30	50.0%	10	0.1
B011 Financial auditors and accountants	130	140	7.7%	10	0.5
B012 Financial and investment analysts	20	25	25.0%	5	0.1
B013 Securities agents, investment dealers and brokers	10	15	50.0%	5	0.1
B014 Other financial officers	65	60	-7.7%	-5	0.2
B021 Specialists in human resources	40	35	-12.5%	-5	0.1
B022 Professional occupations in business services to management	25	65	160.0%	40	0.2
B111 Bookkeepers	275	430	56.4%	155	1.5
B112 Loan officers	0	20	na	20	0.1
B113 Insurance adjusters and claims examiners	20	15	-25.0%	-5	0.1
B114 Insurance underwriters	10	0	-100.0%	-10	0.0
B115 Assessors, valuers and appraisers	10	25	150.0%	15	0.1
B116 Customs, ship and other brokers	0	0	na	0	0.0
C011 Physicists and astronomers	0	0	na	0	0.0
C012 Chemists	0	10	na	10	0.0
C013 Geologists, geochemists and geophysicists	0	0	na	0	0.0
C014 Meteorologists	0	0	na	0	0.0
C015 Other professional occupations in physical sciences	0	0	na	0	0.0
C021 Biologists and related scientists	30	40	33.3%	10	0.1
C022 Forestry professionals	15	10	-33.3%	-5	0.0
C023 Agricultural representatives, consultants and specialists	0	0	na	0	0.0
C031 Civil engineers	30	40	33.3%	10	0.1
C032 Mechanical engineers	60	25	-58.3%	-35	0.1
C033 Electrical and electronics engineers	0	0	na	0	0.0
C034 Chemical engineers	10	0	-100.0%	-10	0.0
C041 Industrial and manufacturing engineers	30	45	50.0%	15	0.2
C042 Metallurgical and materials engineers	0	0	na	0	0.0
C043 Mining engineers	0	0	na	0	0.0
C044 Geological engineers	0	0	na	0	0.0
C045 Petroleum engineers	0	0	na	0	0.0
C046 Aerospace engineers	25	15	-40.0%	-10	0.1
C047 Computer engineers (except software engineers)	0	0	na	0	0.0
C048 Other professional engineers, n.e.c.	10	0	-100.0%	-10	0.0
C051 Architects	10	10	0.0%	0	0.0
C052 Landscape architects	10	0	-100.0%	-10	0.0
C053 Urban and land use planners	35	55	57.1%	20	0.2
C054 Land surveyors	10	35	250.0%	25	0.1

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
C061 Mathematicians, statisticians and actuaries	0	0	na	0	0.0
C071 Information systems analysts and consultants	15	30	100.0%	15	0.1
C072 Database analysts and data administrators	0	35	na	35	0.1
C073 Software engineers	0	10	na	10	0.0
C074 Computer programmers and interactive media developers	35	40	14.3%	5	0.1
C075 Web designers and developers	10	0	-100.0%	-10	0.0
C111 Chemical technologists and technicians	10	10	0.0%	0	0.0
C112 Geological and mineral technologists and technicians	0	10	na	10	0.0
C113 Meteorological technicians	0	0	na	0	0.0
C121 Biological technologists and technicians	0	15	na	15	0.1
C122 Agricultural and fish products inspectors	0	0	na	0	0.0
C123 Forestry technologists and technicians	65	20	-69.2%	-45	0.1
C124 Conservation and fishery officers	20	20	0.0%	0	0.1
C125 Landscape and horticultural technicians and specialists	65	95	46.2%	30	0.3
C131 Civil engineering technologists and technicians	0	10	na	10	0.0
C132 Mechanical engineering technologists and technicians	20	15	-25.0%	-5	0.1
C133 Industrial engineering and manufacturing technologists and technicians	0	10	na	10	0.0
C134 Construction estimators	25	30	20.0%	5	0.1
C141 Electrical and electronics engineering technologists and technicians	50	45	-10.0%	-5	0.2
C142 Electronic service technicians (household and business equipment)	75	55	-26.7%	-20	0.2
C143 Industrial instrument technicians and mechanics	10	0	-100.0%	-10	0.0
C144 Aircraft instrument, electrical and avionics mechanics, technicians and inspectors	0	15	na	15	0.1
C151 Architectural technologists and technicians	0	20	na	20	0.1
C152 Industrial designers	20	65	225.0%	45	0.2
C153 Drafting technologists and technicians	15	25	66.7%	10	0.1
C154 Land survey technologists and technicians	20	25	25.0%	5	0.1
C155 Mapping and related technologists and technicians	10	35	250.0%	25	0.1
C161 Non-destructive testers and inspectors	0	0	na	0	0.0
C162 Engineering inspectors and regulatory officers	0	0	na	0	0.0
C163 Inspectors in public and environmental health and occupational health and safety	10	35	250.0%	25	0.1
C164 Construction inspectors	65	55	-15.4%	-10	0.2
C171 Air pilots, flight engineers and flying instructors	10	20	100.0%	10	0.1
C172 Air traffic control and related occupations	0	0	na	0	0.0
C173 Deck officers, water transport	10	45	350.0%	35	0.2
C174 Engineer officers, water transport	0	0	na	0	0.0
C175 Railway traffic controllers and marine traffic regulators	0	0	na	0	0.0
C181 Computer and network operators and web technicians	20	20	0.0%	0	0.1
C182 User support technicians	10	25	150.0%	15	0.1
C183 Systems testing technicians	0	0	na	0	0.0
D011 Specialist physicians	15	65	333.3%	50	0.2
D012 General practitioners and family physicians	95	65	-31.6%	-30	0.2

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
D013 Dentists	10	35	250.0%	25	0.1
D014 Veterinarians	0	30	na	30	0.1
D021 Optometrists	20	0	-100.0%	-20	0.0
D022 Chiropractors	10	30	200.0%	20	0.1
D023 Other professional occupations in health diagnosing and treating	10	0	-100.0%	-10	0.0
D031 Pharmacists	10	40	300.0%	30	0.1
D032 Dietitians and nutritionists	15	0	-100.0%	-15	0.0
D041 Audiologists and speech-language pathologists	10	15	50.0%	5	0.1
D042 Physiotherapists	25	25	0.0%	0	0.1
D043 Occupational therapists	10	10	0.0%	0	0.0
D044 Other professional occupations in therapy and assessment	0	10	na	10	0.0
D111 Head nurses and supervisors	15	30	100.0%	15	0.1
D112 Registered nurses	300	355	18.3%	55	1.2
D211 Medical laboratory technologists and pathologists' assistants	35	40	14.3%	5	0.1
D212 Medical laboratory technicians	15	35	133.3%	20	0.1
D213 Veterinary and animal health technologists and technicians	0	20	na	20	0.1
D214 Respiratory therapists, clinical perfusionists and cardio-pulmonary technologists	0	0	na	0	0.0
D215 Medical radiation technologists	35	30	-14.3%	-5	0.1
D216 Medical sonographers	10	15	50.0%	5	0.1
D217 Cardiology technologists	0	25	na	25	0.1
D218 Electroencephalographic and other diagnostic technologists, n.e.c.	10	0	-100.0%	-10	0.0
D219 Other medical technologists and technicians (except dental health)	0	0	na	0	0.0
D221 Denturists	0	0	na	0	0.0
D222 Dental hygienists and dental therapists	60	45	-25.0%	-15	0.2
D223 Dental technologists, technicians and laboratory bench workers	10	0	-100.0%	-10	0.0
D231 Opticians	0	10	na	10	0.0
D232 Midwives and practitioners of natural healing	15	20	33.3%	5	0.1
D233 Licensed practical nurses	100	70	-30.0%	-30	0.2
D234 Ambulance attendants and other paramedical occupations	45	65	44.4%	20	0.2
D235 Other technical occupations in therapy and assessment	50	45	-10.0%	-5	0.2
E011 Judges	0	10	na	10	0.0
E012 Lawyers and Quebec notaries	45	85	88.9%	40	0.3
E021 Psychologists	15	35	133.3%	20	0.1
E022 Social workers	55	80	45.5%	25	0.3
E023 Family, marriage and other related counsellors	55	25	-54.5%	-30	0.1
E024 Ministers of religion	75	60	-20.0%	-15	0.2
E025 Probation and parole officers and related occupations	35	20	-42.9%	-15	0.1
E031 Natural and applied science policy researchers, consultants and program officers	15	10	-33.3%	-5	0.0
E032 Economists and economic policy researchers and analysts	0	0	na	0	0.0
E033 Business development officers and marketing researchers and consultants	60	105	75.0%	45	0.4

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
E034 Social policy researchers, consultants and program officers	40	10	-75.0%	-30	0.0
E035 Education policy researchers, consultants and program officers	0	20	na	20	0.1
E036 Recreation, sports and fitness program supervisors and consultants	65	10	-84.6%	-55	0.0
E037 Program officers unique to government	0	10	na	10	0.0
E038 Other professional occupations in social science, n.e.c.	0	0	na	0	0.0
E039 Health policy researchers, consultants and program officers	10	15	50.0%	5	0.1
E111 University professors	10	40	300.0%	30	0.1
E112 Post-secondary teaching and research assistants	0	0	na	0	0.0
E121 College and other vocational instructors	35	95	171.4%	60	0.3
E131 Secondary school teachers	310	320	3.2%	10	1.1
E132 Elementary school and kindergarten teachers	500	455	-9.0%	-45	1.6
E133 Educational counsellors	0	10	na	10	0.0
F011 Librarians	10	20	100.0%	10	0.1
F012 Conservators and curators	0	10	na	10	0.0
F013 Archivists	0	0	na	0	0.0
F021 Authors and writers	15	25	66.7%	10	0.1
F022 Editors	15	15	0.0%	0	0.1
F023 Journalists	0	25	na	25	0.1
F024 Professional occupations in public relations and communications	40	45	12.5%	5	0.2
F025 Translators, terminologists and interpreters	0	0	na	0	0.0
F031 Producers, directors, choreographers and related occupations	10	40	300.0%	30	0.1
F032 Conductors, composers and arrangers	10	0	-100.0%	-10	0.0
F033 Musicians and singers	40	40	0.0%	0	0.1
F034 Dancers	10	10	0.0%	0	0.0
F035 Actors and comedians	0	0	na	0	0.0
F036 Painters, sculptors and other visual artists	40	90	125.0%	50	0.3
F111 Library and archive technicians and assistants	15	20	33.3%	5	0.1
F112 Technical occupations related to museums and art galleries	30	15	-50.0%	-15	0.1
F121 Photographers	10	35	250.0%	25	0.1
F122 Film and video camera operators	0	0	na	0	0.0
F123 Graphic arts technicians	10	0	-100.0%	-10	0.0
F124 Broadcast technicians	0	0	na	0	0.0
F125 Audio and video recording technicians	10	0	-100.0%	-10	0.0
F126 Other technical and co-ordinating occupations in motion pictures, broadcasting and the performing arts	0	0	na	0	0.0
F127 Support occupations in motion pictures, broadcasting and the performing arts	10	20	100.0%	10	0.1
F131 Announcers and other broadcasters	20	15	-25.0%	-5	0.1
F132 Other performers	10	0	-100.0%	-10	0.0
F141 Graphic designers and illustrators	70	75	7.1%	5	0.3
F142 Interior designers	10	10	0.0%	0	0.0
F143 Theatre, fashion, exhibit and other creative designers	0	0	na	0	0.0
F144 Artisans and craftspersons	70	50	-28.6%	-20	0.2

	# jobs '01 Muskoka	# jobs '06 Muskoka	Employment Growth 2001-2006	Actual Change (# jobs) Muskoka	% Employment Muskoka 2006
F145 Patternmakers, textile, leather and fur products	0	0	na	0	0.0
F151 Athletes	0	10	na	10	0.0
F152 Coaches	0	0	na	0	0.0
F153 Sports officials and referees	0	10	na	10	0.0
F154 Program leaders and instructors in recreation and sport	175	135	-22.9%	-40	0.5