

County of Dufferin Economic Development Strategy and Action Plan

Strategic Plan Background Report Information for Those Involved in Stakeholder Consultations

About the Dufferin County Economic Development Strategy and Action Plan

The County of Dufferin is developing its first County-wide Economic Development Strategy and Action Plan. County Council and the County's Economic Development Steering Committee recognize that a strategic approach to economic development is important to promoting economic growth, prosperity and sustainability across Dufferin County and within the larger economic region of Southern Ontario.

The completion of the Plan will provide Dufferin County with a road map on how to best focus its efforts in economic development. It will identify areas of County-wide interest, which sectors represent competitive strengths, what is the competition, what resources are needed, and who are key partners. The strategy will determine the County's best prospects for sustainable growth and return on investment.

Dufferin County has engaged a consultant, the Global Investment Attraction Group (GIAG), to assist in developing, through an inclusive stakeholder engagement process, a focused, contemporary and relevant economic development strategy with a 10-year outlook, and an implementing action plan with a 3-5 year timeframe.

Contents of this Strategic Plan Background Report

Dufferin County, its Economic Development Steering Committee, and the consultants are seeking stakeholder input via three consultations and a public survey which is available online and in hard copy. There will also be a session involving all municipal Councillors. This report is designed to share some of the preliminary background information developed by the consultants.

- **Dufferin County Economic Base Review and Demographic and Labour Force Analysis:** This compilation of selected recent data focuses on job growth and the sector and sub-sector concentrations of businesses in Dufferin County, principally over the last five years (2011 to 2016) with comparisons to Ontario averages.
- **Typical Municipal Economic Development Roles and Structures:** This paper outlines typical municipal economic development roles and structures, including considerations that can influence which levels of government undertake them.
- **Economic Development Programs in Nearby Communities:** This comparative snapshot provides information on economic development programs in three nearby counties – Wellington, Simcoe and Haldimand.
- **Availability and Suitability of Industrial and Commercial Land and Buildings:** An important consideration in attracting business expansion and new investment is the ready availability of industrial and commercial land and buildings. This brief review provides a preliminary current assessment of the situation in Dufferin County.

Next Steps in the Development of the Dufferin County Economic Development Strategy and Action Plan

Based on the stakeholder input and extensive further research, the County's Economic Development Steering Committee and the consultants will develop the Economic Development Strategy and Action Plan. It will be reviewed by municipal Councillors prior to presentation of a final version to the County Council, expected this summer.

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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/sub-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 US 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 (OMAFRA).

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 in 2016 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. The majority of jobs are in the urban areas of Dufferin County, particularly in Orangeville, which accounts for 16,127 jobs. Shelburne has 2,827 jobs. About 78% of Dufferin County jobs are located in these two urban communities. The other urban settlement area as identified in the County Official Plan is Grand Valley urban area. Data for this area is reported as part of the Town of Grand Valley census subdivision by EMSI, and not separately. The reported number of jobs for Town of Grand Valley is relatively small at 636.

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

Location-quotient analysis compares the relative concentration of each sector in a community to a reference area (in this case Ontario). The comparison uses a simple ratio of sector employment to total employment. The provincial average for each sector has a location quotient of 1. A location quotient higher than 1 indicates a higher employment concentration in that sector than the provincial average, while less than 1 indicates the concentration is lower than the provincial average. Greater location-quotient variances mean higher or lower employment concentrations than provincial averages. In essence, location quotients allow us to identify which sectors are over- or under-represented relative to the province as a whole. High location quotients can indicate where a region or community has a particular strength or competitive advantage in attracting and retaining specific types of industries. This information is useful along with sector growth forecast information in determining target sectors for investment attraction. It is used to identify those sectors where there has been a demonstrated strength and concentration above the provincial average.

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

NAICS Code	Description	Amaranth	East Garafraxa	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	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 municipalities with the highest number of jobs and location quotients (LQ) in the sector are 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.

A large portion of the population resides in the urban municipalities, particularly Orangeville which has a population level of 28,900 and Shelburne which has a population level of 8,126. Together these communities account for about 60% of the population in Dufferin County. The other urban settlement area as identified in the County Official Plan is Grand Valley urban area which is part of the broader Town of Grand Valley census subdivision, with a population of 2,956 in 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. Shelburne is ranked as the second fastest growing community in Canada.

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%
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. Educational attainment estimates for Dufferin County from Manifold Data Mining Inc. were also reviewed and found to be comparable.

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%	100.0%

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. Estimates from Manifold Data Mining Inc. were also reviewed. The allocation of labour force by sector was comparable between the two data sets. Manifold Data Mining has estimated that the labour force has increased to 35,993 persons, up from 30,460 in 2011. 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

About 50% of the labour force in Dufferin County in 2011 lived in Orangeville which is slightly higher than that community's share of population (49%). Shelburne accounted for about 9% of the labour force, which is slightly lower than its portion of population (10%).

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).

3.0 Typical Municipal Economic Development Roles and 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.

3.1 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.

3.2 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.

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)
- Mulmur’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.