



ECONOMIC DEVELOPMENT STEERING COMMITTEE AGENDA

Wednesday, March 8, 2017, 9:00 a.m. to 12:00 p.m.
55 Zina Street, Orangeville – Sutton Room (2nd Floor)

1. ECONOMIC DEVELOPMENT – March 8, 2017– ITEM #1
Previous Minutes

Review of Previous minutes and Terms of Reference.

2. ECONOMIC DEVELOPMENT – March 8, 2017– ITEM #2
Background Documents

Review and Discussion of draft documents prepared by the consulting team to provide an overview of the current economic conditions.

Recommendation:

THAT the background information: Dufferin County Economic Base Review, Availability and Suitability of Industrial and Commercial Land and Buildings, and Economic Programs in Nearby Communities and Comparative Overview be received;

AND THAT, the background documents be incorporated into materials to be distributed as part of the Stakeholder Consultation.

3. ECONOMIC DEVELOPMENT – March 8, 2017– ITEM #3
Background Paper on Typical Municipal Economic Development Roles and Structures

Review and discussion of a background paper by the consulting team to provide insight into typical roles and responsibilities with respect to economic development in a two-tier system.

Recommendation:

THAT the background paper, Typical Municipal Economic Development Roles and Structures Report be received;

AND THAT information be incorporated into future recommendations with respect to economic development roles in Dufferin County.

4. ECONOMIC DEVELOPMENT – March 8, 2017– ITEM #4
Stakeholder Consultation

In preparation for the upcoming stakeholder consultation sessions, review a presentation and survey prepared by the consulting team. Discuss session participants, engagement process, dates and survey distribution. Committee members please complete the survey and answer the questions in the presentation in advance of the meeting.

Recommendation:

For the consideration of the committee.

Next Meeting: May 4, 2017 at 4:00 p.m.
Sutton Room, 55 Zina Street, Orangeville



ECONOMIC DEVELOPMENT STEERING COMMITTEE MINUTES **Wednesday, January 18, 2017**

The Committee met at 9:00 am in the Sutton Room, 55 Zina Street, Orangeville

Members Present: **Chair Darren White, Warden**
Joe Andrews, Dufferin Board of Trade
Jane Aultman, Dufferin Board of Trade
Guy Gardhouse, East Garafraxa
Michele Harris, Headwaters Tourism (via Teleconference)
Gail Little, Dufferin Federation of Agriculture
Keith Lowry, Township of Mulmur
MaryAnn Lowry, Mulmur Economic Development Task Force
Bob Mitchell, Dufferin Arts Council
Diana Morris, Dufferin Board of Trade
Mark Ostrowski, Amaranth Economic Development Committee
Ruth Phillips, Town of Orangeville
Pete Renshaw, Orangeville Economic Development Committee
David Reimer, Grand Valley Economic Development Committee
John Telfer, Town of Shelburne
Nancy Tuckett, Town of Orangeville

County Staff: Sonya Pritchard, Chief Administrative Officer

Others Present: Gerry Hurst, OMAFRA

Consulting Team: **Global Investment Attraction Group**
John Tennant
Kelly O'Brien
Bill Elliot

Chair White called the meeting to order at 9:05 pm.

1. WELCOME AND INTRODUCTIONS

Members of the committee introduced themselves and identified which organization they represent.

2. CONSULTING TEAM OVERVIEW

John Tennant introduced the members of the Global Investment Attraction Group team and provided an overview of their backgrounds and experience.

3. REVIEW OF PROJECT TIMELINES

The consulting team reviewed the detailed project schedule (attached) with the committee.

There was considerable discussion with respect to stakeholder and public consultation and the importance of this phase of the project. Questions and comments focused on the purpose, method, content and expected use of the survey. The committee requested that written surveys in addition to online surveys be included and that the response period be longer than proposed. Members also recommended that care be taken to ensure all areas of the community are represented.

4. UPDATES ON LOCAL ECONOMIC DEVELOPMENT ACTIVITIES

Members provided updates as follows:

Municipal/ED Committee Updates

Melancthon – Economic development activity is limited and will remain so with no serviced land, little supporting infrastructure and few properties zoned industrial or commercial. Agriculture is the most important sector and some increases in secondary farming businesses through Mennonite community have occurred. The municipality is supportive of increased economic activity throughout the county with a primary interest in protecting farmland. They are working on their first Strategic Plan.

Mulmur – A community of communities. Residents have indicated they are not interested in gravel pits, windfarms or large industrial development. There is industrial and commercial zoned land in Primrose but Mulmur has the lowest percentage of tax assessment from these classes of all Dufferin municipalities. The Economic Development Task Force identified a desire to focus on cultural, tourism and outdoor recreation, agricultural ie farmgate sales. Most business is SME. Ski Hill and Mansfield Outdoor centre are biggest employers.

Orangeville – Implemented a diversified approach to business attraction and BR&E. Focus on advanced manufacturing, professional services, creative industries. Plastics cluster and food processing more recently. Food sector has good potential. Services through Small Business Enterprise Centre to stimulate entrepreneurship throughout the region. Tourism Plan and Cultural plan in place that include marketing and advertising campaigns. There is a Visitor information Centre. Updated land needs study finds designation is adequate to build out for both residential and industrial and commercial. Significant commuting population. There is pressure to re-designate employment lands to residential. This will impact the population to employment ration of 2:1. Workforce development is a priority to ensure available jobs and applicant skills match.

Amaranth – Economic Development and sustainability Committee in place for 10 years. A plan was done in 2011 and includes inventory of resources and SWOT. A fairly small industrial and commercial base exists. Identifies opportunities for sharing information and resources. They hold an economic development breakfast with an agriculture focused. They try to be open-minded to identifying local projects. Waiting for County work to move forward before doing any additional work. Employment land is at SE corner. Industry located there is privately-serviced. Large number of successful small businesses.

East Garafraxa – no formal economic development. Some land designated for employment in eastern part of township but there is no serviced land. Council is willing to look at opportunities as they come. Primary industry is agriculture and some secondary businesses. Many residents are commuters. Residents are not looking for development or many additional services. Happy to provide amenities through partnership agreements. Supportive of growth in urban centres of the County.

Grand Valley – Economic Development Strategic Plan developed 2 years ago. 7 sub-committees were formed and 4 have completed research and reports. Recommendations have gone to Council. Communications is most advanced. Community Centre, marquee events, senior care facility are the other focus areas. Anxious to see commercial employment in the community. They have a short term goal to gain 50 plus employees. The long-term objective is to develop a business park – 100 acres close to CR109. List of employment land contacts requires updating..

Shelburne – Has found that for investment to occur there needs to be servicing and funds available. There is a need to spend money to attract business. Official Plan work needs to be done in conjunction with economic development work. Currently two large developments and lots of opportunity in the industrial park. New diverse community is bringing new entrepreneurial ventures. KTH is largest employer in community. The Economic Development Committee is very active. Recently hired an ED Coordinator who is to focus on marketing. Working to get to population of 10,000. Two main considerations – traffic (Shelburne bypass), new diversity has been difficult but it is creating strength (cultural, arts, home based business). More service oriented focus for downtown. BIA is another area of interest.

Mono – not interested in extensive development but there is support for commercial sector growth along the highways. The community puts heavy importance on environmental preservation. There is support for the equine industry and creative home based businesses. Some agriculture including a winery. Mono provides a recreational environment and quiet residential area.

Sector Updates

Agriculture – Number of farmers is a small portion of total population but 4th largest sector of employment. The sector should have a higher profile and better focus. Agriculture properties are very diverse in size, needs, and operations. It is important to seek input from different types of farming operations. The Dufferin Federation of Agriculture (DFA) is very concerned about loss of farmland. A large portion of County is

farmable. A lot of land that was previously considered non-agricultural is now being farmed. Agriculture is growing industry. Increased traffic on regional roads impacts farming operations. How do we involve farmers in the process? Limited access to internet. Need to reach out to farm communities. DFA is willing to help with this.

Board of trade – Acts as representative of business. The Board has recently completed a strategic planning process and is in the process of implementing the recommendations. They are taking an advocacy role. Issues are access to skilled workforce, lack of high-speed internet, cost and access to utilities i.e. natural gas.

Tourism – Headwaters supports cross regional tourism with an inventory of 1000 tourism related businesses across the area. Provincial statistics show 400,000 visitors a year. The vision is to be the premier rural tourism destination. Integrating tourism into partners' economic development strategies. The focus is on creating a sense of place. They deal with the consumer audience focusing on marketing and promotion. They do business to business work as well – capacity-building, support. Tourism is a value added portion of many businesses. Five sectors – arts& culture, fresh and local, fun and festive, horse and country, nature and leisure, arts and heritage. Limited resources means leveraging work of others and partners; and taking advantage of innovation. Power of collaboration.

Arts and Culture – Represented by the Dufferin Arts Council (DAC) who developed a strategic plan a year ago and is currently working to create an action plan. DAC is trying to take on more of a leadership role within the arts industry. Support the arts through programs to raise awareness about arts – artist in the schools program, endowment fund to support arts education. Roundtable of art associations. Goal - Headwaters a destination for the arts.

Post secondary – Currently doing research on what programs should be provided to promote local economic development.

Role of Steering Committee

Chair White commented on the importance of the work of the committee emphasizing that each members' contribution would be valuable in working together to ensure success. There was agreement that there is a general sense of optimism and strong willingness to cooperate. The committee agreed to move forward with the motto:

“Together We Win”

There is agreement that there should be a sense of urgency about the work and a need to build the case for change. The committee supports a proactive approach and promoting, “progress not perfection.”

The role of the committee in the Strategic Planning process is detailed in the Draft Terms of Reference (attached). In summary, the committee will provide input and feedback, distribute information, participate in the consultation process, and be Champions of the project.

Committee Communications

A committee online portal will be set up to share documents, schedule events, and allow on-line collaboration and review of reports.

ADJOURNMENT

The meeting adjourned at 11:45 am

FUTURE MEETINGS:

Wednesday, March 8, 2017

9 am to 12 pm

Sutton Room

Thursday, May 4, 2017

9 am to 12 pm

Sutton Room

TERMS OF REFERENCE
ECONOMIC DEVELOPMENT STEERING COMMITTEE
STRATEGIC PLAN PROJECT

“Together We Win”

PURPOSE

County Council authorized the creation of an Economic Development Steering Committee in October 2015. The committee met several times to identify economic development activities across the County and to assess the value in working cooperatively to pursue economic development opportunities. In order to move this initiative to the next level and consolidate a number of parallel initiatives County Council authorized hiring a professional consulting firm to develop a County Economic Development Strategic Plan. The Steering Committee shall play a key role in this project, reviewing documents, providing advice and most importantly serving as Champions for the initiative.

COMPOSITION OF COMMITTEE

Committee membership will include representatives from each municipal economic development committee or the municipality and representatives from the following sectors: agriculture, business community through the Dufferin Board of Trade, tourism, arts and culture, and post-secondary education. Representatives from other sectors may be added if appropriate.

Current membership is 15. Quorum is 50% +1.

Chair shall be a member of County Council, appointed by County Council.

County staff will provide administrative support.

The consulting team shall complete research and create a strategic background report, shall develop and carry out council and stakeholder engagement, and prepare an economic development strategic plan.

Members of the committee may form small working groups or sub-committees to address specific tasks necessary to complete the project. The sub-committees may consist solely of Steering Committee members or may include additional community members or sector representatives if appropriate.

MANDATE

The committee will steer the process of the creating an Economic Development Strategic Plan working with staff and the consulting team. The consulting team will set the agendas and develop all of the background information and reports. County staff will distribute the information and provide the necessary logistical support.

The committee will review background documents and reports and provide comments and feedback.

Members will provide input and feedback in the planning of the consultation process. Members will promote the consultation process within their respective communities/sectors and will participate in the consultation process.

Members will distribute information about the project and its milestones to their stakeholder groups and encourage additional input and feedback from those groups.

The committee will evaluate options and make recommendations to County Council on strategic priorities and objectives.

Members will act as Champions of the project and promote the motto: "Together We Win."

REPORTING

Minutes of the meetings will be forwarded to County Council for review and adoption along with general project updates.

TERM

The term of the committee will be for the duration of the project. It is expected that the Economic Development Strategic Plan will include recommendations concerning the role of a Steering Committee if required. The purpose, composition, and mandate of such a committee will be determined at that time.

FREQUENCY OF MEETINGS

1.0 Dufferin County Economic Base Review

An understanding of Dufferin County's economic base, including a review of sector and sub-sector concentrations and job growth, is an important background foundational analysis to inform the economic development strategy on what sectors/subs-sectors/segments are growing and expected to grow in the future.

1.1 Approach

For this sector review, data from the EMSI Analyst program was analyzed. Analyst is a web-based tool developed by EMSI, a U.S. based company providing data on local and regional economies including jobs levels and growth; number of jobs by sector; number of businesses by sector and employee range; occupational and demographic data. It is made available to economic development agencies and other organizations in Canada and the United States through a subscription service. Access to the program was provided to the County of Dufferin through the Ontario Ministry of Agriculture, Food and Rural Affairs.

It should be noted that for the most part, data available through the EMSI Analyst program are estimates. However, EMSI has the best level of data currently available and the approach and assumptions are the same across all geographic levels. To develop estimates, EMSI combines employment data from the Statistics Canada Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Census, and Canadian Business Patterns (CBP) to form geographic estimates of employment. Projections are based on the latest available EMSI industry data, 10-year past local trends in each industry and growth rates from national industry projections from the Canadian Occupational Projection System (COPS) produced by Human Resources and Skills Development Canada. It is noted, however, that the projections do not take into account any locally specific economic development initiatives, or market, infrastructure or investment readiness changes that may materially impact the level of future growth in any sector in a region or community. Therefore the projections should be viewed as conservative estimates.

1.2 Job Growth and Location Quotients by Sector in Dufferin County

It is estimated by EMSI that the number of jobs in Dufferin County increased from 22,494 in 2011 to 24,354 which is an increase of 1,860 jobs or 8.3%, which is higher than the job growth rate for Ontario over this period (6.6%). In the earlier five year period (2006 – 2011) Dufferin County lost 2.4% of its jobs. Taking these losses into consideration, the ten year growth rate was 5.7% which is about half the job growth rate for Ontario (11.2%) over that period. As discussed later, the largest job losses were in the Manufacturing sector.

Sectors in Dufferin County that had significant growth and job growth rates higher than Ontario between 2011 and 2016 include Manufacturing, Transportation and Warehousing, Information and Cultural Industries, and Arts, Entertainment and Recreational Services.

Data on job growth at the 2 digit NAIC codes level is provided in Exhibit 1 and data for the County area municipalities on the number of jobs by sector and location quotient in 2016 is provided in Exhibit 2 and Exhibit 3 respectively. A brief review of the changes in number of jobs is discussed on the following pages. Data for Dufferin County at the four digit NAIC code level is provided under separate cover.

While the total number of jobs in Dufferin County increased by 8.3% between 2011 and 2016, lower growth has been projected by EMSI for the 2016 to 2021 period (4.0%), which is slightly higher than the level projected for Ontario as a whole (3.6%).

Exhibit 1: Job Growth and Location Quotients in Dufferin County

NAICS Code	Description	2011 Jobs	2016 Jobs	2011 – 2016 % Change	2011-2016 Ontario % Change	2016 Location Quotient
11	Agriculture, forestry, fishing and hunting	935	935	0.0%	-5.8%	1.86
21	Mining, quarrying, and oil and gas extraction	31	31	0.0%	4.6%	0.10
22	Utilities	189	196	3.7%	-9.1%	1.31
23	Construction	1,675	1,773	5.9%	11.2%	1.00
31-33	Manufacturing	2,104	2,511	19.3%	0.9%	1.23
41	Wholesale trade	802	765	-4.6%	6.0%	0.68
44-45	Retail trade	3,294	3,467	5.3%	6.9%	1.27
48-49	Transportation and warehousing	421	494	17.3%	13.2%	0.43
51	Information and cultural industries	308	483	56.8%	7.5%	1.04
52	Finance and insurance	615	525	-14.6%	8.1%	0.51
53	Real estate and rental and leasing	339	342	0.9%	17.7%	0.64
54	Professional, scientific and technical services	1,124	1,195	6.3%	10.4%	0.70
55	Management of companies and enterprises	48	55	14.6%	-12.2%	0.41
56	Administrative and support, waste management and remediation services	1,343	1,211	-9.8%	6.0%	0.98
61	Educational services	1,301	1,560	19.9%	8.8%	0.93
62	Health care and social assistance	2,879	3,104	7.8%	9.5%	1.14
71	Arts, entertainment and recreation	446	575	28.9%	11.8%	1.20
72	Accommodation and food services	1,900	2,146	12.9%	16.1%	1.31
81	Other services (except public administration)	1,599	1,810	13.2%	-0.3%	1.60
91	Public administration	798	882	10.5%	-2.4%	0.60
X0	Unclassified	344	293	-14.8%	-15.8%	0.86
	Total	22,494	24,354	8.3%	6.6%	-

Source: EMSI Q3 2016 Data Set

Exhibit 2: Jobs by Area Municipalities in Dufferin County - 2016

NAICS Code	Description	Amaranth	East Garafraxa	East Luther Grand Valley	Melancthon	Mono	Mulmur	Orangeville	Shelburne
11	Agriculture, forestry, fishing and hunting	223	31	247	174	34	129	65	30
21	Mining, quarrying, and oil and gas extraction	0	<10	0	0	0	30	0	0
22	Utilities	<10	<10	<10	<10	<10	13	152	0
23	Construction	192	70	109	94	128	92	989	100
31-33	Manufacturing	80	18	<10	12	107	46	1,906	334
41	Wholesale trade	73	30	<10	29	138	41	344	104
44-45	Retail trade	48	13	24	<10	318	<10	2,690	355
48-49	Transportation and warehousing	43	<10	13	0	41	0	325	69
51	Information and cultural industries	<10	<10	<10	0	<10	<10	458	0
52	Finance and insurance	21	13	18	12	29	12	368	50
53	Real estate and rental and leasing	26	<10	<10	<10	11	15	200	84
54	Professional, scientific and technical services	84	19	19	12	110	56	753	141
55	Management of companies and enterprises	0	31	0	0	0	24	0	0
56	Administrative and support, waste management and remediation services	69	40	30	38	213	40	699	83
61	Educational services	36	15	30	<10	121	53	968	332
62	Health care and social assistance	13	39	<10	<10	77	11	2,338	614
71	Arts, entertainment and recreation	64	49	22	23	128	36	230	24
72	Accommodation and food services	15	27	42	15	280	80	1,526	161
81	Other services (except public administration)	14	16	37	10	210	56	1,341	127
91	Public administration	18	<10	<10	<10	39	58	572	179
X0	Unclassified	<10	<10	<10	<10	24	<10	202	39
	Total	1,039	443	636	450	2,017	816	16,127	2,827

Exhibit 3: Locations Quotients by Sector for Dufferin County Area Municipalities

NAICS Code	Description	Amaranth	East Garafraxa	East Luther Grand Valley	Melancthon	Mono	Mulmur	Orangeville	Shelburne
11	Agriculture, forestry, fishing and hunting	10.40	3.42	18.80	18.76	0.82	7.66	0.20	0.51
21	Mining, quarrying, and oil and gas extraction	0.00	0.29	0.00	0.00	0.00	2.94	0.00	0.00
22	Utilities	1.13	1.96	1.57	2.30	0.48	2.67	1.53	0.00
23	Construction	2.54	2.17	2.36	2.87	0.87	1.56	0.84	0.49
31-33	Manufacturing	0.92	0.47	0.15	0.32	0.63	0.67	1.41	1.41
41	Wholesale trade	1.51	1.48	0.23	1.39	1.48	1.08	0.46	0.80
44-45	Retail trade	0.41	0.26	0.34	0.15	1.40	0.11	1.48	1.12
48-49	Transportation and warehousing	0.86	0.16	0.44	0.00	0.42	0.00	0.42	0.51
51	Information and cultural industries	0.25	0.91	0.31	0.00	0.09	0.35	1.49	0.00
52	Finance and insurance	0.49	0.71	0.68	0.66	0.35	0.36	0.55	0.42
53	Real estate and rental and leasing	1.14	0.22	0.13	0.26	0.24	0.83	0.57	1.37
54	Professional, scientific and technical services	1.17	0.62	0.44	0.38	0.79	0.99	0.67	0.72
55	Management of companies and enterprises	0.00	12.76	0.00	0.00	0.00	5.35	0.00	0.00
56	Administrative and support, waste management and remediation services	1.30	1.76	0.92	1.65	2.08	0.97	0.85	0.58
61	Educational services	0.51	0.50	0.69	0.15	0.86	0.93	0.87	1.70
62	Health care and social assistance	0.11	0.79	0.08	0.09	0.34	0.12	1.29	1.94
71	Arts, entertainment and recreation	3.14	5.57	1.76	2.56	3.22	2.24	0.73	0.43
72	Accommodation and food services	0.21	0.90	0.98	0.50	2.06	1.45	1.40	0.84
81	Other services (except public administration)	0.29	0.76	1.26	0.49	2.25	1.47	1.79	0.97
91	Public administration	0.28	0.32	0.12	0.11	0.32	1.19	0.59	1.05

NAIC 11: Agriculture, Forestry, Fishing and Hunting

The Agriculture, Forestry, Fishing and Hunting sector in Dufferin County remained stable with no change in the number of jobs at the County level between 2011 and 2016, compared to a job loss in this sector of 5.8% in Ontario. There were some small fluctuations at the area municipal level with three area municipalities in the County gaining a small number of jobs while others lost a small number of jobs in this sector. The sector's 2016 location quotient for the Region was nearly double the provincial average at 1.86. The most significant sub-sector is farms, accounting for 881 jobs (94% of the jobs in this sector), with a 2.1% job growth between 2011 and 2016, and location quotient of 2.18.

The communities with the highest number of jobs and location quotients (LQ) in the sector are East Luther Grand Valley (247 jobs, LQ of 18.8), Amaranth (223 jobs, LQ of 10.4) and Melancthon (174 jobs and LQ of 18.8).

A 1.9% decrease has been projected by EMSI for the number of farming jobs in Dufferin County between 2016 and 2021, compared to a 3.3% decrease in Ontario.

NAIC 23: Construction

The Construction sector in Dufferin County accounted for 1,773 jobs in 2016, with an increase of 5.9% from 2011 and 2016, which is lower than the Ontario job growth rate in this sector over that period (11.2%). The location quotient is average.

EMSI has projected that jobs in the construction sector in Dufferin County will increase by 1.7% between 2016 and 2021, compared to a projected 3.6% increase in Ontario.

NAIC 31-33: Manufacturing

Manufacturing is the third largest employment sector in Dufferin County, as it is in Ontario. The Manufacturing sector accounted for 2,511 jobs in Dufferin County in 2016, which is 407 jobs (19.3%) higher than its 2011 level. However, the 2016 level was about 1,000 jobs lower than the 2006 level, which was 3,512. The percentage jobs loss in the manufacturing sector in Dufferin County was higher than the percentage job loss in the sector in Ontario between 2006 and 2016 - a job loss of 28.5% compared to 19.9%. Dufferin County has gained back some jobs in its Manufacturing sector, and the rate of manufacturing jobs growth in the County between 2011 and 2016 was strong. The percentage growth in this sector over this period was higher in Dufferin County compared to Ontario: while there was only 0.9% job growth in Ontario, the sector job growth in Dufferin County was 19.4%.

The largest manufacturing job losses in Dufferin County over the ten year period were in the Transportation Equipment Manufacturing sub-sector (mainly Motor Vehicle Parts manufacturing - NAIC 3363, with a loss of 604 jobs), followed by Fabricated Metal Product Manufacturing sub-sector (mainly the Spring and Wire Product Manufacturing segment - NAIC 3326, with a loss of 297 jobs). Together these two sub-sectors accounted for 90% of the job loss in the manufacturing sector in Dufferin County over the ten year period. While most manufacturing sub-sectors in Dufferin County lost some jobs during the ten year period, jobs increased in most of these sub-sectors over the 2011 and 2016 period. However the 2016 job levels in most manufacturing sub-sectors are lower than the 2006 levels.

The majority of the manufacturing sector jobs in the County are situated within Orangeville, accounting for 1,906 jobs or about 76% of the County's jobs in this sector in 2016. The number of jobs in the Manufacturing sector in Orangeville increased by 301 between 2011 and 2016 – accounting for about 74% of the job growth in this sector in the County over that period. Shelburne accounted for the next highest number of manufacturing jobs at 334 in 2016 (and increase of 16 jobs from 2011), followed by Mono with 107 jobs (and increase of 17 jobs from 2011). Orangeville and Shelburne also have the highest location quotients in this sector – both 1.4. Mono's location quotient for the sector is much lower at 0.63.

At the 3 digit NAIC level, the strongest manufacturing sub-sectors (those that have location quotients of 1.3 or higher, and employment levels of over 100 jobs) include: Plastics and Rubber Products manufacturing, Machinery manufacturing, Furniture and Related Product manufacturing, Transportation Equipment manufacturing and Chemical manufacturing. Data on the number of jobs at the 3 digit manufacturing NAIC levels (industry sub-sector) is provided in Exhibit 4.

Drilling down further at the four digit NAIC level (industry segment) has revealed that the strongest manufacturing segments in Dufferin County in terms of number of jobs, job growth and concentrations as measured by location quotients are:

- Plastics products manufacturing with 564 jobs in 2016 which is an increase of 12.4% from 2011 (compared to a 3.2% job increase for this segment in Ontario), and a location quotient which is over five times (5.3) the provincial average.
- Motor vehicle parts manufacturing with 299 jobs in 2016, although only a job growth of 7.6% from 2011 which is significantly below the job growth for this sector in Ontario (17.9%). The segment's location quotient is high at 3.26.

Other segments which are smaller but have location quotients nearly double the provincial average or higher and that have had strong growth include:

- Dairy product manufacturing with 144 jobs, and a job increase of 45.5% between 2011 and 2016 (compared to 4.9% for Ontario), and a location quotient of 4.65;
- Beverage manufacturing with 84 jobs, and a job increase of 58.5% between 2011 and 2016 (compared to 23.8% for Ontario), and location quotient of 1.95;
- Rubber product manufacturing with 82 jobs, and job increase of 18.8% between 2011 and 2016 (compared to 3.5% for Ontario) and location quotient of 3.88;
- Office furniture manufacturing with 72 jobs, and job increase of 56.5% between 2011 and 2016 (compared to 11.3% for Ontario) and location quotient of 2.59;
- Metalworking machinery manufacturing, with 62 jobs in 2016 and job increase of 113.8% (compared to 19.3% for Ontario), and location quotient of 2.10.

The number of jobs in the Manufacturing sector in Dufferin County have been projected by EMSI to grow by 5.0% between 2016 and 2021, compared to a 1.2% growth projected for Ontario over this period.

Exhibit 4: Job Change and Location Quotients - Manufacturing Sub-sectors in Dufferin County

NAICS Code	Description	2011 Jobs	2016 Jobs	2011 – 2016 % Change	2011-2016 Ontario % Change	2016 Location Quotient
311	Food manufacturing	156	198	26.9%	-2.2%	0.65
312	Beverage and tobacco product manufacturing	53	84	58.5%	24.2%	1.81
313	Textile mills	12	11	-8.3%	-12.1%	1.10
314	Textile product mills	15	14	-6.7%	-8.6%	1.00
315	Clothing manufacturing	<10	<10	-	-33.8%	0.26
316	Leather and allied product manufacturing	<10	26	-	27.6%	5.61
321	Wood product manufacturing	138	148	7.2%	0.0%	1.00
322	Paper manufacturing	28	25	-10.7%	-18.5%	0.35
323	Printing and related support activities	84	58	-31.0%	-16.8%	0.81
324	Petroleum and coal product manufacturing	11	16	45.5%	17.7%	0.67
325	Chemical manufacturing	113	162	43.4%	5.9%	1.36
326	Plastics and rubber products manufacturing	571	646	13.1%	3.3%	5.06
327	Non-metallic mineral product manufacturing	41	60	46.3%	7.8%	0.84
331	Primary metal manufacturing	87	83	-4.6%	1.4%	1.11
332	Fabricated metal product manufacturing	88	93	5.7%	-4.4%	0.43
333	Machinery manufacturing	173	299	72.8%	13.7%	1.66
334	Computer and electronic product manufacturing	40	35	-12.5%	-27.3%	0.48
335	Electrical equipment, appliance and component manufacturing	23	21	-8.7%	-7.6%	0.46
336	Transportation equipment manufacturing	321	355	10.6%	13.7%	1.43
337	Furniture and related product manufacturing	107	143	33.6%	1.8%	1.60

Source: EMSI Q3 2016 Data Set

NAIC 41: Wholesale Trade

The Wholesale Trade sector accounted for 765 jobs in Dufferin County in 2016, with a decrease of 4.6% between 2011 and 2016, which can be compared to a 6.0% job growth in Ontario. The 2016 location quotient was 0.68 which is below average.

The number of jobs in the Wholesale Trade sector have been projected by EMSI to increase by 2.4% in Dufferin County between 2016 and 2021, which is slightly lower than the level projected for Ontario (3.6%).

NAIC 44-45: Retail Trade

The Retail Trade sector is the largest employment sector in Dufferin County, as it is in Ontario. The Retail Trade sector accounted for 3,467 jobs in Dufferin County in 2016, which represents a 5.3% growth from 2011, which is slightly lower than the Ontario job growth level of 6.9% for this sector.

The number of jobs in the Retail Trade sector have been projected by EMSI to increase by 3.0% in Dufferin County between 2016 and 2021, which is slightly lower than the growth projected for Ontario (3.6%).

NAIC 48-49: Transportation and Warehousing

Although significantly below the Ontario average, with a location quotient of 0.43 in 2016, the Transportation and Warehousing sector in Dufferin County accounted for 494 jobs in 2016, with a 17.3% growth from 2011. This can be compared to 13.2% for Ontario.

The number of jobs in the Transportation and Warehousing sector in Dufferin County have been projected by EMSI to increase by 4.0% in Dufferin County between 2016 and 2021, which is comparable to Ontario (3.9%).

NAIC 51: Information and Cultural Industries

This sector accounted for 483 jobs in Dufferin County in 2016. The job growth level between 2011 and 2016 was significantly higher than the Ontario growth rate – 56.8% compared to 7.5%. The location quotient was average for the overall sector.

The most significant industry segments are:

- Data processing, hosting, and related services at 274 jobs in 2016, a job increase of 53.1% from 2011, and location quotient of 12.1;
- Motion picture and video industries at 116 jobs in 2016, a job increase of 152% and location quotient of 1.67.

The number of jobs in the Information and Cultural Industries sector in Dufferin County have been projected by EMSI to increase by 10.6% between 2016 and 2021, which is significantly higher than the level projected for Ontario (2.1%). Much of the growth is projected for the two above mentioned segments. While the percentage job growth projected for the sector is high, the projected absolute growth for the overall sector is only 51 jobs.

NAIC 52: Finance and Insurance

The Finance and Insurance sector is underrepresented in Dufferin County with a location quotient of 0.51 in 2016, and a job decrease of 14.6% between 2011 and 2016, compared to a job growth of 8.1% for Ontario. The sector accounted for 525 jobs in Dufferin County in 2016.

A further decrease of 0.6% has been projected by EMSI for this sector between 2016 and 2021, compared to a 2.8% job growth projected for Ontario.

NAIC 53: Real Estate, and Rental and Leasing

The location quotient for this sector is below average (0.64), with the sector accounting for 342 jobs in 2016. Job growth in this sector between 2011 and 2016 was only 0.9% compared to the Ontario job growth level of 17.7%.

No change in the number of jobs have been projected by EMSI for this sector in Dufferin County between 2016 and 2021, compared to 3.6% job growth projected for Ontario.

NAIC 54: Professional, Scientific and Technical Services

The Professional, Scientific and Technical Services sector accounted for 1,195 jobs in 2016, which is an increase of 6.3% from 2011, which is lower than the 10.4% job increase over this period in Ontario. The sector is underrepresented with a location quotient of 0.70.

A 4.9% job growth has been projected for this sector in Dufferin County between 2016 and 2021, compared to a 6.3% growth projected for Ontario.

The Professional, Scientific and Technical Services sector is an important sector from an economic development perspective in that it includes high paying, knowledge-intensive jobs and is a tradable sector.

NAIC 56: Administrative, Support, Waste Management and Remediation Services

This sector consists of two distinct sub-sectors. The Administrative and Support services sub-sector includes industry segments such as office administrative services, facilities support services, employment services, business support services, etc. It accounted for 1,197 jobs in 2016, which is 8.8% lower than its 2011 job level. The waste management and remediation services sub-sector includes waste treatment, disposal and remediation services. This is a very small sub-sector at less than 15 jobs in 2016.

EMSI has projected that jobs in this sector in Dufferin County will decrease by 1.8% between 2016 and 2021 compared to a 1.2% job growth for Ontario.

NAIC 61: Educational Services

The Educational Services sector accounted for 1,560 jobs in Dufferin County in 2016, with a job growth of 19.9% between 2011 and 2016, which is higher than the job growth rate for Ontario over this period (8.8%). The location quotient is slightly below average at 0.93. While community colleges and universities are the segments with relatively high growth, their location quotients are well below average (0.54 and 0.10 respectively) while the elementary and secondary schools segment has a location quotient of 1.25, and the other schools and instruction segment has a location quotient of 1.30.

The number of jobs in the Educational sector in Dufferin County has been projected by EMSI to increase at a higher growth rate compared to Ontario between 2016 and 2021 – 6.2% compared to 4.4%.

NAIC 62: Health Care and Social Assistance Services

The Health Care and Social Assistance Services sector is the sector with the second largest number of jobs in Dufferin County (which is consistent with Ontario), with 3,104 jobs in 2016. The growth level between 2011 and 2016 was 7.8% which is slightly below the Ontario job growth rate for this sector (9.5%). The location quotient is slightly above average (1.14). The most significant industry segment in terms of number of jobs and location quotient is nursing care facilities with 742 jobs, including an increase of 100 jobs from 2011 (15.3% growth compared to 5.4% for Ontario) and a location quotient of 3.18. This is followed by general medical and surgical hospitals at 481 jobs in 2016, which is a 10.1% job decrease from 2011 compared to a 7.1% increase for Ontario. The location quotient for this segment is low at 0.67.

Relatively high job growth has been projected by EMSI for this sector relative to other sectors in both Dufferin County and Ontario – 8.6% and 8.3% respectively between 2016 and 2021.

NAIC 71: Arts, Entertainment and Recreation

The Arts, Entertainment and Recreation sector accounted for 575 jobs in Dufferin County in 2016, with high growth between 2011 and 2016 (28.9% compared to 11.8% for Ontario). The sector's location quotient is slightly higher than average (1.2).

The highest number of jobs is in the Independent Artists, Writers and Performers segment with 119 jobs in 2016, an 11.2% job growth between 2011 and 2016 (compared to 2% decrease for Ontario) and a location quotient of 1.49. The next highest job segment is Performing Arts Companies with 112 jobs in 2016, which represents a 45.5% increase from 2011 compared to a 7.1% increase for Ontario, and a location quotient of 2.84.

Jobs in this sector have been projected by EMSI to increase by 3.3% in Dufferin County between 2016 and 2021, which is comparable to the growth level projected for Ontario (3.1%).

The Arts, Entertainment and Recreation sector is also considered part of the Tourism sector, which is not part of the NAIC system. A portion of economic activity in the Tourism sector serves local as well as nonlocal markets.

NAIC 72: Accommodation and Food Services

The Accommodation and Food Services sector accounted for 2,146 jobs in Dufferin County in 2016, with a 12.9% job growth level between 2011 and 2015, which is slightly lower than the growth rate for Ontario (16.1%). The sector has a slightly higher than average location quotient at 1.31.

The largest segment is Full-service Restaurants and Limited-service Eating Places, with 1,751 jobs in 2016 and location quotient of 1.46. The job growth level between 2011 and 2016 was higher than most sectors but slightly lower than Ontario – 16.4% compared to 17.2%.

Relatively low job growth has been projected by EMSI for this sector in Dufferin County at 1.9% between 2016 and 2021, compared to a projected 3.3% growth for Ontario.

The Accommodation and Food Services is also considered part of the Tourism sector, which is not part of the NAIC system. A portion of economic activity in the Tourism sector serves local as well as nonlocal markets.

NAIC 91: Public Administration

The number of jobs in the Public Administration sector in Dufferin County was 882 in 2016. The number of jobs in the overall sector increased by 10.5% compared to a 2.4% decrease for Ontario. The sector is underrepresented with a location quotient of 0.60.

EMSI has projected that the number of jobs in this sector in Dufferin County will increase by 4.3% between 2016 and 2021, which is higher than the job growth rate projected for Ontario (1.0%).

Most Significant Industry Segments

The most significant industry segments (4 digit NAIC level) in Dufferin County in 2016 as measured by number of jobs and above average location quotients are shown below.

Exhibit 5: Significant Industry Segments in Dufferin County

NAIC Codes	Description	2016 Jobs	2011 - 2016 % Change	2016 Location Quotient
7225	Full-service restaurants and limited-service eating places	1,751	16%	1.46
6111	Elementary and secondary schools	1,185	13%	1.25
1110	Farms	881	2%	2.18
4451	Grocery stores	850	13%	1.57
6231	Nursing care facilities	752	15%	3.18
3261	Plastic product manufacturing	564	12%	5.3
5617	Services to buildings and dwellings	559	4%	1.35
8111	Automotive repair and maintenance	545	7%	2.79
8121	Personal care services	435	25%	1.93
4411	Automobile dealers	413	35%	2
6241	Individual and family services	405	19%	1.9
4461	Health and personal care stores	350	16%	1.35
3363	Motor vehicle parts manufacturing	299	8%	3.26
5182	Data processing, hosting, and related services	274	53%	12.14
2373	Highway, street and bridge construction	255	47%	3.44
6213	Offices of other health practitioners	242	8%	1.29
6212	Offices of dentists	225	18%	1.54
6116	Other schools and instruction	212	57%	1.3
8114	Personal and household goods repair and maintenance	209	14%	4.88

Source: EMSI Q3 2016 Data Set

Consideration was also given to how Dufferin County compared against other selected counties (Wellington, excluding Guelph; Grey; Simcoe, excluding Barrie; and Haldimand) for industry segments where there were at least 100 jobs and where the location quotient was 2.0 or higher. Excluding retail and service commercial segments, there were 13 industry segments that fit this criteria. Dufferin County's location quotient was the highest of the considered counties for most (9 of the 13) segments as noted below. The highest location quotients (LQ) for each segment by community are highlighted in yellow.

Exhibit 6: Dufferin County Strongest Industry Segments Location Quotients Compared to Other Counties

NAIC Codes	Description	Dufferin 2016 Jobs	Dufferin LQ	Wellington LQ	Grey LQ	Simcoe LQ	Haldimand LQ
1110	Farms	881	2.18	6.55	4.20	1.49	4.10
2373	Highway, street and bridge construction	255	3.44	2.98	0.21	0.71	1.31
3115	Dairy product manufacturing	144	4.65	0.47	9.91	0.75	2.81
3259	Other chemical product manufacturing	125	8.21	0.15	0.03	2.94	1.86
3261	Plastic product manufacturing	564	5.30	2.98	0.28	2.50	0.00
3339	Other general-purpose machinery manufacturing	154	3.68	4.01	0.54	0.31	2.34
3363	Motor vehicle parts manufacturing	299	3.26	6.42	2.69	5.37	0.15
4179	Other machinery, equipment, supplies wholesalers	196	2.15	0.28	0.30	0.91	0.09
4922	Local messengers and local delivery	107	6.67	4.52	0.42	0.08	1.80
5182	Data processing, hosting, and related services	274	12.14	0.68	0.40	0.10	0.83
5615	Travel arrangement and reservation services	124	2.07	0.28	0.93	0.34	0.00
6231	Nursing care facilities	752	3.18	2.12	1.38	0.84	0.53
7111	Performing arts companies	112	2.84	2.72	0.17	0.78	0.00

Source: EMSI Q3 2016 Data Set

The two largest communities in Dufferin County were then benchmarked against comparable sized communities in Wellington and Simcoe counties for the same industry segments to identify where Dufferin communities had a competitive advantage as measured by higher location quotients than the other communities considered. With the exception of just two industry segments (farms and performing arts companies), the location quotients were higher (and sometimes considerably) higher for Orangeville or Shelburne than the other communities as shown below.

Exhibit 7: Benchmarking of Most Significant Industry Segments by Community

NAIC Codes	Description	Orangeville	Shelburne	Centre Wellington	Erin	New Tecumseth	Collingwood
1110	Farms	0.14	0.64	4.65	4.57	4.57	0.22
2373	Highway, street and bridge construction	3.81	0.60	0.44	0.00	0.00	0.25
3115	Dairy product manufacturing	7.02	0.00	0.33	0.31	0.31	0.00
3259	Other chemical product manufacturing	12.40	0.00	0.56	0.00	0.00	10.71
3261	Plastic product manufacturing	8.00	0.00	0.94	0.45	0.45	0.10
3339	Other general-purpose machinery manufacturing	5.56	0.00	0.56	0.70	0.70	0.00
3363	Motor vehicle parts manufacturing	0.84	23.35	6.49	0.00	0.00	0.60
4179	Other machinery, equipment, supplies merchant wholesalers	0.49	1.62	0.11	0.31	0.31	0.43
4922	Local messengers and local delivery	10.08	0.00	0.49	0.00	0.00	0.00
5182	Data processing, hosting, and related services	18.30	0.00	0.08	0.00	0.00	0.00
5615	Travel arrangement and reservation services	1.18	2.28	0.07	0.22	0.22	1.42
6231	Nursing care facilities	1.77	17.11	2.90	0.01	0.01	0.03
7111	Performing arts companies	2.98	0.00	1.65	4.06	4.06	0.55

Source: EMSI Q3 2016 Data Set

1.3 Enterprises in Dufferin County

Data on number of businesses in Dufferin County is provided in Exhibits 6 and 7, and detailed data is available under separate cover.

Excluding the indeterminate category (firms with no employees or only contracted workers), there were 1,996 enterprise locations in Dufferin County in 2016, which represents an increase of 207 from 2011 or 11.6% as shown in the following exhibit.

Exhibit 8: Dufferin County – Number of Enterprise Locations by Number of Employees

# of Employees	2011	2016	Difference	% Difference
1-4	1,031	1,168	137	13.3%
5-9	369	386	17	4.6%
10-19	212	224	12	5.7%
20-49	116	142	26	22.4%
50-99	35	51	16	45.7%
100-199	19	15	-4	-21.1%
200-499	7	9	2	28.6%
500+	0	1	1	100.0%
Total, excluding Indeterminate	1,789	1,996	207	11.6%

Source: EMSI Q3 2016 Data Set

Micro-Enterprises (1 to 4 employees)

Excluding those in the indeterminate category, close to 59% of enterprise locations in Dufferin County are very small - micro-enterprises, employing 1 to 4 persons. In 2016, there were 1,168 enterprise locations in the micro-enterprises category in Dufferin County, which represents a growth of 137 or around 13% from 2011.

The sectors with the highest portion of micro-enterprise locations in Dufferin County are in the Construction (192) and Professional, Scientific and Technical services (138) sectors.

Small Enterprises (5 to 99 employees)

Enterprises with 5 to 49 employees account for about 38% of enterprise locations in Dufferin County, excluding those that are classified as indeterminate. About half of these are in the 5 to 9 employee range. Only around 2.6% of enterprises fit within the higher end of the Small Enterprise category (50 to 99 employees).

Medium-Sized Enterprises (100 to 499 employees)

There were 24 locations of medium-sized enterprises in Dufferin County in 2016. The majority (15) were in the 100 to 199 employee range. Only 9 were in the 200 to 499 employee range.

Large Enterprises (500+ employees)

Only 1 enterprise in Dufferin County in 2016 had 500 or more employees. This was in Health Care services.

Exhibit 9: Percentage of Dufferin County Businesses by Size

# of Employees	2016	% Total	% Distribution Ontario
1-4	1,168	58.5%	57.8%
5-9	386	19.3%	17.8%
10-19	224	11.2%	11.4%
20-49	142	7.1%	7.8%
50-99	51	2.6%	3.1%
100-199	15	0.8%	1.2%
200-499	9	0.5%	0.6%
500+	1	0.1%	0.3%
Total, excluding Indeterminate	1,996	100%	100%

Source: EMSI Q3 2016 Data Set

2.0 Demographic and Labour Force Analysis

2.1 Population and Age Characteristics

The 2016 population level of Dufferin County was 61,735, which represents an 8.5% increase from 2011, which is higher than the population growth rate for Ontario (4.6%). Dufferin's population growth level between 2011 and 2016 was

higher than bordering counties to the north and west. The population growth level for Grey County over this period was 1.4%. The population growth levels of Wellington County (excluding Guelph) was 4.9%. The population growth level of Simcoe County (excluding Barrie), was only slightly higher than Dufferin's growth at 9.1% between 2011 and 2016.

The largest population growth in Dufferin County between 2011 and 2016 was in Shelburne, with an increase of 2,280 persons (39% growth), which accounts for about 47% of the County population growth over this period.

Exhibit 10: Dufferin County Population

Municipality	2011	2016	Change	% Change
Amaranth	3,963	4,079	116	2.9%
East Garafraxa	2,595	2,579	-16	-0.6%
East Luther Grand Valley	2,726	2,956	230	8.4%
Melancthon	2,839	3,008	169	6.0%
Mono	7,546	8,609	1,063	14.1%
Mulmur	3,391	3,478	87	2.6%
Orangeville	27,975	28,900	925	3.3%
Shelburne	5,846	8,126	2,280	39.0%
Dufferin County	56,881	61,735	4,854	8.5%

Source: Statistics Canada, 2016 Census

Data on the age distribution of the population in Dufferin County from the 2016 Census will be available from Statistics Canada on May 3, 2017, and will be reviewed then. The median age of the county population in 2011 was 40 years which is about the same as Ontario (40.4 years).

2.2 Education Levels

Data on educational attainment from the 2016 Census is scheduled to be released by Statistics Canada in November 2017, which is beyond the time frame of this study. However, data from the 2011 Census is provided below to provide some insight on educational attainment in Dufferin County compared to Ontario.

Based on the 2011 Census data, the educational attainment level of the population aged 25 to 64 in Dufferin County was lower in that year compared to the Ontario average. As shown in Exhibit 2, while close to 65% of the Ontario population in that age cohort has attained a postsecondary certificate, diploma or degree, only about 58% of persons in that age cohort in Dufferin had attained this level of education. The Dufferin County attainment levels for apprenticeships and college were both higher than the provincial averages. On the other hand, while close to 29% of the Ontario population aged 25 to 64 in 2011 had attained a university certificate, diploma or degree at a bachelor level or higher, only around 16% in this age cohort in Dufferin County had attained that level of education.

Exhibit 11: Highest Educational Attainment by Type, Aged 25 – 64 Years, Dufferin County

Highest Educational Attainment	Number	Percent	Ontario Percent
No certificate; diploma or degree	3,390	11.1%	11.0%
High school diploma or equivalent	9,510	31.2%	24.3%
Postsecondary certificate; diploma or degree	17,560	57.6%	64.8%
Apprenticeship or trades certificate or diploma	3,350	11.0%	7.8%
College; CEGEP or other non-university certificate or diploma	8,335	27.4%	23.6%
University certificate or diploma below bachelor level	1,080	3.5%	4.5%
University certificate; diploma or degree at bachelor level or above	4,800	15.8%	28.9%
Bachelor's degree	3,260	10.7%	17.7%
University certificate; diploma or degree above bachelor level	1,540	5.1%	11.2%
Total population aged 25 to 64 years	30,460	100.0%	110%.0

Source: Statistics Canada, National Household Survey, 2011

2.3 Labour Force by Sector

Data on the Dufferin County labour force from the 2016 Census is scheduled to be released by Statistics Canada in November 2017, which is beyond the time frame of this study. However, data from the 2011 Census is provided below to provide some insight on the labour force in Dufferin County compared to Ontario.

Compared to the Ontario average, a slightly higher portion of labour in Dufferin County in 2011 was employed in sectors such as agriculture, construction, manufacturing, wholesale trade, retail trade and transportation and warehousing. A lower percentage of the labour force in Dufferin County, in particular, was employed in the professional, scientific and technical services sector – about 4.4% in Dufferin compared to 7.4% for Ontario.

Exhibit 12: Labour Force by Sector in Dufferin County

Sector	Number	Percent	Ontario Percent
11 Agriculture; forestry; fishing and hunting	970	3.0%	1.5%
21 Mining; quarrying; and oil and gas extraction	75	0.2%	0.4%
22 Utilities	310	1.0%	0.8%
23 Construction	2,620	8.2%	6.1%
31-33 Manufacturing	4,065	12.7%	10.2%
41 Wholesale trade	1,825	5.7%	4.4%
44-45 Retail trade	3,805	11.9%	10.9%
48-49 Transportation and warehousing	1,995	6.3%	4.5%
51 Information and cultural industries	575	1.8%	2.6%
52 Finance and insurance	1,005	3.1%	5.3%
53 Real estate and rental and leasing	520	1.6%	2.0%
54 Professional; scientific and technical services	1,405	4.4%	7.4%
55 Management of companies and enterprises	45	0.1%	0.1%
56 Administrative and support; waste management and remediation services	1,510	4.7%	4.5%
61 Educational services	1,980	6.2%	7.3%
62 Health care and social assistance	2,775	8.7%	10.1%
71 Arts; entertainment and recreation	640	2.0%	2.1%
72 Accommodation and food services	1,865	5.8%	6.1%
81 Other services (except public administration)	1,465	4.6%	4.3%
91 Public administration	1,890	5.9%	6.7%
Industry - not applicable	585	1.8%	2.7%
Total labour force population aged 15 years and over	31,915	100.0%	100.0%

Source: Statistics Canada; 2011 National Household Survey

2.4 Commuting Trends

Data from the 2016 Census on commuting flows is scheduled to be released by Statistics Canada in November 2017, which is beyond the time frame of this study. Data from the 2011 National Household Survey was reviewed to provide insight on past commuting patterns in Dufferin County.

The employed labour force of Dufferin County in 2011 was 29,665. The commuting flow data is based on the portion of labour that worked at a usual place of work which was 23,800 persons. It excluded the the portion that worked at home (2,345), worked outside Canada (85) and those with no fixed place of work (3,435). Commuting flow data was reported for 19,815 persons, which is around 83% of the Dufferin County labour force that worked at usual places of work in 2011. Data was not provided for the total labour force as only commuter flows of 20 or more persons were reported and data was not reported for Amaranth and Melancthon.

Based on the reported data flows, about 50% of the Dufferin County labour force that worked at usual places of work commuted out of Dufferin County for work. Mississauga and Brampton captured the highest shares of out commuters (2,665 and 2,635 respectively), followed by Caledon (1,215) and Toronto (1,265).

Of the portion that worked in Dufferin County (9,935), the majority worked in Orangeville (7,530) followed by Shelburne (1,280).

Availability and Suitability of Industrial and Commercial Land and Buildings

Dufferin County consists of 3 urban areas; Orangeville, Shelburne, Grand Valley and 5 rural townships of Amaranth, East Garafraxa, Melancthon, Mono, Mulmur.

Non-residential lands and buildings are predominately located in the 3 urban areas as indicated by population and growth. Major transportation routes include Highway 10, an extension from Hwy 410 Brampton in the south to Owen Sound in the north; Hwy 124 north to Collingwood and Georgian Bay on Lake Huron; Hwy 9 traversing west – east to Hwy 400 and Hwy 89 traversing west – east Hwy 400 as well.

Our analysis of ICI real estate included a review of existing studies including:

- 2014-02 Dufferin County Official Plan Background Report
- 2015-03 Dufferin County Official Plan
- 2015-11 Comprehensive Review & Shelburne West Secondary Plan
- 2016-03-15 Orangeville Land Needs Assessment Study
- 2016-03-14 urbanMetrics Orangeville - Land Needs Assessment & Commercial Market Analysis
- 2016-07-27 Dufferin County Land Needs Update

Web searches for available lands and buildings were conducted on each Town and Township website.

Further review included interviews and discussions with Real Estate Brokers and Developers with experience doing business in the County as well as Economic Development Steering Committee members representing area towns and townships.

Finally, we physically toured the major employment areas for a first-hand view of industrial subdivisions and commercial nodes, as well as designated employment lands.

Orangeville

Orangeville's website property search function is user friendly and comprehensive.

- Orangeville Business Park - fully-serviced, access to Highway 10 and the GTA
- Veterans Way community offers additional land
- range of available commercial and industrial buildings
- Lands need studies as part of Official Plan review indicate that Orangeville has employment land sufficient to meet needs to build out in 2036
- The Humber lands (29 acres) is under review and represents various opportunities

Shelburne

Shelburne website provides Industrial Park listings and Commercial / Retail opportunities.

Shelburne Industrial Park

- 5 acres – Luxton Way, Fully Serviced, Canopy Development Corporation
- 50 acres – Prentice Dr., Fully Serviced

Many commercial and retail opportunities in central business area and designated malls.

Melancthon

- No serviced or serviceable industrial land – no land zoned industrial and commercial

Mulmur

- Pre-zoned industrial and commercial land in Primrose (north side of the highway 89 at T junction in southwestern corner of municipality)
- Mulmar's Strategic Plan (2013-2018) seeks to "increase industrial/commercial base from <2% to 10% of tax revenue by 2018, however, it has declined.
- No website listing of properties

Amaranth

- Industrial and commercial development largely in south eastern corner bordering on Orangeville
- Land is privately owned with servicing arranged by owners on each property. Water sourcing has not been an issue.
- The established developed area includes a secondary Woolwich Dairy operation, Dufferin Transfer Station, John Bus Garage, Holmes Agro, Orangeville Water Softener and Maples Academy.
- Possible new privately owned unserviced area opening by a land owner who has an anchor tenant
- No website listing of properties

Grand Valley

Grand Valley provides a listing of available employment lands with contact information on owners and a contact info at the Town. The information is dated 2015. This should be updated and more information provided on size, servicing and zoning.

- Would like commercial development. Some commercial land available as mentioned above. Possibility of land adjacent to and south of settlement area could be sold and developed

East Garafraxa

- Designated triangle shaped area in the eastern part of municipality (bounded on two sides by Highway 109 and Durham #3). Limited ability to service land but would consider if approached. Some businesses have bought land recently
- No website listing of properties

Mono

- No land for development, existing commercial development along highway 10
- No website listing of properties

SWOT Analysis

Strengths

- There is sufficient supply of vacant land and buildings (predominately in Orangeville/Shelburne) to service future needs. Shelburne, has applied to convert some nonresidential designated lands to residential, which would still allow for sufficient supply.
- There appears to be a sufficient mix of industrial, commercial and office supply to meet absorption needs
- Competitive pricing compared to GTA communities
- Developers and realtors indicate municipal and county staff are business friendly and helpful

Weakness

- No major 400 series highways

- Is there a suitable mix of required sites (sizes) and buildings (ceiling heights) to accommodate growth?

Opportunities

- Growing population base allows for expanded commercial opportunities
- Adaptive re-use or upgrading of existing buildings (already taking place)
- Consolidated employment land database on County website
- Target specific GTA industries for expansion / relocation

Threats

- Changes in existing business uses from industrial to warehousing decreases tax income
- Local employment availability
- No targeted programs from post-secondary to facilitate sector growth (i.e. manufacturing)

Incentives

Downtown Orangeville Heritage Facade Improvement Program

Shelburne Community Improvement Plan currently under discussion and analyzed by local Economic Development Committee

Discussions with Real Estate Community

Our analysis included discussion with realtors and developers who have been doing business in the County for years as well as close by jurisdictions. They all spoke positively about doing business with both levels of government and their staff.

Although there has been population growth, this was not seen as a driver for industrial growth and comments were made on the length of time some industrial properties have been on the market and even employment lands to the east in southern Simcoe County that have been vacant for some time. Outside greenfield investments such as KTH and acquisitions like Saputo were noted as welcome but not typical.

There is the “Cinderella Story” of SME’s who own their plant and buildings in close by GTA communities, selling those holdings for substantial profit and relocating to Dufferin County for more cost-effective operations and real estate savings for employees as well. This was debunked by our interviews and only one instance was cited of this occurring. Most observed that supply chains and transportation links keep companies along the 400-series network of highways. There could be opportunity to target very specific subsectors in the GTA with a business value case for expansion / location to Dufferin County with a planned targeted calling program.

It is expected that population growth will continue to fuel retail and commercial development, with growth in industrial coming from SME’s within the county.

County of Dufferin - Building Department
 Building Permits - Commercial & Industrial

	Commercial,				Industrial			Total # of Permits	
	New (Wind Turbines)		New (Other)	Additions & Alterations	New	Additions & Alterations			
2016			5	\$1,507,000	11	1	\$300,000	2	19
2015	16	\$12,000,000	19	\$2,605,000	19	5	\$910,000	1	60
2014			3	\$835,000	21	3	\$163,000	4	31
2013	51	\$38,250,000	5	\$2,950,000	12	9	\$1,371,000	3	80
2012			6	\$298,000	20	1	\$100,000	2	29
2011	9	\$9,750,000	11	\$910,000	32	2	\$128,000	3	57
2010			4	\$2,313,000	24	1	\$350,000	2	31
2009			2	\$727,000	10	1	\$130,000	2	15
2008	88	\$26,070,000	12	\$3,778,000	13	4	\$1,274,000	6	123

The number of permits issued for Additions/Alterations to existing structures is listed, but without Construction Values.

Economic Programs in Nearby Communities and Comparative Overview

	Wellington Economic Development	Simcoe Economic Development	Haldimand Economic Development & Tourism
Staffing	6	6	6
Municipalities	7	16 (not including Barrie / Orillia)	5 major population centres
Programs	BR&E Festivals & Events Investment Attraction Tourism Workforce Development	BR&E Growing & Supporting Entrepreneurship Investment Attraction Talent development	BR&E Downtown Development Investment Attraction Rural Development Tourism
Incentives	2015 the County adopted a CIP Program that allow for support to lower tier municipalities individual CIP Programs.	The County is in consultations with the Province and lower tier municipalities for regional support of CIP's. Some lower tier municipalities offer CIP incentives Arts, Culture and Heritage (Build, Natural and Environmental) Grant Program.	Downtown Financial Incentives Community Improvement Plan Tourism & Agriculture Directional Signage Program Rural Water Quality Program Rural Business and Tourism Community Improvement Plan
Investments			
Budgets	\$1,400,000*	\$5,900,000**	\$768,000 (2014)
Other Funding	RED Program, ICCI		
Formal external partnerships			EDCO Investment Alliance
Targeted sectors	Agriculture Creative Healthcare Manufacturing	Agriculture Health & Wellness Manufacturing Oil and Gas Manufacturing	Agribusiness Heavy, Service and Selected Light Industries Food, Film, Tourism
Reporting Structure	CAO's Office	Planning > Engineering, Planning & Environment	General Manager

*includes funding for SWIFT internet project and large International Plowing Event

** Full Planning and Economic Development Budget

Dufferin County Compared to Other Selected Counties for Key Economic Indicators

Indicator	Dufferin	Wellington Without Guelph	Simcoe without Barrie	Haldimand
Number of Jobs - 2016	24,354	44,609	135,024	20,861
Job Growth (2011 - 2016)	8.3%	12.9%	7.3%	6.6%
Population - 2016	61,735	90,932	338,216	45,608
Population growth (2011 - 2016)	8.5%	4.9%	7.5%	1.6%
Land Area (Sq. km.)	1,486.31	2,573.26	4,781.77	1,251.54
Jobs to Population Ratio	0.39	0.49	0.40	0.46

Key Takeaways:

All three selected counties have completed Economic Development Strategies; Simcoe – 2011, Wellington – 2012 and Haldimand – 2016.

While the characteristics of each County are not identical, they provide some valuable guidance and considerations as Dufferin County moves forward in its Economic Development Strategy.

All counties have a mix of rural and urban settlements with longtime established clusters of agriculture, manufacturing and tourism. With the changing economy, each has looked to develop programs that utilize specific assets and develop incentives to promote and grow. Availability of serviced employment lands varies greatly, however there is an understanding of this need and the associated investment readiness requirements.

Community Improvement Plans are utilized as an important tool by all counties, whether at the lower tier or to be further supported by the county. Haldimand and Simcoe Counties have unique incentives, targeting specific segments, over and above geographic downtown or commercial areas.

Interviews have been arranged but not completed with the 3 counties. They all have agreed to share info on condition that the aggregated information will be shared. Confirmation of budgets (including outside funding), investments and outside partnerships will occur.

Dufferin County Economic Development Strategic Plan

Background Paper on

Typical Municipal Economic Development Roles & Structures

Dufferin County is developing its first Economic Development Strategic Plan to provide the County with a framework and road map for its involvement in economic development. To encourage discussion among stakeholders, councillors and officials, this paper outlines typical municipal economic development roles and structures, and considerations that can influence which levels of government undertake them.

Goals of Municipal Economic Development Programs

The overarching goal in economic development is to improve the economic well-being of a community through policies and initiatives that will increase the municipal tax base and that will foster business and job creation, retention and expansion; beneficial investment; the health of the goods, services, agriculture and tourism sectors; economic diversity; and quality of place. Economic development does not equate simply to economic growth; rather it seeks, in addition, to encourage an enhanced quality of life and a qualitative balance with other community goals such as sustainability.

Economic development is a longer-term investment to be sustained through both good and challenging economic times. Efforts are cumulative. Immediate payback is seldom the norm. Results come over the medium- to long-run.

Performance metrics for initiatives and programs should be based principally on the outcomes that they ultimately will directly influence. There is also merit in reporting on the inputs and activities designed to contribute to the outcomes, though they are not ends in themselves.

Municipal Policies and Infrastructure Investments

Economic development is one of many lenses through which elected municipal officials and staff must view issues when developing policies and taking decisions on budgets and programs. The desire to promote economic growth and support the creation of jobs must be weighed together with other goals, such as planning and the environment.

Municipal infrastructure investments are critical to economic development, especially for roads and the provision of water and sanitary sewage for industrial and commercial sites. Having a varied inventory of immediately available industrial and commercial sites and buildings – ideally many fully serviced – is a prerequisite to attracting new businesses and meeting the expansion needs of local businesses. A considerable number of municipal governments invest in the establishment of their own industrial and business parks to ensure the ready availability of serviced land.

Some municipalities choose to develop targeted municipal initiatives to encourage economic development outcomes. Brownfield and Downtown or Main Street Redevelopment programs, involving tax incentives and/or grants, are examples.

High-speed broadband is also a vital part of modern infrastructure that significantly enables and influences economic development. Private sector providers are involved but rural and remote areas can be more costly to service adequately. The Federal and Ontario governments continue to offer some matching funding, including for community initiatives. Some communities have been able to capitalize on government or educational networks and needs to kick-start development. Other municipalities have ensured that conduit for broadband fibre is laid when other services or infrastructure are provided.

Also of importance in terms of municipal contributions is the availability of public transit to get people to and from work places.

Typical Components of Economic Development Programs

Retention and Expansion of Existing Businesses

The retention and expansion of existing businesses are core objectives of economic development programs. Economic development organizations generally rank business retention and expansion as their number one economic development activity. As with a company's sales development efforts, it tends to be easier and less expensive to retain and grow the existing business base, as compared to identifying, cultivating and convincing new clients.

Well-structured and systematic business retention and expansion (BR&E) programs build relations with existing businesses and identify value-added assistance to help them sustain and grow their business, for example through export assistance or research and development linkages. BR&E calls generate valuable aggregate data on the plans, concerns, needs and success factors of local businesses. This can inform municipal decision making. When it comes to attracting new businesses, existing local businesses are on the front lines and best placed to help identify the community's real assets and strengths. Companies can also identify supply chain partners (suppliers and customers) that might be encouraged to establish a presence.

In two-tier municipal structures, the lead for business retention and expansion activity is generally left to the lower-tier municipalities as they are closest to local firms and have the prime interest in responding in the first instance to their taxpayers' needs. Joint effort and the sharing of information between the two tiers (along with coordinated involvement of provincial representatives too) is of obvious value given shared interests and responsibilities. Where smaller lower-tier municipalities have limited resources, regional or county involvement can contribute to joint BR&E programs that will draw on a larger pool of similar companies.

In a number of two-tier regional or county situations, the senior-tier's economic development program may provide dedicated staff or project funding support from which less populous second tier municipalities can benefit, sometimes exclusively or in other cases along with all the area municipalities. For example, the region or county may have an economic development officer who focuses on agriculture and rural affairs. A county or region might also have a modest annual fund to assist area municipalities to build their economic development capacity, to bring certain aspects to a common basic standard, to support BR&E activity, or to undertake joint projects such as a common business directory or a list of available sites and buildings.

Nurturing the Growth of New Firms

New business creation and entrepreneurship are increasingly important to healthy, vibrant local and regional economies. Analysis indicates that job creation is driven by companies which are new and young – generally in existence for five years or less. Though entrepreneurship knows no age barrier, the peak age range of successful entrepreneurs has been shown to be the late 30s or early 40s.

Innovation and business formation and growth are major priorities for the Ontario and Federal governments which are making significant investment both as catalysts and partners. Both governments acknowledge that delivery must be largely through local on-the-ground entities. Innovation and entrepreneurship are also driven – not only among start-ups but with more mature firms – by strong linkages with universities and colleges involving, research and development, prototyping and testing.

The Orangeville and Area Small Business Enterprise Centre (SBEC), which is run by Orangeville Economic Development for the benefit of the entire County and to which the County contributes, focuses on servicing small businesses that have been in existence for five years or less and have ten or fewer employees. It offers assistance as well to other smaller businesses and individuals that seek its help. SBEC's advisory services are offered at no cost. The SBEC is one of 57 Ontario Small Business Enterprise Centres that are part of the Ontario Network of Entrepreneurs (ONE) and that are funded in part by the Ontario Government. SBEC also delivers targeted programs offered by the Ontario government, such as Summer Company and Starter Company.

Municipalities in Ontario have also chosen to support the development of incubators and shared working spaces to create places and ecosystems designed to foster and mentor innovative start-ups that have high growth potential. Private sector models are also operating.

Attracting New Investment

The pro-active attraction of new businesses requires sustained and focused effort and resources.

Investment attraction is exceptionally competitive. In order to hope to be successful, initiatives must be exceedingly well researched and targeted toward companies in sub-sectors, niches and specialized clusters for which economic development organizations have developed credible and compelling value propositions that clearly differentiate their region from most others.

Economic development organizations involved in investment attraction must be fully investment ready – that is, staffed and organized to provide prompt and professional engagement with prospects. The key aspects of such readiness are the availability of comprehensive, up-to-date databases that permit full and immediate responses to prospective investors' detailed requirements, including profiles of available sites and industrial and commercial buildings.

Municipalities benefit from cultivating close relationships with the Ontario Ministry of Economic Development and Growth (and a new Strategy Investment Office that is now being established) in order to ensure provincial officials are well informed about the principal local opportunities. In addition to local realtors involved with industrial and commercial properties, the industrial and commercial real estate and development community in the Greater Toronto Area (GTA) is a further target group meriting cultivation, potentially through the Society of Industrial and Office Realtors (SIOR) Central Ontario Chapter events.

In two-tier government structures, the lead responsibility for investment attraction is almost always at the more senior level. Companies considering a new location examine alternative locations without reference to political boundaries. The data that will influence their decisions is common to an economic region wider than any one municipality. As a result, foreign direct investment (FDI) attraction agencies are now commonly structured to represent wider economic areas, such as the new entity for the GTA, Toronto Global. Headwaters Tourism is an example focused on that sector.

Collaborative efforts among economic development agencies – sometimes labelled co-opetition or competi-mating – have grown in Ontario and are now common – especially for tourism and foreign direct investment attraction. Some are product centred (e.g. food, information and communication technologies, manufacturing, and clean technologies), while others involve a wider geographic area (such as Ontario East and the Southwestern Ontario Marketing Alliance). A group of jurisdictions pooling resources in this way stands to create a critical mass that will attract more attention, have greater impact, share research and lead generation and generate more prospects than if each organization went it alone. Though potentially helpful and beneficial to all, such collaborations need to be subject to careful due diligence to be sure that the group will serve the participant's principal needs.

Marketing

The marketing of a community needs to be built upon well-defined advantages and attractions.

Websites are central marketing tools. Tourism websites offer an unequalled opportunity to visually introduce the community and its assets and to enable prospects to get further information and make bookings. For investment attraction, the most critical aspect is to populate the website with readily accessible and detailed factual information and comprehensive data that companies, site selection professionals, realtors and investors require as they narrow their search for locations that align with the specific requirements that they have developed. An informative and searchable real estate directory and maps are essential components.

The other elements that feature prominently in tourism and economic development marketing are branding, marketing collateral, social media, video content, media relations, testimonials, value propositions and advocacy.

Tourism and investment attraction involve different audiences, channels, products and offerings, though some themes may be similar. Each may benefit from interest that the other generates. As such, neither's marketing should be developed in isolation.

Proactive marketing of a jurisdiction should only be launched once the community is fully investment ready – or, in the case of tourism, product ready. There is no benefit – indeed there are definite downsides – in generating interest and not being able to promptly and fully respond to the interest and enquiries that result.

Workforce Availability and Development

Global firms undertaking expansions or new investments in advanced economies such as Canada put a premium on the ability to access the best and most highly qualified personnel. The ability to get well-trained and experienced talent is invariably the principal pain point for high performance firms in almost all sectors. Immigration is a key component if communities are to sustain a sufficiently large talent pool, as the number of young Canadians entering the labour force plateaus.

Economic development agencies need to have detailed information on the available workforce and its characteristics, including commuters who can be attracted to take jobs closer to home. Well-structured workforce development and worker retention programs that identify, develop and retrain the workers that are known to be in demand will attract the attention of expanding businesses. The ability to partner with and access talent from post-secondary educational institutions is a vital important component that will give a community an advantage.

Partnerships with Workforce Development Boards – such as have been identified by Dufferin County and Orangeville with the Workforce Development Board of Waterloo Wellington and Dufferin – are often a key aspect.

Sectors of Focus

Economic developers and economic development initiatives almost always concentrate on so-called tradable sectors. Tradable sectors are ones where goods or services from local firms are (or could be) sold outside the region and internationally, drawing revenue into the community and thereby generating incremental wealth locally. Tourism is also among the tradable sectors, as it brings incremental expenditures by non-residents to the community. Non-tradable sectors involve goods and services – most often services – that meet mainly local needs and demand, including in the health, education, retail and construction sectors. In non-tradable sectors, the revenue and funding sources are mainly local. The growth of non-tradable sectors tends to track local population changes.

Traditionally, economic development strategies identify priority sectors. In recent years however, sector boundaries are less distinct than they once were, given the emergence of technologies that cross traditional boundaries and influence many sectors. Targeting of limited resources remains crucial nevertheless, though the focus may need to be less fixated on conventional sectors.

The growing convergence of technologies – most digitally-based – has increasingly blurred traditional product sector boundaries, as the same technologies cut across and impact many different categories of products and services. Technologies that are driving innovation across traditional sectors include the Internet of Things (IoT), Big Data, the Cloud, 3D printing, 3D visualization, imaging, robotics, GPS, cyber security, augmented and virtual reality, machine learning and artificial intelligence. Another cross-cutting factor is the emergence of major thematic policy initiatives – such as sustainability policies to mitigate climate change – where technologies apply across multiple sectors and lead to categories such as clean technologies that encompass a broad swath of products and services. The growing difficulties of packaging priorities into neat sector packages are increasingly apparent – and will become more so. Sector distinctions are also less relevant from a talent point of view. Given the pervasiveness of new technologies, businesses are now more often seeking employees possessing advanced digitally-based skill sets instead of people who distinguish themselves by in-depth sector experience and traditional sector qualifications.

Sectors can also intersect in ways that cross-fertilize and add value to other sectors. Tourism marries well with agriculture-based pursuits and with foods and beverages, not least the craft, artisanal, culinary and specialty variety. Creative industries blend with and can enrich tourism, the agri-food and hospitality sectors, architecture and design, media and communication, software, talent attraction and retention, and research and innovation.

Organizational Structures for Economic Development

Throughout Canada, the most common organizational model adopted for the municipal economic development function is a department or division within the municipal government structure.

Municipalities most commonly position economic development either as (1) a parallel unit alongside the planning department with both reporting to the same manager, or, alternatively (2) a unit in the Office of the CAO reporting to the CAO. The former acknowledges the close relationship between economic development and planning and development approvals, while the latter recognizes and emphasizes that the economic development role cuts across and interfaces with many municipal functions and that economic development is the principal unit within the organization that is proactively marketing the municipality.

An optional approach is the creation of stand-alone economic development agency. Generally, the stand-alone model is adopted in larger urban areas especially in regional situations where multiple municipal jurisdictions are involved. Often such arrangements evolve based on prior less formal collaborations among economic developers that have built relationships and trust. Varying degrees of municipal control can be involved. Having an accountable but independent agency with some degree of private sector input or direction at the Board level is desirable because it can co-opt community leaders and introduce business-oriented approaches. The greatest challenges often relate to tensions over the extent of direct involvement by elected officials and/or the direction and the independence and accountability of the organization.

Where two levels of municipal government are playing direct roles in economic development, consultative mechanisms to ensure collaboration are an essential part of the fabric, ideally supported by protocols about respective roles, lead handling, assuring transparency and areas for cooperation.

Marshalling the Local Community

Conscious steps are generally taken to bring the community to play a part in economic development efforts.

Economic development advisory committees are common, some populated entirely, others dominantly with a representative mix of non-elected individuals. The choice of a stand-alone model for economic development is often favoured as a means to involve the business community directly in the governance of the economic development entity.

An additional approach is the creation of Ambassador teams which will harness community leaders and their networks to be volunteer sales persons on behalf of the community. Their testimony about the community assets has special credibility. The economic development agency needs to devote resources to ensuring Ambassadors have up-to-date material and messaging.

Draft Questionnaire

Dufferin County Economic Development Survey

Introduction

The County of Dufferin is in the process of undertaking a Strategy to provide a road map on how to best focus its efforts in Economic Development. This process will result in a contemporary and relevant economic development strategy with a 10-year outlook, and an implementing action plan with a 3-5 year timeframe.

The Global Investment Attraction Group (GIAG) consulting firm has been contracted to assist the County in developing the strategy. A key component of this process is an inclusive stakeholder engagement process including a survey.

Your views and opinions are an important. We would appreciate your input through completion of this survey questionnaire. It should only take about five (5) minutes of your time. The responses will only be publicly shared in aggregate.

Should you have any questions about the Economic Development Strategy process or the survey, please contact Sonya Pritchard, CAO at the County of Dufferin (519-941-2816 Ext. 2502 or spritchard@dufferincounty.ca) or John Tennant, GIAG Project Manager at 519-957-9701 or jtennant@globalinvestattraction.ca.

1a. Are you a resident in Dufferin County?

- Yes No

1b. If yes, in which municipality do you live?

- | | |
|---|---|
| <input type="checkbox"/> Amaranth | <input type="checkbox"/> East Garafraxa |
| <input type="checkbox"/> East Luther Grand Valley | <input type="checkbox"/> Melancthon |
| <input type="checkbox"/> Mono | <input type="checkbox"/> Mulmur |
| <input type="checkbox"/> Orangeville | <input type="checkbox"/> Shelburne |

2a. Do you operate or work at a farm, business or organization in Dufferin County?

- Yes No

2b. If Yes, in which municipality is the farm, business or organization located?

- | | |
|---|---|
| <input type="checkbox"/> Amaranth | <input type="checkbox"/> East Garafraxa |
| <input type="checkbox"/> East Luther Grand Valley | <input type="checkbox"/> Melancthon |
| <input type="checkbox"/> Mono | <input type="checkbox"/> Mulmur |
| <input type="checkbox"/> Orangeville | <input type="checkbox"/> Shelburne |

Draft Questionnaire
Dufferin County Economic Development Survey (cont'd)

2c. In which sector?

- | | |
|---------------------------------|--|
| a. Agriculture | b. Retail trade |
| c. Finance and insurance | d. Professional, scientific and technical services |
| e. Engineering services | f. Real estate |
| g. Construction | h. Legal or accounting |
| i. Education services | j. Health services |
| k. Government | l. Manufacturing |
| m. Accommodation | n. Food services |
| o. Tourism | p. Non-profit |
| q. Other (please specify) _____ | |

3. What do you think are Dufferin County's top three economic development strengths? Please choose from the following list.

- | | |
|--|---------------------------------------|
| a. Location | b. Availability of skilled work force |
| c. Manufacturing base | d. Agricultural land and farms |
| e. Highway accessibility | f. Amenities and downtowns |
| g. Easy access to larger communities | h. Housing affordability |
| i. Natural setting and natural amenities | j. Other (please specify) _____ |

4. What are Dufferin County's top three weaknesses and challenges related to economic development? Please choose from the following list.

- | | |
|-----------------------------|--|
| a. Property taxes | b. Development approvals process/timelines |
| c. Government regulation | d. Encouraging innovation/entrepreneurship |
| e. Development charges | f. Employment lands availability |
| g. Public transportation | h. Labour availability |
| i. Lease space availability | j. Other (please specify) _____ |

5a. Where should the County of Dufferin County focus its efforts to support the growth of its economic base and its businesses? Please choose from the following list.

- | | |
|-----------------------------------|--|
| a. Support entrepreneurship | b. Communicate with businesses and residents |
| c. Investment attraction | d. Active role of County in economic development |
| e. Business retention | f. Promote area to external businesses |
| g. Workforce development | h. Promote area for tourism |
| i. Enhance community/county image | j. Other (please specify) _____ |

Draft Questionnaire
Dufferin County Economic Development Survey (cont'd)

5b. Which of the following sectors do you think will drive future economic growth in the County?

- | | |
|------------------------------------|--|
| a. Agriculture and agri-businesses | b. Professional, technical and scientific services |
| c. Educational services | d. Arts, entertainment and recreation |
| e. Health care | f. Retail |
| g. Manufacturing | h. Real estate |
| i. Tourism | j. Other (please specify) _____ |

6. What do you think differentiates Dufferin County from other communities in and neighbouring on the Greater Toronto Area?

- | | |
|---------------------------------------|------------------------------------|
| a. Housing affordability | b. Higher quality of life |
| c. Natural setting and amenities | d. Less crime |
| e. Mix of urban and rural communities | f. Less congested and room to grow |
| g. Strong manufacturing base | h. Labour and talent |
| i. Strong agricultural base | j. Other (please specify) _____ |

7. What do you think are the most important or pressing issues that should be addressed in the Dufferin County Economic Development Strategic Plan?

8. What is your Vision for economic development in Dufferin County for the next 5-10 years? What words or phrases come to mind?

~~~~~ **THANK YOU FOR YOUR PARTICIPATION!** ~~~~~



# Dufferin County Economic Development Strategic Plan

Stakeholder Engagement

March 2017



# Introductions

- County CAO: Sonya Pritchard
- Representatives of the Dufferin Economic Development Steering Committee
- Global Investment Attraction Group
  - John Tennant
  - Bill Elliot
  - Kelly O’Brien

# Development of the Strategic Plan

- Global Investment Attraction Group + County CAO + Dufferin Economic Development Steering Committee
- County's First Economic Development Strategic Plan
- Background Research and Analysis
- Consultative Phase
- Draft Economic Development Strategic Plan
- Review of Draft Economic Development Strategic Plan
  - Dufferin Economic Development Steering Committee
  - All Councillors Session
- Presentation to County Council

# Content of the Strategic Plan

- Vision
- Overview – Economic Trends, Population, Jobs, Infrastructure, Higher Education, Quality of Life
- Economic Development, Investment and Visitor Readiness
- Key Economic Development Roles with Goals, Objectives & Actions
  - Economic Development Related Policies
  - Business Retention & Expansion, including Business Creation, Entrepreneurship & Innovation
  - New Investment Attraction
  - Marketing the County
  - Sectors of Focus
  - Performance Metrics

# Stakeholder Consultations

- Three Stakeholder Engagement Sessions
- All Councillors Engagement Session
- Voluntary Public Survey – Online & Hard Copy
- Open dialogue on opportunities for further investment, threats and obstacles to further development
- Results to be aggregated and used to inform the Economic Development Strategic Plan
- Participants encouraged to have others complete online survey.

# Voluntary Public Survey

- 12 Questions/10 Minutes
- Opportunity for Residents and Businesses to Provide Input on Economic Development Issues, Strengths, Challenges, Opportunities & Vision
- Available on County Website, and in Hard Copy Version

# Today's Session

- Obtain Input from the Community at Large
- Topics
  - Dufferin County's Strengths, Weaknesses, Opportunities, Threats, and Issues
  - Dufferin County's Economic Development Vision
  - Principal Opportunities for Agriculture, Business & Sector Expansion and Growth

# Question # 1

What are the Economic  
Development Related  
**Competitive Strengths** You  
Associate with Dufferin  
County?



## Question # 2

What are Dufferin County's  
**Greatest Weaknesses &  
Challenges** related to  
Economic Development?

## Question # 3

What are the **Greatest External Threats** to Future Economic Growth in Dufferin County?

## Question # 4

What **Future Opportunities** Do You See for Dufferin County in Growing Its Economic Base, Businesses & and Agriculture?

What **Sectors & Sub-Sectors** Do You Think Will Drive Future Economic Growth and Why?

## Question # 5

Is Dufferin County's **Workforce and Talent** Aligned with Future Requirements of Agriculture & Business?

If Not, What Improvements are Needed?

## Question # 6

How Do You Perceive  
Dufferin County as a  
Location for **New**  
**Investment in Business &**  
**Agriculture?**

## Question # 7

What is Your **Vision** for  
Dufferin County's Economic  
Development?

# Additional Information/Comments

## Contact

John Tennant, Principal

Global Investment Attraction Group

[jtennant@globalinvestattraction.ca](mailto:jtennant@globalinvestattraction.ca)

519-957-9701

