Economic Analysis & Impact of Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford On the City of Brantford, Brant County & Other Local Regions

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1.0 EXECUTIVE SUMMARY

Background & Methodology

The Grand Valley Educational Society, in coordination with the City of Brantford, engaged Adventus Research Inc. from September through December 2011 on a project examining the economic impacts of the three major, locally-based post-secondary institutions on the City of Brantford and the surrounding area:

- Wilfrid Laurier University (whose local campus is known as “Laurier Brantford”),
- Nipissing University (whose local campus is known as “Nipissing-Brantford”) and
- Mohawk College (both Brantford campuses - Elgin & downtown, known as “Mohawk Laurier”).

This report includes the following:

1. Assessment of the current economic and social impacts that Laurier Brantford, Mohawk College and Nipissing-Brantford have had on the a) downtown core, b) the City of Brantford, and c) Brant County, from 2006 to the present. This is designed to build on the 2005 benchmarking assessment (also conducted by Adventus) and is accomplished through a combination of survey and stakeholder interview research.

   a) For downtown Brantford - A survey of 73 (budgeted target = 70) existing businesses, institutions and offices in the downtown core of the City of Brantford. (Statistical confidence = +/- 11.3% 19 times out of 20)

   b) For the greater City of Brantford (excluding the downtown core) - A survey of a representative sample of 102 (budgeted target = 100) businesses, offices and institutions in the City of Brantford proper. (Statistical confidence = +/- 9.8% 19 times out of 20)

   c) For Brantford, Brant County and other surrounding regions - 29 stakeholder interviews were conducted (budgeted target = 15) in Brantford, Brant County and the Six Nations, concentrating on understanding the contribution and impacts of Laurier Brantford, Mohawk College and Nipissing-Brantford to Brant County overall, and the relationship of the City of Brantford’s economic prosperity with that of the County and other key regions.

2. Modeling of the continuing future economic impacts that Laurier Brantford, Mohawk College and Nipissing-Brantford will have on a) the downtown core, b) City of Brantford, and c) Brant County, through 2015/16. Modeling includes direct, indirect and induced impacts. Issues addressed in this and other sections of the report include:

   a) Direct and indirect economic benefits
      - Housing, Restaurants, Retail, and Consumers in general
      - Growth opportunities

   b) The benefits for downtown revitalization (people traffic, security, retail opportunities)
      - Effects on city prestige and reputation
      - Construction/renovation impacts

3. Conclusions and Recommendations as appropriate. Specific issues examined in this and other sections of the report include:

   - Downtown diversification.
   - The identification of priority issues for both local post-secondary institutions and businesses in downtown Brantford.
   - Identification of ways and means by which post-secondary institutions can help support the City’s economic development strategies.
   - Identification of key sectoral/industry opportunities that may be capitalized on.
   - The importance of sustainable post-secondary institutional diversity and balance in key areas (seasonal programming, student body mix (local vs. regional), gender balance issues etc.). Recommendations regarding new and alternate programming.
   - Identifying key elements to enhance Brantford’s emerging position as a Canadian Centre of Excellence in Municipal Innovation.
General Conclusion & Recommendations

Following is the general conclusion of this study:

1. In its totality, when measured by all elements of this study (survey, stakeholder interviews and economic impact modelling), the community / academic partnership to revitalize the Brantford downtown continues to be significant, notable, and a still developing success.

   Ongoing efforts by all players (the academic institutions, the City, the business and cultural communities, citizens, and other levels of government) should be maintained and deepened to maximize and sustain the ultimate degree of economic success possible for the downtown, greater Brantford, Brant County and the Six Nations.

Following are the recommendations of this study.

1. That all parties continue to prioritize the importance of deepening communications channels and consultative collaboration.

   All stakeholders indicated in the study that although excellent communication between all parties (the academic players, the City and the greater community) has been a hallmark of the downtown Brantford revitalization project to date, collaborative efforts will need to redoubled as the size of the academic footprint continues to grow, and the problems of accommodating growth while maintaining community balance become more complex.

2. That significant efforts continue be focussed on finding innovative ways to balance the academic year.

   It became apparent in dialoguing with stakeholders that the full economic benefit of the downtown academic presence will not be realized without an innovative solution to the challenge of the summer months of current relative academic inactivity. This is a significant and real barrier to fully maximize downtown economic revitalization.

3. That all parties strive to move forward to commence the downtown YMCA project as soon as is practicable.

   The downtown YMCA was identified by all stakeholders as the key to next step in the revitalization process of the Brantford downtown - that of drawing the greater community back into the downtown on a regular basis with a significant and important new community destination - the downtown YMCA.

4. That the City and its partners prioritize the identification and engagement of a new college partner for Brantford.

   With the imminent departure of most of the Mohawk College presence, stakeholders identified an emerging gap in the Brantford post-secondary education continuum. We concur with the subsequent conclusion of most stakeholders - that the best way to deal with this gap is to seek/attract a new college to the community. An ideal candidate would be one that has extensive knowledge of & awareness in the south-western Ontario region.

5. That the City and its partners move forward with taking the next steps to establish Brantford as a Centre of Excellence in Municipal Innovation.

   While the downtown Brantford revitalization story is still building and evolving, we agree with the stakeholders who indicate that there is sufficient learning, insight and success accumulated locally over the past decade to justify the creation of a Centre of Excellence in Municipal Innovation.
Report Findings - Results & Conclusions

1.0 As of 2011, total full-time enrolment in post-secondary institutions in Brantford is approximately 4,355 students, which represents about 0.7% of the total number of students enrolled in post-secondary institutions in Ontario - approximately 557,000. (Page 21)


1.1 A wide range of companies responded to the survey conducted for this report (102 in the greater city and 73 in the downtown). In terms of company size by revenue, 47% of downtown respondents reporting revenues of over $500,000, 23% reporting revenues in excess of $1 million and 7% reporting revenues in excess of $5 million. These numbers are comparable to the 2005 survey. (P 24)

1.2 In the greater city excluding the downtown, 48% of all respondents who provided a response (19 out of 40) reported revenues at their location of under $1 million, with 37% (15 out of 40) reporting revenues of $1-5 million, and 15% (6 out of 40) reporting revenues in excess of $5 million. (P 24)

1.3 In comparison to the 2005 data, companies are generally reporting more revenue at their location in 2011. For example, the 47% of downtown respondents reporting revenues of greater than $500,000 is up from 29% who reported this level of revenue in 2005, and the 57% of greater Brantford respondents who reported in excess of $500,000 in 2011 is up from 48% in 2005. (P 24)

1.4 The typical respondent to the 2011 survey represents a small business, as was also the case in 2005. Downtown businesses most frequently report that they have 2 employees in the downtown and none elsewhere in the greater city. Greater Brantford businesses most frequently report that they have 4 employees in the greater city and none in the downtown. (P 25)

1.5 As in 2005, downtown businesses represent a different business mix than do greater Brantford respondents. Downtown respondents most frequently classified themselves as: lawyers and legal services, restaurants and fast food, and social services, whereas greater city respondents most frequently classify themselves as: manufacturing, automotive services, & retail electronics. (P 26)

1.6 Familiarity with Laurier Brantford remains high in 2011, but familiarity levels have decreased somewhat from 2005. 65% of downtown respondents report that they are at least somewhat familiar with the programs of Laurier Brantford, down from 84% in 2005. Similarly, 42% of greater city respondents in 2011 report they are at least somewhat familiar, down from 60% in 2005. (P 27)

1.7 Familiarity with Mohawk College is slightly higher in 2011 than it was in 2005, with 75% of downtown and 59% of greater Brantford respondents indicating that they are at least somewhat familiar with Mohawk, up from 71% and 56% in 2005. (P 27)

1.8 Familiarity with Nipissing-Brantford was lower than that of the other two institutions although still substantial, with 48% of downtown and 33% of greater Brantford respondents indicating that they are at least somewhat familiar with Nipissing. (P 28)

1.9 The three local post-secondary programs mentioned most frequently by all respondents are: teaching (22 mentions - 13% of all respondents), police foundations (18 mentions - 10%) and criminology (14 mentions - 8%). (P 28)

1.10 The impact of the post-secondary institutions on Brantford businesses increased over the 2005-11 period, both among downtown and greater Brantford respondents. The number of downtown respondents reporting at least moderate positive impact on their businesses more than tripled to 47% in 2011, from 15% in 2005. Similarly, the number of greater city respondents reporting at least moderate positive economic impact almost doubled to 32% in 2011, from 18% in 2005. (P 29)

1.11 Over 60% of respondents were able to describe the nature of a positive economic impact of the post-secondary institutions on their businesses (including those stating “little but positive” impact). Downtown respondents were more likely (70%) to describe impacts than greater Brantford respondents (55%). By far the most frequently reported impact is the sale of goods and services to students and faculty, reported by 52% of downtown and 41% of greater city respondents. (P 30)
1.12 In terms of changing impact, 37% of all respondents state that the impact of the post-secondary institutions increased over the 2005 to 2011 period. The increasing impact is felt more strongly among downtown respondents (48%), and less so for greater Brantford respondents (29%). (P 31)

1.13 In terms of graduates/students hired, over the 2005 through 2011 timeframe, greater Brantford hiring increased, with respondents reporting hiring an average of 0.7 part-time hires (up 105% from 2005) and 0.32 full time hires (up 88% from 2005) each from the three institutions. (P 32)

1.14 Conversely, downtown hiring decreased, with respondents hiring an average of 1.05 part-time hires (down slightly - 8% from 2005) and 0.42 full time hires (down 73% from 2005.) from the three local post-secondary institutions. (P 32)

1.15 In terms of which programs students and/or graduates are hired from, the most commonly mentioned specific programs where students/graduates were hired from are contemporary studies and automotive repair/mechanic, both mentioned by 3 respondents each. (P 33)

1.16 As was also the case in 2005, a large majority of greater Brantford respondents (97%) are not considering opening or moving to a downtown location at present. The primary reasons for not considering such a move are: they are happy with their current location (26%), they need more space than the downtown can provide (14%), and there is no reason to move (10%). (P 34)

1.17 The great majority of respondents (85% in the downtown, 90% in greater Brantford) indicate that they foresee little or no change in their company’s expansion plans at this time. However, a sizeable minority (27% in the downtown, 32% in greater Brantford), are expecting some likely staff expansion in their current location. These responses are similar to those in 2005. (P 35)

1.18 A very strong consensus exists, both among downtown and greater Brantford respondents, that Laurier Brantford enhances the reputation of Brantford, with over 93% supporting that opinion, virtually unchanged from 2005. (P 36)

1.19 A strong consensus also exists that Nipissing-Brantford enhances the reputation of Brantford, with 80% of downtown and 86% of greater Brantford respondents stating this opinion. (P 36)

1.20 As well, a strong consensus also exists that Mohawk College enhances the reputation of Brantford, with 87% of downtown and 84% of greater Brantford respondents stating this opinion. (P 37)

1.21 When asked to comment on the general qualitative degree to which Laurier Brantford, Nipissing-Brantford and Mohawk College contribute to the economic well-being of Brantford; a large majority agreed that all three institutions contribute - 86% for Laurier Brantford, 76% for Nipissing-Brantford, and 81% for Mohawk College. These numbers are slightly lower than those reported in 2005 for Laurier Brantford (90%) and Mohawk College (87%). (P 38-40)

1.22 Over three-quarters of all respondents (77%) feel that the business climate in the Brantford downtown has improved over the 2005-2011 period at least somewhat, with 34% indicating that it has significantly improved. This is a significant improvement over the 2005 survey, when only 63% felt that the downtown had improved at least somewhat, and 16% felt it has improved significantly over the previous five years. (P 41)

1.23 The number of downtown respondents that feel that the post-secondary institutions have had at least some influence to the changes in the Brantford downtown in 2011 has increased from the 2005 results. Overall, 76% of downtown respondents indicate that Laurier Brantford has at least some influence, 89% that Mohawk has at least some influence, and 83% that Nipissing-Brantford has at least some influence. (P 42)

1.24 A clear majority of respondents are aware of the likely changes coming to Mohawk College’s presence in Brantford (i.e. closing of the Elgin St. campus). Downtown respondents (75%) are slightly more aware than greater Brantford respondents are (70%). (P 43)

1.25 A clear majority of both downtown (70%) and greater Brantford (72%) respondents indicate that the changes planned with respect to Mohawk College’s Brantford presence will have a moderate to very large impact on Brantford. (P 44)
1.26 In terms of additional closing comments, downtown respondents most often positively comment that they are generally very pleased with the impact of the three post-secondary institutions on the City of Brantford, followed by the observation that the institutions have changed the face of Brantford and revitalized the city. The most common negative comment, by far, is regret over the impending loss of the Mohawk College main (Elgin St.) campus. (P 45)

1.27 Greater city respondents, similarly to downtown respondents, most often positively comment that they are generally very pleased with the impact of the three post-secondary institutions on the City of Brantford, followed by the observation that things are much better now than 10 years ago. The most common negative comment is regret over the impending loss of the Mohawk College Elgin St. campus. (P 45)

Stakeholder Interviews: Regional Impacts - Brantford, Brant County & Communities

1.28 City stakeholder comments regarding the city-wide and regional impacts of the post-secondary institutions were all generally positive, but were also qualitative and hard to quantify. (P 46-47)

1.29 City stakeholders commented favourably on the positive physical changes to the downtown, in particular how the presence of an increasing number of students is transforming the look and feel of the downtown. (P 47)

1.30 City stakeholders also noted the longer-term stability post-secondary institutions provide. (P 47)

1.31 City stakeholders feel that the presence of the post-secondary institutions in the downtown provides a marketing advantage for the community, as employers generally want to locate in communities where the quality of life is enhanced by the presence of colleges and universities. (P 47)

1.32 From a real estate perspective, the growth of the institutions also creates an increasing demand for properties in the Brantford downtown. (P 48)

1.33 City stakeholders view the relationship between the institutions and the community to be a successful partnership. (P 48)

1.34 Regional stakeholders generally recognize that the post-secondary institutions have brought direct benefits to Brant County in a number of ways, including through employment opportunities, training programs, construction projects and other benefits. (P 48)

1.35 Some regional stakeholders report that they have yet to notice tangible impacts on their communities. (P 48)

1.36 One major advantage of having the post-secondary institutions in Brantford noted by regional stakeholders is that it keeps talented young people in the local area. (P 48)

Stakeholder Interviews: Regional Impacts - Six Nations

1.37 Six Nations stakeholders expressed strong general recognition and support for the growing impact of the local post-secondary institutions. (P 49)

1.38 Six Nations stakeholders also noted the strategic partnerships and linkages that already exist between their own post-secondary institution, Six Nations Polytechnic, and Laurier Brantford, Nipissing-Brantford and Mohawk College. (P 49)

1.39 Six Nations stakeholders noted a number of specific skills-sets that local post-secondary institutions can potentially supply to them, including environmental specialists and engineers. (P 49)

1.40 Six Nations stakeholders also recognize that the growing presence of the Brantford post-secondary institutions will create potential employment for qualified Six Nations personnel for staff and faculty positions at the institutions. (P 50)

1.41 Six Nations stakeholders did reference outstanding land claims in Brantford requiring resolution before full engagement and coordination can be expected to ensue with respect to downtown land use issues. (P 50)
Stakeholder Interviews - Priority Issues & Challenges

1.42 Stakeholders indicated that one of the most significant priority issues with respect to the growing post-secondary presence in the Brantford downtown is **how to effectively develop/build the infrastructure to accommodate this growth in a balanced way**. (P 51)

1.43 Another priority issue mentioned by several stakeholders is the need for **more frequent communication between the local post-secondary academic institutions and the community**, especially with respect to the University planning process. (P 51)

1.44 Stakeholder feelings about the imminent closure of Mohawk College’s Elgin Street Campus are **mixed**. There is **acknowledgement** that the Elgin Street location is sub-optimal and that a move was required. But there is also **general disappointment** shared by all stakeholders interviewed that a relocation-to-downtown Brantford for the Elgin Street campus could not be achieved. (P 52)

1.45 General stakeholder opinion is that discussions to explore **a new college player** in the community should be a **priority** item. (P 52)

Stakeholder Interviews - Downtown Diversification & Revitalization

1.46 **Generally, stakeholders are very pleased with the overall progress being made with respect to downtown revitalization** as a result of the growth of the downtown academic institutions. (P 53)

1.47 One of the greatest challenges mentioned by community stakeholders is **how to sustain reasonably steady economic activity in the Brantford downtown 12 months of the year**, when most academic-related activity noticeably lessens in the summer months of May through August. (P 53)

1.48 There was general stakeholder consensus that a **highly desirable outcome** of the growing downtown academic presence would be **growth in the downtown retail business sector** that would be initially attracted to support the growing body of students, faculty and staff. There is also broad stakeholder agreement that such downtown business development has been **fairly limited to date**. (P 53)

1.49 Some private sector stakeholders estimate that the **tipping point will arrive when the number of students in the downtown reaches about 5,000** (i.e. in about 2015-2016). At that point, they estimate that significant business investment will begin to take place. These stakeholders do not envisage large-scale developments, but rather smaller, specialty retail development. (P 54)

1.50 Some community stakeholders also mentioned that they felt that the **private sector needs to do a more effective job** of due diligence in terms of understanding the needs (and business opportunities arising from) of students, or **diversify accordingly**. (P 54)

1.51 **Conversely, some private sector stakeholders commented that the city should carefully review the restrictions that it places on businesses** if it wants to encourage business growth. (P 54)

1.52 Stakeholders mentioned that one of the primary challenges to a campus-oriented downtown is that after the school day is over student activity and traffic greatly decreases. Therefore, one of the goals of downtown diversification should be to ensure **non-academic activities and destinations are available for the greater community in the downtown**, in particular in the evening. (P 54)

1.53 One project that many stakeholders are particularly excited about that would contribute to accomplishing this would be the **opening of a new YMCA complex** in cooperation with Laurier Brantford in the downtown. (P 54)

Stakeholder Interviews - Post-Secondary Institutional Diversity & Balance

1.54 In general, **post-secondary institutional diversity and balance** is a recognized issue among stakeholders contacted for this report. Academic stakeholders note that this is an area targeted for ongoing attention. (P 56)

1.55 Several stakeholders indicated that it was their strong preference that a **significant college presence continues to be available** in Brantford. (P 56)
1.56 It was noted by some academic stakeholders that the local post-secondary academic institutions are aware that gender balance is becoming an issue as the balance of enrolment is increasingly skewing female in many programs - as part of a more general phenomenon. However, not all stakeholders believe that this is significant issue or one that can be addressed at a local level. (P 56)

1.57 Academic stakeholders also report that they are concentrating on the issue of mature students, referencing that there has been a Working Group established on that subject. They note that there is a very good and still largely untapped local opportunity to address mature student needs. (P 56)

1.58 Academic stakeholders note that the local post-secondary academic institutions have also prioritized strategies to enhance and deepen the relationship with the First Nations. For example, Laurier Brantford Aboriginal Student Support Services is not only a resource centre, but also hires aboriginal students as well. In addition, Laurier Brantford is in the process of reviewing their Indigenous Studies minor, and upgrading it to a full honours program. (P 56)

1.59 There are also direct linkages between Laurier Brantford, Nipissing-Brantford and Mohawk College and Six Nations Polytechnic. For instance, Laurier and Nipissing, along with three other universities, have entered into a partnership with Six Nations Polytechnic to offer university courses in the community of Six Nations. The courses offered in the Native University Program are eligible for transfer credit at any of the universities within the consortium. (P 56)

1.60 Stakeholders noted that post-secondary educational diversity should include a balance of both local students (from Brantford, Brant County and the Six Nations) and non-local students (from Ontario beyond Brant County and from outside of Ontario, including international students). (P 56)

1.61 In particular, stakeholders are of the opinion that attracting non-local students would serve the community significantly in the longer run as some of these non-local students might be inclined to remain in the community after graduation. (P 57)

1.62 Meeting the needs of higher-risk youth and their families is also noted through partnership with MOSAIC - a professional counseling service for eligible WLU employees and their families. (P 57)

1.63 Finally, several community stakeholders stressed the importance of continuing to emphasize open communication between the academic institutions and the rest of the surrounding community, noting that there are (and will likely always continue to be) cultural differences between the academic and municipal/business sectors. (P 57)

### Stakeholder Interviews - Social Issues

1.64 Stakeholders mentioned that in the past six years there has been a significant and noticeable improvement in both the appearance and the substance of the social fabric of the Brantford downtown. (P 58)

1.65 With each passing year, there are noticeably more “youth with purpose” (i.e. students) moving about in the downtown. This has had a noticeable and positive effect on the appearance of the downtown, and stakeholders mentioned that it is especially noticeable when speaking with visitors to the city - particularly when those visitors have returned after some time and had a previously more negative impression. (P 58)

1.66 At the same time however, stakeholders note that the unemployed or underemployed continue to gravitate to sections of the downtown. This remains an ongoing concern and one that stakeholders recognize needs continuing attention. (P 58)

1.67 Also, some stakeholders commented that it is their impression that the underemployed who have left the downtown area have simply been displaced to the regions immediately outside of the growing academic footprint of the post-secondary institutions. (P 58)

1.68 Some stakeholders noted the strong linkage between increasing student volunteerism and general improvement in the social fabric of the City and the Downtown. (P 58)
Stakeholder Interviews - Impact of Students - Volunteerism

1.69 By and large, stakeholders strongly agree that the post-secondary student body in Brantford provides significant community impact through volunteering, both as part of their formal academic curriculum and more informally. (P 59)

1.70 Both academic and community stakeholders recognize that volunteerism is encouraged and in some cases even mandated by the academic institutions, as a way to stimulate civic engagement by the student population, and in turn build positive good will, community engagement and direct benefits to the targeted recipients. (P 59)

1.71 It is recognized that many, if not most, student-run organizations and activities work on the basis of volunteerism. Examples include Laurier Students for Literacy, the Laurier Brantford Foot Patrol, Community Service-Learning (CSL), and Arts after School. (P 59)

1.72 Another aspect of student volunteering mentioned by stakeholders is fundraising. Local student volunteer events mentioned include Lions’ Run, Shinerama, Relay for Life and the Rotary Run, Days of Caring, Dress Denim Tuesdays, Strong Start (an early literacy initiative), Partnership with Ganohkwasra (cultural awareness), Friendship House partnership (social skills groups), Soup for the Soul (part of the Brantford Food Program), Good Start (partnership with the Pregnancy Resource Centre), Cooking for Real Life (life skills program), and several other initiatives. (P 59)

1.73 Several stakeholders also commented favourably on the positive impact of volunteering on the volunteers themselves. (P 59)

1.74 Data from the National Survey on Giving, Volunteering and Participating reveals that the incremental economic value to Ontario post-secondary volunteerism is about $ 244 million in 2011 dollars. Given that Brantford has about 0.7% of the enrolment of Ontario colleges and universities in 2011, this amounts to a regional benefit of $ 1.7 million annually (in dollar equivalents). (P 60)

Stakeholder Interviews - Key Sectoral /Industry Opportunities Identified

1.75 Many community stakeholders pointed out that it is now generally considered a good idea for post-secondary institutions to pursue a “specialization” strategy, and to extend their perceived competencies beyond that of the liberal arts/primarily undergraduate programming. (P 61)

1.76 Some stakeholders commented on particular industry or sectoral areas that the post-secondary academic institutional could focus on a) to successfully differentiate themselves and b) to establish new and/or build on existing synergies/opportunities in the community. (P 61)

1.77 Stakeholders commented that with sufficient specialization and critical mass, sectorally-specific companies can be attracted from outside the community, in addition to academic-industry collaborative research & development or academic institution-generated business spin-offs (which provide a basis for specialist attraction and retention within the community). (P 61)

1.78 Stakeholders also pointed out that Brantford/Brant offers significant attractiveness for industry because it is a relatively low-cost region within southern Ontario. (P 61)

1.79 Some community stakeholders felt that a food processing/food industries focus would be a natural fit for a Brantford post-secondary campus, given that the area is already known for the fact that it has several food processing companies, and because of its geographical location in close proximity to southern Ontario agriculture and excellent transportation infrastructure. (P61)

1.80 Several stakeholders indicated that they felt that the post-secondary institutions should continue to work to closely coordinate with ongoing local community efforts to form a green energy hub - establishing Brantford/Brant/Six Nations as the focal point in Ontario for green energy. (P 61)

1.81 Similarly, or perhaps building on that, one stakeholder suggested that environmental studies - possibly environmental sciences, could be a potential area of educational specialization. (P 61)

1.82 One stakeholder stated that, as their business transitions to one of supporting the tech sector that the local post-secondary institutions need to in turn produce more graduates that support the growth of local technology-based businesses. (P 62)
Similarly, some stakeholders identified that it would be desirable if the academic institutions offered more programming in the sciences, including biotech and technology applications. (P 62)

Most stakeholders understand that the post-secondary presence in Brantford is still in its relatively early stages and is not well-developed enough to offer such specialization at present, although it is their general opinion that planning for the future in this regard should already be underway. (P 62)

Some anticipate that such specialization will come in coordination with Laurier Brantford’s future graduate-level programming. (P 62)

Several stakeholders suggested that the city and greater community work and partner with Laurier Brantford on this issue. (P 62)

Stakeholder Interviews - Elements to Enhance Brantford’s Position as a Centre of Excellence in Municipal Innovation

Several stakeholders expressed a positive opinion regarding Brantford’s past decade of experience in downtown revitalization as being the key element to building towards establishing a Centre of Excellence in Municipal Innovation in the future. (P 63)

Some stakeholders acknowledged that there is ongoing discussion of the establishment of a Regional Innovation Centre (RIC) along these lines, and that if the community wants to attract attention to itself from outside the region, that this would be an excellent way to do it. (P 63)

Stakeholders also suggested that the ultimate litmus test for the viability of such an entity would be the degree to which it is funded by sponsors or clients. (P 63)

There are also some stakeholders who expressed an opinion that Brantford “may not be there yet”, citing that although the city has come a long way, there are many other centres that can also lay claim to innovative urban revitalization. (P 63)

Some stakeholders commented that even at this relatively early stage, the demand for expertise in downtown redevelopment that has been attracted to the Brantford “story” from other jurisdictions appears to indicate that there would be a likely demand for this type of expertise. As a result of this interest, there are at least two symposia on this subject planned in the upcoming months of 2012. As well, senior city officials are now being asked to speak on the subject as well. (P 63)

Although it is still early in the process, some community stakeholders are generally of the opinion that momentum on this issue is moving in a positive direction, and that the relationship-building groundwork has been largely accomplished - and that progress will be able to be made quickly to realizing the goal of establishing a local Centre of Excellence in Municipal Innovation. (P 63)

Economic Impacts

Estimated construction and renovation costs for the Brantford post-secondary institutions over the 2012-2016 timeframe will likely total up to $155.2 million. These expenditures will support a temporary increase in income in the province of up to 184.7 million, of which up to $110.2 million will be retained within Brantford/Brant. (P 71)

A total of up to 1,904 person years of employment are estimated to be generated in the Province from the proposed projects. Of this amount, up to 1,135 person-years of employment will come from Brantford/Brant, representing a 5-year average of up to 227 jobs. (P 71)

In terms of employment, the up to 227 Brantford/Brant jobs are estimated to be generated from the implementation of the proposed Brantford post-secondary projects over the 2012-2016 timeframe. This represents up to 0.31% of the estimated total Brantford CMA labour force of 73,824 in 2011. (P 71)
1.96 The sustained economic benefits of the operations of Brantford Post-Secondary institutions are based on the direct operating expenditures of $114.6 - 141.8 million over the 2011-12 to 2015-16 period. This in turn drives expenditures of $191.4 - 236.8 million in the Province, of which $152.4 to 188.6 million will be spent within Brantford/Brant.  

1.97 In terms of jobs created, an estimated 2,838 - 3,508 person-years of work, or an average of 568 - 702 jobs, will be sustained by the activities of the Brantford post-secondary institutions in the province. Of this amount, 2,260 - 2,795 person-years - an average of 452 - 559 jobs - will be from Brantford/Brant.  

1.98 In terms of employment, the 452 - 559 Brantford/Brant jobs estimated to be sustained by the activities of the Brantford-based post-secondary institutions represents 0.6 - 0.75% of the estimated total Brantford/Brant labour force of 73,824 in 2011.  

1.99 It is estimated that students attending the Brantford post-secondary institutions will spend approximately $26.8 million locally annually on non-institutional spending over the 2012-2016 period (including accommodation, transportation, food, clothing, entertainment, and miscellaneous uses). This is approximately equivalent to $6,033 annually per student.  

1.100 The impact of visitors to Brantford / Brant for the purposes of visiting the campuses of Laurier Brantford, Nipissing-Brantford and Mohawk Brantford is estimated to be in the range of about $586,000 annually. Given the nature of the visitors is to centre their visits on campus and the immediate campus vicinity, on a regional basis, most visitor impact will be on the Brantford downtown, and secondarily on the greater city of Brantford and Brant county.  

Comparison: 2011 Economic Impacts (Survey Estimates) vs. 2005 Forecast (Model)  

1.101 To review, the 2005 baseline study estimated that the total average economic impact of all post-secondary institutions in Brantford over the 2006-2010 time period would be $39 to 49 million annually.  

1.102 Based on 2011 greater city survey results, the total actual estimated economic impact of the downtown Brantford-based post-secondary institutions is $43.3 - 58.5 million annually.  

1.103 When one compares the predicted economic impact from the 2005 baseline study of $39 - 49 million annually, to the actual extrapolated results of the 2011 survey of $43.3 - 58.5 million annually, it can be seen that these results substantially overlap, and therefore the 2005 economic impact methodology employed is a good predictor of actual estimated economic impact results.
2.0 BACKGROUND & METHODOLOGY

2.1 Study Background

The Grand Valley Educational Society engaged Adventus Research Inc. in a project examining the economic impacts of the three major, locally-based post-secondary institutions on the City of Brantford and the surrounding area:

- **Wilfrid Laurier University** (whose local campus is known as “Laurier Brantford”),
- **Nipissing University** (whose local campus is known as “Nipissing-Brantford”) and
- **Mohawk College** (both Brantford campuses - Elgin and downtown, known as Mohawk Laurier).

This study serves as a follow up and update to the initial baseline study conducted in 2005, and encompasses the following components:

a) **Assessment of the current economic and social impacts** that Laurier Brantford, Mohawk College and Nipissing-Brantford have had on the a) downtown core, b) the City of Brantford proper, and c) Brant County, from 2006 up to the present (2011). This was accomplished through a combination of survey and stakeholder interview research.

While the surveys utilized the basic elements of 2005 baseline question list, some additional elements may be added. Elements included in the survey were aimed at:

- The identification of priority issues for both local post-secondary institutions and businesses in downtown Brantford.
- The importance of post-secondary diversity and balance in key areas (seasonal programming, student body mix (local vs. regional), gender balance issues etc.)
- Identifying key elements to enhance Brantford’s emerging position as a Canadian Centre of Excellence in Municipal Innovation.

Finally, the 2011 survey results are compared to the 2005 benchmark survey results and impacts.

b) **Comparison of the current impacts measured by survey above with predicted economic impacts** modeled in the 2005 baseline study, to determine and confirm the degree of accuracy of the economic model.

c) **Modeling of the continuing future economic impacts** that Wilfrid Laurier University, Mohawk College and Nipissing-Brantford will have on a) the downtown core, b) the City of Brantford proper, and c) Brant County, through 2015/16. This was accomplished through standard economic impact modeling, using accepted multipliers and methodologies obtained through similar recent studies, including work performed recently by Adventus Research Inc., and applied to current Laurier Brantford, Mohawk College and Nipissing-Brantford planning models through 2015/16.

This project was undertaken in order to measure the impacts of these major post-secondary institutions on Brantford, and to assist key stakeholders with developing the case for continuing to attract new private and institutional sector business investment into the local economy.

Adventus Research Inc., located in Guelph, Ontario, is a market research, economic and technology assessment consultancy. Gary Svoboda is the President, and is the primary author of this report. Survey assistance was provided by Strategic Research Associates of Guelph.
2.2 Overall Study Objectives

The client determined that the updated study should incorporate:

- Historic numbers of students, faculty, support staff of Laurier Brantford, Mohawk College and Nipissing-Brantford, plus;
- Growth of enrollment
- Shrinkage in numbers
  - Students not continuing and completing the year
  - Migration beyond the 1st year
- Student demographics
  - Gender
  - Number of students attending residing in the Brantford-Brant area. A student residing in Brantford would potentially result in increased local spending, versus someone who is commuting
- Assessment of the current economic and social impacts that Laurier Brantford, Mohawk College Brantford and Nipissing-Brantford has had on (a) downtown core; (b) the City of Brantford proper and (c) County of Brant
- Modelling (projections) of both direct and indirect impacts

2.3 Services Provided in the Project

Adventus Research completed the following deliverables for the Grand Valley Educational Society:

1. Assessment of the current economic and social impacts that Laurier Brantford, Mohawk College and Nipissing-Brantford have had on the a) downtown core, b) the City of Brantford, and c) Brant County, from 2006 to the end of 2010 (i.e. up to the present). This is designed to build on the 2005 benchmarking assessment and is accomplished through a combination of survey and stakeholder interview research.

   a) For downtown Brantford - A survey of 73 (planned - 70) existing businesses, institutions and offices in the downtown core of the City of Brantford - utilizing the list of the Brantford Downtown Business Improvement Area Business Directory. (Statistical confidence = +/- 11.3% 19 times out of 20)

   Survey questions concentrated on the issues of measurement of the degree of impacts of Laurier Brantford, Nipissing-Brantford and Mohawk College on downtown businesses. Further, it measures perceptions of the overall downtown community impact of these institutions during the past 5 years (2006-2010). Additionally, questions were asked regarding their future plans through 2015/16 and the degree to which Laurier Brantford, Mohawk College and Nipissing-Brantford will impact those plans.

   b) For the City of Brantford proper - A survey of a representative sample of 102 (planned - 100) businesses, offices and institutions in the City of Brantford proper. This survey is similar to a) above, but perhaps less in-depth and will concentrate on overall City impacts, rather than downtown-specific issues. (Statistical confidence = +/- 9.8% 19 times out of 20)

   c) For Brant County and other surrounding regions - 29 stakeholder interviews (planned - up to 15) in Brantford and greater Brant County. Centres to be contacted could include Paris, Six Nations and others. These interviews concentrate on understanding the contribution and impacts of Laurier Brantford, Mohawk College and Nipissing-Brantford to Brant County overall, and the relationship of the City of Brantford’s economic prosperity with that of the County and other key regions.
2. **Modeling of the continuing future economic impacts** that Laurier Brantford, Mohawk College and Nipissing-Brantford will have on a) the downtown core, b) City of Brantford, and c) Brant County, through 2015/16. Modeling includes direct, indirect and induced impacts, as in the 2005 benchmarking study. Issues addressed include:

   c) Direct and indirect economic benefits
      - Housing, Restaurants, Retail, and Consumers in general
      - Growth opportunities

d) Quantification of the benefits for downtown revitalization (people traffic, security, retail opportunities)
   - Effects on city prestige and reputation
   - Construction/renovation impacts

See Appendix 8.3 for further detail.

3. **Conclusions and Recommendations** as appropriate. Specific areas/issues examined and discussed in this section include:

   - **Downtown diversification** - understanding and mapping a future strategy for the downtown that integrates the educational institutions with local business and services. The downtown must be viewed as more than downtown campus.

   - The identification of **priority issues for both local post-secondary institutions and businesses** in downtown Brantford.

   - Identification of ways and means by which **post-secondary institutions can help support the City’s economic development strategies**.

   - Identification of **key sectoral/industry opportunities** that may be capitalized on (e.g. Pharmaceuticals etc.)

   - The importance of sustainable **post-secondary institutional diversity and balance** in key areas (seasonal programming, student body mix (local vs. regional), gender balance issues etc.). Recommendations regarding new and alternate programming.

   - Identifying key elements to enhance **Brantford’s emerging position as a Canadian Centre of Excellence in Municipal Innovation**. This vision includes a focus on Research and Development that will have sustainable long-term benefits for the city.
2.4 Study Methodology

2.4.1 Orientation
The project began with an orientation session with key stakeholders including: City of Brantford, Grand Valley Educational Society, Laurier Brantford, Nipissing-Brantford and Mohawk College Brantford Campus, where the client was given opportunity to further discuss the project and review client expectations. Also, the client was given the opportunity to suggest relevant sources of information. In addition, the client was able to provide the project team with access to the most current versions of the Brantford BIA Directory (for the downtown), the City Business Directory (for the City of Brantford), and a list of key stakeholders that could be contacted for stakeholder interviews. Also, a complete discussion of key survey issues and questions was tabled at the orientation, in order that survey design can proceed as efficiently as possible.

2.4.2 Information Collection - Secondary
The next step was to collect secondary information (i.e. information already published from other sources) for benchmarking data on the economic/social impact of the establishment of campuses of post-secondary educational institutions in cities similar to Brantford in size and/or geographical proximity. Internet searches and association information also provided useful information.

2.4.3 Primary Research
Primary research consisted of one survey, segmented into two groups: a) 73 (planned 70) business/institutional contacts in the downtown and b) 102 (planned 100) in the City overall. All surveys were conducted by telephone and took no more than 7 minutes to conduct. Questions asked of each population were very similar in nature, with the downtown version being more downtown-specific. Analysis is quantitative and subject to normal degrees of statistical confidence of studies of this type (given the sample sizes = 10% +/- 19 times out of 20). Survey development and client approval prior to implementation was needed for this project. Some cross-tabulations are included. Stakeholder interviews were qualitative and less formal, and concentrated on similar issues.

28 stakeholder interviews were also conducted to better understand the contribution/impacts of Laurier Brantford, Mohawk College and Nipissing-Brantford and the relationship of the City of Brantford’s economic prosperity with that of the County and other key regions.

2.4.4 Economic Impact Modelling
Economic impact modelling, consisting of benchmarking of the comparative data across Brantford economic and social statistics, with appropriate analyses and extrapolations to yield an estimate of the economic impact of Laurier Brantford, Nipissing-Brantford and Mohawk College through 2015-2016, was accomplished through standard economic impact modelling, using accepted multipliers and methodologies obtained through similar recent studies and applied to current Laurier Brantford, Mohawk College and Nipissing-Brantford planning models through 2015-2016.

2.4.5 Analysis & Reporting
All information was collected and analysed and a written report provided to the client 14 weeks after project commissioning. Subsequent to the issuing of the report, a review meeting shall be held between Adventus and primary stakeholders to discuss the report. Adventus will also present an executive summary of its findings to a meeting of stakeholders shortly after report delivery.

During the course of the study, Adventus liaised regularly with the client. All information provided by the client and collected by Adventus during this study, as well as the final report, is the property of the client, the Grand Valley Educational Society.
3.0 OVERVIEW - LOCAL POST-SECONDARY INSTITUTIONAL GROWTH PLANNED

As a frame of reference for the rest of the information provided in this study, this section of the report provides a brief review of the historic numbers of students, faculty, and support staff of Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford, together with 5-year forecasts for student enrolment and planned faculty/staff levels.

To quickly review and set the context, the following maps illustrate the locations of the Laurier Brantford, Nipissing-Brantford and Mohawk College campuses.

**Figure 1**
Laurier Brantford & Nipissing-Brantford Campuses

![Laurier Brantford & Nipissing-Brantford Campuses](Source: Laurier Brantford website)

**Figure 2**
Mohawk College Campuses in Brantford

![Mohawk College Campuses in Brantford](Source: Mohawk College website)
3.1 Laurier Brantford

The Laurier Brantford campus was established through partnerships and collaboration between Wilfrid Laurier University, the City of Brantford, Mohawk College, Nipissing University, and members of the Brantford Community, including the Grand valley Education Society.

The Laurier Brantford campus opened in 1999 to its first group of 39 students, who were housed within the Carnegie Building. Since the opening of the campus, Laurier Brantford has experienced significant growth, and the campus has established a reputation as a small university with a distinct heritage identity that is integrated into the urban environment of downtown Brantford.

In 2009, the University celebrated both its 10th anniversary and presented a degree to its 1,000th graduating student - significant milestones in the history of the campus.

### Figure 3
Laurier Brantford
Enrolment & Staffing History & Forecast Growth

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Time Enrolment (All Programs)</th>
<th>Part-Time Enrolment</th>
<th>Total Enrolment</th>
<th>Total Faculty</th>
<th>Total Staff</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999-2000</td>
<td>39</td>
<td>0</td>
<td>39</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>2000-2001</td>
<td>100</td>
<td>15</td>
<td>115</td>
<td>10</td>
<td>5</td>
</tr>
<tr>
<td>2001-2002</td>
<td>200</td>
<td>25</td>
<td>225</td>
<td>14</td>
<td>7</td>
</tr>
<tr>
<td>2002-2003</td>
<td>325</td>
<td>35</td>
<td>360</td>
<td>17</td>
<td>9</td>
</tr>
<tr>
<td>2003-2004</td>
<td>625</td>
<td>65</td>
<td>690</td>
<td>26</td>
<td>12</td>
</tr>
<tr>
<td>2004-2005</td>
<td>950</td>
<td>100</td>
<td>1,050</td>
<td>35</td>
<td>16</td>
</tr>
<tr>
<td>2005-2006</td>
<td>1,250</td>
<td>125</td>
<td>1,375</td>
<td>39</td>
<td>25</td>
</tr>
<tr>
<td>2006-2007</td>
<td>1,500</td>
<td>150</td>
<td>1,650</td>
<td>41</td>
<td>33</td>
</tr>
<tr>
<td>2007-2008</td>
<td>1,703</td>
<td>198</td>
<td>1,901</td>
<td>43</td>
<td>39</td>
</tr>
<tr>
<td>2008-2009</td>
<td>1,888</td>
<td>243</td>
<td>2,131</td>
<td>51</td>
<td>47</td>
</tr>
<tr>
<td>2009-2010</td>
<td>2,054</td>
<td>274</td>
<td>2,328</td>
<td>60</td>
<td>55</td>
</tr>
<tr>
<td>2010-2011</td>
<td>2,235</td>
<td>248</td>
<td>2,483</td>
<td>69</td>
<td>64</td>
</tr>
<tr>
<td>2011-2012</td>
<td>2,492</td>
<td>238</td>
<td>2,730</td>
<td>76</td>
<td>67</td>
</tr>
<tr>
<td>2012-2013</td>
<td>2,580</td>
<td>255</td>
<td>2,835</td>
<td>79</td>
<td>69</td>
</tr>
<tr>
<td>2013-2014</td>
<td>2,994</td>
<td>296</td>
<td>3,290</td>
<td>93</td>
<td>81</td>
</tr>
<tr>
<td>2014-2015</td>
<td>3,572</td>
<td>353</td>
<td>3,925</td>
<td>110</td>
<td>85</td>
</tr>
<tr>
<td>2015-2016</td>
<td>4,095</td>
<td>405</td>
<td>4,500</td>
<td>126</td>
<td>105</td>
</tr>
</tbody>
</table>

Sources: WLU Campus Master Plan (2010), WLU Office of the Registrar, Adventus Research Estimates (2011)

Laurier Brantford currently has 2,492 full-time and 238 part-time students registered for the 2011-2012 academic year (including 936 in the Laurier- Nipissing concurrent education program), for a total headcount of 2,730 students. Current plans are to grow that to 4,500 by 2015-2016, representing 65% growth over the next four years.

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1 Prior to 2007-2008, part-time students are estimated as a percentage of full-time students.
2 From 2007-2008 through 2015-2016, based on information from WLU Financial Coordinator.
3 From 2007-2008 through 2015-2016, based on information from WLU Financial Coordinator.
3.2 Nipissing-Brantford

Nipissing University established its Brantford campus (Nipissing-Brantford) in 2002, operating in its first year with 29 Nipissing - Laurier concurrent education program students. The program quickly grew, to 731 students enrolled by 2009.

The program has continued to grow to a projected 999 full-time and part-time students as of the current academic year (2011-2012), with 936 in the Nipissing - Laurier Brantford concurrent education program, and a further 63 (14 full-time and 49 part-time) in the Master’s of Education program, which was launched at Nipissing-Brantford for the 2009-2010 academic year⁴.

The figure below outlines plans for the next five years, with planned increases in enrolment of 10% per year in existing programming (not including possible new programming).

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Time Enrolment</th>
<th>Part-Time Enrolment</th>
<th>Total Enrolment</th>
<th>Total Faculty FTE</th>
<th>Total Staff FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-2012</td>
<td>936 concurrent with Laurier Brantford 14 Master’s of Education</td>
<td>49 Master’s of Education</td>
<td>999</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>2012-2013</td>
<td>1,030 concurrent 15 Master’s of Education</td>
<td>54 Master’s of Education</td>
<td>1,099</td>
<td>6.5</td>
<td>3.3</td>
</tr>
<tr>
<td>2013-2014</td>
<td>1,133 concurrent 16 Master’s of Education</td>
<td>59 Master’s of Education</td>
<td>1,207</td>
<td>7</td>
<td>3.6</td>
</tr>
<tr>
<td>2014-2015</td>
<td>1,246 concurrent 17 Master’s of Education</td>
<td>65 Master’s of Education</td>
<td>1,328</td>
<td>7.5</td>
<td>3.9</td>
</tr>
<tr>
<td>2015-2016</td>
<td>1,371 concurrent 18 Master’s of Education</td>
<td>71 Master’s of Education</td>
<td>1,460</td>
<td>8</td>
<td>4.2</td>
</tr>
</tbody>
</table>

Sources: Nipissing-Brantford estimates (2011)

Over the next five years, with planned increments in enrolment and a budget of approximately 10% per year, Nipissing-Brantford plans to add, on average, one new faculty/staff position per year in its Brantford campus⁵.

⁴ The Brantford Expositor, Students line up for Master’s Program, June 23, 2009
⁵ Source: Nipissing-Brantford
3.3 Mohawk College in Brantford

Mohawk College was founded in 1966 with its first campus in Hamilton, and has maintained a presence in Brantford for over 40 years, since the founding of its Elgin Street campus.

As of 2011-2012, Mohawk College has, across all of its campuses, 11,500 full-time post secondary students, 4,000 apprenticeships and 600 international students. It currently has 1,800 students on its two Brantford campuses, with 1,300 at its Elgin Street Location and 500 in downtown Brantford at its Mohawk Laurier campus.

Below are the forecast enrolment estimates for Mohawk College in Brantford looking forward through 2015-2016. The overall reduction in numbers beginning in 2013-2014 reflects the closing of the Elgin Street campus, combined with growth in the downtown campus. Beginning in September 2013, Mohawk will also offer the Ceramics, Pottery and Upholstery part-time programs in downtown Brantford in a facility in which it is a partner, called the Brantford Arts Block.6

<table>
<thead>
<tr>
<th>Year</th>
<th>Full-Time Enrolment</th>
<th>Total Faculty FTE</th>
<th>Total Staff FTE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011-2012</td>
<td>1,300 Elgin 500 Mohawk Laurier</td>
<td>45.6</td>
<td>9.5</td>
</tr>
<tr>
<td>2012-2013</td>
<td>1,300 Elgin 500 Mohawk Laurier</td>
<td>45.6</td>
<td>9.5</td>
</tr>
<tr>
<td>2013-2014</td>
<td>0 Elgin 800 Mohawk Laurier</td>
<td>14.4</td>
<td>3.0</td>
</tr>
<tr>
<td>2014-2015</td>
<td>0 Elgin 900 Mohawk Laurier</td>
<td>18</td>
<td>5.0</td>
</tr>
<tr>
<td>2015-2016</td>
<td>0 Elgin 1,000 Mohawk Laurier</td>
<td>20</td>
<td>6.0</td>
</tr>
</tbody>
</table>

Source: Mohawk College & Adventus Research Estimates (2011)

As reported on December 7th, 2011 in the Brantford Expositor, a Mohawk College spokesperson recently stated the Elgin Street campus will close as planned at the end of the next academic year in September 2013 and the college will maintain a Brantford presence at the Odeon Building it shares with Laurier and Nipissing.7

In summary, as of 2011, total full-time enrolment in post-secondary institutions in Brantford is approximately 4,355 students, which represents about 0.7% of the total number of students enrolled full-time in post-secondary institutions in Ontario - approximately 557,0008.

6 Interview with Paul Armstrong, Dean, Community and Urban Studies, Dec 2011
7 The Brantford Expositor, City won't lead push for college presence, Dec 7, 2011
8 According to the Higher Education Quality Council of Ontario (Mar 18, 2010 News Release), Enrolment in Ontario’s postsecondary education system has grown significantly. In 2008-09 total full-time enrolment in Ontario’s colleges was 193,420 compared to 182,404 in 2004-05. For universities, total enrolment in 2008-09 was nearly 364,000 students, compared to 330,374 in 2004-05.
4.0 SURVEY RESULTS

4.1 Introduction - Location of Survey Respondents

In this section of the report, the economic impacts of the three major post-secondary institutions in Brantford (Laurier Brantford, Nipissing-Brantford and Mohawk College) are reviewed from 2005 (the date of the previous study) to the present (2011).

The primary tool used to perform this assessment is the survey conducted in the Brantford downtown and the City of Brantford (see Appendix 9.3). This was augmented by stakeholder interviews in Brantford and regions outlying the City of Brantford, namely Brant County (including the towns of Paris and St. George), and the Six Nations.

With respect to the survey conducted for this assessment, the following chart shows the geographical location of the 175 interviews. For the purpose of this analysis, the 73 downtown interviewees surveyed are located in the core downtown area, with an additional 102 interviews conducted with interviewees in the City of Brantford outside the downtown.

On the map below, the downtown zone is bordered by Grey Street (north), Brant Ave. (west), Veteran’s Parkway (south), and Clarence (east), and is highlighted in a darker tone in the centre of the map, with the City of Brantford shown outlined surrounding it.

Figure 6
Location of Survey Respondents - Downtown & Greater City of Brantford

Source: Strategic Research Associates
4.2 2011 Survey Results

The total population of potential business respondents is based on the 934 downtown listings in the current BIA listing, and the 3,953 businesses listed for Brantford, excluding the downtown. The respondents contacted for these surveys therefore represent 7.8% of all possible downtown business contacts, and 2.6% of all possible greater city contacts.

The results to these surveys follow, broken down by downtown and greater city response groups. Comparisons with 2005 data are also made where appropriate.

4.2.1 Respondents by Major Products or Services

Question 1: What are your company’s major products or services?

Companies of all types participated in the survey.

In the downtown, the most commonly frequently interviewed category was lawyers and legal services, accounting for 9 interviews (12%). Respondents in the top three categories: lawyers and legal, restaurants and fast food, and social services, accounted for 27% of all responses.

In the greater city excluding the downtown, the most frequently interviewed category was manufacturing, accounting for 10 interviews (10%). Respondents in the top three categories: manufacturing, automotive repair and service, and electronics sales and service, accounted for 23% of all responses.
4.2.2 Respondents by Revenue

**Question 2: What was your total revenue at this location in 2010? (Provide a range)**

**Figure 9**

**Figure 10**

Companies of all sizes, from the very small to the very large, participated in the 2011 survey.

In the downtown, in terms of company size as determined by revenue, 47% of all downtown respondents interviewed who provided a response (14 out of 30) reported revenues at their location of over $500,000, with 23% (7 out of 30) reporting revenues in excess of $1 million and 7% (2 out of 30) reporting revenues in excess of $5 million.

59% (43 out of 73) did not answer this question, either due to the question’s sensitivity or because they could not estimate an answer.9

In the greater city excluding the downtown, 48% of all respondents who provided a response (19 out of 40) reported revenues at their location of under $1 million, with 37% (15 out of 40) reporting revenues of $1-$5 million, and 15% (6 out of 40) reporting revenues in excess of $5 million.

61% (62 out of 102) refused to answer this question, either due to the question’s sensitivity or because they could not estimate an answer.

In summary, most respondents who indicated a revenue range to this question are smaller companies, with greater city respondents reporting a higher percentage of larger firms.

In comparison to 2005 data, companies are generally reporting more revenue at their location in 2011. The 47% of downtown respondents who reported revenue of over $500,000 in 2011 is up from 29% who reported this level of revenue in 2005. Similarly, the 57% of greater city respondents who reported revenues in excess of $500,000 is up from the 48% who reported this level of revenue in 2005.

9 The inability or refusal to answer this most sensitive question in the survey by a majority of respondents is consistent with other surveys of this type, and does not affect our ability to quantitative and qualitative conclusions from this question.
4.2.3 Respondents by Number of Employees

Question 3: How many employees do you have:

a) At this location,
b) In total in downtown Brantford,
c) In total in Brantford, excluding the downtown.

Figure 11

<table>
<thead>
<tr>
<th>Number of Employees Reported</th>
<th>Downtown Mean</th>
<th>Downtown - Mode</th>
<th>Greater City - Mean</th>
<th>Greater City - Mode</th>
</tr>
</thead>
<tbody>
<tr>
<td>In this location</td>
<td>23.2</td>
<td>2</td>
<td>10.8</td>
<td>4</td>
</tr>
<tr>
<td>In downtown Brantford</td>
<td>27.4</td>
<td>2</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>In Brantford excluding downtown</td>
<td>7.1</td>
<td>0</td>
<td>11.2</td>
<td>4</td>
</tr>
</tbody>
</table>

In terms of the number of employees reported by respondents, downtown respondents report a higher mean (average) than do those in greater Brantford, with downtown respondents reporting a mean of 23.2 employees at their location, and 27.4 employees overall, but only 7.1 employees outside of the downtown on average.

Greater city respondents report a mean of 10.8 employees in their location, with that number rising slightly to 11.2 employees when all other greater city locations are taken into account, but only 1 employee on average located in the downtown.

However, if one looks at the “mode” response (the most frequently stated response), one sees that the average scores are not indicative of the typical respondent. This “skew” is due to the inclusion of larger downtown-based organizations in the study.

When one looks at the modal responses, downtown respondents most often report that they have 2 employees in downtown Brantford, and none elsewhere in Brantford (this is the same as reported in the 2005 survey).

By modal response, greater city respondents most often report that they have 4 employees at their location, and 4 in total outside of the downtown, with none located in the downtown (these numbers are up from a mode of 2 employees reported in 2005).
4.2.4 Respondents by Business Category

Question 4: Please indicate which category your business best fits into (check the single most applicable):

- Agriculture, forestry & fishing
- Manufacturing
- Construction
- Transportation & storage
- Information/communication
- Wholesale trade
- Retail trade
- Finance, insurance, real estate
- Business services
- Government services
- Educational services
- Health & social services
- Accommodation services
- Other products/services

Figure 12

In terms of business categories reported, the most frequently reported downtown business categories in 2011 are: finance, insurance & real estate (10 responses - 14%), retail trade (9 responses - 12%), health & social services (8 responses - 11%), legal services (included in “other” - 8 responses - 11%), business services (7 responses - 10%) and food & drink services (included in “other” - 6 responses - 8%).

The most frequently reported greater city business categories in 2011 are: retail trade (21 responses - 21%), manufacturing (18 responses - 18%), health & social services (11 responses - 11%), and finance, insurance & real estate (8 responses - 8%).

In terms of changes in the downtown in the 2005 to 2011 period, business services and “other” increased, while retail declined.

In terms of changes in the greater city in the 2005 to 2011 period, retail, educational services and health/social services increased, while “other” and manufacturing decreased.
4.2.5 Familiarity with Post-Secondary Institutions

Question 5: A) How well would you say that you know or are familiar with the programs of Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford (Elgin and/or Downtown campus)? (Check one for each institution: very familiar, somewhat familiar, a little familiar, not at all familiar). B) Can you name one program at any of these institutions?

Familiarity with Laurier Brantford remains high in 2011, with over 65% of downtown respondents and 42% of greater city respondents saying that they are at least somewhat familiar with Laurier Brantford, although levels have decreased from 2005 when the corresponding levels were 84% and 60%. This may be due to the fact that the institution’s presence in the downtown is no longer a “new” story in 2011.

Familiarity with Mohawk College is slightly higher in 2011 than it was in 2005, with 75% of downtown and 59% of greater city respondents saying that they are at least somewhat familiar with Mohawk College - up from 71% and 56% in 2005. These are also somewhat higher familiarity levels than that of Laurier Brantford.
Familiarity with Nipissing-Brantford was lower, although still substantial, with 48% of downtown respondents and 33% of greater city respondents being at least somewhat familiar with Nipissing (this question was not asked in 2005).

### 4.2.6 Post-Secondary Institutions - Programs Recalled

**Question 5b: Can you name one program at any of these institutions?**

The top three local post-secondary programs mentioned by all respondents are: teaching (22 mentions - 13% of all respondents), police foundations (18 mentions - 10%) and criminology (with 14 mentions - 8%).
4.2.7 Current Impact of Post-Secondary Institutions

Question 6a: How would you rate the current impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business in the past year? (Estimating staff, student, and institutional spending as a percentage of your business)

- Very significant positive impact (the major part of our business = over 50%)
- Significant positive impact (a large part of our business =25-49%)
- Moderate positive impact (a moderate part of our business = 10-24%)
- Little but positive impact (a small part of our business = 1-9%)
- No impact at all (it doesn’t affect our business = 0%)
- Negative impact (hurts our business)

Figure 17

The impact of the three post-secondary institutions increased over the 2011 to 2005 period, among both downtown and greater city respondents.

The number of downtown respondents reporting very significant, significant or moderate economic impact on their businesses from the post-secondary institutions more than tripled from 15% in 2005 to 47% in 2011.

The number of greater city respondents reporting very significant, significant or moderate economic impact on their businesses from the post-secondary institutions almost doubled from 18% in 2005 to 32% in 2011.

In 2011, a clear majority of both downtown respondents (70%) and greater city respondents (57%) report at least some positive economic impact on their businesses from the post-secondary institutions.
4.2.8 Nature of the Impact of the Post-Secondary Institutions

Question 6b: Briefly, what is the nature of the business impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business? (Characterize whether it comes from students, staff, the institution, type of goods/services sold, frequency, amounts, etc.). (This is an opened ended question)

Figure 18

Over 60% of respondents in total were able to describe the nature of a positive economic impact of the post-secondary institutions on their businesses. Downtown respondents were more likely (70%) to be able to describe the nature of the economic impact than were greater city respondents (55%).

By far, the most frequently reported impact is the sale of goods and services to students and faculty, reported by 52% of downtown respondents and 41% of greater city respondents.

Other economic impacts mentioned fairly frequently include: staff - hiring of current/former students, volunteers/co-ops, and student housing requirements.
4.2.9 Changing Impact of Post-Secondary Institutions

Question 6c: From 2005 to 2011, how would you best characterize the changing impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business?

- It has increased greatly
- It has increased moderately
- It has increased slightly
- It has not changed
- It has decreased slightly
- It has decreased moderately
- It has decreased greatly

Figure 19

Overall, 37% of all respondents report that the impact of the post secondary institutions increased over the 2005 to 2011 period.

The increasing impact is felt more strongly amongst downtown respondents, where almost one-half (48%) report increasing impact. Furthermore, the perception of increasing impact is growing in this group, up from 41% in 2005.

Amongst greater city respondents, 29% report increasing impact, down slightly from 32% reported in 2005.

Virtually no one reported decreasing impact of the institutions over the 2005-2011 period.
4.2.10  How Many Students / Graduates Hired

Question 6d: During the period 2005 to 2011, could you identify how many students/graduates of Laurier Brantford, Nipissing-Brantford and Mohawk College you have hired?

- As part-time employees
- As full-time employees

**Figure 20**

Students/Graduates Hired from Post-Secondary Institutions
Downtown & Greater City 2005 & 2011 (n = 175)

<table>
<thead>
<tr>
<th></th>
<th>Full-time</th>
<th>Part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Downtown 2011</td>
<td>0.42</td>
<td>1.05</td>
</tr>
<tr>
<td>Downtown 2005</td>
<td>1.6</td>
<td>1.14</td>
</tr>
<tr>
<td>Greater City 2011</td>
<td>0.32</td>
<td>0.7</td>
</tr>
<tr>
<td>Greater City 2005</td>
<td>0.17</td>
<td>0.34</td>
</tr>
</tbody>
</table>

**Part-Time**
Over the 2005-2011 timeframe, greater city respondents report hiring an average of 0.7 part-time hires each from the three post-secondary institutions, which is up 105% (more than double) from the 1998-2005 number of 0.34 part-time hires per firm on average. Overall, 21% of greater city respondents reported hiring at least one part-time hire over the 2005-2011 timeframe.

Downtown respondents report hiring an average of 1.05 part-time hires from the three post-secondary institutions, which is down slightly from the 1.14 part-time hires reported over the 1998-2005 timeframe. Overall, 20% of downtown respondents reported hiring at least one part-time hire over the 2005-2011 timeframe.

**Full-Time**
Over the 2005-2011 timeframe, greater city respondents report hiring an average of 0.32 full-time hires each from the three post-secondary institutions, which is up 88% from the 1998-2005 number of 0.17 full-time hires per firm on average. Overall, 10% of greater city respondents reported hiring at least one part-time hire over the 2005-2011 timeframe.

Downtown respondents report hiring an average of 0.42 full-time hires from the three post-secondary institutions, which is down from the 1.6 full-time hires reported over the 1998-2005 timeframe. Overall, 14% of downtown respondents reported hiring at least one full-time hire over the 2005-2011 timeframe.
4.2.11 Which Programs Students /Graduates Hired From

*Question 6e: If Yes (1 or more) to 6d, from which program(s) did you hire?*

**Figure 21**

Relatively few respondents were able to name the specific programs that they hired from with respect to the Brantford-based post-secondary institutions. Those 25 respondents that did mention a program responded with a variety of programs - mentioning a total of 15 programs - for an average of 1.7 hires per program (with an additional 4 mentioning non-specific local post-secondary hires).

The most commonly mentioned specific programs where students/graduates were hired from are contemporary studies and automotive repair/mechanic, both mentioned by 3 respondents each.
4.2.12 Considering Opening or Moving To Downtown

Question 7: Are you considering opening or moving to a downtown Brantford location in the future within the next 2 years?
- Yes, we are considering an additional downtown location
- Yes, we are considering moving this location downtown
- No, we are not considering a downtown location

Please briefly explain your answer. (This question was asked of only non-downtown respondents.)

Figure 22

Once again, in 2011, the overwhelming majority of greater Brantford respondents (97%) indicated that they are not currently considering opening or moving to a downtown location.

Figure 23

The primary reasons stated for not planning to move or open a downtown location are: greater city respondents are happy with their current location (26%), they need more space than the downtown can provide (14%), and that there is no reason to move (10%).
4.2.13 Likely Plans in Brantford Moving Forward

Question 8: What are your company’s likely plans in Brantford through 2011? (Choose as many as applicable)

- Likely staff expansion in current location
- Likely plant or building expansion in current location
- Likely growth in number of uptown Brantford locations
- Likely growth in downtown Brantford locations
- Likely little or no change

The great majority of respondents (85% in the downtown, 90% in the greater city) indicated that they foresee little or no change in their company’s expansion plans at this time. However, a sizeable minority (27% in the downtown, 32% in the greater city) are expecting staff expansion in their current location.

On the whole, 2011 responses are more or less similar to 2005 responses, with perhaps a slight overall increase in those expecting little or no change, in comparison to other scenarios.
4.2.14 Impact of Laurier Brantford on Reputation of Brantford

Question 9: How would you best describe the impact of Laurier Brantford on the reputation of the City of Brantford?

- Laurier Brantford enhances the reputation of Brantford
- Laurier Brantford has no impact on the city’s reputation
- Laurier Brantford diminishes the reputation of Brantford

Figure 25

A very strong consensus exists, both among downtown and greater city respondents, that Laurier Brantford enhances the reputation of Brantford, with over 93% supporting that opinion, virtually unchanged from the 2005 response to this question.

4.2.15 Impact of Nipissing-Brantford on Reputation of Brantford

Question 10: How would you best describe the impact of Nipissing-Brantford on the reputation of the City of Brantford?

- Nipissing-Brantford enhances the reputation of Brantford
- Nipissing-Brantford has no impact on the city’s reputation
- Nipissing-Brantford diminishes the reputation of Brantford

Figure 26

A strong consensus exists that Nipissing-Brantford enhances the reputation of the City of Brantford, with 80% of downtown and 86% of greater city respondents stating this opinion.
4.2.16 Impact of Mohawk College on Reputation of Brantford

Question 11: How would you best describe the impact of Mohawk College on the reputation of the City of Brantford?

- Mohawk College enhances the reputation of Brantford
- Mohawk College has no impact on the city’s reputation
- Mohawk College diminishes the reputation of Brantford

Figure 27

A strong consensus exists that Mohawk College enhances the reputation of the City of Brantford, with 87% of downtown and 84% of greater city respondents stating this opinion. The opinion breakdown on this question essentially remains unchanged from 2005 levels.
4.2.17 Degree to Which Laurier Brantford Contributes to Economic Well-Being of Brantford

**Question 12a:** Overall, could you please **rate your level of agreement** with the following statement: Laurier Brantford contributes to the economic well-being of the City of Brantford.

- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

**Figure 28**

Laurier Brantford Contributes to Economic Well-Being of Brantford  
Level of Agreement  
Downtown & Greater City  2011 & 2005  (n = 175)

An increasing number of downtown respondents strongly agree that Laurier Brantford contributes to the economic well-being of Brantford, with 60% expressing strong agreement in 2011, up from 54% in 2005. Overall, 88% of downtown respondents agree with the statement, as do 86% of greater city respondents.

This may be due to the larger size of the Laurier Brantford downtown campus in 2011, in comparison to 2005.
4.2.18  Degree to Which Nipissing-Brantford Contributes to Economic Well-Being of Brantford

Question 12b: Overall, could you please rate your level of agreement with the following statement: Nipissing-Brantford contributes to the economic well-being of the City of Brantford.

- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

**Figure 29**

Nipissing-Brantford Contributes to Economic Well-Being of Brantford  
Level of Agreement  
Downtown & Greater City 2011 (n= 175)

<table>
<thead>
<tr>
<th>Level of Agreement</th>
<th>Downtown 2011</th>
<th>Greater City 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly Agree</td>
<td>42.50%</td>
<td>39.20%</td>
</tr>
<tr>
<td>Somewhat agree</td>
<td>30.10%</td>
<td>40.20%</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>24.70%</td>
<td>20.60%</td>
</tr>
<tr>
<td>Somewhat disagree</td>
<td>1.40%</td>
<td>0.00%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>1.40%</td>
<td>0.00%</td>
</tr>
</tbody>
</table>

A majority of respondents agree that Nipissing-Brantford contributes to the economic well-being of Brantford. Overall, 73% of downtown respondents agree with the statement, as do 79% of greater city respondents.
4.2.19 Degree to Which Mohawk College Contributes to Economic Well-Being of Brantford

Question 12c: Overall, could you please rate your level of agreement with the following statement: Mohawk College contributes to the economic well-being of the City of Brantford.

- Strongly Agree
- Somewhat Agree
- Neither Agree nor Disagree
- Somewhat Disagree
- Strongly Disagree

**Figure 30**

<table>
<thead>
<tr>
<th></th>
<th>Downtown 2011</th>
<th>Downtown 2005</th>
<th>Greater City 2011</th>
<th>Greater City 2005</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>42.50%</td>
<td>49%</td>
<td>37.30%</td>
<td>45%</td>
</tr>
<tr>
<td>Somewhat agree</td>
<td>39.70%</td>
<td>40%</td>
<td>42.20%</td>
<td>42%</td>
</tr>
<tr>
<td>Neither agree nor disagree</td>
<td>13.70%</td>
<td>10%</td>
<td>19.60%</td>
<td>10%</td>
</tr>
<tr>
<td>Somewhat disagree</td>
<td>2.70%</td>
<td>1%</td>
<td>1.00%</td>
<td>3%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>1.40%</td>
<td>0%</td>
<td>0.00%</td>
<td>0%</td>
</tr>
</tbody>
</table>

A decreasing number of respondents strongly agree that Mohawk College contributes to the economic well-being of Brantford, with 42% of downtown respondents expressing strong agreement in 2011, down from 49% in 2005. Similarly, 37% of greater city respondents strongly agree with the statement in 2011, down from 42% in 2005.

Nevertheless, 82% of downtown respondents and 80% of greater city respondents still agree at least somewhat that Mohawk College contributes to the economic well-being of Brantford.
4.2.20 Business Climate Change in Brantford Downtown Core

Question 13: How would you say the business climate has changed in the downtown core of Brantford since 2005? (Asked of downtown respondents only)

- Significantly improved
- Moderately improved
- Slightly improved
- Unchanged
- Slightly worsened
- Moderately worsened
- Significantly worsened

Figure 31

Overall, over three-quarters of respondents (77%) feel that the business climate in the Brantford downtown core has at least slightly improved since 2005 - as opposed to just 7% who feel that it worsened.

On balance, 11 times as many downtown business respondents feel that the business climate has improved over the past 6 years as feel that it has declined.

This is an improvement over the 2005 results, when only 63% felt that the business climate in the downtown had improved in the previous 5 years, and 24% had felt that it worsened.
4.2.21 Impact of Post-Secondary Institutions on Business Climate Change

Question 14: How big a factor have Laurier Brantford, Nipissing-Brantford and Mohawk College been to this change? (Check one for each institution) (Asked of downtown respondents only)

- Very large factor
- Large factor
- Moderate factor
- Small factor
- Not a factor

Figure 32

The number of downtown respondents that state that the post secondary institutions have had at least some influence to the changes in the Brantford downtown in 2011 has increased from 2005 results.

Over three-quarters of downtown respondents (76%) in 2011 state that Laurier Brantford has had at least some influence, up from 69% in 2005. Similarly, 89% of downtown respondents indicated that Mohawk College has had at least some influence to changes in the downtown in 2011, up from 61% in 2005.

Conversely, the number of respondents indicating that the institutions were not a factor in the change to the downtown significantly decreased, from 31% and 39% for Laurier Brantford and Mohawk College in 2005, to just 18% and 11% in 2011.
4.2.22 Awareness of Mohawk College’s Elgin Street Campus Closing

Question 15: Were you aware that Mohawk College plans to close its Elgin Street campus but will be maintaining a presence in the downtown? (Yes or No)

Figure 33

A clear majority of respondents are aware of the changes coming to Mohawk College's presence in Brantford. Downtown respondents seem to slightly more aware of the general status of Mohawk College and its future plans.

Three-quarters of downtown respondents are aware of Mohawk College’s intent to close it Elgin Street Campus in the future, with a slightly smaller percentage of greater city respondents (70%) also being aware.

A lower percentage of both downtown (47%) and greater city (30%) respondents are aware that Mohawk College will be maintaining a downtown presence.
4.2.23 Impact of Mohawk College Changes

Question 16: Could you estimate the impact of these changes with Mohawk College campuses on the City of Brantford?

- Very large impact
- Large impact
- Moderate impact
- Small impact
- No impact

Figure 34

A clear majority of both downtown (70%) and greater city (72%) respondents indicated that the changes planned with respect to Mohawk College’s Brantford presence will have a moderate to very large impact on the city of Brantford.

A large majority agreed these changes would have some impact. Only 5% of downtown respondents and 3% of greater city respondents indicated it would have no impact, with a further 15% in both groups having no response.
4.2.24 Additional Comments

Question 17: As a last question, are there any last comments that you would like to make about Laurier Brantford, Nipissing-Brantford and Mohawk College and their impact on the City of Brantford?

**Figure 35**

Additional Comments
Downtown Respondents (n = 73)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Number of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally very positive/impressed</td>
<td>17</td>
</tr>
<tr>
<td>Loss of Mohawk main campus is a concern</td>
<td>0</td>
</tr>
<tr>
<td>Changed face of revitalized city</td>
<td>7</td>
</tr>
<tr>
<td>Want all three institutions to stay in Brantford</td>
<td>2</td>
</tr>
<tr>
<td>Students have added traffic/presence to downtown</td>
<td>1</td>
</tr>
<tr>
<td>Just keep doing what you are doing</td>
<td>1</td>
</tr>
<tr>
<td>Would be disastrous if Laurier or Nipissing left</td>
<td>1</td>
</tr>
<tr>
<td>Nipissing needs higher profile</td>
<td>1</td>
</tr>
<tr>
<td>Cannot become an all-downtown campus - need geographical diversity</td>
<td>1</td>
</tr>
<tr>
<td>Students take jobs from locals</td>
<td>1</td>
</tr>
</tbody>
</table>

Downtown respondents most often positively comment that they are generally very pleased with the impact of the three post-secondary institutions on the City of Brantford (17 out of 40 comments), followed by the observation that the institutions have changed the face of Brantford and revitalized the city (7 comments). The most common negative comment, by far (8 comments), is regret over the impending loss of the Mohawk College main (Elgin St.) campus.

**Figure 36**

Additional Comments
Greater City Respondents (n = 102)

<table>
<thead>
<tr>
<th>Statement</th>
<th>Number of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generally very positive/impressed</td>
<td>23</td>
</tr>
<tr>
<td>Loss of Mohawk main campus is a concern</td>
<td>3</td>
</tr>
<tr>
<td>Things are much better than 10 years ago/positive change</td>
<td>3</td>
</tr>
<tr>
<td>Good idea to have education in the downtown</td>
<td>2</td>
</tr>
<tr>
<td>More students in downtown is good</td>
<td>2</td>
</tr>
<tr>
<td>Will bring more jobs to city &amp; for young people</td>
<td>1</td>
</tr>
<tr>
<td>Mohawk should be replaced by another college</td>
<td>1</td>
</tr>
<tr>
<td>Need to figure out what to do with Mohawk (Elgin St.) space</td>
<td>1</td>
</tr>
<tr>
<td>Future of downtown is now linked to these institutions</td>
<td>1</td>
</tr>
<tr>
<td>Looking forward to continuing our relationship with these institutions</td>
<td>1</td>
</tr>
<tr>
<td>It is good that they are expanding</td>
<td>1</td>
</tr>
<tr>
<td>Have had contact with an outside college but not from any of these three</td>
<td>1</td>
</tr>
<tr>
<td>Downtown is dying - nothing there</td>
<td>1</td>
</tr>
<tr>
<td>If I move my business, it will be to outside of Brantford</td>
<td>1</td>
</tr>
</tbody>
</table>

Greater city respondents, similarly to downtown respondents, most often positively comment that they are generally very pleased with the impact of the three post-secondary institutions (23 out of 50 comments), followed by the observation that things are much better now than 10 years ago (5 comments). The most common negative comment (5 comments) is regret over the impending loss of the Mohawk College main (Elgin St.) campus.
5.0 STAKEHOLDER INTERVIEWS

This section of the report was performed by primarily by conducting 29 interviews with key stakeholders in Brantford, Brant County, the Six Nations, and other relevant organizations, as follows:

- Brant Stereo, Brantford
  John O’Neill, Owner
- Brantford Public Library
  Rose Vespa - CEO
- The Brantford Expositor
  Mike Walsh, Publisher
- City of Brantford
  Trudy Belanco, Manager, Corporate Policy & Mgmt.
  John Frabotta, Director, Economic Development
  Mark Gladysz, Senior Planner, Projects
  Paisley MacKenzie, Senior Development Officer
  Matt Reniers, Mgr - Policy, Planning & Heritage
- County of Brant - Economic Development
  Eric Rowan, Director of Economic Dev. & Tourism
- County of Brant - Oakland
  Joan Gatward, Councillor, Ward 5
- Cowan Insurance Group - Brantford
  Bob Herron, Branch Manager
- Home Building Centre - Paris
  Arnie Small, Owner
- Laurier Brantford
  Dr. Lesley Cooper - Vice-President & Principal
  Antonio Araujo - Director of Campus Operations
  Heather Bouillon - Financial Coordinator
  Melissa Huszczo - Associate Registrar
- Ludlow’s - Brantford
  Don Ludlow, Owner
- Mohawk College - Hamilton
  David Graham, Vice President, Finance
  Scott Tipping, Director - Budget & Financial Strategies
- Mohawk College - Brantford
  Paul Armstrong, Dean, Community & Urban Studies
  Lacey Devine, Enrolment & Liaison Officer
- Nipissing - Brantford
  Maria Cantalini-Williams, Associate Dean (Interim)
- Pewatatis - Ohsweken
  Claudine VanEvery-Albert, Owner
- Remax Commercial - Brantford
  Ted Ward-Giffen, Broker
- Six Nations Council
  Matt Jamieson, Director of Economic Development
- Strodes Express - Brantford
  Craig Woodrow, Owner
- Tiercel Technology - Princeton
  Bruce Seeley, President & CEO
- Waterous Holden Amey Hitchon - Brantford
  Steve Portelli, Corporate Commercial Lawyer
- Wilfrid Laurier University - Waterloo
  Gary Nower, Assistant VP - Physical Resources

The nature of this section of the report is non-quantitative in nature. Instead, qualitative interviews discussing economic impact issues were held with the stakeholders. Also, relevant quotations gathered in interviews are included, but not specifically attributed.

Figure 37
City of Brantford, Brant County & Six Nations/New Credit Communities

Source: City of Brantford
5.1 Regional Impacts - Brantford, Brant County & Communities

Overview
Brant County covers a geographic area of 1,093 km$^2$ and contains one city - Brantford - and the communities of Paris (with a 2006 population of 11,107, up from 9,881 in 2001), St. George (the largest community in South Dumfries Township - 2006 population 6,795), and Burford (with a 2006 area population of 7,430). Smaller communities in the municipality include Bishopsgate, Burtch, Cainsville, Cathcart, East Oakland, Etonia, Fairfield, Falkland, Glen Morris, Gobles, Harley, Harrisburg, Hatchley, Langford, Lockie, Maple Grove, Middleport, Mount Pleasant, Mount Vernon, New Durham, Newport, Northfield, Northfield Centre, Oakland, Onondaga, Osborne Corners, and Scotland. Together, the two largest communities in Brant County, Brantford and Paris, account for approximately 82% of the total population of the county. The total population of Brant excluding Brantford was 34,420 in 2006.

In terms of recent growth, the population of Brant County, including Brantford, grew by 5.6% from 2001 through 2006 (4.4% for Brantford and 8.7% for Brant County). In terms of medium to long-term forecast growth, between 2006 and 2031, the total population of Brant County is expected to grow by 26.5% (to 171,715), and 30% across Ontario (to 16,489,070). Rapid growth is expected for the population aged 60+, both for Brant and Ontario.

Stakeholder Overview Comments - City and Downtown
General comments from stakeholders regarding city-wide and regional impacts of the post-secondary institutions in Brantford were almost all positive, with several stakeholders interviewed in 2005 as well stating that their positive comments still apply, only even more so now that the academic footprint is substantially larger now. As one community stakeholder said, “The decay in downtown Brantford actually created an opportunity, and anybody could see that the solution to stopping and reversing the decay needed to be something major. Attracting the universities was absolutely the right thing to do.” Another stated that “In the long run, Laurier could be the biggest employer in Brantford.”

However, many stakeholders mentioned that the benefits of the downtown post-secondary presence to date are qualitative and hard to specifically quantify.

A broad consensus of both regional and city stakeholders commented on the “physical change” to the downtown, as just the presence of an increasingly large number of students transforms the look and feel of the downtown, from that of a general feeling of decline to one of a more positive, upbeat tone. (“It looks better and it feels better.”)

Several stakeholders also mentioned that academic institutions are “reasonably recession-proof”, and bring a long-term stability that private sector businesses, which are more subject to regularly changing market and economic forces, cannot provide. (“When you walk downtown, you have the same feeling that you would have if you were walking through a university campus.”)

Community stakeholders comment that, from a marketing perspective, the growing reputation of Brantford as a community with a strong and growing post-secondary university/college presence is “a huge benefit”, as employers generally want to locate in a community where the quality of life and cultural benefits are enhanced by the presence of universities and colleges. This is turn helps to build pride in the community. (“Building pride in the community is critical and the university is a huge piece of that puzzle.”)
And from a real estate perspective, stakeholders commented that the effect of the growth of the post-secondary presence has “created a demand for properties where there was previously no demand.”

Academic stakeholders stated that that they view the relationship between the institutions and the community to be a successful partnership, and one that will continue to grow into the future. They generally commented that the city is a very good partner. (“We are committed to the downtown campus concept, and appreciate the support of the community and various levels of government.”). They note that their students increasingly come from “far and wide in Ontario”, and bring with them a commitment to the community of four to five years. Community stakeholders echo this sentiment. (“The partnership between the post-secondary institutions and the community is just phenomenal!”)

**Stakeholder Overview Comments - Regional**

Brant County stakeholders recognize that the post secondary institutions have brought direct benefits to Brant County citizens in a number of ways, including through employment opportunities, training programs, construction projects, supporting operating activities of the institutions, and in increasing the quality of the local talent pool through producing university and college graduates.

However, some regional stakeholders indicate that while they agree with the above comments in theory, they have yet to notice a significant tangible impact in their communities, although they acknowledge that the presence of the institutions is revitalizing to Brantford and its downtown in particular.

Regional community stakeholders commented that the primary benefit of the local post-secondary academic institutions is to keep people here in the local area. Some commented that back when they attended post-secondary institutions and they had to leave the area to attend college/university, most of their local peers never returned to their communities (“It’s good for local kids to have a chance to go to a university within driving distance of their homes.”). The establishment of a significant local post-secondary presence is therefore viewed by some stakeholders as a tool for competitive advantage for the region. (“It is vital to keep people here - it’s essential.”)

With respect to Paris in particular, one regional stakeholder commented that they effectively view Paris as one greater community together with Brantford, and hence “when good things are happening to Brantford, it is good for Paris too.”
5.2 First Nations - Six Nations of the Grand River

Overview

The Six Nations of the Grand River community is the largest of the 608 First Nations in Canada.\textsuperscript{10} With a band membership of 22,294 as of September 2005\textsuperscript{11}, 11,297 of whom (51\%) live within the First Nation, the Six Nations territory covers approximately 182 km\textsuperscript{2}, or approximately 18,000 hectares. The Mississauga of the New Credit is another First Nation situated within the regional municipalities of Haldimand-Norfolk and Brant. Located about 16 km southeast of Brantford, it covers 24 km\textsuperscript{2} and has a registered population of 1,494.

The population within the Six Nations community is spread fairly evenly, with the densest population in the village of Ohsweken. The overall on-reserve population has increased from 4,907 persons in 1972 to 11,297 in 2005, with the off-reserve population increasing from 4,148 to 10,977 persons in that same time period. A 20-year projection (to 2025) estimates the on-reserve population to grow to 19,244, and the 50-year projection (to 2055) to 41,563.

Currently on the Six Nations of the Grand River, there are approximately 300 businesses\textsuperscript{12}, with new business start-ups and openings occurring monthly.

Stakeholder Comments

Stakeholders from the Six Nations expressed strong general support for the growing impact of the Brantford post-secondary educational institutions on their community.

One Six Nations stakeholder observed that strong local post-secondary presences serve to enrich the communities in which they reside and are adjacent to, not just economically, but also socially and culturally. ("We view post-secondary institutions in proximity to our community as a good thing.")

Six Nations stakeholders also mentioned the strategic partnership and linkages that already exist between their own post-secondary institution - Six Nations Polytechnic\textsuperscript{13} - and Brantford-based Laurier Brantford, Nipissing-Brantford and Mohawk College. They commented that as long as their students are not lost to Brantford by programming potentially overlapping with that of Six Nations Polytechnic, the growing presence of the Brantford-based post-secondary institutions is a strong plus because it allows for additional academic choice for Six Nations youth without the necessity of leaving home - which is viewed as highly desirable outcome.

Similarly, academic stakeholders commented that Laurier Brantford, Nipissing-Brantford and Mohawk College have all been very specific and deliberate in their intention of working in close coordination with the Six Nations.

Six Nations stakeholders identified a number of specific skill sets that are in short supply in their community and that the local post-secondary institutions could potentially supply, including environmental specialists and engineers - especially in association with current local projects including the Six Nations water treatment plant and the thermal treatment plant. ("We need highly skilled employees - as every community does.")

\textsuperscript{10} Stevens, A., Demographic Profile: Brant 2006, 2006
\textsuperscript{11} This number is the most recent data available, and is posted on the Six Nations website www.sixnations.ca
\textsuperscript{12} www.sixnations.ca
\textsuperscript{13} www.snpolytechnic.com
In terms of other benefits, Six Nations stakeholders also observed that the growing Brantford post-secondary presence also will create the potential for the employment of qualified Six Nations personnel for staff and faculty positions in the downtown campus, although to date this benefit has not yet significantly materialized. It was pointed out that there are a number of highly educated and qualified people potentially employable in the Brantford post-secondary milieu.

In terms of ongoing challenges, Six Nations stakeholders referenced outstanding land claims issues in the Brantford downtown as requiring ongoing attention and hopefully resolution before full engagement and coordination can be expected to ensue with respect to land use issues for academic expansion. (“There needs to be resolution of the land claims issue so that we can get back to improving the infrastructure that we provide to the community.”)

As a gesture of goodwill, one stakeholder suggested that reduced tuition to local First Nations students could be considered by the Brantford post-secondary institutions.
5.3 General Qualitative Economic Impacts

This section of the report deals with stakeholder comments regarding specific qualitative impacts of the post-secondary institutions in Brantford, as requested in the terms of reference and listed in Section 2.3 of this report.

5.3.1 Priority Issues & Challenges

At the outset of stakeholder interviews, we asked many stakeholders what the top-of-mind or priority issues with respect to the local post-secondary institutions are. Following are their primary responses, grouped by topic, and the general frequency of response.

Developing the Necessary Infrastructure to Continue to Allow for Post-Secondary Growth

Stakeholders indicated that one of the most significant priority issues with respect to the growing post-secondary presence in the Brantford downtown is how to effectively develop/build the infrastructure to accommodate this growth in a balanced way. This will necessitate the continuing identification of downtown buildings for repurposing and selective new construction projects. One local stakeholder estimates that, due to demand, the current zone of buildings or land being sought out for academic repurposing (including student housing), is growing at the rate of about one city block per year.

Community stakeholders are very aware that the medium to long-range (2023+) growth plans of Laurier Brantford are envisaging approximately 15,000 students in the downtown (which is about 5-6 times the current student body population). Another way of looking at this is that in about 15 years, the Brantford campus will likely represent about 40% of the total WLU footprint, and in very round numbers will require about 2 million square feet of building space to accommodate this. Such growth will require careful and considered long-term planning and an integrated and collaborative approach between the academic players and their community partners.

Some community stakeholders worry that a potential issue might be that such growth might be prematurely capped if continued communication, cooperation and willingness to understand partner needs are not fully sustained and even enhanced into the future.

One example mentioned of successful community-academic partnership is the Brantford Library, which currently has post-secondary programming and partnerships. At some point the growing size of the student presence will require a modification of the supporting role that the Library plays, as the institutions will have to move to supply more of their library needs from on-campus resources. That being said, there is the expectation that there will be a continuing role for the Library to play in support of the academic institutions. ("The future is all about collaboration.")

Deepening Communication & Linkages between Stakeholder Groups

Another priority issue mentioned by several stakeholders is the need for more frequent communication between the local post-secondary academic institutions and the community, especially with respect to the University planning process.

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14 According to WLU – Physical Resources
Regular presentations to council meetings (City and County), more university Open Houses, media releases and other regular forms of communication are all viewed favourably by stakeholders, some of whom sometimes feel somewhat “out of the loop” when it comes to post-secondary dialogue, planning and forecasting. (“From time to time, I feel that I am not as up to date as I would like to be on these issues.”)

From academic stakeholders, there is recognition that local post-secondary academic communication and community outreach needs to be happening directly with local youth (“...when they are still young - by Grades 11 and 12 it is too late.”)

**Identification of Potential New Academic Partners**

Stakeholder feelings about the imminent closure of Mohawk College’s Elgin Street Campus are mixed. On one hand, there is acknowledgement that the Elgin Street location (in an industrial area of the city) was sub-optimal, especially from a student perspective, and that a move was required (“We understand that Elgin Street wasn’t working for them.”, “It was not a sustainable campus”). On the other hand, there is general disappointment shared by all stakeholders interviewed that a relocation-to-downtown Brantford solution for the Elgin Street campus could not be achieved.

Moving forward, several community stakeholders commented that, with the closing of Mohawk College’s Elgin Street campus and the likely departure of those programs to other jurisdictions, there will be a clear gap in local post-secondary college-level programming in Brantford/Brant County.

Many stakeholders feel that this gap should be addressed by either attracting a new College partner to the area or seek to establish a new, locally based College. In the first scenario, a frequently mentioned potential new partner is Conestoga College, who several stakeholders pointed out already has significant linkages with Wilfrid Laurier University. Some stakeholders further elaborated that such a scenario could be structured similarly to Nipissing-Brantford, with some co-located sharing of common space.

General stakeholder opinion is that discussions to explore a new college player in the community should be a priority item.

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**The Education Premium - The Private & Public Payback of Post-Secondary Education**

Obtaining one or more college diplomas/university degrees is a good investment from the individuals’ point of view. In other words, the higher earnings associated with a college diploma more than offset the individual’s contribution to their education.

According to the Council of Ontario Universities Study (2001), over the average working lifetime of a person (approximately 45 years), the holder of a bachelor’s degree will earn, before tax, an average of $561,000 more in 2010 dollars than an individual who has graduated from high school (an average of $12,460 annually).

In terms of how Canadian college diplomas compare in this regard to universities, a University of Calgary study (2004) indicated that overall salaries, although lower overall than for university graduates, were higher than their high-school peers and about 80% of that of bachelors-level university graduates. This translates into an average education premium of a college diploma holder of $450,000 more in 2010 dollars - or an average of $11,125 annually (assuming a 40 year working career).

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16 According to the Statistics Canada, the Consumer Price Index (CPI), which stood at 100 in 2002, was at 115.1 in January 2010.
5.3.2 Downtown Diversification & Revitalization

Generally, stakeholders are very pleased with the overall progress that is being made with respect to downtown revitalization as a result of the growth of the downtown post-secondary institutions. (“It has made a big impact - it is nice to see people in the downtown, where before the downtown was a ghost town.”)

Academic and community stakeholders commented on the following specific issues with respect to downtown diversification and revitalization.

Year-Round Student Programming

One of the greatest challenges mentioned by many community stakeholders is the issue of how to sustain reasonably steady economic activity in the Brantford downtown 12 months of the year, when most academic-related activity noticeably lessens in the summer months of May through August. (“For businesses there needs to be reasons for people to be in the downtown throughout the year.”)

Community stakeholders indicate they are aware that Laurier Brantford is currently examining the issue of increasing its summer programming with the intent of achieving a greater balance of year-round student enrolment. (“You can certainly feel the presence of the students, and you can really feel it when they are gone for the summer - it changes the feel of the downtown.”)

Attracting and Retaining Businesses in the Downtown

There was general stakeholder consensus that a highly desirable outcome of the growing downtown academic presence would be to see growth in the downtown retail business sector that would be initially attracted to the downtown to support the growing body of students, faculty and staff of the institutions.

There is also broad stakeholder agreement that such downtown business development has been fairly limited to date, although according to some stakeholders the number of student/youth-oriented business enquiries into downtown locations are growing. (“The horizon is bright, but is still two to three years away. In the meantime, it is still a struggle.”) There is also a clear recognition that, although students spend, they do not spend at the same level as the average community member.

Community and private sector stakeholders commented that the first and obvious beneficiaries have been providers of student housing, and to some degree student-supported businesses, such as some fast-food/budget restaurants (although not all restaurant launches in the past few years have been successful) and youth clothing stores.

However, stakeholders caution that business establishments must be prepared for the reality that most of their student-based business will occur primarily during weekdays and daytime hours. At this time, they also need to organize around the current reality that the summer months mean a very significant reduction in student traffic.

Several community stakeholders emphasized more than just students are required for a healthy downtown, especially given that students have a limited income. A growing trend pointing towards increasing downtown diversification, and commented on by several stakeholders, is noticeable growth in downtown-based professional services firms (lawyers, accountants, consultants etc.). This in turn will contribute to creating more demand for higher-end, downtown restaurants and possibly other retail opportunities.
Working somewhat against this trend of improving business climate are generally increasing rents in the downtown, possibly as a result of the increasing needs of the academic institutions and the accompanying student housing, which although can be viewed as a good indicator of an improving economic outlook for the downtown, also makes it more difficult for businesses to operate profitably as well.

Some community stakeholders mentioned that attracting bank branches to the downtown core is viewed as a positive sign by the rest of the business community. Conversely, the departure of bank branches is viewed as a harbinger of core decline.

Some private sector stakeholders estimate that the tipping point may arrive when the number of students in the downtown reaches about 5,000 (i.e. in about 2015-2016). At that point, they estimate that significant business investment will begin to take place. These stakeholders do not envisage large-scale developments, but rather smaller, specialty retail development. Also, some stakeholders indicated that establishing a downtown location would likely make the most sense as a second-location scenario (rather than relocation). The area to the south of Colborne Street was mentioned by several stakeholders as being prime potential future retail space.

Some community stakeholders also mentioned that they felt that the private sector needs to do a more effective job of due diligence in terms of understanding the needs (and business opportunities arising from) of students, or diversify accordingly (“During the academic season, I focus on serving professionals and students. In the summertime, we focus more on catering.”)

Conversely, some private sector stakeholders commented that the city should carefully review the restrictions that it places on entrepreneurs and commercial businesses if it wants to encourage business growth. (“Treat us more like customers.”)

**Diversification of Use of Space - Attracting the Community to the Downtown**

Stakeholders mentioned that one of the primary challenges to a post-secondary campus-oriented downtown is the fact that after the school day is over (generally around 5 to 6 pm) student activity and traffic greatly decreases. Therefore, one of the goals of downtown diversification should be to ensure that non-academic activities and destinations are available for the greater community in the downtown, in particular in the evening hours.

One project that many stakeholders are particularly excited about that would contribute to accomplishing this would be the opening of a new YMCA complex in cooperation with Laurier Brantford in the downtown. Although only a proposal at this time, and still an estimated 3-4 years from likely completion, the Y partnership is viewed by many as a major element of the redevelopment of the downtown - as it will attract people into the downtown from the greater city and beyond, in particular from the south-west. Plans call for a target member membership for the new facility of 7,000 members, equivalent in scale to the Les Chater YMCA in South Hamilton, which could then generate up to 500,000 additional annual visits to the facility, and hence to the downtown. (“I believe the YMCA-Laurier project will be a galvanizing event for the community.”) (“This would be very handy from the perspective of someone who lives in the southern part of Brant County - I could be there in 15-20 minutes.”)

Another project mentioned by stakeholders would be the establishment of a Ministry of Transportation Office in the downtown, which again would have the effect of drawing the greater community into the downtown core.

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Stakeholders also commented on the desirability of have residential development in the downtown as well. ("Residential, commercial and institutional - that’s about all you can have in the downtown - and it would be a good balance.")

Initiatives such as these that attract the greater community into the downtown create the opportunity for those same people to visit other locations (restaurants, coffee shops, retailers etc.) and spend dollars in the downtown.

A Balance of Building Repurposing and New Construction
Academic stakeholders indicated that continued future expansion in the downtown will require a plan that combines efficient repurposing of existing downtown buildings with new construction.

One of the issues needing to be factored in that heritage-designated buildings are more likely to be repurposed due to their heritage designation, and therefore a key decision in that process is determining which buildings will be so designated and which will not.

Some community stakeholders are already commenting that there is already “a bit of a shortage” in available and developed student housing.

As the student population continues to grow, academic stakeholders commented that buildings available for efficient re-use will not likely be sufficient for expanding institutional needs. Furthermore, not all existing buildings offer the required size efficiencies that the universities will require, and hence there will be pressure to combine repurposing with some new construction. In order to accomplish this, the expectation is that a reasonable compromise will have to be found with community partners.

The Economic Stimulus of Higher Education
The presence of college/university graduates in a community also stimulates economic activity by attracting businesses seeking to capitalize on the availability of its graduates.

In addition, a study conducted on the status of education in Waterloo Region determined that the supply of a skilled and motivated labour force is the principal determinant of economic prosperity in the region. Individuals with a post-secondary degree are essential for the region’s export-oriented, knowledge-based economy.

The “accreditation” role of the college/university potentially has the greatest impact. The signals provided to potential employers regarding certain qualities (e.g. ability to accomplish long-term objectives, ability to deal with administrative issues, attainment of a certain level of social skills, etc.) are quite valuable. Without post-secondary designations, the cost to local business of screening candidates would be significantly higher.

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18 Smith, L., (1997), Regional Municipality of Waterloo: Education in Waterloo, Essential Economics Corporation
5.3.3 Post-Secondary Institutional Diversity & Balance

Post-secondary institutional diversity and balance is a recognized issue among stakeholders contacted for this report. Academic stakeholders note that this is an area targeted for ongoing attention. Following are some of the main highlights reported on this issue.

An Ongoing College Presence
Several stakeholders indicated that it was their strong preference that a significant college presence continues to be available in Brantford. (“I am a strong supporter of a post-secondary education of practical value.”)

Gender Balance
It was noted by some academic stakeholders that the local post-secondary academic institutions are aware that gender balance is becoming an issue as the balance of enrolment is increasingly skewing female in many programs - as part of a general phenomenon that goes well beyond Brantford and the local region. Not all stakeholders believe that this is significant issue or one that can be addressed at a local level. (“We are aware of this and are discussing it.”)

Mature Students
Academic stakeholders also report that they are concentrating on the issue of mature students - referencing the fact that there has been a Working Group established on that subject. They note that, given the fairly recent history of most of the post-secondary academic partners in the community, there is a very good and still largely untapped local opportunity to address mature student needs.

First Nations Students
Academic stakeholders note that the local post-secondary academic institutions have also prioritized strategies to enhance and deepen the relationship with the First Nations. For example, Laurier Brantford Aboriginal Student Support Services is not only a resource centre, but also hires aboriginal students as well. In addition, Laurier Brantford is in the process of reviewing their Indigenous Studies minor, and upgrading it to a full honours program.

There are also direct linkages between Laurier Brantford, Nipissing-Brantford and Mohawk College and Six Nations Polytechnic. For instance, Laurier and Nipissing, along with three other universities, have entered into a partnership with Six Nations Polytechnic to offer university courses in the community of Six Nations. The courses offered in the Native University Program are eligible for transfer credit at any of the universities within the consortium.¹⁹

Local & Non-Local Students
Stakeholders noted that post-secondary educational diversity should include a balance of both local students (from Brantford, Brant County and the Six Nations) and non-local students (from Ontario beyond Brant County and also from outside of Ontario, including international students).

¹⁹ For further information on courses offered, go to http://www.wlu.ca/calendars/section.php?cal=1&s=374&sp=1325&ss=1607&y=44
In particular, stakeholders are of the opinion that attracting non-local students would serve the community significantly in the longer run as some of these non-local students might be inclined to remain in the community after graduation. (“I am starting to hear stories of students who came from other centres, went to school at Laurier Brantford and stayed in the community after graduation.”)

**At-Risk Youth**
Meeting the needs of higher-risk youth and their families is also noted through partnership with MOSAIC - a confidential, professional counseling service for eligible WLU employees and their families. It is a free, voluntary and high quality service provided by the Mosaic Counsel Inc. & Family Services.

**Enhancing Communication to Continue to Provide Diversity & Balance**
Finally, several community stakeholders stressed the importance of continuing to emphasize open communication between the academic institutions and the rest of the surrounding community, noting that there are (and will likely always continue to be) cultural differences between the academic and municipal/business sectors.

Given these differences, it will be important to maintain clear communications linkages regarding the consultative process and future planning regarding the needs of both the academic institutions and the city within which they reside. It was mentioned by several non-academic stakeholders that left to themselves, academic institutions, even the most innovative and progressive, can tend to give the impression of being somewhat inward-looking from the perspective of their urban partners. ("More communication is needed - let’s share practices.")
5.3.4 Social Issues

Stakeholders mentioned that in the past six years (i.e. since the 2005 study), **there has been a significant and noticeable improvement in both the appearance and the substance of the social fabric of the Brantford downtown.** (“There is a different and better feel to the downtown now if you come down to a meeting.”)

With each passing year, there are noticeably more “youth with purpose” (i.e. students) moving about the downtown, between classes, or to and from local retailers for lunch or local shopping. This has had a noticeable and positive effect on the appearance of the downtown, and stakeholders mentioned that it is **especially noticeable when speaking with visitors to the city**—particularly when those visitors have returned after some time and had a previously more negative impression.

At the same time however, stakeholders were quick to mention that **there is still a “youth with less purpose” issue in the downtown** as well, as the unemployed or underemployed gravitate to sections of the downtown. This remains an ongoing concern and one that stakeholders recognize needs continuing attention.

Also, some stakeholders commented that it is their impression that the **underemployed who have left the downtown area have simply been displaced** to the regions immediately outside of the growing academic footprint of the post-secondary institutions. Further to that point, with the transitions/redevelopment occurring on the south side of Colborne, less-employed individuals have moved elsewhere in the city.

Some stakeholders noted the **strong linkage** between increasing **student volunteerism** and general improvement in the social fabric of the City and the Downtown.

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**The Philanthropic Premium**

According to a study by the Ontario Council of Universities20, university graduates donate to charitable institutions more frequently and at a significantly higher level than do high school graduates.

Although the quantitative information is dated (1998), the study indicated that Ontario university graduates donated $420 million more than the equivalent donations would have been if they would have been high school graduates. Adjusted for inflation, this amounts to **$537 million in 2011 dollars**.

This figure would likely be comparable for Ontario College graduates.

5.3.5  Impact of Students - Volunteerism

By and large, stakeholders strongly agree that the post-secondary student body in Brantford provides significant community impact through volunteering, both as part of their formal academic curriculum and more informally.

Both academic and community stakeholders recognize that volunteerism is encouraged and in some cases even mandated\(^2^1\) by the academic institutions, as a way to stimulate civic engagement by the student population, and in turn build positive good will, community engagement and direct benefits to the targeted recipients. (“Our volunteer and ancillary programs are greatly appreciated by the community.”).

One stakeholder commented that education program students are particularly involved in volunteerism and also recognize the attractiveness of this trait to potential employers.

It is recognized that many, if not most, student-run organizations and activities work on the basis of volunteerism. For instance, at the Brantford Public Library, the Laurier Students for Literacy volunteers currently operate a homework help centre, staffed with up to 10 students, from 4 through 10 pm Mondays through Thursdays. On campus, the Laurier Brantford Foot Patrol offers pedestrian security services for fellow students. Community Service-Learning (CSL), which integrates meaningful community service with classroom instruction and critical reflection, was also mentioned by stakeholders. Other programs mentioned include Arts after School.

Another aspect of student volunteering mentioned by stakeholders is fundraising. Local student volunteer-affiliated or driven events mentioned include Lions’ Run, Shinerama, Relay for Life and the Rotary Run. In 2011, Wilfrid Laurier’s 2011 United Way campaign, which ran Oct. 13-28, raised $60,000\(^2^2\) in employee donations from the university’s Waterloo, Brantford, Kitchener and Toronto locations. Brantford campus events included Days of Caring where volunteers spent their lunch hours helping at the local food bank, a campaign kick-off BBQ in the Research and Academic Centre, and Dress Denim Tuesdays, and various Frosh Week activities, car washes etc.

Similarly, Mohawk Collage and its students participate in a number of volunteer events and community projects\(^2^3\). Some of the 2011-2012 events include: Strong Start (an early literacy initiative), Partnership with Ganohkwara (cultural awareness), Friendship House partnership (social skills groups), Soup for the Soul (part of the Brantford Food Program), Good Start (partnership with the Pregnancy Resource Centre), Cooking for Real Life (life skills program), and several other initiatives.

Several stakeholders also commented favourably on the positive impact of volunteering on the volunteers themselves. (“I don’t know what better work experience you can have for life experience than you can get when you volunteer.”) (“If you can teach kids to give, then they grow up to be better adults.”)

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\(^{21}\) Students that volunteer receive recognition for this on their co-curriculum record. Volunteerism is also embedded into the program of Nipissing students, who are required to provide 120 hours of service in a teaching/learning capacity.


\(^{23}\) Interview with Paul Armstrong, Mohawk College, December 2011
The Volunteerism Premium - Additional Volunteer Hours

Data from the National Survey on Giving, Volunteering and Participating\(^{24}\) reveals that, while the total number of volunteer hours for an individual post-secondary graduate are less than that of a high school graduate, the participation rate is higher. Therefore, the total number of volunteer hours is greater for the post-secondary group. If one assigns a modest hourly value to this additional volunteer contribution (Ontario minimum wage), this yields an incremental economic value to Ontario post-secondary volunteerism of about $244 million in 2011 dollars.

Given that Brantford has about 0.7\% of the enrolment of Ontario colleges and universities in 2011, this amounts to a regional benefit of $1.7 million annually (in dollar equivalents).

According to the Council of Ontario Universities, the types of organizations that most benefit from volunteer work are recreational and social clubs (31\% of all volunteer hours), social service organizations (20\%), religious organizations (15\%), health organizations (14\%) and educational and research organizations (4\%). The “other” category receives 16\% of all volunteer hours.

5.3.6 Key Sectoral/Industry Opportunities Identified

Many community stakeholders pointed out that it is now generally considered a good idea for post-secondary institutions to pursue a “specialization” strategy, and to extend their perceived competencies beyond that of liberal arts/primarily undergraduate programming.

Some stakeholders further commented on particular industry or sectoral areas that the post-secondary academic institutional could focus on a) to successfully differentiate themselves and b) to establish new and/or build on existing synergies/opportunities in the community. In contrast, some stakeholders indicated that although a specialization strategy was likely desirable, they had no suggestions on what those areas could be.

Stakeholders commented that with sufficient specialization and critical mass, sectorally-specific companies can be attracted from outside the community in addition to academic-industry collaborative research & development or academic institution-generated business spin-offs (which provide a basis for specialist attraction and retention within the community).

Stakeholders also pointed out that Brantford/Brant offers significant attractiveness for industry because it is a relatively low-cost region within southern Ontario.

In this regard, comments were made by some stakeholders that a comparison/target/model might be an institution such as the University of Guelph (with its agriculture/biotech focus) or the University of Waterloo (with its information technology/computer science/engineering focus). Others thought that Trent University/Peterborough would be an appropriate comparative model.

Following are some relevant stakeholder comments on a few specific sectoral suggestions / opportunities:

Food Processing/Food Industries
Some community stakeholders felt that a food processing/food industries focus would be a natural fit for a Brantford post-secondary campus, given that the area is already known for the fact that it has several food processing companies, and because of its geographical location in close proximity to southern Ontario agriculture and excellent transportation infrastructure.

Stakeholders felt that such a focus would lend itself very well to a successful marketing/branding exercise for the local institutions.

Green Energy/Sustainable Living/Environmental Studies
Several stakeholders indicated that they felt that the post-secondary institutions should continue to work to closely coordinate with ongoing local community efforts to form a green energy hub - establishing Brantford/Brant/Six Nations as the focal point in Ontario for green energy25.

Similarly, or perhaps building on that, one stakeholder suggested that environmental studies - possibly environmental sciences, could be a potential area of educational specialization.

25 The Chamber of Commerce Brantford-Brant has spearheaded an initiative to have Brant County, Six Nations, and Brantford designated as a Green Energy Hub. The goal is to be recognized internationally as a centre of excellence for renewable energy and sustainable living. For further information, see www.thegreenhub.ca
Sciences/Technology
One stakeholder stated that, as their business transitions to one of supporting the tech sector that the local post-secondary institutions need to in turn produce more graduates that support the growth of local technology-based businesses. The general concern is that local liberal arts undergraduates may be less competitive than engineering or technology graduates from other local universities when it comes to meeting the needs of technology-oriented businesses. ("My business is going to require a higher degree of technical education and competency than I may be able to get locally.")

Similarly, some stakeholders identified that it would be desirable if the academic institutions offered more programming in the sciences, including biotech and technology applications.

Stage of Development - Planning Now & Focusing Later
Generally, most stakeholders understand that the post-secondary presence in Brantford is still in its relatively early stages and is not yet well-developed enough to offer such specialization at present, although it is their general opinion that thinking and planning for the future in this regard should already be underway.

Some anticipate that such specialization will come in coordination with Laurier Brantford's future graduate-level programming.

Several stakeholders suggested that the city and greater community work and partner with Laurier Brantford on this issue.

The Innovation Premium - Economic Benefits of R & D & Spin off Companies
Estimating the economic impact associated with research and innovation emerging from colleges and universities is one of the most difficult factors to measure when attempting to capture the real rate of return on higher education.

Economic activity, which has its much of its origins in post-secondary-based innovation, may show up in a variety of ways. Some examples include: consulting activities by faculty members, new companies created as “spin-offs” from the original research, joint ventures between faculty and off-campus partners, and licensing of innovations to existing firms. Knowledge transfer also takes place as a result of individuals with innovative ideas and capabilities, moving from a college or university environment to a commercial setting where their ideas can be incorporated into product development. The most frequent technology transfer agent is the college or university graduate.

For comparison to a larger institution and the innovation premium, an analysis of the operating and capital expenditures of 30 University of Waterloo spin-off companies conducted for the PricewaterhouseCoopers study determined that more than $ 910 million in economic activity was generated within the province, and more than $ 660 million for Waterloo Region. It can be successfully argued that the same effect is also applicable to Ontario college graduates.

26 PricewaterhouseCoopers (2001), University of Waterloo: Regional Economic Benefits Study, U. of Waterloo, pg. 30
5.3.7 Elements to Enhance Brantford’s Position as a Centre of Excellence in Municipal Innovation

Several stakeholders expressed an opinion regarding Brantford’s past decade of experience in downtown revitalization as being the key element to building towards establishing a Centre of Excellence in Municipal Innovation in the future. (“I couldn’t agree more - I think that this would be the missing piece in this story - the establishment of a structure that captures all of the things that we do well, to get the word out so that others can follow.”)

Some stakeholders acknowledged that there is ongoing discussion of the establishment of a Regional Innovation Centre (RIC) along these lines, and that if the community wants to attract attention to itself from outside the region, that this would be an excellent way to do it.

Stakeholders also suggested that the ultimate litmus test for the viability of such an entity would be the degree to which it is funded by sponsors or clients. (“The bottom line on it will be dollars and cents and how it gets supported.”)

Finally, there are some stakeholders who expressed an opinion that Brantford “may not be there yet”, citing that although the city has come a long way, there are many other centres that can also lay claim to innovative urban revitalization, such as Burlington, for example.

Apparent Demand

Some stakeholders commented that even at this relatively early stage in the Brantford downtown redevelopment, the demand for expertise in downtown redevelopment that has been attracted to the Brantford “story” from other jurisdictions appears to indicate that there would be a likely demand for this type of expertise. For example, as a result of this interest, there are at least two symposia on this subject planned in the upcoming months of 2012. As well, senior city officials are now being asked to speak on the subject as well.

Although it is still early in the process, some community stakeholders are generally of the opinion that momentum on this issue is moving in a positive direction, and that the relationship-building groundwork has been largely accomplished - in short, that if this is viewed as a desired outcome, that progress will be able to be made quickly to realizing the goal of establishing a local Centre of Excellence in Municipal Innovation.
6.0 ECONOMIC IMPACTS

6.1 Methodology: Economic Impact Modelling - Factors Affected by Universities & Colleges

Based on this analysis and on previous work by Adventus Research on the impacts of post-secondary institutions in Durham Region (UOIT - 2010), Brantford (Laurier Brantford and Mohawk College - 2005) and Waterloo Region (WLU - 2004), we note that the following issues are relevant to the discussion of the economic and non-economic factors affected by colleges and universities.

Although a university or college is primarily an educational institution, it is also an economic entity. It hires faculty and staff, pays wages and salaries and purchases a variety of goods and services from outside of the university. The incomes earned by those employed by the university/college and those employed by suppliers to the university/college are spent (to a large extent) back in the community, creating further rounds of economic activity. As well, students and visitors create economic activity that ripples through the local economy and generates additional activity in turn.

The total economic impact of an institution is not limited to its direct expenditures. New spending always generates a series of “rounds” of economic activity, the sum total of which is greater than the initial spending amount. For instance, if a college or university engages in a new capital project and spends $1 million, that amount flows to all of the inputs into the project: architectural services, services for machinery and, mainly, labour services to the people that work on the project. Those payments become, in turn, the income of those who receive it. That income gets distributed several ways. Some of it is taxed away at the source and some of it is saved. But much of it is spent on goods and services. And a small amount leaves the local community when people buy goods from outside sellers or when they travel; a process called “leakage”.

The “multiplier” is the technical concept that captures the extent to which the initial spending generates a magnified amount of economic activity. A multiplier of 2, for example, means that new spending of $1 million in the community will result in $2 million of total additional income in the community. The use of an appropriate multiplier allows for proper estimation of the full impact of an entity or a new spending project in a community.

A major Canadian post-secondary economic impact study was conducted by McMaster University\(^{27}\). Using an input-output model, the province-wide impacts of university spending were examined and it was found that Ontario Universities as a whole were responsible for a total of $8.3 Billion in the provincial economy, and a total of 182,000 jobs.

It was also noted that the “value-added” by colleges and universities is high in comparison with other industries, and multipliers are also high, and ranged between 2.15 and 2.4. Nevertheless, the local impacts of university expenditures are “typically consistent and significant. Their non-cyclical pattern shields the local economies and sectors dependant on these expenditures from wide swings characteristic of market-oriented economies and regions with limited economic bases.” More recently, the PricewaterhouseCoopers study conducted for the University of Waterloo in 2001 utilized an overall economic multiplier of 2.35 province-wide and 1.96 for Waterloo Region specifically.

\(^{27}\) Kubursi, A., The Economic Impact of University Expenditures, McMaster University, 1992
It is also important to remember that the economic impacts of any development are almost never contained within the boundaries of a single municipality. If even one employee lives outside of the municipality, some of the economic benefits will leak beyond the municipal boundaries. For this reason, it is necessary to estimate the proportion of employment and spending that will occur within a given municipality in order to accurately represent what the impact will be.

The following figure summarizes some relatively recent published economic multiplier - total GDP impact information found in recent studies. The Universities selected reflect a range of sizes and regions of institutions across Canada.

**Figure 38: Sustainable Economic Impact Estimates of Some Universities across Canada & Derivation of Multipliers**

<table>
<thead>
<tr>
<th>University/College</th>
<th>University Expenditure ($ mil/year)</th>
<th>Multiplier / Impact Ratio ($ x 1$ Expenditure)</th>
<th>Total GDP Impact ($ mil/year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of New Brunswick</td>
<td>$ 173 (00)</td>
<td>1.68 (Province-wide)</td>
<td>$ 291</td>
</tr>
<tr>
<td>University of British Columbia</td>
<td>$ 806 (98)</td>
<td>1.30 (Province-wide)</td>
<td>$ 1046</td>
</tr>
<tr>
<td>Lakehead University</td>
<td>$ 72 (98)</td>
<td>2.15 (Province-wide)</td>
<td>$ 155</td>
</tr>
<tr>
<td>University of Windsor</td>
<td>$ 139 (98)</td>
<td>2.15 (Province-wide)</td>
<td>$ 299</td>
</tr>
<tr>
<td>University of Waterloo</td>
<td>$ 314 (99)</td>
<td>2.34 (Province-wide)</td>
<td>$ 735</td>
</tr>
<tr>
<td>Wilfrid Laurier University</td>
<td>$ 92 (98)</td>
<td>2.34 (Province-wide)</td>
<td>$ 216</td>
</tr>
</tbody>
</table>

Sources: Council of Ontario Universities Study (2001), Adventus Research (2011)

**Review of Overall Economic Impact Derivation**

The calculation of the overall economic impact of monies forecast to be spent on the local post-secondary institutions over the 2011/12 - 2015/16 period depends on a number of factors, which can be grouped into four principal areas. The first three (direct, indirect and induced) are quantitative impacts, and are measurable in dollars. The fourth area is the qualitative impacts, concentrating on improvements to various aspects of the quality of a community, and is not usually measured in dollars.

**Direct impacts**

These are the impacts that result from initial expenditures in the local economy (including private sector construction projects planned as a direct result of investments):

- The costs of ongoing construction and renovation, with the associated wages and materials.
- The costs of operating expenditures, including:
  - Salaries (faculty & support staff),
  - Goods and services.

**Indirect impacts**

These include the subsequent purchases by suppliers of services and materials to sustain the original initiative:

- Salaries paid or jobs created from producing the supplies to be used in the construction or operation of the project.
- Spending of full-time and part-time students, faculty and staff (on and off campus):
  - Local student activity expenditures,
  - Consumer goods,
  - Recreation,
  - Entertainment,
  - Housing,
  - Miscellaneous goods and services.
Spending of visitors to the institutions to attend functions on campus:

- Open houses, tours, conferences sponsored by professional associations, societies etc., student and/or faculty events, academic conferences, sporting and cultural events, etc.

**Induced impacts**

These are the secondary economic effects that result when workers and suppliers in sectors stimulated by the direct and indirect expenditures spend their additional income on local consumer goods and services:

**Figure 39: Total Economic Impact**

| Direct Impacts | + | Indirect Impacts | + | Induced Impacts | = | Total Economic Impact |

**Qualitative Factors**

- **Urban revitalization issues**
  - Reclaiming derelict or declining buildings and areas,
  - Integrating new buildings with the architectural character of the downtown core,
  - Strengthening pedestrian-friendly neighbourhoods with a mix of activities within walking distance of homes,
  - Expanded entertainment facilities,
  - Buildings not suitable for commercial use that can be used as academic space.

- **Business & economic growth issues**
  - With respect to local business - have initiatives had impact on the growth and/or sustainability of your company?

- **Social issues / Volunteerism**
  - Student/staff involvement in charitable activities,
  - Increase in volunteer pool available,
  - High levels of participation in charities, fund raising events and volunteer work,
  - Community involvements, activities and donations.

- **Graduate Rates**
  - Student graduate rates: Example - How many 1st year students complete, withdraw, transfer out to another college or university?

In addition, following are some definitions to assist in the interpretation of the results.

**Initial expenditures** - The amount of expenditures directly made by the operators of the facility.

**Value Added** - The net output generated by initial expenditures, typically the sum of wages, rent, interest and profits in addition to indirect business taxes and depreciation minus subsidies.

**Employment** - The total person-years in full time equivalent jobs, generated by the facility and its sustaining activities.

**Taxes** - An estimate of the various taxes, including income taxes, HST, liquor, tobacco, etc., each linked with the level of government receiving it.

**Imports** - The goods and services acquired from outside the province to sustain the activities of the facility and its visitors (i.e. the leakage from the province).

**Multipliers** - The summary measures representing the division of the total impacts (direct, indirect and induced) by the initial expenditures.
6.1.1 Base Demographic & Comparative Data - Brantford/Brant & Ontario

For comparison purposes, Brantford/Brant is faster-growing and slightly less affluent than Ontario as a whole. By age, citizens of Brantford/Brant are very similar to those of Ontario as a whole. By occupational profile, citizens of Brantford/Brant again closely resemble that of Ontario overall, with a greater percentage of the workforce working in manufacturing and a smaller percentage working in business services than in Ontario as a whole.

Figure 40
Demographic Profile:
Brantford/Brant Census Metropolitan Area (CMA) & Ontario

<table>
<thead>
<tr>
<th>Selected Statistics</th>
<th>Brantford/Brant CMA</th>
<th>Ontario</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population – Selected Statistics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median age of population - 2006</td>
<td>39.6</td>
<td>39.0</td>
</tr>
<tr>
<td>2001 Population</td>
<td>118,086</td>
<td>11,410,046</td>
</tr>
<tr>
<td>2006 Population</td>
<td>124,607</td>
<td>12,160,282</td>
</tr>
<tr>
<td>2011 Population - Forecast</td>
<td>138,000</td>
<td>13,349,100</td>
</tr>
<tr>
<td>2031 Population – Forecast</td>
<td>184,000</td>
<td>16,366,200</td>
</tr>
<tr>
<td>Annual Forecast Growth Rate: 06-31</td>
<td>1.6%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Income – Selected Statistics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Median Earnings – Persons 15 &amp; over: worked full year, full time ($ 2005)</td>
<td>$41,741</td>
<td>$44,748</td>
</tr>
<tr>
<td>Median Income – All Private Households ($ 2005)</td>
<td>$56,624</td>
<td>$60,455</td>
</tr>
<tr>
<td>Education – Selected Statistics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Population – 15-64</td>
<td>82,610</td>
<td>8,263,165</td>
</tr>
<tr>
<td>Population 15-64 attaining university degree – Bachelor &amp; above</td>
<td>10,010</td>
<td>1,843,455</td>
</tr>
<tr>
<td>12.1%</td>
<td>22.3%</td>
<td></td>
</tr>
<tr>
<td>Labour Force – Selected Statistics</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total labour force: 15 yrs &amp; over - 2006</td>
<td>66,660</td>
<td>6,473,730</td>
</tr>
<tr>
<td>Total labour force: 15 yrs &amp; over – 2011 (estimated)</td>
<td>73,824</td>
<td>7,105,000</td>
</tr>
<tr>
<td>Business Services</td>
<td>10,915</td>
<td>1,274,345</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>14,210</td>
<td>899,670</td>
</tr>
<tr>
<td>Retail</td>
<td>6,960</td>
<td>720,235</td>
</tr>
<tr>
<td>Educational Services</td>
<td>4,045</td>
<td>433,485</td>
</tr>
</tbody>
</table>

In summary, while there are some small differences between Brantford/Brant and Ontario as a whole, these differences are relatively minor and therefore an economic impact analysis using similar multipliers to other Ontario studies is valid.

Introduction
An overall quantitative economic impact analysis of the Post-Secondary Institutions in Brantford (Laurier Brantford, Nipissing-Brantford and Mohawk College) follows in this section and is provided with low, medium and high estimates, in a cumulative five-year format. The low and high estimates use the lowest and highest estimates for construction and enrolment. The medium estimate uses the midpoints of the high and low estimates.

6.2.1 Calculation of Impacts - Public Construction

In order to calculate the impacts of construction, all significant public construction projects must be incorporated into the analysis. The following figure outlines all public construction projects underway, planned or proposed for Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford, as identified by the institutions to Adventus Research. It does not include projects that are considered as complete by Dec 1, 2011.

As can be seen from the previous figure, there is a wide variance between the low and high construction estimates for the Brantford post-secondary institutions for the 2012-2016 period, since none of the projects listed above are officially committed projects.

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28 Estimated at 500 beds, at a cost of $75,000 per bed, likely in two locations, plus land
29 Incorporated into residence complex, estimated at $300/sq ft and 25,000 square feet
30 Estimated at 130,000 square feet and $ 350/sq ft plus
31 Source: Mohawk College Finance Division: Representing a budgeted amount of $15,000 annually for each of the five years for miscellaneous minor renovations.

Figure 41
Laurier Brantford, Nipissing-Brantford & Mohawk College
Current or Planned Public Construction:
2011-12 to 2015-16 ($ millions)

<table>
<thead>
<tr>
<th>Institution/Project</th>
<th>Purpose</th>
<th>Cost ($ Millions)</th>
<th>Year Completed</th>
<th>Commitment Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laurier Brantford</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1 YMCA Complex</td>
<td>Recreation &amp; athletics</td>
<td>$ 60 M</td>
<td>2015</td>
<td>Probable</td>
</tr>
<tr>
<td>2 Student Residence Complex</td>
<td>Residences</td>
<td>$ 37.5 M&lt;sup&gt;26&lt;/sup&gt;</td>
<td>2016</td>
<td>Likely</td>
</tr>
<tr>
<td>3 Dining Hall</td>
<td>Supporting student residence</td>
<td>$ 7.5 M&lt;sup&gt;27&lt;/sup&gt;</td>
<td>2016</td>
<td>Likely</td>
</tr>
<tr>
<td>4 Library</td>
<td>Learning Commons</td>
<td>$ 50 M&lt;sup&gt;28&lt;/sup&gt;</td>
<td>2016</td>
<td>Likely</td>
</tr>
<tr>
<td>Nipissing-Brantford</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6 39 Nelson Street</td>
<td>Renovations</td>
<td>$.075 M</td>
<td>2016</td>
<td>Possible</td>
</tr>
<tr>
<td>Mohawk College</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7 Miscellaneous</td>
<td>Renovation</td>
<td>$.075 M&lt;sup&gt;29&lt;/sup&gt;</td>
<td>2016</td>
<td>Likely</td>
</tr>
<tr>
<td><strong>Total Value</strong></td>
<td></td>
<td><strong>$ 0 to 155.15M</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Sources: Stakeholder interviews, Laurier Brantford, Nipissing-Brantford & Mohawk College planning documents (2011)
6.2.2 Calculation of Impacts - Operating Expenditures

The direct operating (salaries and goods and services) expenditures of the three post-secondary institutions in Brantford are summarized in the following figure, for the 2012-2016 period. In some cases, ranges are provided where stated as such.

Figure 42
Laurier Brantford, Nipissing-Brantford & Mohawk College
Planned Operating Expenditures:
2011-12 to 2015-16 ($ millions)

<table>
<thead>
<tr>
<th>Item</th>
<th>2011-12</th>
<th>2012-13</th>
<th>2013-14</th>
<th>2014-15</th>
<th>2015-16</th>
<th>Spending 5 Year Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic</td>
<td>.490</td>
<td>.499</td>
<td>.508</td>
<td>.528</td>
<td>.538</td>
<td>2.56 - 3.45</td>
</tr>
<tr>
<td>Academic Services</td>
<td>.888</td>
<td>.905</td>
<td>.922</td>
<td>.957</td>
<td>.976</td>
<td>4.65 - 4.65</td>
</tr>
<tr>
<td>Administration</td>
<td>1.929</td>
<td>1.990</td>
<td>2.054</td>
<td>2.188</td>
<td>2.258</td>
<td>10.42 - 10.42</td>
</tr>
<tr>
<td>Campus Operations</td>
<td>1.578</td>
<td>1.608</td>
<td>1.639</td>
<td>1.702</td>
<td>1.734</td>
<td>8.26 - 11.13</td>
</tr>
<tr>
<td>Student Services</td>
<td>2.601</td>
<td>2.684</td>
<td>2.770</td>
<td>2.950</td>
<td>3.044</td>
<td>14.05 - 19.10</td>
</tr>
<tr>
<td>Residential Services</td>
<td>$16.69</td>
<td>17.07</td>
<td>17.45</td>
<td>18.25</td>
<td>18.66</td>
<td>$88.12 - 113.64</td>
</tr>
<tr>
<td><strong>Sub-Total</strong></td>
<td>$1.46</td>
<td>1.49</td>
<td>1.52</td>
<td>1.55</td>
<td>1.58</td>
<td>$ 7.60 - 9.25</td>
</tr>
<tr>
<td><strong>Nipissing-Brantford</strong></td>
<td>$ .696</td>
<td>.710</td>
<td>.724</td>
<td>.739</td>
<td>.753</td>
<td>$ 3.62 - 4.42</td>
</tr>
<tr>
<td>Academic - Part-time</td>
<td>.342</td>
<td>.349</td>
<td>.356</td>
<td>.363</td>
<td>.370</td>
<td>1.78 - 2.17</td>
</tr>
<tr>
<td>Staff</td>
<td>.219</td>
<td>.223</td>
<td>.228</td>
<td>.232</td>
<td>.237</td>
<td>1.14 - 1.37</td>
</tr>
<tr>
<td>Operating</td>
<td>$1.46</td>
<td>1.49</td>
<td>1.52</td>
<td>1.55</td>
<td>1.58</td>
<td>$ 7.60 - 9.25</td>
</tr>
<tr>
<td><strong>Sub-Total</strong></td>
<td>$ 5.68</td>
<td>5.85</td>
<td>3.39</td>
<td>1.94</td>
<td>2.03</td>
<td>$18.92</td>
</tr>
<tr>
<td>Mohawk Brantford</td>
<td>$ 4.620</td>
<td>4.759</td>
<td>2.936</td>
<td>1.579</td>
<td>1.626</td>
<td>$ 15.52</td>
</tr>
<tr>
<td>Salaries &amp; Personnel</td>
<td>1.058</td>
<td>1.090</td>
<td>.454</td>
<td>.395</td>
<td>.407</td>
<td>3.40</td>
</tr>
<tr>
<td>Operating: Goods &amp; Services</td>
<td>$ 5.68</td>
<td>5.85</td>
<td>3.39</td>
<td>1.94</td>
<td>2.03</td>
<td>$18.92</td>
</tr>
<tr>
<td><strong>Sub-Total</strong></td>
<td>$23.83</td>
<td>24.41</td>
<td>25.90</td>
<td>22.36-24.55</td>
<td>21.77-30.85</td>
<td>22.27-36.68</td>
</tr>
</tbody>
</table>

Sources: Laurier Brantford, Nipissing-Brantford, Mohawk College (2011)

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32 Operating expenditures are reported here as provided, and differ slightly from institution to institution.
33 All sub-totals are rounded to two decimal places. Numbers may not add up exactly due to rounding.
34 Nipissing-Brantford operating expenditures assumed to grow at 2% minimum (inflation) or 12% (inflation plus 10% program growth)
6.3 Economic & Employment Impacts of Post-Secondary Institutions on Brantford/Brant

In this section, we estimate the impact of capital projects and operations of the Brantford-based post-secondary institutions on local employment in Brantford /Brant. For example, how many jobs have been/will be created or supported by Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford?

6.3.1 Direct, Indirect & Induced Impacts of Construction: 2012-2016 - Brantford/Brant

The construction impact model calculations for the Brantford post-secondary institutions in Figure 43 are based on the initial estimated range of expenditures, as summarized in figure 40, of between $ 0 and $ 155.2 million (together with a midpoint calculation of $ 77.6 million).

They are based on the pro-rated calculations of the Econometric business model for the Region of Waterloo (including the identical multipliers used in the 2005 benchmark study). The model in turn uses standard multipliers derived from economic and technical databases published regularly from Statistics Canada, as well as locally derived data.

- For value-added construction impacts\(^{35}\): Ontario multiplier = 1.19; Local multiplier = 0.71
- In addition, job creation is based on an average total wage of $64,700\(^{36}\).

**Figure 43**

**Brantford Post-Secondary Institutions:**

**Construction Impacts - 2011-12 to 2015-16**

<table>
<thead>
<tr>
<th>Initial Expenditure</th>
<th>Ontario</th>
<th>Brantford/Brant</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low $0</td>
<td>Medium $77.6 M</td>
</tr>
<tr>
<td></td>
<td>Low $0</td>
<td>Medium $77.6 M</td>
</tr>
<tr>
<td><strong>Gross Output</strong>(^{37})</td>
<td>Multiplier</td>
<td>2.19</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 0</td>
</tr>
<tr>
<td><strong>Value Added</strong></td>
<td>Multiplier</td>
<td>1.19</td>
</tr>
<tr>
<td></td>
<td>Direct</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 0</td>
</tr>
<tr>
<td><strong>Wages &amp; Salaries</strong></td>
<td>Direct</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 0</td>
</tr>
<tr>
<td><strong>Employment (person years)</strong></td>
<td>Direct</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>0</td>
</tr>
<tr>
<td><strong>Taxes</strong></td>
<td>Federal</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Provincial</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Local</td>
<td>$ 0</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 0</td>
</tr>
</tbody>
</table>

*Sources: Adventus Research, Laurier Brantford, Nipissing-Brantford, Mohawk College (2011)*

---

\(^{35}\) Construction impacts are estimated differently than operating impacts, and multipliers are usually significantly lower. Also local multipliers are lower than provincial multipliers since a significant portion of value-added impacts will occur outside of the region.

\(^{36}\) Based on Econometric model estimates of typical recent wages in this region for these jobs, and adjusted to 2011 dollars

\(^{37}\) Gross output = initial expenditures plus value added
Brant Post-Secondary Institutions: Construction Impacts on Brantford/Brant

As has been stated earlier in the analysis, estimated construction and renovation costs for the Brantford post-secondary institutions over the 2012-2016 timeframe will likely total up to $155.2 million. These expenditures will support a temporary increase in income in the province of up to $184.7 million, of which up to $110.2 million will be retained within Brantford/Brant.

Based on an estimate of an average total wage of $64,700, a total of up to 1,904 person years of employment are estimated to be generated from the implementation of the proposed projects. Of this amount, up to 1,135 person-years of employment will come from Brantford/Brant, representing a 5-year average of up to 227 jobs.

In addition, the government will collect taxes at all levels. The federal government would collect up to $32 million, primarily from personal income taxes and HST. The provincial government would collect up to $23.4 million. Local government would collect up to $6.1 million, in fees, permits and increased revenues due to higher property values.

In terms of employment, the up to 227 Brantford/Brant direct and indirect construction and renovation-related jobs estimated to implement the proposed Brantford post-secondary projects over the 2012-2016 timeframe represent up to approximately 0.31% of the estimated total Brantford CMA labour force of 73,824 in 2011.
6.3.2 Direct, Indirect & Induced Impacts of Operations: 2012-2016 - Brantford/Brant

The sustainable economic impact estimate of the operations of the Brantford post-secondary institutions following in figure 44 is based on staffing and operational cost data supplied by Laurier Brantford, Nipissing-Brantford and Mohawk College (see Figure 42), and is presented in cumulative five-year form. They are based on the pro-rated calculations of the Econometric business model for the Region of Waterloo (including the identical multipliers used in the 2005 benchmark study). The model in turn uses standard multipliers derived from economic and technical databases published regularly from Statistics Canada, as well as locally derived data.

- For value-added ongoing operating impacts: Ontario multiplier = 1.67; Local multiplier = 1.33

**Figure 44**
Brantford-Based Post-Secondary Institutions:
Impacts of Operations - 2011-12 to 2015-16

<table>
<thead>
<tr>
<th>Initial Expenditure</th>
<th>Ontario</th>
<th>Brantford/Brant</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>$ 114.6 M</td>
<td>$ 128.2 M</td>
</tr>
<tr>
<td></td>
<td>Low</td>
<td>Medium</td>
</tr>
<tr>
<td></td>
<td>$ 114.6 M</td>
<td>$ 128.2 M</td>
</tr>
<tr>
<td>Gross Output(^{38})</td>
<td>Multiplier</td>
<td>2.67</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 306.0 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 378.6 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 267.0 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 330.4 M</td>
</tr>
<tr>
<td>Value Added</td>
<td>Multiplier</td>
<td>1.67</td>
</tr>
<tr>
<td></td>
<td>Direct</td>
<td>$ 99.5 M</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>$ 91.9 M</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 191.4 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 236.8 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 152.4 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 188.6 M</td>
</tr>
<tr>
<td>Wages &amp; Salaries</td>
<td>Direct</td>
<td>$ 70.2 M</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>$ 57.5 M</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>$ 127.7 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 157.9 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 101.7 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$ 125.8 M</td>
</tr>
<tr>
<td>Employment (person years)(^{39})</td>
<td>Direct</td>
<td>1,560</td>
</tr>
<tr>
<td></td>
<td>Indirect/Induced</td>
<td>1,278</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>2,838</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3,508</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,242</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,389</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,242</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,389</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,242</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1,389</td>
</tr>
</tbody>
</table>

| Sources: Adventus Research (2011) |

**Brantford Post-Secondary Institutions: Operational Impacts on Brantford/Brant**

The sustained economic benefits of the operations of Brantford Post-Secondary institutions are based on the direct operating expenditures of $114.6 - 141.8 million over the 2011-12 to 2015-16 period. This in turn drives additional expenditures of $191.4 - 236.8 million in the Province, of which $152.4 - 188.6 million will be spent within Brantford/Brant.

In terms of jobs created, according to this model, an estimated 2,838 - 3,508 person-years of work, or an average of 568 - 702 jobs, will be sustained by the activities of the Brantford post-secondary institutions in the province. Of this amount, 2,260 - 2,795 person-years - an average of 452 - 559 jobs - will be from Brantford/Brant.

\(^{38}\) Gross Output = Initial expenditure + value added

\(^{39}\) Average salary calculated at $45,000
In terms of tax revenues derived for the levels of government within Brantford/Brant, total operational impacts are estimated at $26.4 - 32.7 million for the federal government, $19.3 - 23.9 million for the provincial government, and $5.7 - 6.2 million for the local government.

In terms of employment, the 452 - 559 Brantford/Brant jobs estimated to be sustained by the activities of the Brantford-based post-secondary institutions represents 0.6 - 0.75% of the estimated total Brantford/Brant labour force of 73,824 in 2011.
6.3.3 Indirect Impacts: Students - Non Post-Secondary Institutional Expenditures

If the Brantford-based post-secondary institutions did not exist, most full-time students would attend other colleges or universities and take their spending with them. It is only the student’s non-college/university spending that is relevant to the matter of local area impact.

The student’s university/college expenditures on tuition fees, institutional parking, room and board in university/college residences etc. are part of the university/college income and have already been counted.

**Figure 45**

**Brantford Post-Secondary Institutions**

**Annual Indirect Impact of Students (2012 - 2016): Base Data & Assumptions**

<table>
<thead>
<tr>
<th>Base Data &amp; Assumptions</th>
<th>Data</th>
</tr>
</thead>
</table>
| **Average number of forecast full-time students:** | **Laurier Brantford** = 2,679  
Nipissing-Brantford = 512  
Mohawk College in Brantford = 1,260  
**Total** = 4,451 |
| **Percentage of students:** At home in Brantford/Brant; Commuting from outside Brantford/Brant; In residence; Off-campus rental accommodation**

At home & Commuting from outside = 15%  
On-campus residence = 15%  
Off-campus rental = 35% |
| **Local student spending in local economy - including transportation, clothing, restaurants, entertainment & miscellaneous**  
$ 5,400 over 8 months ($22 per day) |
| **Commuter student spending in local economy - including transportation, clothing, restaurants, entertainment and miscellaneous**  
$ 3,240 over 8 months ($12 per day) |
| **Students in residence spending in local economy - including transportation, clothing, restaurants, entertainment and miscellaneous**  
$ 4,800 over 8 months ($20 per day) |
| **Students in private rental accommodation spending in local economy - including transportation, clothing, restaurants, entertainment and miscellaneous**  
$ 9,600 over 8 months ($40 per day) |
| **Total average student spending**  
# students x (% commuters) ($ spent by commuter students) + (% local) ($ spent by local students) + (% residence)($ spent by residence students) + (% renting) ($ spent by renting students)  
$ 5,047,000 (Commuters) +  
$ 3,605,000 (Local) +  
$ 3,204,000 (Residence) +  
$ 14,955,000 (Rental) =  
$ 26,811,000 Annually |
| **TOTAL** | $ 26,811,000 Annually |

*Sources: Laurier Brantford, Adventus Research, Statistics Canada (2011)*

In summary, it is estimated that students attending the Brantford post-secondary institutions will spend approximately $26.8 million locally annually on non-institutional spending over the 2012-2016 period (including accommodation, transportation, food, clothing, entertainment, and miscellaneous uses). This is approximately equivalent to $6,033 annually per student. (Note: These estimates are proportional to the 2005 student spending estimates.)

---

40 Calculations from Section 3; Nipissing-Brantford & Laurier Brantford student numbers reflect shared concurrent program students
41 Approximations based on 2005 Laurier Brantford/Mohawk College study and stakeholder estimates
42 Source for student category expenditure estimates: Adventus Research: 2010 Durham College Study (originally from Statistics Canada), adjusted for inflation
6.3.4 Indirect Impacts: Visitors

Colleges and universities attract out-of-town students and other out-of-town visitors for attractions that include sporting events, theatrical, music or arts presentations, conferences and public lectures. Visitor expenditures attracted by university-held events are thus a significant source of “imported” revenue for Brantford/Brant.

Visitors to Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford

The local post-secondary institutions host open houses, conferences and formal/informal tours of the campus on a regular basis. Also, we have conservatively estimated informal and unorganized visitors for all purposes to the local post-secondary institutions for various meetings, seminars, and cultural/athletic/other programs as well.

Based on some spending assumptions consistent with other Ontario college and university economic impact studies (including the 2005 Brantford baseline study), Figure 46 summarizes the estimated annual average visitor spending for the 2012 - 2016 period, based on average full-time student enrolment estimates.

### Figure 46
Laurier Brantford, Nipissing-Brantford, Mohawk College in Brantford
Indirect Impact of Visitors: 2012-2016: Base Data & Assumptions

<table>
<thead>
<tr>
<th>Base Data Parameters</th>
<th>Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average number of forecast full-time students:</td>
<td></td>
</tr>
<tr>
<td>2011-12 through 2015-16</td>
<td>Laurier Brantford = 2,679</td>
</tr>
<tr>
<td></td>
<td>Nipissing-Brantford = 512</td>
</tr>
<tr>
<td></td>
<td>Mohawk College/Brantford = 1,260</td>
</tr>
<tr>
<td></td>
<td>Total43 = 4,451</td>
</tr>
<tr>
<td>Ratio of annual visitors/year to students44</td>
<td>6.85 to 1</td>
</tr>
<tr>
<td>Annual visitor average</td>
<td>30,489</td>
</tr>
</tbody>
</table>

#### Modelling Assumptions

- Percentage of visitors overnight ($75/night & 2 meals @ $ 20) 5%
- Percentage of visitors that stay in town for at least one meal 50%
- Average price per meal per visitor $ 10
- Average other spending per visitor (incl. gas, parking, goods) $ 10
- Total visitor restaurant/fast food spending = (.50 x 10 x 30,489) + (.05 x 10 x 30,489) $ 167,689
- Total visitor other spending $ 304,489
- Total visitor accommodation spending $ 114,333

**Total Annual Visitor Spending 2012-2016: Estimated** $ 586,511

From the assumptions in the previous figure, we estimate the impact of visitors to Brantford / Brant for the purposes of visiting the campuses of Laurier Brantford, Nipissing-Brantford and Mohawk Brantford to be in the range of about $586,000 annually. Given the nature of the visitors is to centre their visits on campus and the immediate campus vicinity, we estimate that, on a regional basis, most visitor impact will be on the Brantford downtown, and secondarily on the greater city of Brantford and Brant county.

43 Calculations from Section 3; Nipissing-Brantford & Laurier Brantford student numbers reflect shared concurrent program students
44 Estimation of this number is somewhat problematic, and dependant on a combination of complete institutional records and thorough estimates of informal visitors. For reference purposes, the 2005 Brantford study estimated this ratio at 5.48 to 1, and the 2010 UOIT ratio was 6.74 to 1. For this study, we have estimated the ratio to be 25% higher than the 2005 Brantford study ratio, reflecting the relative lack of complete data in this difficult to track parameter, and a ratio that is more consistent with that of other, more recent studies.
6.4 Comparisons with Reported 2011 Economic Impacts vs. 2005 Model Estimates

In this section, we compare actual reported economic impacts, extrapolated from the 2011 survey results, with the economic impacts forecast in the 2005 baseline study. The principal intent of this comparison is to gauge the relatively accuracy and therefore usefulness of the economic impact model employed in the both the 2005 and this (2011) study.

6.4.1 2005 Economic Impact Forecast - Review

In the 2005 baseline study, it was determined that, based on all information provided regarding forecasts for student enrolment, faculty and staff expenditures, capital expenditures, student non-university spending and visitors, the total average economic impact of Laurier Brantford (and Nipissing-Brantford) during the 2006-2010 time period would be between $20-27 million annually.

Similarly, the total average economic impact of Mohawk College in Brantford over the 2006-2010 time period was calculated at between $19-22 million annually.

Thus, the total average economic impact of all post-secondary institutions in Brantford over the 2006-2010 time period was estimated at $39-49 million annually.

One of the key elements of this study is to compare estimated forecast impacts from the 2005 baseline study with the actual results of the 2011 study. In order to do this comparison, we will now examine the 2011 business survey results and compare the calculated actual estimated economic impact with that forecast in 2005. This comparison is made in the following section.

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45 Adventus Research, Economic Impact & Benchmarking Analysis of Laurier Brantford & Mohawk College on the City of Brantford, Brant County and Other Local Regions, pg 54
46 Adventus Research, Economic Impact & Benchmarking Analysis of Laurier Brantford & Mohawk College on the City of Brantford, Brant County and Other Local Regions, pg 61
6.4.2 2011 Economic Impact - Survey Results & Comparison with 2005 Results

The following analysis utilizes the 2011 survey data collected and reported, and calculates the actual estimated overall economic impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on the City of Brantford.

As a first step in obtaining the 2011 actual estimated impact, we cross-tabulated the results of the estimation of economic impact survey question (question #6a, Figure 17), by the reported revenue range of the respondent companies (Figure 10).

**Figure 47**
Company Revenues vs. Post-Secondary Institutional Impact on Business
Greater City Only

<table>
<thead>
<tr>
<th>Company Revenues vs. Post-Secondary Institutional Impact on Business</th>
<th>Greater City Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under $500,000</td>
<td>1</td>
</tr>
<tr>
<td>$500,000 - $1 million</td>
<td>1</td>
</tr>
<tr>
<td>$1 million - $2 million</td>
<td>2</td>
</tr>
<tr>
<td>$2 million - $5 million</td>
<td>1</td>
</tr>
<tr>
<td>$5 million - $10 million</td>
<td>1</td>
</tr>
<tr>
<td>Over $10 million</td>
<td>0</td>
</tr>
</tbody>
</table>

Note - the analysis above is for the greater city-only responses, given that it is deemed more accurate to extrapolate total city impacts of the post-secondary institutions from the response pattern of greater city respondents.
The next step in the estimation process is to utilize the minimum of the reported ranges (for conservative calculation purposes) for all the reported ranges and to total the resulting calculated impacts, as follows:

**Figure 48**

*Estimated Economic Impact of Brantford Post-Secondary Institutions*  
*Actual 2011 Survey Results*

<table>
<thead>
<tr>
<th>Minimums of Self-Reported Revenue Ranges</th>
<th>$ 100k 47</th>
<th>$ 500k</th>
<th>$ 1 M</th>
<th>$ 2 M</th>
<th>$ 5 M</th>
<th>$ 10 M</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimums of Self Reported Impact of Business Ranges</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Very Significant Impact = 50%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Significant Impact = 25%</td>
<td>0</td>
<td>1 125k</td>
<td>0</td>
<td>2 1M 48</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Moderate Impact = 10%</td>
<td>2 20k</td>
<td>0</td>
<td>1 100k</td>
<td>1 200k</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Little Impact = 1%</td>
<td>10 10k</td>
<td>0</td>
<td>3 30k</td>
<td>0</td>
<td>0</td>
<td>1 100k</td>
</tr>
<tr>
<td>No Impact - 0%</td>
<td>4</td>
<td>1</td>
<td>6</td>
<td>2</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Negative Impact</td>
<td>1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>$ 0.030 M</strong></td>
<td><strong>$ 0.125 M</strong></td>
<td><strong>$ 0.130 M</strong></td>
<td><strong>$ 0.200 M</strong></td>
<td><strong>$ 0.000 M</strong></td>
<td><strong>$ 0.100 M</strong></td>
</tr>
</tbody>
</table>

From the bottom row of Figure 48, the total estimated economic impact of the Brantford post-secondary institutions on all respondents to the survey, as measured by the conservative calculation methods outlined previously, is $585,000.

The last step in this calculation is to extrapolate this reported impact to the entire business base of Brantford. Based on a total number of 3,953 businesses 49, the total estimated impact of the downtown Brantford-based post-secondary institutions from greater city businesses survey is:

\[
= \frac{585,000 \times 3953 \text{ (total businesses)}}{38 \text{ (total businesses sampled that reported revenue ranges)}}
\]

\[
= 50.9 \text{ Million } +/– 15\% 50 \text{ annually}
\]

\[
= 43.3 - 58.5 \text{ Million annually}
\]

When one compares the predicted economic impact from the 2005 baseline study of $39 - 49 million annually to the actual extrapolated results of the 2011 survey of $43.3 - 58.5 million annually, it can be seen that these results substantially overlap, and therefore the 2005 economic impact methodology employed is a good predictor of actual estimated economic impact results.

---

47 $100,000 was judged to be the effective minimum in this category.
48 Not included in the extrapolation calculation because the respondents are deemed to be non-representative of the greater city business community in terms of the impact of the post-secondary institutions on their businesses.
49 This number is based on the list of 2011 business records provided by the City of Brantford for the 2011 survey.
50 +/- 15% represents the standard statistical confidence limits for a survey sample of 38.
7.0 GENERAL CONCLUSION & RECOMMENDATIONS

Following is the general conclusion of this study:

1. In its totality, when measured by all elements of this study (survey, stakeholder interviews and economic impact modelling), the community / academic partnership to revitalize the Brantford downtown has been a significant and notable, but still developing success.

The ongoing effort by all players (academic institutions, the City, the business and cultural communities, and other levels of government) should be maintained and deepened to maximize and sustain the ultimate degree of economic success possible for the downtown, greater Brantford, Brant County and the Six Nations.

Following are the recommendations of this study.

1. That all parties continue to prioritize the importance of deepening communications channels and consultative collaboration.

All stakeholders indicated in the study that although excellent communication between all parties (the academic players, the City and the greater community) has been a hallmark of the downtown Brantford revitalization project to date, collaborative efforts will need to redoubled as the size of the academic footprint continues to grow, and the problems of accommodating growth while maintaining community balance become more complex.

2. That significant efforts continue be focussed on finding innovative ways to balance the academic year.

It became apparent in dialoguing with stakeholders that the full economic benefit of the downtown academic presence will not be realized without an innovative solution to the challenge of the summer months of current relative academic inactivity. This is a significant and real barrier to fully maximizing downtown economic revitalization.

3. That all parties strive to move forward to commence the downtown YMCA project as soon as is practicable.

The downtown YMCA was identified by all stakeholders as the key to next step in the revitalization process of the Brantford downtown - that of drawing the greater community back into the downtown on a regular basis with a significant and important new community destination - the downtown YMCA.

4. That the City and its partners prioritize the identification and engagement of a new college partner for Brantford.

With the imminent departure of most of the Mohawk College presence, stakeholders identified an emerging gap in the Brantford post-secondary education continuum. We concur with the subsequent conclusion of most stakeholders - that the best way to deal with this gap is to seek/attract a new college to the community. An ideal candidate would be one that has extensive knowledge of & awareness in the south-western Ontario region.

5. That the City and its partners move forward with taking the next steps to establish Brantford as a Centre of Excellence in Municipal Innovation.

While the downtown Brantford revitalization story is still building and evolving, we agree with the stakeholders who indicate that there is sufficient learning, insight and success accumulated locally over the past decade to justify the creation of a Centre of Excellence in Municipal Innovation.
8.0 APPENDICES

8.1 Stakeholders Interviewed

Armstrong, Paul
Dean - Community & Urban Studies, Health Sciences
Mohawk College - Hamilton
905-577-5001

Arraujo, Antonio
Director of Campus Operations
Laurier Brantford
519-756-8228 x 3701

Belanco, Trudy
Manager, Corporate Policy and Management Practices
City of Brantford
519.759-4222 ext 2340

Bouillon, Heather
Financial Coordinator
Laurier Brantford
519-756-8228 x 5795

Cantalini-Williams, Maria
Associate Dean (Interim)
Schulich School of Education
Nipissing-Brantford
519-752-1524, ext.7501

Cooper, Dr. Lesley
Vice-President & Principal
Laurier Brantford
519-756-8228 x 5881

Devine, Lacey
Enrolment & Liaison Officer
Mohawk Brantford
519-758-6041

Frabotta, John
Director - Economic Development
City of Brantford
519-751-9900 x 303

Gatward, Joan
Councillor, Ward 5 - County of Brant
Oakland
519-446-0060

Gladysz, Mark
Senior Planner, Projects
City of Brantford
519-759-4150 x 2388

Graham, David
Vice President - Finance
Mohawk College - Hamilton
905-575-2068

Herron, Bob
Branch Manager - Brantford
Cowan Insurance Group
519-756-4200

Huszczo, Melissa
Associate Registrar
Laurier Brantford
519-756-8228 x 5720

Jamieson, Matt
Economic Development
Six Nations
519-753-1950

Ludlow, Don
Owner - Ludlow’s, Brantford
519-752-5475

MacKenzie, Paisley
Senior Development Officer
City of Brantford
519-751-2617

Nower, Gary
Assistant Vice President - Physical Resources
Wilfrid Laurier University, Waterloo
519-884-1970 x 6210

O'Neil, John
Owner - Brant Stereo, Brantford
519-752-1783

Portelli, Steve
Corporate Commercial Lawyer
Waterous Holden Amey Hitchon
Brantford
519-759-6220

Reniers, Matthew
Manager - Policy, Planning & Heritage
City of Brantford
519-4150 x 2333

Rowan, Eric
Manager of Economic Development & Tourism
The County of Brant, Paris
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Broker - Remax Commercial
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519-756-8111

Walsh, Mike
Publisher
The Brantford Expositor
519-756-2020

Woodrow, Craig
Owner - Strodes Express, Brantford
519-754-0007
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8.3 Employer Opinion Survey

Employer Opinion Survey of the Economic Impact of Colleges & Universities on Brantford

Adventus Research Inc. and Strategic Research Associates have been engaged by the Grand Valley Education Society, in association with the City of Brantford, Laurier Brantford, Nipissing-Brantford and Mohawk College, to assess the impacts of all local post secondary institutions (Laurier Brantford, Nipissing-Brantford and Mohawk College) on the City of Brantford, and its downtown. (For the purposes of this survey, the downtown is defined as the area bounded by Grey Street (north), Brant Ave (west), Veterans Parkway (south) and Clarence (east))

In order to perform this assessment, we are speaking with owner/managers of a number of businesses and institutions in Brantford. Answering these questions should take only a few minutes. We can assure you that the information you provide will be kept strictly confidential. We thank you for your time and assistance on this project.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Address</th>
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</table>

Company Location

(Choose one) [ ] Downtown [ ] City, but not Downtown

Company Profile – All Respondents

1. What are your company’s major products or services offered? (Details would be appreciated - for example, volume, market share or market reach etc.).

2. What was your total revenue at this location in 2010? $ __________

Or provide a range if preferred (check one)

   a) Under $ 500,000
   b) $ 500,000 to $ 1 million
   c) $ 1 million to $ 2 million
   d) $ 2 million to $ 5 million
   e) $ 5 million to $ 10 million
   f) Over $ 10 million

3. How many employees do you have:
   a) At this location
   b) In total in downtown Brantford
   c) In total in Brantford, excluding downtown

4. Please indicate which category your business best fits into (check the single most applicable)
   a) Agriculture, Forestry & Fishing
   b) Manufacturing
   c) Construction
   d) Transportation & Storage
   e) Information/Communication
   f) Wholesale Trade
   g) Retail Trade
   h) Finance, Insurance, Real Estate
   i) Business Services
   j) Government Services
   k) Educational Services
   l) Health & Social Services
   m) Accommodation Services
   n) Other Products/Services
Company Questions - All Respondents

5. A) How well would you say that you know or are familiar with the programs of Laurier Brantford, Nipissing-Brantford and Mohawk College in Brantford (Elgin and/or Downtown campus)? (check one for each institution)

<table>
<thead>
<tr>
<th></th>
<th>Laurier Brantford</th>
<th>Nipissing-Brantford</th>
<th>Mohawk College</th>
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<tbody>
<tr>
<td>Very familiar</td>
<td>______</td>
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<tr>
<td>A little familiar</td>
<td>______</td>
<td>______</td>
<td>______</td>
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<tr>
<td>Not at all familiar</td>
<td>______</td>
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B) Can you name one program at any of these institutions? ________________________________________

6. A) How would you rate the current impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business in the past year? (estimating staff, student, and institutional spending as a percentage of your business)

- Very significant positive impact (the major part of our business = over 50%) ______
- Significant positive impact (a large part of our business =25-49%) ______
- Moderate positive impact (a moderate part of our business = 10-24%) ______
- Little but positive impact (a small part of our business = 1-9%) ______
- No impact at all (it doesn’t affect our business = 0%) ______
- Negative impact (hurts our business) ______

B) Briefly, what is the nature of the business impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business? (Characterize whether it comes from students, staff, the institution, type of goods/services sold, frequency, amounts, etc.).

C) From 2005 to 2011, how would you best characterize the changing impact of Laurier Brantford, Nipissing-Brantford and Mohawk College on your business?

- It has increased greatly ______
- It has increased moderately ______
- It has increased slightly ______
- It has not changed ______
- It has decreased slightly ______
- It has decreased moderately ______
- It has decreased greatly ______

D) During the period 2005 to 2011, could you identify how many students/graduates of Laurier Brantford, Nipissing-Brantford and Mohawk College you have hired?

- As part-time employees ______
- As full-time employees ______

E) If Yes (1 or more) to D), from which program(s) did you hire? ______________________________________

7. (Ask if not located in the downtown)

Are you considering opening or moving to a downtown Brantford location in the future (within the next 2 years)?

- Yes, we are considering an additional downtown location ______
- Yes, we are considering moving this location downtown ______
- No, we are not considering a downtown location ______

Please briefly explain your answer

__________________________________________________________________________________________
8. **What are your company’s likely plans in Brantford through 2011?** (choose as many as applicable)
   - Likely staff expansion in current location ______
   - Likely plant or building expansion in current location ______
   - Likely growth in number of uptown Brantford locations ______
   - Likely growth in downtown Brantford locations ______
   - Likely little or no change ______

9. **How would you best describe the impact of Laurier Brantford on the reputation of the City of Brantford?**
   - Laurier Brantford enhances the reputation of Brantford ______
   - Laurier Brantford has no impact on the city’s reputation ______
   - Laurier Brantford diminishes the reputation of Brantford ______

10. **How would you best describe the impact of Nipissing-Brantford on the reputation of the City of Brantford?**
    - Nipissing-Brantford enhances the reputation of Brantford ______
    - Nipissing-Brantford has no impact on the city’s reputation ______
    - Nipissing-Brantford diminishes the reputation of Brantford ______

11. **How would you best describe the impact of Mohawk College on the reputation of the City of Brantford?**
    - Mohawk College enhances the reputation of Brantford ______
    - Mohawk College has no impact on the city’s reputation ______
    - Mohawk College diminishes the reputation of Brantford ______

12. **Overall, could you please rate your level of agreement with the following statements?**
    a) Laurier Brantford contributes to the economic well-being of the City of Brantford.
    b) Nipissing-Brantford contributes to the economic well-being of the City of Brantford.
    c) Mohawk College contributes to the economic well-being of the City of Brantford.

    |                      | Laurier Brantford | Nipissing-Brantford | Mohawk College |
    |----------------------|------------------|---------------------|---------------|
    | Strongly Agree       | _____            | _____               | _____         |
    | Somewhat Agree       | _____            | _____               | _____         |
    | Neither Agree nor Disagree | _____     | _____               | _____         |
    | Somewhat Disagree    | _____            | _____               | _____         |
    | Strongly Disagree    | _____            | _____               | _____         |

**Company Questions - Downtown Respondents Only**

13. **How would you say the business climate has changed in the downtown core of Brantford since 2005?**
    - Significantly improved ______
    - Moderately improved ______
    - Slightly improved ______
    - Unchanged ______
    - Slightly worsened ______
    - Moderately worsened ______
    - Significantly worsened ______

14. **How big a factor have Laurier Brantford, Nipissing-Brantford and Mohawk College been to this change? (Check one for each institution)**

    |                      | Laurier Brantford | Nipissing-Brantford | Mohawk College |
    |----------------------|------------------|---------------------|---------------|
    | Very large factor    | _____            | _____               | _____         |
    | Large factor         | _____            | _____               | _____         |
    | Moderate factor      | _____            | _____               | _____         |
    | Small factor         | _____            | _____               | _____         |
    | Not a factor         | _____            | _____               | _____         |
Last Questions – All Respondents

15. Were you aware that Mohawk College plans to close its Elgin Street campus but will be maintaining a presence in the downtown?
   
   Yes ______
   No ______

16. Could you estimate the impact of these changes with Mohawk College campuses on the City of Brantford?
   
   Very large impact ______
   Large impact ______
   Moderate impact ______
   Small impact ______
   No impact ______

17. As a last question, are there any last comments that you would like to make about Laurier Brantford, Nipissing-Brantford and Mohawk College and their impact on the City of Brantford?

Thank you for your time and assistance on this project.
8.4 Economic Impact Expectations

**Economic Impact Expectations:** It is vital that clear expectations are outlined as to what information is sourced and included in an economic impact study. It is important to remember that an economic impact study is referred to as a modeling, which simply means it is not an exact science. It is a model or projection of what is feasible and attainable, based on historical, statistical data. Standard to all economic impact studies are the following:

**Direct Impacts**
Resulting from initial expenditures in the local economy: *(Including private sector construction projects created directly as result of the investments of Laurier Brantford, Mohawk College & Nipissing-Brantford)*

Examples include:
- Construction/renovation (Capital and/or one-time expenditures)
  - Equipment (To include HVAC, office/classroom equipment etc.)
  - Materials
  - Professional fees (legal fees, architectural fees, project management etc.)
- Operating expenditures
  - Salaries
    - Full and part time faculty
      - Normally this is a calculation completed of who lives locally and who lives within the area.
      - Different multipliers are then used as it is assumed those that are in area spend additional monies locally
    - Support staff (administrative, maintenance, janitorial)
      - Normally this is a calculation completed of who lives locally and who lives within the area.
      - Different multipliers are then used as it is assumed those that are in area spend additional monies locally
  - Goods and services

**Indirect Impacts**
Subsequent purchases by suppliers of goods and services to sustain the original and derivative expenditures
- Salaries paid or jobs created from producing the supplies to be used in the construction or operation of the project
- Spending of full time and part time students, faculty and staff (on and off campus)
  - Normally this is a calculation completed of who lives locally and who lives within the area. Different multipliers are then used as it is assumed those that are in area spend additional monies locally:
  - Local student activity expenditures
  - Consumer goods
  - Recreation
  - Entertainment
  - Housing
  - Misc. goods and services
- Spending of visitors to the region to attend:
  - Conferences sponsored by professional associations, societies etc.
  - Student and/or faculty events
  - Academic conferences
  - Sporting and cultural events
  - Family/friends of students
  - Homecoming, reunions, convocations
  - Theatrical, music or arts presentations
  - Open houses
  - Academic contests
- Visitors would include:
  - Elementary/secondary students and parents (academic contests, open houses, campus events)
  - Business visitors (guest lecturers, sales people, recruiters)
  - Event goes and facility users (public lectures, sporting events, theatres, academic contests, events)
  - Conference attendees (conferences, seminars and workshops)
  - Alumni (convocation, homecoming, reunions)
  - Casual visitors (visiting faculty, staff and students)
Induced Impacts
Workers from sectors stimulated by direct/indirect expenditures spend their income on consumer goods and services

Spending in Overview
- Students (full and part time)
- Faculty (full and part time)
- Staff (full and part time)
- Visitors
- Returning alumni
- The institution as an organization
  - Capital projects
  - Operations
  - Maintenance
  - Finance
  - Athletics and recreational services
  - Retail services
  - Food services
  - On and off campus spending

Sources/Issues:
Contact Mohawk, Laurier and Nipissing regarding:
- Staff, faculty and students
  - Statistical information regarding local versus out of town for each of above
- Suppliers to post secondary facilities
- Construction (this also ties into the urban revitalization of downtown)
  - Do we want to go to the extent where we identify some of the key construction companies, contact the company and determine whether or not their employees are local or out-of-town?

Urban revitalization Issues (qualitative discussion points)
- Reclaiming derelict buildings and areas
- Integrating new buildings with architectural character of the downtown core
- Strengthen pedestrian friendly neighborhoods with a mix of activities within walking distance of homes
- Promote neighbourhood stability
- Expanded public library
- Facilities for primary healthcare and community policing
- Expanded entertainment facilities (Sanderson)
- Buildings not suited for commercial are suited for academic space

Business Issues / Economic Growth Issues
- Student residences (including private sector)
- Recreation centre
- Need to work directly with economic development (City) to source info and contacts on new business to the area (was the initiative an attractor)
- Usually question local business re: has the initiative had (a) no (b) little (c) somewhat (d) recognizable (e) substantial impact on the growth and/or sustainability of your company?

Social Issues
Volunteerism
- Student, staff and faculty involvement in charitable activities
- Substantial increase in volunteer pool available
- High levels of participation in charities, fund raising events and volunteer work
- Community involvements, activities and donations

Graduate Rates
- Student graduate rates: Example: How many of the 1st year students
  - Complete their programs
  - Withdraw from their programs
  - Transfer out to another college/university

Graduate rates have a major impact on such things as residences, student spending, faculty requirements etc., which is why this becomes a major point.
8.5  Index of Figures

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8.6 Acknowledgements

The following organizations are to be acknowledged for their support and/or their financial commitment to the completion of this study:

- City of Brantford
- Grand Valley Educational Society
- Laurier Brantford
- Mohawk College of Applied Arts & Technology
- Nipissing-Brantford

8.7 Comments on Methodologies Used in This Report

All analysis methodologies, including the survey, stakeholder interviews, and economic impact modelling, utilize standard and accepted procedures.

Survey analysis is quantitative and is subject to the normal degree of statistical confidence of surveys of this type.

Economic impact modelling was accomplished using accepted multipliers and methodologies consistent with other similar recent studies.

Where assumptions are made, they are clearly stated as such. Dollar values are stated in Canadian dollars, unless otherwise specified.