



Economic Development Strategic Plan



Developed by



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Table of Contents

EXECUTIVE SUMMARY.....	ii
A. Introduction.....	1
B. Dufferin County – Profile and Outlook	2
1. Population.....	3
2. Jobs	4
3. Economic Structure	5
C. Dufferin County – Opportunities and Constraints	6
1. Recognition of the Need for a Dufferin County Economic Development Strategy	6
2. Jobs for a Growing Resident Labour Force.....	6
3. Availability of Industrial and Commercial Land and Buildings	6
4. Property Tax and Development Incentives.....	7
5. High-Speed Broadband Coverage – A Fundamental Requirement	9
6. Extension of Natural Gas Distribution – Economical Energy for Rural Areas.....	11
7. Dufferin County’s Sustainability Advantage	12
8. Federal and Ontario Climate Change Policies.....	12
9. External Developments and Trends.....	12
10. Strengths, Weakness, Opportunities and Threats.....	13
D. Principal County Economic Development Roles.....	20
1. The County as an Economic Development Convenor, Coordinator and Advocate	20
2. Investment Readiness	26
3. Business Retention and Expansion	28
4. Nurturing the Growth of New Firms and Agricultural Enterprises.....	31
5. Attracting New Investment.....	34
6. Marketing Dufferin County.....	36
7. Talent and Workforce Availability and Development.....	41
E. Sectors of Focus.....	47
1. Agriculture, Food and Beverages.....	50
2. Tourism.....	56
3. Creative Industries.....	60
4. Health and Wellness, Well-Being and Recreation Destinations	62
5. Manufacturing.....	63
6. Professional, Engineering, Information Technology and Financial Services	66
F. Resource Implications.....	69
G. Implementation Plan	70

Appendix

1. Members – Dufferin County Economic Development Steering Committee.....	1
2. Summary of the Public Survey Results.....	2
3. Notes from the Stakeholder Consultations.....	19
4. Selected Economic Base and Sector Analysis Tables – Dufferin County.....	26
5. Note on the EMSI Analyst Statistical Source.....	31
6. Comparative Overview of Economic Development Programs in Nearby Communities.....	32
7. Background Paper on Performance Measurement.....	36

Dufferin County Economic Development Strategic Plan

EXECUTIVE SUMMARY

Vision for Dufferin County Economic Development

*Dufferin County will be a strong and vibrant local economy
rooted in a spirit of collaboration
striving to enhance opportunities for growth
while preserving natural and cultural assets and
balancing urban and rural values.*

Recognizing the importance of a coordinated County-wide approach, the County of Dufferin is adopting its first Economic Development Strategic Plan with the goal of enhancing economic growth, prosperity and sustainability. The development of the Strategic Plan involved extensive background analysis, interviews with selected stakeholders, three public consultations, two joint meetings of the municipal councils, and a public survey, the results of which are reflected throughout the Strategic Plan.

Dufferin County Profile and Outlook

Dufferin County is fortuitously positioned on the perimeter of the Greater Toronto Area (GTA) and within the Greater Golden Horseshoe whose population of 9.4 million is predicted to grow to 13.5 million by 2041.

The “Hills of Headwaters” region, where Dufferin County is located, is the Ontario highland that is the source of five river systems. The County’s agriculture sector benefits from high-quality Class 1 soils that support cattle, dairy, hogs, sheep, horses, soybeans, winter wheat, corn, mixed farming and potatoes.

Though the County’s growing population and economy are challenging the capacity of many segments of the existing road systems, Canada’s principal airport is within 60 kilometers of Orangeville, and County residents, businesses and producers can access Ontario’s 400-series arteries via Highway 10. The Orangeville-Brampton Railway – owned by the Town of Orangeville – serves manufacturers in Orangeville.

Dufferin County’s population reached 61,735 in 2016, with a rate of growth of 8.5% since the 2011 Census that is well ahead of the Provincial and national rates. Sixty percent of the population is in the urban centres of Orangeville (28,900) and Shelburne (8,126). Shelburne had the highest growth rate between 2011 and 2016 – 39% – among southern Ontario communities over 5,000 people. Dufferin County had 24,354 jobs in 2016, with relatively high job concentrations in agriculture, manufacturing and tourism-related sectors. Job growth in Dufferin County kept pace with the population growth from 2011 to 2016, though there is extensive commuting.

Opportunities and Constraints

Local Jobs for a Growing Population: Dufferin County's strong population growth reflects the relatively more affordable housing. The challenge and opportunity from an economic development perspective is to encourage business expansion and new investment that will provide more local jobs that will offer resident commuters employment opportunities closer to their homes.

Availability of Industrial and Commercial Land and Buildings: Recent lands needs and commercial demand and market analysis indicated a sufficient supply of serviced industrial and commercial land and buildings is available to meet future requirements. This supply is located predominately in Orangeville and Shelburne. However, given market requirements for a variety of parcel sizes and changing building criteria such as ceiling heights, it would be beneficial from an economic development perspective to undertake an assessment of the adequacy of the specific land and building offerings as full information is assembled on available sites and buildings.

Competitiveness: County and municipal industrial and commercial tax rates are below most nearby jurisdictions, with the exception of commercial rates in Caledon and industrial rates in Brampton and Caledon. Only three of eight Dufferin County municipalities have industrial development charges, so that in the other five only County development charges apply. No evidence was encountered that a lack of incentives had been a factor that cost the County new investment. In the future, it is possible that timely and well-targeted Community Improvement Plans (CIPs) and Tax Increment Financing (TIF) could encourage and accelerate beneficial development, leading to increased assessments and tax receipts over time.

High-Speed Broadband: The County and many of its economic development aspirations are significantly constrained by the widespread lack of affordable high-speed broadband – now an essential part of any community's infrastructure. Development of a \$270 million SouthWestern Integrated Fibre Technology (SWIFT) Network is underway, led by the Western Ontario Wardens' Caucus (WOWC). Competitively selected independent service provider (ISP) partners are expected to provide distributed "last mile" service from the three to six Dufferin County points of presence that the SWIFT project will deliver by 2021. In the meantime, it will be important to have an overall strategy that includes investment in additional opportunities that complement SWIFT. The potential to grow and attract new investment in several otherwise-promising areas is severely hampered, pending the availability of adequate and competitive broadband access. Efforts to retain and attract talent to Dufferin County are also inhibited.

Extension of Natural Gas Distribution: The extension of natural gas distribution in the County, especially to rural areas, is required to provide access to a competitive alternative fuel for heating animal barns and greenhouses and for drying crops. A possible opportunity to obtain funding may be available through the new natural gas distribution grant program for rural communities that was announced by the Ontario government in January 2017.

Sustainability: Dufferin County can build on its sustainable identity by entertaining and supporting sound propositions that demonstrate balanced respect for the natural environment. This will further enhance the attractiveness of the County for tourism, as a source of foods, beverages and culinary delights, and as a destination for year-round outdoor recreation. Federal and Ontario government Climate Change policies will put upward pressure on energy costs but will also provide funding for clean technology ventures,

accelerators and clusters, and methane demonstration projects, while spurring businesses capable of retrofitting buildings and providing home energy audits and net-zero housing.

External Developments: External developments and trends raise issues that influence aspects of the Economic Development Strategic Plan. Economic growth has been slower since the global financial crisis of 2008 and 2009, a norm that is likely to continue. Business investment, including foreign direct investment (FDI), has been tentative and cautious. Protectionist and nationalist tendencies have introduced unknowns and risks, including the NAFTA negotiations triggered by the US. From an economic development perspective, the greatest growth in FDI is more likely on balance to be through expansions by existing foreign-owned companies, rather than in new ventures. Since the recession, growth in the stock of foreign investment in Canada has been proportionately strongest from Europe. European food processing investment has shown especially strong growth.

The Strategic Plan provides a comprehensive list of strengths, weaknesses, opportunities and threats.

Principal County Economic Development Roles

The Strategic Plan outlines the prime economic development roles the County should adopt as it initiates direct involvement in economic development. The overarching goal in economic development is to improve the economic well-being of a community through policies and initiatives that will grow the municipal tax base by retaining and attracting investment and talent and by fostering and sustaining beneficial economic growth and diversity.

Convenor, Coordinator and Advocate: The prime role for the County is as a coordinator, leader and advocate for County-wide economic development interests and initiatives, including ensuring that business and agricultural enterprises are connected to programs, funding and sources of advice and support.

GOAL: Coordinate and lead County economic development initiatives that support municipal interests, and advocate for County-wide economic development interests

Key aspects would centre on:

- Establishing a working level County economic development coordinating committee, comprised of a representative from the County and each municipality, whether a staff member or a volunteer or elected representative. The coordinating committee would be the County focal point to foster collaboration, including by:
 - Sharing and acting on information and ideas;
 - Mobilizing partners and resources and building collaborative effort;
 - Developing and coordinating prioritized annual economic development plans; and
 - Identifying issues for coordinated advocacy.
- Developing an Agriculture and Rural Affairs portfolio for the County economic development program, in light of the County's entrepreneurial character and the special importance of agriculture and agriculture-related businesses to the County and to many related areas including tourism and the value-added foods and beverages.
- Creating a County Economic Development Fund to support initiatives in economic development capacity building by the eight municipalities by making grants of up to \$20,000 to \$30,000 annually to each municipality to support well defined projects and initiatives that align with the County's

overall economic development efforts (e.g. investment and tourism readiness; downtown revitalization incentives; business incubation; workforce training; business support workshops; newcomer attraction; employment attraction; and project feasibility studies).

- Partnering with County stakeholders such as the Dufferin Board of Trade (DBOT) and the Dufferin Federation of Agriculture (DFA) which have County-wide leadership roles and engage in a number of member-driven programming that contribute to economic development in the County.
- Connecting County businesses and agricultural ventures with the Federal and Ontario economic development partners with responsibility for Dufferin County – nearly all of who are based elsewhere – to provide the central point of contact that they have indicated that they would welcome and to ensure that Dufferin County, the municipalities and County businesses and agricultural ventures participate fully in relevant Federal and Provincial funding and programs.
- Quarterbacking and supporting the economic development component of the broader County advocacy agenda, enabling a unified community voice.

Investment Readiness: A foundational objective is to establish an investment ready County economic development function that will convey an “open for business” message by responding promptly and professionally to investment inquiries and opportunities. This encompasses the information required for businesses to make decisions on new investments and tools to manage the decision process:

- Detailed economic, demographic, workforce and sector data;
- Available land and buildings;
- Transportation infrastructure, taxes and utility rates;
- A business directory;
- A Development Approval Flow Chart summarizing the processes and anticipated timelines of required development approvals typically required for a new investment or expansion; and
- A Customer Relationship Management (CRM) system to allow staff to manage and track contacts including the status of enquiries and leads.

Business Retention and Expansion (BR&E): Dufferin County has almost 2,000 enterprise locations – 97% of which have fewer than 100 employees.¹ The retention and possible expansion of existing businesses is a core objective for an economic development program. The public survey undertaken in conjunction with the Strategic Plan preparation ranked business retention as the top area on which the County should focus its efforts to support growth of its economic base and its businesses, along with supporting entrepreneurship (a tie).

GOAL: Encourage the retention and expansion of existing Dufferin County businesses and agricultural enterprises

Prime responsibility for BR&E activity normally rests with lower-tier municipalities who tend to be closest to the firms in their jurisdiction. In Dufferin County’s case, the County roles will be to:

- Support and involvement, especially with the six municipalities that lack dedicated economic development resources, in BR&E calling programs and follow-through and in on-going contacts with their business and agricultural base;

¹ Excludes the indeterminate category which covers firms with no employees or only contracted workers.

- Reporting to County Council on structured BR&E calling programs in terms of the aggregated feedback from business and rural ventures on their hiring and expansion intentions, the state of the business climate, the principal business challenges, and areas of greatest concern.

Nurturing the Growth of New Firms and Agricultural Enterprises: New business creation and entrepreneurship are important to healthy, vibrant local economies. Job creation is driven by dynamic companies which are generally younger than five-years and growing quickly. The Ontario and Federal governments recognize that responsive local entities are often best placed to deliver programs and assistance involving innovation and business formation, areas that are major priorities for both. 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 financially, focuses on servicing small businesses that have been in existence for five years or less and have ten or fewer employees, generally offering support at no cost. Part of the network of Ontario government supported SBECs, the Orangeville and Area SBEC dealt with over 3,200 enquiries in 2016, provided over 600 in-depth business consultations, and was involved with 106 business start-ups which created 208 jobs. About 30% of the SBECs consultations involved clients in the County outside of Orangeville, compared to about 50% in the Town and under 20% outside the County. Specific areas for attention will be to:

GOAL: Encourage and support a climate for entrepreneurship and innovation

- Expand the Orangeville and Area Small Business Enterprise Centre's reach and presence in the County;
- Encourage involvement by Innovation Guelph, the Provincially supported Regional Innovation Centre with the mandate for Dufferin County, which focuses on the specific needs of innovating businesses that are seeking to scale-up rapidly; and
- Work with partners to foster research and innovation connections for more mature companies and agricultural enterprises through linkages with specialized nearby post-secondary educational institutions (e.g. in addition to Humber and Georgian Colleges, the University of Guelph and Sheridan College's Brampton campus which has a state-of-the-art advanced manufacturing centre).

Attracting New Investment: The attraction of new investment is a highly competitive arena where success requires sustained and well-focused efforts, including compelling value propositions and defined targets. In two-tier municipalities, the lead for investment attraction is almost always at the upper-tier level. Investment readiness is essential. Areas for County focus are:

GOAL: Attract new investment to Dufferin County

- Serve as the prime point of contact for new leads, using its extensive databases and working collaboratively with the municipalities meeting a prospect's requirements;
- Establish direct relationships with the principal Ontario government entities involved in foreign investment attraction to ensure they are fully aware of Dufferin County's assets and interest;
- Build relationships with the principal commercial and industrial realtors who have an interest in Dufferin County;

Having established close relationships with these key intermediaries, the County – working with its local economic development partners – will need over time to settle on sector and geographic priorities for carefully selected, timely and well-targeted initiatives, beginning with the Greater Toronto Hamilton Area

(GTHA). This would also be the timeframe in which to evaluate the benefits of collaborative investment attraction arrangements involving other jurisdictions.

Marketing Dufferin County: A data-rich website is particularly vital to economic development as a repository of information that will be consulted by investors and professional site selectors to screen prospective locations. Social media and e-marketing campaigns are important aspects to integrate with the website architecture. Critical first steps on readiness on the marketing front are:

GOAL: Brand and market Dufferin County

- Engagement of a firm to develop economic development branding for the County,
- Transitioning the Dufferin.biz website to a new County economic development website, and
- Developing basic marketing collateral.

Talent and Workforce Availability and Development: The availability of highly qualified talent is a front-of-mind requirement for firms undertaking expansions and new investments. Given the constant need for upgrading and reskilling, businesses are attracted to communities that are working actively to provide resources that support adjustment and alignment of skills and workplace needs. Dufferin County has a growing resident workforce but a significant number of commuters. The recently established Dufferin County Workforce Development Committee will be a valuable forum for coordinated research and workforce initiatives and the development of new programs.

GOAL: Talent and workforce availability to grow the Dufferin County economy

Areas for attention include:

- Analysis of 2016 Census data on the labour force and commuting patterns to be released in November 2017 to enable identification of the resident talent pools that could be attracted to jobs closer to home, providing the basis for local talent matching initiatives such as job fairs, and for focused investment attraction efforts;
- Development of programs to keep and attract talent, including youth and immigrants, merit special consideration once high-speed broadband is available; and
- Encouraging public transit that will promote mobility within the County and get workers to and from places of work.

Sectors of Focus for Dufferin County

Economic development programs focus on tradable sectors – those where local goods and services are sold to people from outside the region and internationally, resulting in revenues that flow into the community and thereby generate incremental wealth. Non-tradeable sectors on the other hand involve goods and services that mainly meet local needs and demand, including in the health, education, retail and construction sectors.

Commonly, economic development entities have sought to single out high priority sectors on which to focus their limited resources. Increasingly, digitally-based technologies are driving innovation in nearly all sectors, thereby blurring what previously were distinct, well defined sector boundaries. The digital platforms that are involved have overlapping labels such as the Internet of Things (IoT), Big Data Analytics, The Cloud, 3D

printing, robotics, cybersecurity, machine learning and artificial intelligence. Their convergence also means that change is evolving more and more at an exponential rather than linear rate.

Major thematic government policy initiatives – such as climate change, innovation, and infrastructure – also apply across or influence multiple traditional sectors.

Agriculture, Food and Beverages: Seventy percent of Dufferin County’s land base is prime agricultural land. The County has a diverse agricultural sector, with cattle, dairy, hogs, sheep, hay, soybeans, winter wheat, corn and mixed farming in the western part and potatoes in the northeastern quadrant. Dufferin County is also horse country, which advantages tourism and presents related opportunities for support businesses. Respondents to the public survey conducted as part of the development of the Strategic Plan ranked agriculture second among the sectors that they felt will drive future economic growth in the County.

OBJECTIVE: Support the retention, growth and diversification of Dufferin County agricultural enterprises, and grow and attract beverage and food processing operations

According to the 2016 Census of Agriculture, total gross farm receipts from the County’s 690 farms were \$157.5 million, up 20% since the 2011 Census, though the number of farms declined by 13.2% from 2011 levels. There has been a long-term decline of nearly 30% over two decades in the land area that is farmed.

Agriculture is adopting advanced technologies and is severely handicapped without access to affordable high-speed broadband. In the absence of local sources of research and innovative technologies, entrepreneurially-oriented farm ventures can potentially be assisted with relevant connections to sources such as the University of Guelph, the Vineland Research and Innovation Centre, Conestoga College’s Institute of Food Processing, and Agriculture and Agri-Food Canada’s Potato Research Centre.

Dufferin County is well placed to grow and launch ventures that take advantage of food trends favouring farm-gate sales, farmers’ markets, and small-batch breweries, distilleries, wineries and cideries. Initiatives to provide wayfinding signage will assist in attracting visits. If Dufferin County can identify or encourage the development of suitable shared acceleration space with common commercial kitchen and refrigeration facilities, links with Toronto food processing incubators may provide a path to Dufferin County for Toronto food start-ups wanting to be proximate to produce and to have location in which they can grow their business. With leadership from the Dufferin Federation of Agriculture, a Dufferin County agricultural summit may have the potential to draw attention to the sector’s evolution and success, and to inform, challenge, celebrate and network those engaged with agriculture.

Tourism: Tourism, which is one of the largest and fastest growing economic sectors globally, is an important dimension of economic development. As part of the Headwaters region, Dufferin County has grown significantly as a tourism destination, centred on arts, culture, food and culinary destinations, and its rural, scenic and recreational offerings. In the public survey associated with the Strategic Plan’s development, tourism ranked first as the sector respondents felt would contribute to the County’s future economic growth.

OBJECTIVE: Grow and expand tourism offerings and capacity, and welcome increased numbers of tourists to Dufferin County

Headwaters Tourism, the destination marketing organization that is financially supported by the County and by Shelburne and Mono, has registered great success with its award-winning, “Where Ontario Gets Real,” campaigns. Headwaters Tourism spotlights authentic messages about the people and their connection to

the land and focuses on five segments: horse country, fresh and local, arts and heritage, fun and festivals, and nature.

Dufferin County accounts for 45% of tourism in the Headwaters region, which also includes Caledon and Erin. This translates into 390,000 visitors to Dufferin County, \$30 million in visitor spending, and an estimated \$788,400 in municipal tax revenue. Other data shows that the jobs in the County's food and accommodation sector have registered strong growth, especially restaurants and fast food outlets.

As a complement to the Headwaters Tourism mandate to brand, market and generate visitors for the area, the County and the local municipalities have the responsibility to identify and inventory their tourism assets, service visitor enquiries, engage and build the capacity and readiness of operators, attract tourism-related investment, and encourage the development of local infrastructure. A County tourism strategy that addresses these aspects is needed and could be developed to complement Orangeville's own strategy which is due to be revisited before 2020.

Creative Industries: Dufferin County appears to have established itself as destination with a critical mass of recognized festivals and cultural assets which link well with the tourism, culinary, and food and beverage sectors. In the public survey associated with the Strategic Plan, arts, entertainment and recreation ranked third among the sectors that respondents thought will drive future economic growth in the County. Job growth from 2011 to 2016 in the sector has been notable, including employment with performing arts companies. Based on recent evidence, there may also be potential – especially when and where ultra-high-speed broadband is available – to attract film and video producers to the County. Strengthening and building the creative clusters should be an economic development focus, stimulated by the relevant lessons that can be learned from other communities' success.

OBJECTIVE: Support growth, greater recognition, and audience attraction for Dufferin County's creative industries

Health and Wellness, Well-Being and Recreation Destinations: The County's proximity to Toronto and its natural settings suggest opportunities to attract private sector and not-for-profit facilities that cater to people's health and wellness, well-being, education, reflection and lifestyle transformation, and to recreational and outdoor activities. Pine River Institute and the Athlete Institute Basketball Academy are examples of existing facilities known for their excellence. Other types that may be appropriate are spas, specialized medical clinics, sports training facilities, corporate and institution retreats, and experiential educational facilities. Successful existing facilities need to be catalogued and prospective locations identified as a basis for a well targeted campaign.

OBJECTIVE: Attract facilities that address health and wellness, well-being, and education, and capitalize on recreational and outdoor activity

Manufacturing: The manufacturing sector is the third largest by employment in Dufferin County, after retail and health care and social services. From 2011 to 2016, manufacturing jobs grew by nearly 20%, a markedly higher rate than the 1% provincial increase. The number of manufacturing jobs in 2016 is still substantially below the level of a decade earlier (2006) however, due particularly to declines in automotive parts and fabricated metal products. Ninety percent of manufacturing employment is in Orangeville and Shelburne. Notable manufacturing sub-sectors are plastics, automotive parts, dairy products, beverages, store fixtures and metal working. The principal

OBJECTIVE: Support retention and growth of Dufferin County's manufacturing sector, and attract new investment

challenge is to retain and grow the existing firms which have demonstrated their competitiveness in coming through the 2008-2009 recession, while identifying and targeting new prospects.

Professional, Engineering, Information Technology and Financial Services: The continued shift from manufacturing toward services sector employment among all advanced economies invites close examination of the potential for Dufferin County to attract firms specialized in fields such as engineering, information technology, architecture, accounting, human resources, finance and insurance. Many new facilities might initially be regional headquarters. However, the lack of access to affordable ultra-high-speed fibre constrains immediate prospects. As a first step toward developing investment attraction strategies once broadband availability is assured, careful analysis of the 2016 Census data due to be released in November 2017 is needed on the occupations of Dufferin County residents who are commuting to jobs elsewhere, as it may identify attractive talent pools into which locally-based operations can tap.

OBJECTIVE: Attract professional, engineering, information technology, business support and financial service operations to Dufferin County

Resource Implications

Staffing: The implementation of the Dufferin County Economic Development Strategic Plan would initially be spearheaded by a full-time economic development officer, benefiting from part-time administrative support. The officer would chair the working level County economic development coordinating committee. Contracted part-time staff and consultants would be engaged to assist the officer in establishing the foundational systems, policies, databases, branding and a website required to make the program operational and investment ready. Later, additional full-time staff resources would be evaluated. The economic development function would report to the CAO.

Budgets: Initially, the economic development function would have a number of one-time up-front investments associated with a Customer Relationship Management (CRM) system, establishing a site selection database, branding, website creation, and marketing collateral. This would be done by contracted resources. The County Council established an Economic Development Reserve in 2016 which might be drawn upon for up-front costs.

Transition arrangements related to the County's financial support of Dufferin.biz through the Dufferin Board of Trade (DBOT) will need to be worked out but will return funding to the County to meet some of the County's branding and marketing costs including websites.

The Dufferin County Workforce Development Committee will begin to focus on collaborative projects that require funding in 2018. The County Economic Development Fund should be initiated in 2018. An increased share of funding for the Orangeville and Area Small Business Enterprise Centre is envisaged as it increases its programming, reach and presence. A contribution to Innovation Guelph would likely accompany greater involvement on its part with County start-ups and firms that are rapidly scaling. Contributions for Headwaters Tourism are already agreed and budgeted through 2019.

Implementation Plan

The working level economic development coordinating committee would begin to meet immediately. The new County economic development unit will have significant foundational work to accomplish over the first year to year-and-a-half to be investment ready. Key areas of initial focus, in addition to investment readiness, will be branding, the new economic development website, and marketing collateral, to be done under contract. The Dufferin County Workforce Development Committee will be focused on collaborative projects to initiate in 2018. The County Economic Development Fund should be targeted for launch in 2018, if possible. In addition to the development of strong working level relationships with Federal and Ontario officials and with programs and those involved with initiatives that they support, an initial County-wide economic development advocacy agenda should be assembled in the first six to nine months. A plan for an expanded footprint for the Orangeville and Area Small Business Enterprise Centre and its programs should be established during 2018. The development of meaningful involvement of Innovation Guelph should be targeted for mid-2018.



**Economic Development
Strategic Plan**

A. Introduction

The County of Dufferin is adopting its first County-wide Economic Development Strategic Plan, recognizing that a strategic approach is important to promoting economic growth, prosperity and sustainability across the County. A key objective of the Strategic Plan is to define a County role that acknowledges the unique opportunities and challenges of the County within the larger Southern Ontario economic region. The Strategy has a ten-year outlook with an action plan covering three to five years.

The development of the Economic Development Strategic Plan took place from December 2016 to July 2017 and involved extensive background analyses and interviews with selected stakeholders.

Input from the County's Economic Development Steering Committee has been an important aspect of the process to develop this Strategy. Membership of the Committee is provided in Appendix 1. The Steering Committee's meetings in 2015 and 2016 laid the early groundwork that led to the retention of the Global Investment Attraction Group to assist in the development of the Strategy. The Steering Committee reviewed extensive documentation and drafts, meeting four times with the consultants to contribute suggestions, input and views. In addition, two All Councils meetings were held – the first as a consultative session and the second to review a draft of the Strategic Plan.

Three public consultations were held in Shelburne, Mono and Grand Valley with 65 people participating. A public survey using Survey Monkey was undertaken between March 13 and April 28, resulting in 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

Sincerest appreciation is extended to all those who participated in the development of the Strategic Plan.

Vision for Dufferin County Economic Development

*Dufferin County will be a strong and vibrant local economy
rooted in a spirit of collaboration
striving to enhance opportunities for growth
while preserving natural and cultural assets and
balancing urban and rural values.*

B. Dufferin County – Profile and Outlook

Dufferin County is in south-central Ontario, just 75 kilometres north-west of Toronto. Comprising eight municipalities, the picturesque area is part of what is commonly known as the “Hills of the Headwaters” which is the origin of five major river systems. This affords Dufferin County’s urban areas, which have a small-town feel, a balance with natural beauty, making the County an attractive place to base a business and to live, work and raise a family.

The Headwaters region, rising to 526 metres above sea level, is also referred to as the roof of Ontario. In addition to being the source of the Credit, Humber, Grand, Saugeen and Nottawasaga Rivers, Dufferin County lays claim to the picturesque Island Lake Conservation Area and to Luther Lake, a man-made Grand River reservoir, that provides unique wildlife habitat and recreation opportunities. The world-famous Bruce Trail in the Niagara Escarpment, a UN World Biosphere Reserve, runs through the County.

Dufferin County’s agricultural sector benefits from high quality agricultural land well suited to potatoes and to cattle, dairy and mixed farming. The entrepreneurship of the farm community is evident in growing on-farm and farm-related ventures. The County is also known for its horses and equestrian sector.

At the same time, the County is also part of the Greater Golden Horseshoe (GGH) – one of North America’s most notable and fastest growing economic regions. Anchored by the city of Toronto, this population concentration of 9.4 million people² ranks it fifth among US and Canadian metropolitan regions.³ It contains over one-quarter of Canada’s population and attracts one in three new immigrants to Canada. As one of North America’s fastest growing regions, it is forecast to have a population of 13.5 million by 2041.⁴

Dufferin County has good access to major transportation networks. The ability to get to Toronto Pearson International Airport, just 60 kilometers south, is a major plus. Toronto Pearson is Canada’s busiest airport and a major North American gateway, serving more international passengers than any airport in North America other than New York’s JFK.⁵ Proposals have also been advanced to create a western regional multi-modal transit hub at Pearson comparable in scale to Union Station.⁶ In addition, the Region of Waterloo International Airport (to the west) and Lake Simcoe Regional Airport (to the north-east) are available, both offering full international passenger and freight clearances. Access to Ontario’s 400-series highways and US Interstate Highway network is afforded via Highway 410. Though the Highway 10 connection from the Orangeville area to 410 was upgraded to four-lanes, increased traffic invites extension of Highway 410 further northward, along with an upgraded Highway 10 connection between Shelburne to Orangeville and in other areas of heavy use to address growing congestion. The Niagara-Buffalo US-Canada border facilities are just over two hours away. The 55-kilometer Orangeville-Brampton Railway, owned by the Town of Orangeville, provides twice-weekly freight connections to and from the CP Rail mainline. Both the Toronto and Hamilton Seaway ports are close at hand and have rail connections from Orangeville, as do Montreal and Halifax.

² Canadian Census 2016.

³ Based on a comparison with US “Combined Statistical Areas” in 2015 US Census. New York-Newark NY-NJ-CT-PA, Los Angeles-Long Beach CA, Chicago-Naperville IL-IN-WI, and Washington-Baltimore-Arlington DC-MD-VA-WV-PA are the four ahead, while San Jose-San Francisco-Oakland CA, Boston-Worcester-Providence MA-RI-NH-CT, Dallas-Fort Worth TX-OK and Philadelphia-Reading-Camden PA-NJ-DE-MD follow.

⁴ Ontario Ministry of Municipal Affairs (<http://www.mah.gov.on.ca/AssetFactory.aspx?did=10852>). Accessed on February 17, 2017.

⁵ Airports Council International, International Passenger Travel, 2015 statistics (https://en.wikipedia.org/wiki/List_of_busiest_airports_by_international_passenger_traffic#2015_statistics)

⁶ Greater Toronto Airports Authority, “Pearson Connects: A Multi-Modal Platform for Prosperity,” February 2017.

1. Population

The 2016 Census placed Dufferin County's population at 61,735, representing 8.5% growth since the 2011 national count, well ahead of Ontario's 4.6% and Canada's 5.0% increases. The rate of increase in Dufferin County from 2011 to 2016 was nearly double its 4.5% growth between the 2006 and 2011 Censuses. Sixty per cent of the population is found in the two largest urban areas – the County seat, Orangeville (28,900), and fast-growing Shelburne (8,126) (Exhibit 1).

Exhibit 1					
Dufferin County Population – 2016 Census – By Municipality					
Municipality	2011 Census	2016 Census	Change	% Change	% of County
Amaranth	3,963	4,079	116	2.9%	6.6%
East Garafraxa	2,595	2,579	-16	-0.6%	4.2%
Grand Valley	2,726	2,956	230	8.4%	4.8%
Melancthon	2,839	3,008	169	6.0%	4.9%
Mono	7,546	8,609	1,063	14.1%	13.9%
Mulmur	3,391	3,478	87	2.6%	5.6%
Orangeville	27,975	28,900	925	3.3%	46.8%
Shelburne	5,846	8,126	2,280	39.0%	13.2%
Dufferin County	56,881	61,735	4,854	8.5%	100%

Source: Statistics Canada, 2016 Census

The pace of Orangeville's population growth has continued to slow from 6.6% between 2001 and 2006 to the recent increase of 3.3% from 2011 to 2016. Shelburne, which has expanded its water and sewage capacity, has grown rapidly. The Town had the highest rate of growth (39.0%) in the 2016 Census among southern Ontario communities over 5,000 people, trebling its 13.2% rate of growth between 2006 and 2011. The Town of Mono at 14.1% was the other municipality that grew above the County average

In the regional context, Dufferin County's 8.5% growth between 2011 and 2016 compares to somewhat higher growth rates in Caledon (11.8%) and Simcoe County (9.1%), but is stronger than neighbouring Wellington (4.9%) and Grey (1.4%) Counties.

Exhibit 2				
Dufferin County Population Growth Compared to Neighbouring Jurisdictions				
Municipality	2011 Census	2016 Census	Change	% Change
Dufferin County	56,881	61,735	4,854	8.5%
Wellington County (not including Guelph)	86,672	90,932	4,260	4.9%
Grey County	92,568	93,830	1,262	1.4%
Simcoe County (not including Barrie)	310,000	338,216	28,216	9.1%
Caledon	59,460	66,502	7,042	11.8%

Source: Statistics Canada, 2016 Census

Compared to Ontario, Dufferin County had a larger portion of the population under 19 years of age (25%) compared to Ontario (22%) in the 2016 Census, but a smaller portion of seniors (15% compared to 17%). About 62% of the population was between 20 and 64 years of age, consistent with Ontario. The average age of the population in Dufferin County in 2016 was 39.6 years, compared to 41.0 years for Ontario.

Exhibit 3		
Dufferin County Population by Age Group (2016)		
Age Group	Dufferin County	
	Number	Percentage
0 to 4 years	3,575	5.8%
5 to 9 years	3,895	6.3%
10 to 14 years	3,975	6.4%
15 to 19 years	4,275	6.9%
20 to 24 years	3,865	6.3%
25 to 29 years	3,425	5.5%
30 to 34 years	3,585	5.8%
35 to 39 years	3,770	6.1%
40 to 44 years	4,180	6.8%
45 to 49 years	4,715	7.6%
50 to 54 years	5,375	8.7%
55 to 59 years	4,480	7.3%
60 to 64 years	3,570	5.8%
65 to 69 years	3,140	5.1%
70 to 74 years	2,245	3.6%
75 to 79 years	1,495	2.4%
80 to 84 years	1,075	1.7%
85 years and over	1,100	1.8%
Total	61,735	100.0%
Source: Statistics Canada, 2016 Census		

The Greater Golden Horseshoe (GGH) mega-region – centred on the City of Toronto – has a population of 9.4 million people,⁷ ranking it as the fifth largest US and Canadian metropolitan agglomeration.⁸ The region contains over one-quarter of Canada’s population and attracts one in three new immigrants to Canada. One of North America’s fastest growing regions, the GGH is forecast to have a population of 13.5 million by 2041.⁹ Any point in the GGH is less than two hours’ drive from Dufferin County, offering businesses and the agricultural sector a huge market at their doorstep – both to sell into and from which to attract tourists or people who will benefit from services offered in the County.

2. Jobs

The estimated number of jobs in Dufferin County increased from 22,494 in 2011 to 24,354 in 2016 – an increase of 8.3% which comfortably exceeds the job growth rate for Ontario (6.6%). Encouragingly, this rate of employment growth was nearly equal to the County’s population increase. In the prior five year period (2006 to 2011), however, Dufferin County lost 2.4% of its jobs. As a result, the job growth for Dufferin County over the longer ten-year span from 2006 to 2016 was only 5.7% compared to a provincial average of 11.2%. Most of jobs in 2016 – 78% – were in the Orangeville (16,127) and Shelburne (2,827) urban areas, giving them a higher share of County jobs than their populations. The jobs located in the other municipalities range from 2,017 in

⁷ Canadian Census 2016.

⁸ Based on a comparison with US “Combined Statistical Areas” in 2015 US Census. New York-Newark NY-NJ-CT-PA, Los Angeles-Long Beach CA, Chicago-Naperville IL-IN-WI, and Washington-Baltimore-Arlington DC-MD-VA-WV-PA are the four ahead, while San Jose-San Francisco-Oakland CA, Boston-Worcester-Providence MA-RI-NH-CT, Dallas-Fort Worth TX-OK and Philadelphia-Reading-Camden PA-NJ-DE-MD follow.

⁹ Ontario Ministry of Municipal Affairs (<http://www.mah.gov.on.ca/AssetFactory.aspx?did=10852>). Accessed on March 10, 2017.

Mono, through 1,039 in Amaranth, 816 in Mulmur, 636 in Grand Valley, 450 in Melancthon, to 443 in East Garafraxa.

3. Economic Structure

The four largest sectors by employment are retail, health care and social assistance, manufacturing, and accommodation and food services. However, of these, only the manufacturing sector had percentage job increases higher in Dufferin County than provincially between 2011 and 2016 (Exhibit 4).

Exhibit 4 Dufferin County Job Growth and Location Quotients Largest Employment by Sector						
NAICS Code	Sector Description	Jobs 2011	Jobs 2016	% Change 2011-2016	% Change Ontario 2011-2016	Location Quotient 2016
44-45	Retail	3,294	3,467	5.3%	6.9%	1.27
62	Health Care & Social Assistance	2,879	3,104	7.8%	9.5%	1.14
31-33	Manufacturing	2,104	2,511	19.3%	0.9%	1.23
72	Accommodation & Food Services	1,900	2,146	12.9%	16.1%	1.31
23	Construction	1,675	1,773	5.9%	11.2%	1.00
61	Educational Services	1,301	1,560	19.9%	8.8%	0.93
56	Administrative & Support & Waste Management & Remediation Services	1,343	1,211	-9.8%	6.0%	0.98
54	Professional, Scientific & Technical Services	1,124	1,195	6.3%	10.4%	0.70

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. Location quotients allow us to identify which sectors are over- or under-represented relative to the province. 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.

C. Dufferin County – Opportunities and Constraints

1. Recognition of the Need for a Dufferin County Economic Development Strategy

Economic vitality was identified by the County Council as a key priority as part of a corporate planning process completed in 2015. In launching the development of the County-wide Economic Development Strategic Plan, the County of Dufferin was concerned about the need to keep pace – possibly even catch-up – with other similar and neighbouring jurisdictions. An Economic Development Steering Committee was established and a strategy workshop was held with the Queen’s Executive Decision-Making Team to identify some common issues and opportunities. The Steering Committee has been involved in the development of this Strategy which has also involved stakeholder engagement and a public survey.

2. Jobs for a Growing Resident Labour Force

Location is a major advantage for Dufferin County – one that becomes even more apparent as the urban Greater Toronto Area (GTA) grows less affordable and more crowded and congested.

Dufferin County’s stepped-up rate of population growth indicates the ready market for new housing that is relatively more affordable and that includes single-family homes and housing units with larger floor areas and the availability of yards in communities offering greater amenities.

The growth in population presents the opportunity and challenge to the County and the municipalities to encourage business expansion and new investment that will provide jobs to the growing resident labour force, enabling them to find suitable employment closer to their homes.

3. Availability of Industrial and Commercial Land and Buildings

Available and prospective industrial and commercial land and buildings are predominately located in the three urban areas – Orangeville, Shelburne and Grand Valley. There are industrial and commercial sites in the parts of Amaranth, East Garafraxa and Mono that border on Orangeville. The development of some of these sites may benefit from cross-municipal-boundary servicing cooperation. Mulmur has pre-zoned unserviced employment lands in Primrose at the junction of Highways 10 and 89.

Recent Employment Land Needs Assessments, Commercial Demand and Market Analysis and a Development Charge Background Study were undertaken in 2014, 2015 and 2016 at the County level and in Orangeville and Shelburne. These studies reviewed population forecasts, employment growth and forecasts and trends in specific sectors of the economy, to estimate the future needs for industrial, commercial/retail and office space. The reports indicated a sufficient supply of serviceable land and buildings, predominately in Orangeville and Shelburne, to meet future requirements. It was noted that the growth in service sectors can be accommodated by existing retail/commercial nodes and possible mixed use development of vacant employment lands.

While there was an overall reduction in employment levels in manufacturing from 2006-2016, job increases have been strong from 2011 to 2016. Manufacturing operations have opened, with further expected

announcements. A key recommendation was to accommodate growth in traditional sectors in existing employment areas and buildings.

Shelburne has applied to convert some land that is designated for employment to residential with this still allowing adequate supply.

The various reports did not analyze the specific characteristics of land and buildings regarding lot size, ceiling heights or the requirements of today's manufacturing economy. As Dufferin County looks to target specific sectors for economic growth, it would be beneficial to undertake an inventory of specific land and buildings including lot size, square footage, ceiling heights and existing utility servicing including water, wastewater, hydro, gas and broadband.

This assessment of the inventory would support targeted marketing and provide background for any incentives that are deemed required.

An early requirement for County economic development efforts will be to work with the municipalities to gather full information on the industrial, commercial and investment (ICI) sites and buildings available for sale and lease and to develop and then keep up-to-date a readily accessible and searchable property directory covering the entire County.

Consideration should be given to obtaining the Ontario Ministry of Economic Development and Growth's "Investment Ready: Certified Site" designation for any industrial land in the County that qualifies. The advantages of the "Investment Ready: Certified Site" designation are that the sites are included in a prominently promoted Ontario Government online listing and that they will attract special interest in searches for sites where construction can begin immediately with limited or no due diligence. Certification is available for serviced sites or business parks – both publicly or privately owned – that are larger than 4 hectares (10 acres). The applications must be sponsored or endorsed by local municipal economic development or planning officials. The Ontario government offers to reimburse 50% of eligible expenses involved in obtaining the certification, to a maximum of \$50,000 per application.

4. Property Taxes and Development Incentives

The County and municipal industrial and commercial property tax rates per assessed value in Dufferin County are below most nearby jurisdictions, the notable exceptions being Caledon in commercial and Brampton and Caledon in industrial (Exhibit 3). Their advantage comes in part from having a lower education rate as set by the Provincial government.

In Dufferin County, the development charges are low. There is a County imposed development charge. Five of the eight municipalities do not add any local municipal development charges, however. Only Shelburne, Mulmur and Grand Valley have their own development charges for non-residential properties (Exhibit 5).

Exhibit 5 2016 Comparisons of Total Industrial & Commercial Property Tax Rates			
Dufferin County Municipalities¹	Development Charges³	Commercial Occupied Tax Rate	Industrial Occupied Tax Rate
Amaranth	\$0.58	2.09%	3.42%
East Garafraxa	\$0.58	2.03%	3.31%
Grand Valley Urban	\$10.34	2.38%	3.95%
Grand Valley Rural	\$4.24	2.38%	3.95%
Melancthon	\$0.58	1.19%	3.41%
Mono	\$0.58	1.98%	3.23%
Mulmur	\$2.20	2.09%	4.00%
Orangeville	\$0.58	2.54%	4.22%
Shelburne	\$9.14	2.41%	3.95%
Municipality²	Development Charges	Commercial Occupied Tax Rate	Industrial Occupied Tax Rate
Brampton	\$17.97	2.44%	2.64%
Caledon	\$16.96	1.97%	2.39%
Centre Wellington	\$8.76	2.43%	3.77%
Collingwood	\$9.14	2.50%	3.12%
Erin	\$7.22	2.40%	3.73%
Guelph-Eramosa	\$8.17	2.38%	3.70%
Owen Sound	\$0.00	4.06%	5.65%
Woolwich	\$8.24	2.90%	3.01%
¹ Source: Municipal published rates. ² Source: 2016 BMA Municipal Study ³ Grand Valley, Mulmur and Shelburne have Development Charges. In the other Dufferin County municipalities, only County Development Charges apply. NOTE: Rates and charges not include any incentives such as CIPs.			

Development Incentives: Incentives are used to stimulate development. Any consideration of whether to provide development incentives should be based on a clear appreciation of what outcomes are being sought within the municipalities' overall strategies and assessments as to the future course of development. Smart incentives forego immediate tax revenue in return for the opportunity to gain increased future tax revenue from appreciated values. An analysis of competitor jurisdictions' incentives, their objectives and anticipated or demonstrated outcomes is required. Such an evaluation also needs to take account of the fact that the buyer of a site will look at the total cost of ownership, including the acquisition, building costs, return on investment, ease of doing business, transportation, and labour. Incentives will not compensate for other inadequacies. They tend to influence the locational decision after the other requirements have been evaluated and met.

The principal tools are:

- Community Improvement Plans (CIPs) which allow municipalities to provide tax assistance, grants and loans and adopt policy initiatives directed toward a defined project area with a view to encouraging revitalization and stimulating development and redevelopment;

- Tax Increment Financing (TIF) which uses the anticipated gains in taxes to subsidize current improvement, effectively by rebating for a defined period the increment in the property tax that results from the new investment; and
- Development charge exemptions which eliminate the up-front charges that recover municipal investments related to new developments.

Community Improvement Plans (CIPs) have been crafted to cover widely varied objectives and situations, including downtown revitalization, brownfield cleanups, encouraging construction of sustainable buildings, and incenting sector focused investment. A brief summary of the situation with respect to incentive programs in Wellington County, Haldimand County and Simcoe County is included in the Comparative Overview of Economic Development Programs in Nearby Communities (Appendix 6).

The usual practice in two-tier municipalities is to offer parallel and complementary municipal initiatives at both levels, jointly planned with a coordinated approval process. As the incentives are meant to attract development, it is important that a marketing plan accompany the program.

Though incentives were mentioned during the consultations and meetings, there was no specific evidence offered that the lack of incentives in Dufferin County had been a decisive factor that cost the County investment. Monitoring remains important. The use of municipal incentives has grown in Ontario. In the future, there may be merit in evaluation of well-targeted Community Improvement Plans (CIPs) and Tax Increment Financing (TIF) to accelerate or encourage needed development or meet well-defined competitive considerations.

5. High-Speed Broadband Coverage – A Fundamental Requirement

Virtually every aspect of the economy and people's lives have become digitized. Throughout Dufferin County, a critical impediment to the attraction of new investment and talent, and the competitiveness and further expansion of existing businesses and agricultural enterprises is the widespread lack of affordable high-speed broadband that is an essential part of today's infrastructure – just as electricity, roads, water and sewage have long been. Broadband availability is also vital to the attraction of entrepreneurs, risk takers, creative professionals, and mobile millennials, many of whom are attracted to a lifestyle, such as that offered in Dufferin County, provided they have reliable broadband connections and ready personal access to the GTA when the business need arises. The absence of affordable broadband access ranked near the top as the most widely felt challenge that was raised in stakeholder consultations and the public survey.¹⁰

The County of Dufferin has played an active and prominent role in the \$270 million SouthWestern Integrated Fibre Technology (SWIFT) Network that is being realized by the Western Ontario Wardens' Caucus (WOWC) with \$180 million in Federal and Ontario government financial support. SWIFT will expand the reach of existing fibre networks to about 350 internet access points – or points of presence – so that it will be easier, faster and cheaper for internet service providers (ISPs) to connect businesses and homes to high-speed internet. The providers who will be selected competitively to work with SWIFT will match public funding with their own investments and will continue to own and operate their networks and deliver services directly to customers.

¹⁰ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County). See Appendix 2.

Three to six points of presence should be installed in Dufferin County by 2021. SWIFT will measurably strengthen the network but the “last mile” access to homes and businesses will rest with ISPs.

Pending the establishment of the Dufferin County points of presence under the SWIFT Network plan, the interests of Dufferin County, its municipalities and residents and businesses lie in exploring and availing themselves of other additional opportunities, including projects that can benefit from the Federal government’s Connect to Innovate funding. The absence of affordable high-speed broadband and gaps or weak spots in existing coverage are putting a brake on the County’s economic development. A comprehensive strategy for the County and local municipalities is urgently required. Municipal investment and facilitative regulatory policies frequently play an essential role in leveraging additional funding and participation, as already shown by the SWIFT Network project. Municipalities, school boards and hospital systems require high-speed networks and can sometimes find ways to support other networks in their communities. Access to utility right-of-ways and poles can aid network development. Municipal “dig once” policies can encourage the laying of conduit for fibre at the same time that other road or utility work is undertaken. In some situations, tall structures or high points of land can be capitalized upon to facilitate the development of Wi-Fi links at lower costs. Opportunities to hasten access may come through providing early high-speed connections to shared office spaces and to business or incubation hubs. Strategically located high-speed Wi-Fi networks may also hasten access for multiple users.

The absence of affordable high-speed broadband and gaps or weak spots in existing coverage have put a brake on the County’s economic development. Dufferin County almost certainly does not make the short list for many new investments, while expansions of local businesses and agricultural ventures are being held back or pursued elsewhere. The timing of any proactive efforts to attract new investment on the part of Dufferin County and its economic development partners in Orangeville, Shelburne and elsewhere will depend almost entirely in many sub-sectors on the actual availability of high-speed broadband. Many of the sectors of focus that are identified in Section E as potential priorities for attracting new investment are effectively non-starters without competitively-priced high-speed broadband access. Prospects will also want to be assured that any new networks have a track record of reliability before making commitments. Furthermore, the bandwidth that is required by users continues to grow significantly and rapidly, meaning that higher and higher speeds and capacity will be in required in the future.

Exhibit 6 highlights examples of situations and sectors where the absence of access to affordable, reliable high-speed broadband will be a barrier to the competitiveness and growth of existing ventures and to the attraction of talent, investment and tourism to Dufferin County. The introduction of the new high-speed SWIFT Network points of presence and other coverage expansion in Dufferin County may be able to take into account where the new service can have the most strategic impact from an economic development perspective.

Exhibit 6	
Examples of Situations and Sectors that are Significantly Impacted by a Lack of High-Speed Broadband	
Retail	An online e-commerce presence is now essential for all retailers, including for niche and speciality stores and for artisans producing one-off items
Manufacturing	Manufacturers require ultra-high-speed, large capacity fibre to interact with suppliers and clients to send and receive digitized designs and specifications, including for 3D printing
Professional Services	Reliable, ultra-high-speed broadband access is a fundamental requirement for services providers such as engineering, architectural, design, computer systems, software, business support, and financial services firms – all rapidly growing sub-sectors

Exhibit 6 (Continued)	
Examples of Situations and Sectors that are Significantly Impacted by a Lack of High-Speed Broadband	
Agriculture	The digital agricultural revolution – precision farming – has brought robotic milking systems, tailored weather forecasts, online market data and sales and buying execution, satellites and drones monitoring soil moisture, GPS- and computer-guided tractors and farm implements that precisely plant, fertilize and irrigate crops
Tourism	Social media is part of the visitor experience and a vital promotional aspect. Guests in overnight accommodations (especially glampers ¹¹) anticipate having access to high-speed Wi-Fi for personal devices and multi-channel TV
Digital Media and Film and Video Production	Film and digital media are highly dependent on access to ultra-high-speed, very high capacity optical fibre
Technology-Oriented Firms	Innovative, technology-oriented firms invariably have a dependence on advanced digitally-based technologies, as represented by Big Data Analytics, the Internet of Things, imaging, GPS, artificial intelligence, cyber security, robotics, 3D printing, and virtual reality
Creative Professionals and Lone Eagles	Entrepreneurially-oriented individuals are attracted to locations matching their lifestyle preferences, provided they have access to reliable high-speed broadband and, when required, can readily access a neighbouring metropolitan area and major airport
Telecommuting Options for Knowledge Workers	Where they have access to high-speed broadband, many knowledge workers can exercise or seek out options to telecommute or work from home several days per week
Attracting and Retaining Millennials	Millennials are accustomed to connectivity, and often able adopt flexible working arrangements if they have access to high-speed broadband
Students, Workforce Training and Lifelong Learning	Most learning requires some online access, even for classroom-based courses. Students must research online. Some courses are only available online. Live class streaming is often an option during adverse weather.

6. Extension of Natural Gas Distribution – Economical Energy for Rural Areas

A long-felt need, especially on the part of Dufferin County farmers, is the extension of natural gas distribution to rural areas of the County to provide access to competitively priced fuels for heating greenhouses and animal barns and for crop drying. According to the Ontario Federation of Agriculture, fewer than one in five rural Ontarians have service. Natural gas rates are one-quarter the cost of electricity and less than half the cost of propane.¹² In January 2017, the Ontario government announced a new natural gas grant program to support the building of infrastructure in rural, Northern and First Nations communities. According to the Ministry of Infrastructure, municipalities will be able to work with utilities and distributors to bring forward proposals under a competitive intake process.¹³ This presents an opportunity for well-coordinated leadership and collaboration on an important economic development issue involving the County, municipalities, Dufferin Federation of Agriculture and other potential beneficiaries to work with Union Gas/Enbridge, the current supplier to southern parts of the County.

¹¹ Glampers are people engaged in glamping, a term which derives from a blend of the noun “camping” and with the adjective “glamorous.”

¹² Ontario Federation of Agriculture, “LTEP Policy for Natural Gas and Electricity,” (<https://ofa.on.ca/issues/additional-information/rural-ontario-natural-gas-backgrounder>). Accessed on April 17, 2017.

¹³ Ontario Government News Release, “Expanding Natural Gas to More Communities Across Ontario,” January 30, 2017 (<https://news.ontario.ca/moi/en/2017/01/expanding-natural-gas-to-more-communities-across-ontario.html>). Accessed on April 10, 2017.

7. Dufferin County's Sustainability Opportunity

Sustainability – the conservation of an ecological balance by avoiding depletion of natural resources¹⁴ – is a significant aspect of Dufferin County's identity and advantage, as represented by its natural environment, open spaces, nature preserves, trails and recreational areas. People readily associate this topography with relaxation, fresh air, farm-fresh produce, hiking, cycling, horse riding, skiing and other outdoor activities. It is also evident that the County's wind generated electricity contributes alternative energy. A relatively high proportion of Dufferin County farms are the site of renewable energy production systems, according to new data collected as part of the 2016 Census of Agriculture. Ninety-six farms – or nearly 14% – have solar (60) or wind (44) generation systems or both. Many people in Southern Ontario recall the successful resistance to the mega-quarry. The County and its municipalities should entertain sound propositions going forward that publicly underline a respect and preoccupation for sustainability. For example, can Dufferin County be an early adopter of strategically located electric vehicle charging stations? Are there opportunities to use solar and wind power generation for lighting and signage in public areas and at publicly-owned facilities, including those that are frequented by tourists? What private sector, County and municipal environmental initiatives can be drawn to the attention of an audience beyond the County?

8. Federal and Ontario Climate Change Policies

The ambitious climate change plans that the Federal and Ontario governments are adopting to reduce greenhouse gas emissions to fight climate change have aspects that are potentially important from an economic development perspective.

Most notable in terms of impact and immediate opportunities is the Ontario Climate Change Action Plan. A major focus of the plan is greater energy efficiency in buildings, including significant retrofitting of institutional buildings prior to mandating net-zero carbon emission standards by 2030. Funding is being offered for methane demonstration projects, clean technology accelerators and clusters, and pre-sale energy audits for homes. There will be upward pressure on energy costs, but the government says it will focus on helping the agri-food sector adopt low-carbon technologies, for example for greenhouses and grain dryers.

At the Federal level, the 2017 Budget included \$1.4 billion over three years in new equity, working capital and project financing for clean technologies ventures to be offered through the Business Development Bank of Canada (BDC) and Export Development Canada (EDC).

9. External Developments and Trends

The changing external environment raises issues that are of potential consequence to the Dufferin County Economic Development Strategic Plan.

Global Economic and Policy Trends: The international economic outlook has shifted and has been more uncertain since the global financial crisis of 2008 and 2009. The economic growth trajectory has been lower, though generally sustained. Business investment has been more tentative, especially in the face of protectionist and nationalist tendencies that have emerged in the United States, Britain and Europe. The NAFTA negotiations pose further unknowns and risks, including possible adjustments to Canadian dairy,

¹⁴ Definition for "sustainable" from the Oxford Canadian Dictionary (Second Edition).

poultry and other agricultural policies. One practical response for Canadian business and agriculture is diversification of export markets, though the heavy export dependence on the US makes any meaningful shift a substantial challenge. The coming into effect of the Comprehensive Economic and Trade Agreement (CETA) with the European Union opens new access. Subject to continued assurances of access to the US market, CETA can also potentially make Canada a preferred North American location for selected investments that link the North American and European markets. One consequence of CETA will be greater competition from Europe in the specialty cheese market, though better access may also encourage investments to expand European food processors' Canadian presence.

Foreign Direct Investment Trends: International foreign direct investment (FDI) flows – excluding merger and acquisition (M&A) activity – have been cautious and have not recovered to pre-recession levels. The total stock of FDI in Canada rose by 37% from 2011 to 2016 to \$Cdn 826 billion. Over the same period, the proportion of FDI from the US declined (51% to 47%) while the European share rose from 33% to 37%. Over the six years to 2016, FDI in manufacturing rose by only 9% or about one-quarter of the overall rate, though one of the most robust rates of the FDI growth in the sector was in food manufacturing, especially from Europe. FDI in professional, scientific and technical services showed remarkable growth with the stock of FDI increasing by 186% from 2011 to 2016.

Though accurate data is not available, the most notable source of increased FDI in Ontario, especially in manufacturing, has been from existing foreign investors. These firms know the quality of the workforce and have the connections and reputation to add further highly qualified staff. As well, they often are familiar with tax incentives and programs that support innovation.

These FDI trends underline the prime importance of economic development activities aimed at supporting, retaining and expanding existing foreign-owned firms.

Federal, Ontario and GTA Investment Attraction Initiatives: Both the Federal and Ontario governments are putting in place their own strengthened new foreign direct investment (FDI) attraction organizations. The objective in both cases is to offer a well-coordinated single-window concierge service to foreign firms looking to expand or undertake new investments. The new provincial entity, the Ontario Investment Office, will be an important FDI partner for Dufferin County. As well, a new Greater Toronto Area (GTA) FDI attraction agency – Toronto Global – was inaugurated in early 2017, supported by Federal and Ontario government funding. The municipalities involved include York, Durham and Halton Regions, Caledon, Brampton, Mississauga, and Toronto.

10. Strengths, Weaknesses, Opportunities and Threats

Strengths

- Proximity to larger communities in the GTA, particularly Brampton, Mississauga and Toronto, which makes the County attractive for people who want to live in a rural and small town environment but have access to jobs, shopping and amenities of larger centres.
- Proximity to a large customer market in the GTA is a benefit for existing and future businesses in Dufferin.
- Ready access to Toronto Pearson International Airport via Highway 10 and Highway 410, particularly for persons living or working in communities in the southern portion of the County. In moderate traffic, it is an approximate 48 minute drive at posted speed limits to the airport from Orangeville.

- Recently strengthened highway infrastructure – Orangeville Bypass and extension of four lanes on Highway 10 between Caledon Village and Highway 9, leading to Ontario’s 400-series highway network, Canada-US border crossings, and the US Interstate Highway system.
- GO Transit bus connections from Orangeville to Brampton hub.
- The 55-kilometer Orangeville-Brampton Railway, owned by the Town of Orangeville, provides twice-weekly freight connections to and from the CP Rail mainline, and is an asset which is critical to manufacturers that use it.
- Dufferin County has an attractive mix of urban and rural communities with a natural setting and amenities and access to a wide range of outdoor recreational areas including lakes, rivers, the Bruce Trail and other hiking, horse riding and cycling trails, and forests – amenities that are attractive to residents and visitors.
- Smaller towns and rural areas, with big city amenities close at hand.
- Offers a calmer, measured pace of life compared to the congestion and hectic pace of large urban centres.
- Range of amenities, including high quality restaurants, craft breweries, micro-distilleries, wineries, and resort properties.
- Local campuses of two post-secondary educational institutions – Georgian and Humber Colleges.
- Relatively more affordable housing compared to more central locations in the GTA, particularly Toronto.
- Employment lands are more affordable than GTA locations.
- The County and area municipalities have a reputation among developers and realtors as being business friendly and helpful.
- Population is increasing – the 2016 population level was 61,735 which represents an increase of 8.5% from 2011, which is well ahead of Ontario’s 4.6% increase. One of Dufferin County’s area municipalities – Shelburne – had the highest population growth rate (39%) among southern Ontario communities over 5,000 people between 2011 and 2016.
- Along with population growth, the size of the resident labour force in Dufferin is increasing, resulting in a larger and more diverse talent base.
- High level of resident labour outflow (around 50%) that could potentially be attracted to work at local jobs if such jobs were available.
- The number of jobs in Dufferin County increased by 8.3% between 2011 and 2016 which is higher than the job growth rate in Ontario over that period (6.6%) and considerably higher than the County job growth rate between 2006 and 2011 when it lost 2.4% of its jobs.
- The manufacturing sector has rebounded - the number of manufacturing jobs in Dufferin County increased significantly between 2011 and 2016 with a 19.3% increase compared to a 0.9% job growth in this sector in Ontario.
- Dufferin County is located near the Honda of Canada Manufacturing plant in Alliston, making the County an attractive site for parts suppliers.
- Dufferin County is endowed with rich, arable land. Roughly 70% of the land base in Dufferin County is classified as prime agricultural land.
- Dufferin County has a diverse farming sector, centred on cattle, dairy, hogs and mixed farming in the western part and potatoes in the northeastern quadrant.

- Dufferin has a significant equine sector with an estimated nearly 6,000 horses and is a prominent component of the successful Headwaters Horse Country initiative that has taken root and grown rapidly over the last 10 years.¹⁵
- Strong, vibrant and growing arts, culture and creative sector, with well above the provincial increase in jobs from 2011 to 2016 and notable festivals such as the Shelburne Heritage Music Festival and the Orangeville Blues and Jazz Festival. Growth is evident too in the film segment as Dufferin has attractive and varied locations for film and productions.
- Dufferin County, as part of the Headwaters region, has grown substantially as a tourism destination, centred on arts, culture, culinary attractions, scenery and the outdoors, recreational pursuits and equestrian offerings. Headwaters Tourism has won national and provincial recognition for its “Where Ontario Gets Real” campaign, highlighting people and their connection to the land.
- Dufferin County has an entrepreneurial culture in agriculture and business.
- Orangeville and Shelburne have full-time Economic development staff and programs.
- Municipalities in Dufferin County have collaborated on the County’s first Official Plan and in the provision of municipal services.

Weaknesses

- Many areas of the County lack access to affordable and reliable high-speed broadband. This is a significant issue that inhibits investment and talent attraction and that handicaps residents, business and agriculture relative to neighbouring areas.
- No immediate direct access to a 400-series highway.
- The availability of commercial transportation and distribution services are sometimes deficient due to the lack of the needed critical mass of people and businesses to sustain such services.
- Lack of public transportation throughout most of the County. Only Orangeville currently has a public bus system, and GO buses offer service to Brampton only from Orangeville.
- No natural gas distribution in rural areas of the County which is a particular disadvantage for farms which need competitively priced energy for drying crops and heating animal barns.
- Only three of the eight municipalities in the County have full water and sewer servicing in place.
- Insufficient water capacity to accommodate large water users.
- Increasing housing and land prices, especially in the southern part of the County.
- Insufficient number and range of jobs to provide an opportunity for all of the County resident labour force to work in the area.
- Youth leave the County to pursue post-secondary education and job opportunities elsewhere.
- Low levels of employment in a number of sectors such as finance and insurance; and professional, scientific and technical services.
- Access to certified young labour for manufacturing jobs is problematic and needed trades training is not offered through local colleges.
- Lack of labour such as lower skilled labour for some industries and unrealistic wage expectations (Toronto wages) for professional level jobs.

¹⁵ Estimate based on 2016 Census of Agriculture reporting of 1,529 horses and ponies in Dufferin County multiplied by industry multiplier of 3.9 which is the standard multiplier used in the Ontario equine sector to account for underreporting.

- The lack of rental housing and spousal employment opportunities discourage people who may be interested in living in Dufferin County. Inability to get approvals for on-farm employee housing complicate hiring.
- The low tax base in rural areas does not adequately support improvements and economic development initiatives.
- Most municipalities In Dufferin County do not have economic development departments and currently there is no economic development function or full-time staff at the County level.
- Land banking and absentee land owners are resulting in some prime agricultural land not being used for farming.
- The challenges of arranging farm succession present risks in the agriculture sector.
- Multiple layers of government and inconsistencies in policies and approaches creates frustration, particularly in land development process.
- The offices and officers of many government departments and agencies that have responsibility for Dufferin County are based elsewhere in widely varied locations, inhibiting efforts to build collaboration, strong partnerships and common purpose.
- Historically, Dufferin County municipalities have acted with a degree of independence that has fed an impression that a collaborative spirit is lacking.
- The significant powers that are vested in the Ontario government frequently leave local governments, elected officials and citizens with frustration and concern over their inability to take actions that they believe would benefit the community.

Opportunities

- Attract young adults (25 to 40 years) who were raised in Dufferin and moved elsewhere but could be attracted back to the area by family ties, lower cost of living, access to the GTA and lifestyle opportunities.
- Attract professionals, ‘lone eagles,’ entrepreneurs and the creative class who want to live in small town and rural environments and who can work from home or local offices, provided they have access to high-speed broadband.
- An environment and location suited to businesses and organizations that offer a diverse range of specialized services that address people’s health and wellness.
- Natural assets and a location well-suited to tourism sector expansion by encouraging further growth in food, recreational and creative sector activities on which the area can build its reputation.
- Further support of farming and agri-businesses through land use policies and zoning that address sector needs.
- Build closer relations with the University of Guelph to further innovation, research and learning in the agriculture, agri-food and rural sectors in the County.
- Trends in the food sector toward wholesome, locally-produced foods favour the development of niche and specialty agri-businesses and food manufacturing in the County. Rapid expansion of craft breweries, micro-distilleries and hard cider production, aided by Provincial policy changes, affords opportunities to County entrepreneurs.
- Collaborate with Humber and Georgian Colleges in the development of skills needed by local business including those in manufacturing.
- Collaborate with communities within the County on economic development initiatives that will result in regional economic benefits.
- The Federal and Ontario government have accorded high priority to innovation and entrepreneurship and are supporting local initiatives, organizations and ventures.

- Federal and Ontario Climate Change initiatives include significant financial support for the development of clean technologies.
- Dufferin County is home to retired and semi-retired business executives who can be recruited to work as mentors for entrepreneurs and early-stage companies.
- Capitalize on the County being part of the Headwaters region.
- As the number of jobs continues to grow, a portion of the resident labour force that commutes out of Dufferin for work could potentially be attracted to work in the County.
- The lower Canadian dollar compared to its US counterpart enhances the competitiveness of Canadian firms in the US and international markets and against US competition.
- The Comprehensive Economic and Trade Agreement (CETA) between Canada and the European Union can make Canada a preferred North American location for investments that link Europe and North America, provided US market access is assured.
- The SouthWestern Integrated Fibre Technology (SWIFT) Network will expand the reach of existing fibre networks and provide three to six ultra-high-speed points of presence in Dufferin County by 2021.

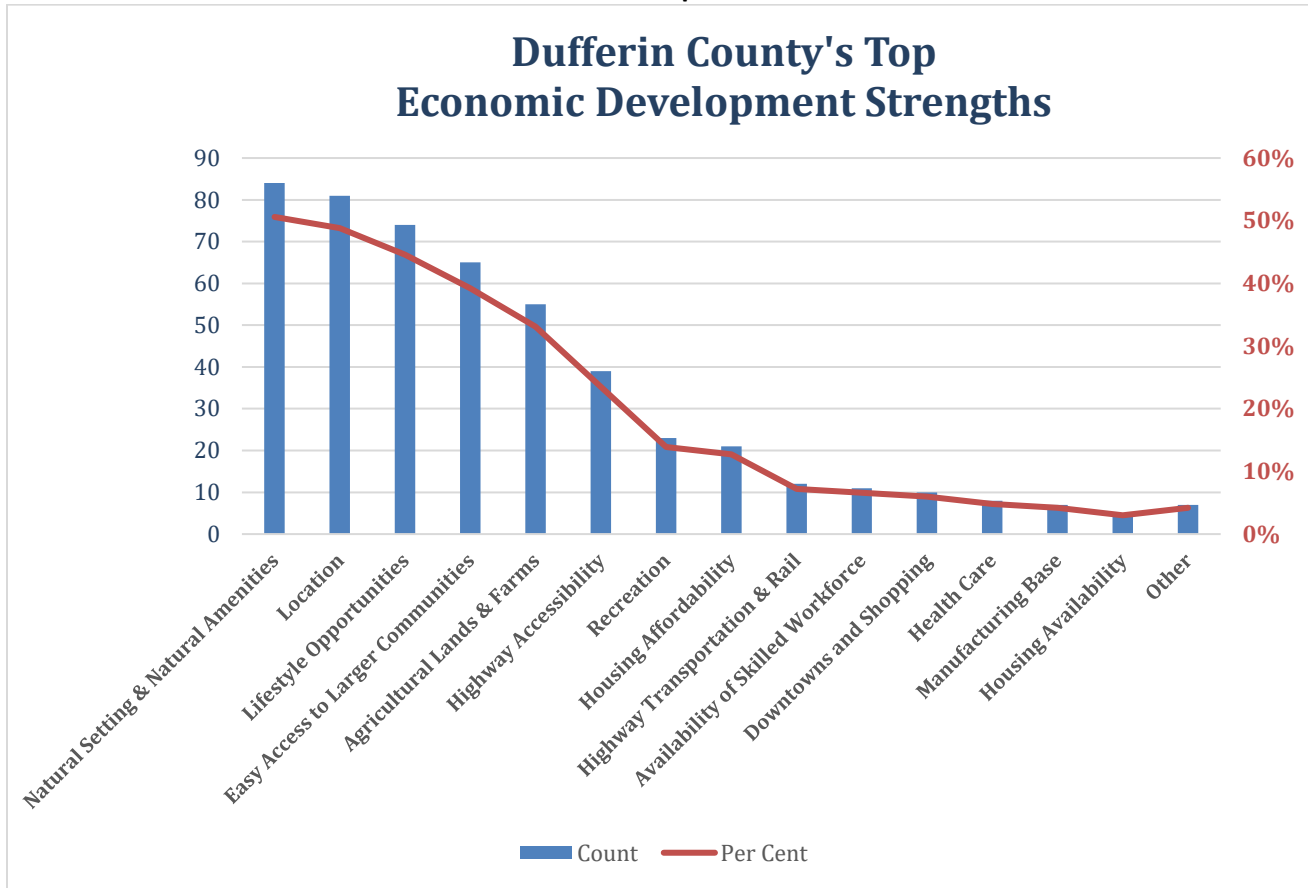
Threats

- Competition from other communities such as Caledon and Collingwood that offer similar quality of life attributes to attract new residents.
- Communities elsewhere close to the edge or bordering the GTA may be more attractive for businesses given larger employment lands supply and variety.
- Resource extraction interests (aggregates) that could take large tracts of agricultural land out of production and adversely impact quality of life and attractiveness for visitors and new residents.
- Dependence of some manufacturers on the Orangeville Brampton Railway, owned by the Town of Orangeville and operating at a loss.
- Possible loss of land zoned for industrial use through its re-designation to residential.
- Dependence on ground water reserves for municipal water, rather than having a pipeline to bring water from the Great Lakes.
- Continued competitive pressure on the manufacturing sector and protectionist and nationalist policies and tendencies (especially the US) that may affect access to international markets.
- The renegotiation of NAFTA poses unknowns and risks, including possible adjustments to Canadian dairy and poultry policies.
- One consequence of the upcoming Comprehensive Economic and Trade Agreement (CETA) will be greater competition from Europe in the specialty cheese market.
- Societal challenges of welcoming and integrating growing numbers of new County residents, many of whom are commuting considerable distances to workplaces.
- Policies and legislated changes by senior levels of government could adversely impact some sectors such as farming.

Public Feedback – Dufferin County Economic Development Strengths & Challenges

In the public survey undertaken as part of the development of the Strategic Plan, people were asked what they felt were Dufferin County’s top three economic development strengths. The dominant five choices were natural setting and natural amenities; location; lifestyle opportunities; easy access to larger communities; and agricultural land and farms. Exhibit 7 shows the respondents’ choices.

Exhibit 7
Summary of Dufferin County Economic Development Survey Results
Choices of Respondents¹⁶

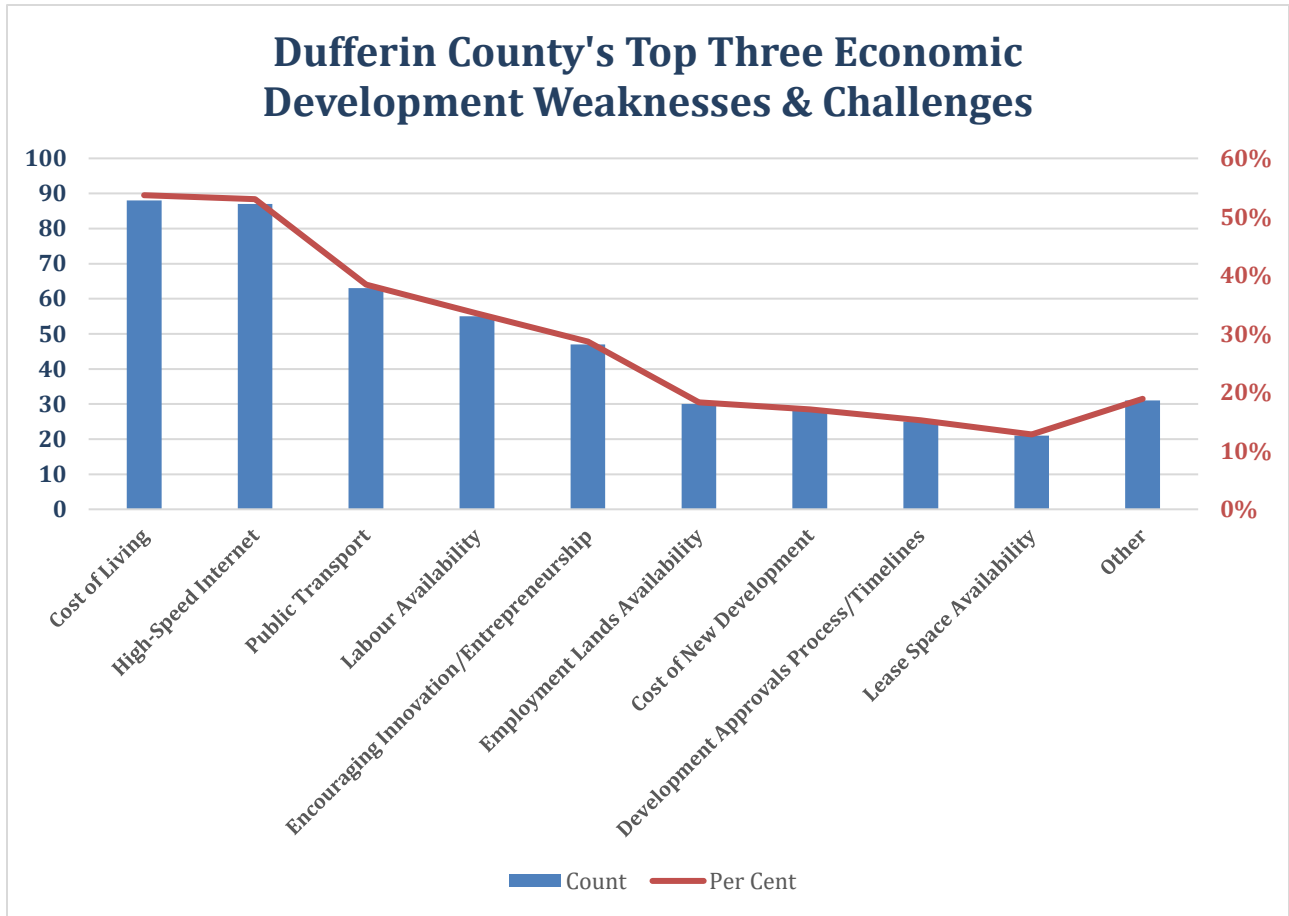


NOTE: The public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

When asked about weaknesses and challenges, the cost of living and high-speed internet both ended up at the top of the list. Public transportation, labour availability, and encouraging innovation/entrepreneurship were the others in the top five, as shown in Exhibit 8 (on the next page).

¹⁶ See Appendix 2 for the detailed results.

Exhibit 8
Summary of Dufferin County Economic Development Survey Results
Choices of Respondents¹⁷



NOTE: The public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

¹⁷ See Appendix 2 for the detailed results.

D. Principal County Economic Development Roles

The overarching goal in economic development is to improve the economic well-being of a community through policies and initiatives that will grow the municipal tax base by retaining and attracting investment and talent and by fostering and sustaining beneficial economic growth and diversity. 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. (See the Background Paper on Economic Development Performance Metrics in Appendix 7.)

1. The County as an Economic Development Convenor, Coordinator and Advocate

As the County moves to be more directly involved in economic development and tourism, the obvious prime initial role is as a coordinator, leader, and advocate for County-wide economic development interests.

Coordination Among the County and Municipalities

As part of an increased direct role in economic development, a working level County economic development coordination committee should be established soon after the first County economic development staff member is hired. This coordinating committee would be comprised of a staff or a volunteer or elected member from each municipality, and would focus on:

- Information and idea sharing;
- Making connections with partners, identifying areas for collaboration, and mobilizing resources;
- Planning, prioritizing and coordinating economic development initiatives and activities; and
- Advocacy issue identification and outreach plans.

The coordinating committee should position itself to be the prime contact point and the unified voice on economic development matters.

Information and Idea Sharing: A County-wide economic development coordinating group will, first and foremost, assure information sharing that will avoid inadvertent and unnecessary blind spots. Openly shared information and ideas also inevitably create common purpose around possible new initiatives or better or more efficient ways of doing things, as well as a sharing of the associated work.

The coordinating committee should work towards adopting simple protocols or memorandums of understanding which outline the committee's membership, role, and basic operating principles and

procedures. In addition, an investment lead handling protocol should be developed to define roles and shared interests, and to achieve transparency amongst committee members, while respecting corporate confidences.

Planning, Prioritizing and Coordinating Activities: The coordinating committee will be a key venue for discussion of joint activities among the County and municipalities and with partners and stakeholders. Agreed processes and timelines for the committee to plan ahead, prioritize, seek funding, and agree on projects and initiatives will need to be mapped out and put in place. Ideally, planning will cover two to three years, with the key decisions being taken each year around the development of an annual County economic development business plan. The annual plan should incorporate performance metrics. Performance indicators should be agreed for each individual major project and rigorous assessments undertaken after.

A County Economic Development Role in Agriculture and Rural Affairs: The two principal urban municipalities – Orangeville and Shelburne – are the location of the vast majority of businesses in Dufferin County. Both have staff devoting time to economic development, with business retention and expansion being a prime role. Currently, none of the other six municipalities have staff dedicated to economic development; rather, they depend on part-time contributions of staff members and/or volunteer effort of Councillors or citizens. The result is that, though agriculture is extremely important to the County and six of its eight municipalities, there are no County or municipal staff members whose time is specifically devoted to agriculture as a business and to rural economic development, while helping as well to make the important links between agriculture and the tourism and food processing sectors.

There is a strong case to be made to have the County devote much of its economic development expertise and resources principally to agriculture and rural affairs. The County's urban areas benefit too as they are heavily dependent on the agriculture sector's success and benefit from supplying many of personal and business needs. The role would entail very close collaboration with all the six municipalities that have a heavy dependence on agriculture. A considerable part of the activity would be of a business retention and expansion nature.

County Economic Development Fund: Locally-oriented initiatives by municipalities – individually or together – can strengthen the overall County economic development effort, including tourism. It is recommended that a County of Dufferin Municipal Economic Development Implementation Fund be established to make up to \$20,000 to \$30,000 available annually for each municipality to support projects and initiatives that will enhance the County's overall economic development efforts. Final approval of the funding requests would rest with the County Council or a Council Committee dealing with economic development. A successful model is in place in Wellington County where the program is known as the Business Retention and Expansion Municipal Implementation Fund.

Direct grants would be available to each municipality up to a common, maximum, annual individual amount. The grant would need to be expended and claimed during the year in which it was granted. Matching funding by the municipality would not be an explicit requirement, but would be a welcome signal that the project is important to the municipality. The provision of funding to each municipality recognizes that each has distinct assets, interests, and priorities. The County's involvement is founded on the premise that the success of one benefits others. Priority could be given to projects where municipalities need to take steps to be ready to contribute or participate in joint County-wide projects. Each municipality would make an application that would be assessed. Typical projects might involve investment readiness; downtown revitalization incentives; business incubation; workforce training; business support workshops; newcomer attraction; employment attraction; and project feasibility studies.

Dufferin County Partnership Opportunities

County and municipal economic development efforts recognize the many shared interests in economic development with the County's two principal member-based organizations – the Dufferin Board of Trade (DBOT) and the Dufferin Federation of Agriculture (DFA).

Dufferin Board of Trade: Chambers of Commerce and Boards of Trade occupy an important space in economic development on behalf of their members. Because of their broad membership bases – the DBOT has over 300 members – they are important front line partners for municipal economic development organizations and are frequently invited to represent their membership at events and on groups. Boards of Trade and Chambers of Commerce also add further value when they bring together common interest segments of their membership. In the DBOT's case, this includes women in business, young professionals, and manufacturers. The DBOT's annual business excellence awards celebrate the success of their members. The "Think Local Food Showcase," held concurrently with the DBOT Annual General Meeting, supports local business. Chambers and Boards of Trade also provide seminars and events that respond to member needs. Examples can include exporting and international business; enhancing competitiveness; sources of financing, funding, equity, and incentives; innovation and research; and marketing techniques. These initiatives are ones which economic development staff can support and promote more widely. There will also be areas for joint collaboration.



In the absence of dedicated resources of its own, the County of Dufferin provided the Dufferin Board of Trade's predecessor organization, the Greater Dufferin Chamber of Commerce, with \$30,000 annually for a series of years for the contributions it could be called upon to make in promoting the County's business profile and supporting economic development-related interests. Beginning in 2015, County Council endorsed the amalgamation of a separately constituted and funded Dufferin.biz initiative with the Dufferin Board of Trade. The Dufferin.biz funding and its associated website were transferred to the DBOT. The total County contribution was \$195,000 in 2016 and \$150,000 in 2017. Websites are central to economic development and tourism programs. The discussion of the marketing of Dufferin County (Section D.6) recommends that Dufferin.biz be transitioned to a new County economic development website as soon as branding and a new site can be established. A financial arrangement to support the DBOT during this process will need to be worked out.

There are only a few instances in Canada where a Chamber of Commerce or Board of Trade has been contracted by a municipality to provide dedicated staff to deliver a municipality's economic development program on an on-going basis. These include the Municipality of Clarington in Durham Region and the City of Burnaby in British Columbia. A consideration is that Boards of Trade and Chambers of Commerce have a prime accountability to their members, including to advocate to governments on their behalf, meaning that they have an obligation to be active in the political arena.

Dufferin Federation of Agriculture: The Dufferin Federation of Agriculture (DAF) is the principal forum and voice for the County's agricultural sector. Federations of Agriculture in Ontario have a stated commitment to rural economic development that will encourage vibrant and resilient rural communities, support the economic well-being of rural Ontario, and benefit farm families and the broader agri-food sector. This encompasses the attraction, retention and expansion of related rural businesses; the growth of value-added on-farm processing, direct farm marketing and agri-tourism; agricultural research, innovation hubs,

entrepreneurship and business incubation; and opportunities to use crop residue and purpose grown crops to fuel the bioeconomy.¹⁸

The Dufferin Federation of Agriculture puts a high priority on promoting awareness of agriculture's vital and significant role in the economy and an understanding of the unique and not-always-appreciated challenges and opportunities that the sector faces. The DFA organizes an annual Dufferin Farm and Country Tour to a cross-section of farms in the County to draw attention to the rural economy, connect people directly with their food sources, educate the public about agriculture's advanced production methods, and highlight the contribution of agriculture, typically drawing in the order of 1,000 people, half of whom are from outside the County. The DFA reaches out systematically to the County and municipal governments to build understanding of the actions that will enhance the sector's competitiveness and promote growth.



Possible Areas of Collaboration: The County's adoption of a conscious and direct role in economic development invites consideration of roles where the Dufferin Board of Trade, Dufferin Federation of Agriculture and other groups may have an interest and can be leaders in realizing initiatives that can further common economic development and tourism goals. An evaluation and consensus will be needed, but the types of County-wide situations in which the DBOT, DFA and others might take a prominent value-added role include ones such as:

- Participate in the organization of major annual County agricultural and business summits or outlook sessions that bring together those aspiring to strengthen the local economy by creating a shared agenda and narrative and seeking to chart future economic directions;
- Develop and coordinate a Dufferin County "Ambassador" Team consisting of a cross-section of volunteer senior business executives, owners and agricultural leaders who are prepared to meet with prospective investors visiting the County, and who are capable of reaching out proactively through their national and international networks – including as part of their travels – to encourage counterparts to consider establishing a business in the County; and
- Identify prospective mentors and advisors for the local organizations and initiatives working with small businesses, entrepreneurs, and innovative, early-stage, high-growth companies.

Connecting with Federal and Ontario Partners and Resources

The County and the individual municipalities are currently not fully maximizing the benefits and funding that are available from a host of Federal and Ontario partner organizations. In part this is because there is no readily identifiable County contact point or group that these partners organizations can work with that will assist them in reaching all those in the County actively interested and involved in economic development and able to connect with the business and agricultural enterprises in their municipalities. The partners who were interviewed in the course of the development of the Strategic Plan all indicated that a coordinated approach would be very helpful in encouraging fuller County involvement on their part. Though it would be up to the coordinating committee to decide on appropriate mechanisms, they may see merit in regular meetings with

¹⁸ Ontario Federation of Agriculture, "Rural Economic Development," (<https://ofa.on.ca/issues/overview/rural-economic-development>). Accessed on May 15, 2017.

partners or groups of partners or in inviting representatives from partner organizations to attend all or a dedicated portion of some or all coordinating committee meetings.

In addition to the support that these Federal and Ontario partners will bring to the overall economic development efforts, a potential measure of success for a more coordinated effort in Dufferin County should be whether a larger number of County firms and agricultural enterprises end up benefiting from funding programs and access to assistance, counselling and advice.

Exhibit 9 Principal Economic Development Partners – Dufferin County	
Ontario Ministry of Agriculture, Food & Rural Affairs (OMAFRA)	Workforce Planning Board of Waterloo, Wellington & Dufferin
Ontario Ministry of Economic Development & Growth (MEDG)	Innovation Guelph
Ontario Investment Office (MEDG)	Vineland Research & Innovation Centre
Ontario Ministry of International Trade (MIT)	Ontario Centres of Excellence Inc. (OCE Inc.)
Ontario Ministry of Citizenship & Immigration	Georgian Angel Network
Ontario Ministry of Research, Science & Innovation (MRSI)	Humber College
Ontario Ministry of Tourism, Culture & Sport (MTCS)	Georgian College
Industrial Research Assistance Program (IRAP) - NRC	Sheridan College, Brampton Campus
Global Affairs Canada	University of Guelph
FedDev Ontario	Conestoga College
Centre for Business & Economic Development (CFDC)	(Note: This Exhibit focuses on externally-based partners)

Advocacy: Key objectives in engaging with partners would include:

- Ensuring that all businesses and agricultural enterprises are connected to and knowledgeable about a full range of programs and sources of financial support and advice;
- Developing joint initiatives and programs that capitalize on partners strengths, capabilities, resources and reach; and
- Accessing Federal and Ontario funding sources that support municipal economic development activities, typically on a collaborative basis involving all the interested Dufferin County municipalities.

Prominent among the Federal and Ontario funding programs that might be targeted to support selected economic development initiatives are:

- The Ontario **Rural Economic Development (RED)** program, which was given renewed annual funding of \$5 million under the Ministry of Agriculture, Food and Rural Affairs (OMAFRA) in January 2017. RED funding is designed to support local projects that will attract investment, create jobs and boost economic growth in rural communities. Typical initiatives are downtown revitalization programs, tourism-related marketing, and promotional strategies to attract business, investors and visitors.¹⁹
- **Additional OMAFRA programs** designed for rural communities including Community Immigrant Retention in Rural Ontario; First Impressions Community Exchange; Downtown Revitalization; and Community Economic Development 101 Workshops.

¹⁹ Ontario Ministry of Agriculture, Food and Rural Affairs, News Release, “Boosting Economic Growth in Rural Ontario,” January 30, 2017 (<https://news.ontario.ca/omafra/en/2017/01/boosting-economic-growth-in-rural-ontario.html>). Accessed on March 16, 2017.

- The Regional Stream of the Ontario government’s **Southwestern Ontario Development Fund (SWODF)**, for new projects larger than \$100,000 that align with Provincial government priorities, focus on economic development and job creation, and have private sector support.
- **Invest Canada – Community Initiatives (ICCI)** program, which is offered by Global Affairs Canada to provide support to Canadian communities seeking to improve their capacity to attract, retain and expand FDI in order to create jobs for Canadians, support innovation and increase exports.²⁰
- **FedDev Ontario’s Community Economic Development Program** aimed at economic diversification, growth, and the creation of new businesses and high quality jobs, though it should be borne in mind that FedDev Ontario’s current five-year mandate concludes March 2019, so it is already focused on launching an expected new cycle during 2018.
- A new **Federal, Provincial and Territorial Agricultural Framework**, to be launched April 2018, will likely include a successor joint Federal-Ontario funding program to Growing Forward 2, which has now taken its last applications.

In addition to working level engagement with Federal and Ontario representatives, organizations and programs, the coordinating committee should also quarterback and support the economic development component of the broader County and municipal advocacy agenda with the Federal and Ontario governments. Representations are more powerful when the County and the municipalities can speak with one voice. As well, the Western Ontario Wardens’ Caucus (WOWC) is focusing on developing joint advocacy for priority area-wide economic development issues. These should be taken into account. As pointed out in the consultations associated with the development of the Strategic Plan, the policies and programs that the provincial government exercises can have extensive impacts. Provincial entities such as the Niagara Escarpment Commission and Conservation Authorities may be involved. Policies and regulations do not always fully take into account local circumstances or needs. Approvals or changes may become drawn out. Requirements may not clear. The County and municipalities must also draw attention to priority needs, such as those related to broadband, infrastructure, transportation, workforce and education.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.1 ECONOMIC DEVELOPMENT CONVENOR, COORDINATOR AND ADVOCATE				
Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.1	<p>GOAL: Coordinate and lead County economic development initiatives that support municipal interests, and advocate for County-wide economic development interests</p> <p>OBJECTIVE: Establish a focused, collaborative County-wide team effort in economic development</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Establish and manage a working level County economic development coordinating committee, including establishing protocols 2. Develop and lead collaborative annual County economic development business plans 3. Design and pursue a County agriculture and rural affairs economic development program 	A	2017 & On-Going	DCED, DC8 & HT
		A	2017 & On-Going	DCED & DC8
		A	2018 & On-Going	DCED & DC8

²⁰ Global Affairs Canada website (<http://tradecommissioner.gc.ca/funding-financement/icci-icic/index.aspx?lang=eng>). Accessed on April 16, 2017.

D.1	4. Develop and gain approval for a County Economic Development Fund that will build capacity and assist in realizing common objectives	A	2018 & On-Going	DCED & DC8
	5. Connect with and maximize assistance and benefits offered by Federal and Ontario economic development funding, officers and resources	B	2018 & On-Going	DCED, DC8, CBED, FEDDEV, MEDG, OCE, OMAFRA & IRAP
	6. Build mutually productive relationships with the DBOT, DFA and other County economic development stakeholders	A	2017 & On-Going	DCED, DC8, DBOT & DFA
	7. Quarterback and support a County economic development advocacy agenda vis a vis the Ontario and Federal governments	B	2018 & On-Going	DCED & DC8

Funding:

- Collaborative approaches to County economic development based on well formulated plans are most likely to attract funding support from the Ontario and Federal governments under programs such as Global Affairs Canada’s Invest Canada Community Initiatives (ICCI) program and OMAFRA’s Rural Economic Development (RED) program.
- Availability of discretionary funding from a County Economic Development Fund will remove barriers to wider involvement of the municipalities in economic development initiatives that will support County-wide interests

Performance Metrics:

- Achievement of actions indicated
- Recipients of funding from a County Economic Development Fund will need to report on how measurable objectives were met

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)	IRAP = Industrial Research Assistance Program – National Research Council
DAC = Dufferin Arts Council	MEDG = Ontario Ministry of Economic Development & Growth
DBOT = Dufferin Board of Trade	MCI = Ontario Ministry of Citizenship & Immigration
DC8 = Eight Dufferin County Municipalities	MTCS = Ontario Ministry of Tourism, Culture & Sport
DCED = Dufferin County Economic Development	NEC = Niagara Escarpment Commission
DFA = Dufferin Federation of Agriculture	OASBEC = Orangeville & Area Small Business Enterprise Centre
FEDDEV = FedDev Ontario	OCE = Ontario Centres of Excellence Inc.
GAC = Global Affairs Canada	OEDT = Orangeville Economic Development & Tourism
GAN = Georgian Angel Network	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs
GC = Georgian College	SC = Sheridan College, Brampton Campus
HC = Humber College	SED = Shelburne Economic Development
HELG = Headwaters Equine Leadership Group	UG = University of Guelph
HT = Headwaters Tourism	VRIC = Vineland Research & Innovation Centre
IG = Innovation Guelph	WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

2. Investment Readiness

A fundamental need and basic requirement in economic development is to be fully investment ready from the outset.

Comprehensive, detailed, up-to-date economic, demographic, workforce, and sector data needs to be available that will respond fully and immediately to prospective investors’ requirements to enable informed decisions. The 2016 Census data is being released throughout 2017, providing an opportunity to ensure that data will be current. Full information must also be available on the transportation infrastructure, taxes and utility rates, and commercial and industrial buildings and land. The data should also be accessible on the

website. The website content is discussed in Section D.6 Marketing. Other basic requirements include a community profile, fact sheet, and marketing collateral. Beyond the foundational information, selected value propositions for high priority sub-sectors and niches should be available that differentiate Dufferin County's advantages. The County and municipal economic development team also should have identified selected local business leaders and professional services providers on whom they can call who are willing to meet with visiting prospects. The team should also anticipate what to do to meet the needs of foreign visitors.

Comprehensive information on local companies, other than in the retail sector, should be brought together on a County-wide basis. This would be a standardized and shared effort drawing on any data gathered and maintained by the partner municipalities. A business directory, arranged by standardized classifications, would be developed to be publicly available online.

In addition to County- and municipal-level information, economic development officers need to be fully familiar with and have readily retrievable and up-to-date information on applicable Ontario and Federal funding and incentive programs.

Leads about prospective investors are valueless unless they are acted upon in a professional and timely way by providing complete information. Lack of a prompt and full response to leads will damage the community's and the organization's reputation. Therefore, it is essential, prior to undertaking any proactive initiatives, to work with existing companies or to identify and target new prospects, that resources are focused on ensuring that the response systems and clear procedures are in place.

A Development Approval Flow Chart: An important tool that enhances transparency and conveys a business-like approach to prospects seeking to expand or invest is creation of a Development Approval Flow Chart that clearly and succinctly outlines the procedures, processes and people involved in development approvals with indicative timelines for decisions that will be honoured. The creation of such a Development Approval Flow Chart requires close collaboration with planning officials. It is also desirable that the flow chart and the process associated with it include all provincial requirements and other entities that can be involved (e.g. Conservation Authorities and the Niagara Escarpment Commission). The Flow Chart should be posted online as evidence of the County's and municipalities' interest in having a business-like transparent process. A best practice utilized by some municipalities is to arrange an initial roundtable pre-qualification meeting with the proponent that involves a two-way dialogue with all the key people who may be involved to establish a shared understanding of the requirements and approval time lines and processes, thereby avoiding surprises later.

Customer Relationship Management System: A Customer Relationship Management (CRM) system is essential to be able to manage, track, keep detailed notes, and contribute performance metrics on all leads and prospects. The CRM system will also contain categorized distribution lists and information on local companies, partners, officials, professional services firms, and organizations, Ontario and Federal government contacts, site selectors, realtors, post-secondary partners, and selected foreign representatives in Canada. There may be advantages in adopting the same CRM system as is currently used by Orangeville economic development.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES																																
D.2 INVESTMENT READINESS																																
Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²																												
D.2	<p>GOAL: Be an attractive location that is competitive, responsive and functions at the pace of business</p> <p>OBJECTIVE: Establish and maintain a high level of investment readiness</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Implement a Customer Relationship Management (CRM) system 2. Establish and keep up-to-date a comprehensive site location database 3. Develop and maintain a searchable County-wide real estate database of available commercial and industrial buildings and land 4. Develop a business directory 5. Identify local business leaders and service providers willing to meet with visiting prospects 	A A A A B	2017 & On-Going 2017 & On-Going 2017 & On-Going 2017 & On-Going 2018 & On-Going	DCED & DC8 DCED & DC8 DCED & DC8 DCED & DC8 DCED & DC8																												
<p>Funding:</p> <ul style="list-style-type: none"> Initially, many of these actions will involve upfront costs and investments. The County Economic Development Reserve may be a source of funding for some. Part-time or contract staff or consultants may need to be engaged to assist with CRM set-up and training and database development 																																
<p>Performance Metrics:</p> <ul style="list-style-type: none"> The County economic development program will meet investment ready criteria outlined The CRM system will be set up to be a source of certain performance metrics 																																
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <table border="0"> <tr> <td>CBED = Centre for Business & Economic Development (CFDC)</td> <td>IRAP = Industrial Research Assistance Program – National Research Council</td> </tr> <tr> <td>DAC = Dufferin Arts Council</td> <td>MEDG = Ontario Ministry of Economic Development & Growth</td> </tr> <tr> <td>DBOT = Dufferin Board of Trade</td> <td>MCI = Ontario Ministry of Citizenship & Immigration</td> </tr> <tr> <td>DC8 = Eight Dufferin County Municipalities</td> <td>MTCS = Ontario Ministry of Tourism, Culture & Sport</td> </tr> <tr> <td>DCED = Dufferin County Economic Development</td> <td>NEC = Niagara Escarpment Commission</td> </tr> <tr> <td>DFA = Dufferin Federation of Agriculture</td> <td>OASBEC = Orangeville & Area Small Business Enterprise Centre</td> </tr> <tr> <td>FEDDEV = FedDev Ontario</td> <td>OCE = Ontario Centres of Excellence Inc.</td> </tr> <tr> <td>GAC = Global Affairs Canada</td> <td>OEDT = Orangeville Economic Development & Tourism</td> </tr> <tr> <td>GAN = Georgian Angel Network</td> <td>OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs</td> </tr> <tr> <td>GC = Georgian College</td> <td>SC = Sheridan College, Brampton Campus</td> </tr> <tr> <td>HC = Humber College</td> <td>SED = Shelburne Economic Development</td> </tr> <tr> <td>HELG = Headwaters Equine Leadership Group</td> <td>UG = University of Guelph</td> </tr> <tr> <td>HT = Headwaters Tourism</td> <td>VRIC = Vineland Research & Innovation Centre</td> </tr> <tr> <td>IG = Innovation Guelph</td> <td>WPBWW = Workforce Planning Board of Waterloo, Wellington & Dufferin</td> </tr> </table>					CBED = Centre for Business & Economic Development (CFDC)	IRAP = Industrial Research Assistance Program – National Research Council	DAC = Dufferin Arts Council	MEDG = Ontario Ministry of Economic Development & Growth	DBOT = Dufferin Board of Trade	MCI = Ontario Ministry of Citizenship & Immigration	DC8 = Eight Dufferin County Municipalities	MTCS = Ontario Ministry of Tourism, Culture & Sport	DCED = Dufferin County Economic Development	NEC = Niagara Escarpment Commission	DFA = Dufferin Federation of Agriculture	OASBEC = Orangeville & Area Small Business Enterprise Centre	FEDDEV = FedDev Ontario	OCE = Ontario Centres of Excellence Inc.	GAC = Global Affairs Canada	OEDT = Orangeville Economic Development & Tourism	GAN = Georgian Angel Network	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs	GC = Georgian College	SC = Sheridan College, Brampton Campus	HC = Humber College	SED = Shelburne Economic Development	HELG = Headwaters Equine Leadership Group	UG = University of Guelph	HT = Headwaters Tourism	VRIC = Vineland Research & Innovation Centre	IG = Innovation Guelph	WPBWW = Workforce Planning Board of Waterloo, Wellington & Dufferin
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3. Business Retention and Expansion

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 on-going economic development activity. The public survey undertaken in conjunction with the Strategic Plan

preparation ranked business retention as the top area on which the County should focus its efforts to support the growth of its economic base and its businesses, along with supporting entrepreneurship (a tie).²¹ 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 the cost and expenditure of time identifying, cultivating and convincing new clients.

**Business goes where it is invited
and stays where it is cared for.**

W. Clement Stone
17 Principles of Success

Dufferin County had nearly 2,000 enterprise locations as of 2016 (Exhibit 10), an increase of 2.8% from 2014 (the earliest year for which comparable data is available). This count excludes firms in the “indeterminate” category that have no employees or have only contracted workers.

Of the total enterprise locations, 97% are locations where there are fewer than 100 employees. Micro-enterprises (with 1 to 4 employees) represent 59%, while small enterprises (5 to 99 employees) comprise 38%. As compared to Ontario, Dufferin County has a higher proportion of enterprise locations where there are fewer than 10 employees, but a lower proportion for categories involving more than 10 employees. In 2016, Dufferin County had one location where there were more than 500 employees. There were 24 medium-sized enterprise locations (100 to 499 employees), with the majority (15) having 100 to 199 employees.

Exhibit 10 Dufferin County – Number of Enterprise Locations by Number of Employees				
# of Employees	2014	2016	Difference	% Difference
1-4	1,153	1,168	15	1.3%
5-9	362	386	24	6.6%
10-19	221	224	3	1.4%
20-49	139	142	3	2.2%
50-99	40	51	11	27.5%
100-199	13	15	2	15.4%
200-499	13	9	-4	-30.8%
500+	0	1	1	100.0%
Total, excluding Indeterminate	1,941	1,996	55	2.8%
Source: EMSI Q3 2016 Data Set Note: Excludes the indeterminate category which covers firms with no employees or only contracted workers.				

Well-structured and systematic business retention and expansion (BR&E) programs build relations with existing businesses and agricultural enterprises and identify value-added assistance to help them sustain and grow their business, for example through export assistance, support for entrepreneurship, or research and development linkages. BR&E calls generate valuable aggregate data on the plans, concerns, needs and success factors of local businesses and agricultural enterprises. This can inform municipal decision making. When it comes to attracting new businesses, existing local businesses are on the front lines and best placed

²¹ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

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. In Dufferin County, the economic development staff in both Orangeville and Shelburne are regularly undertaking business retention and expansion calls. Orangeville mounted a well-structured BR&E program during late 2016 and 2017 with its manufacturing sector, using the OMAFRA-designed approach that produces a comprehensive summary report with data on the group, their views on the local business climate, satisfaction with municipal services, R&D activity and use of technology, exporting, sourcing of inputs, workforce and future plans.

Joint effort and the sharing of information between the two tiers (along with coordinated involvement of provincial representatives too) are of obvious benefit given shared interests and responsibilities. From the County perspective, there would be great value in coordinating a County-wide BR&E call program as early as 2018 involving all municipalities, possibly focused on a major sector (maybe agriculture, food and beverages for example) or a representative cross-section of businesses and agricultural enterprises. In most scenarios, the initiative would be dominated, of course, by Orangeville and Shelburne calls. Where smaller lower-tier municipalities have limited resources, County support can be offered.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.3 BUSINESS RETENTION AND EXPANSION				
Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.3	<p>GOAL: Encourage the retention and expansion of existing Dufferin County businesses and agricultural enterprises</p> <p>OBJECTIVE: Support municipal partners in reaching out, engaging, understanding, supporting and reporting on the preoccupations and intentions of existing Dufferin County businesses and agricultural enterprises</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Participate in arranging regular business retention and expansion (BR&E) programs, and report in the aggregate on the intentions and needs of local businesses 2. Offer, support and promote programs that will assist local businesses and agricultural ventures to sustain their competitiveness and grow 	B	2017 & On-Going	DCED & DC8
		B	2017 & On-Going	DCED, DC8. DBOT & DFA
<p>Funding:</p> <ul style="list-style-type: none"> • OMAFRA offers a BR&E program that can be utilized, or other proprietary systems can be purchased • Some of the programs to assist local businesses and agricultural enterprises will be provided by DCED, often with a fee for events covering recovery of direct costs • DCED, municipalities and OASBEC will also be ensuring local businesses are aware of programs mounted by other partners organizations 				
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • The basic metrics are numbers of BR&E calls and meetings; businesses retained; expansion projects; value of investment retained or invested in new projects; and jobs retained and created (in situations where DCED has influenced outcomes) 				

NOTES AND ABBREVIATIONS

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4. Nurturing the Growth of New Firms and Agricultural Enterprises

New business creation and entrepreneurship are increasingly important to healthy, vibrant local and regional economies. Analysis indicates that job creation is driven by growing 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. In the public survey done as part of the Strategic Plan development, support for entrepreneurship ranked first (tied with business retention) as the area where the County should focus efforts to support the growth of its economic base and businesses.²²

Orangeville and Area Small Business Enterprise Centre: 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 financially, 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. The SBEC was selected by the Ontario government to mount a pilot Cultural Entrepreneurship program in 2016 that offered training and mentorship to 21 program participants, resulting in 16 detailed business plans.

The SBEC dealt with 3,247 general enquiries in 2016 and was involved in 608 in-depth business consultations. The SBEC's 32 events attracted 918 attendees. The 106 business start-ups with which it was involved created 208 jobs.

The Small Business Enterprise Centre caters to many clients in the County based outside of Orangeville. Using the in-depth business consultations as a measure, 53% of the SBEC activity in 2016 related to Orangeville-based

²² A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

clients, compared to 31% for the remainder of the County. The other 16% was with clients from outside the County. These proportions are in line with trends from 2012.

An increased focus on economic development involvement by the County of Dufferin invites consideration of where there may be unmet demand for SBEC's services and programs throughout the County and what steps will widen SBEC's reach. The SBEC's space in the Orangeville Town Hall is somewhat constrained in terms of providing shared workspaces. It would be desirable to have space for programing and shared working space available in Shelburne – possibly elsewhere. Further needs should be considered in terms of the County's agricultural sector interests in entrepreneurship and the development of new on-farm ventures.

Greater Involvement with Innovation Guelph: Steps that will build meaningful access and greater involvement by Innovation Guelph (IG), the Regional Innovation Centre (RIC) with responsibility for Dufferin County, would be particularly helpful in increasing the focus on entrepreneurship and innovation in Dufferin County. Innovation Guelph caters only to firms and ventures that are focused on innovation and/or on rapidly scaling-up. Innovation does not just mean technological innovation but any innovation, including in the business model. Innovation Guelph's programs are structured and offer intensive diagnostic, mentoring and specialized assistance. Attractive dimensions of Innovation Guelph programing are social enterprises (Good Biz Guelph), the Rhyze Project for Women, and a new online learning centre offering certifications, for example in human resources. Involvement with Innovation Guelph would also have the potential ancillary benefit of building contacts with Guelph-based organizations that are actively supporting innovation such as the Agri-Technology Commercialization Centre, the Centre for Business and Student Entrepreneurship (CBaSE) Hub Incubator program at the University, and other University of Guelph centres of excellence. Innovation Guelph has already established a relationship with Wellington County Economic Development which will provide some guidance and benchmarks. Wellington County contributes \$20,000 per year and has cross-memberships on several related committees.

Other organizations that are involved in innovation and entrepreneurship should also be engaged. These entities include the Centre for Business & Economic Development (a Community Futures Development Corporation), OCE Inc., the Industrial Research Assistance Program (IRAP) associated with the National Research Council (NRC), and the Georgian Angel Network.

Though SBEC offers work spaces and computer access, more shared working spaces would be desirable to foster and enable mentoring of innovative start-ups that have high growth potential. Private sector shared space models that have also met some success may also be an option. Another initiative which is discussed related to the food processing sector is whether an accelerator with common food preparation and refrigeration space might be established in Dufferin County that would attract early-stage graduates of Toronto food incubators that are interested to be closer to sources of supply and more affordable locations. Any expansion of incubation or shared spaces – particularly outside Orangeville – should be planned to capitalize on new high-speed broadband nodes.

Federal and Ontario Priorities: 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, as emphasized by their 2017 Budget proposals. Both governments acknowledge that delivery must be largely through local on-the-ground entities. Dufferin County's interests in providing access to Ontario and Federal innovation programing and initiatives will most likely be served in the near-term by strengthening partnerships with entities such as Innovation Guelph.

Clean technologies have attracted significant commitments by the Federal and Ontario governments. Ontario’s Climate Change Action Plan indicates that the Ontario government will develop low-carbon clean technology accelerators and clusters, support proof-of-concept projects, and help emerging low-carbon companies increase scale. Funding in addition to the \$55 million in the 2016 Budget is signalled. Competition for available funding will be keen. In Dufferin County’s case, the best means to seek to be involved – if there is substantive interest related, say, to biogas, greenhouses or barns – will be to join an effort being spearheaded by an entity such as Innovation Guelph, rather than going it alone. The 2017 Federal Budget includes \$1.4 billion over the next three years in new equity, working capital and project financing for cleantech companies to be offered through the Business Development Bank of Canada (BDC) and Export Development Canada (EDC). In addition, \$400 million over five years was allocated to recapitalize the SD Tech Fund™, a flagship Sustainable Development Technology Canada (SDTC) program for the development and pre-commercial demonstration of clean technologies.

Innovation and entrepreneurship are also driven – not only among start-ups but with more mature firms and by agricultural enterprises – by strong linkages with universities and colleges involving research and development, prototyping and testing. Among the entities with which closer linkages might be cultivated are the University of Guelph and Sheridan College’s Centre for Advanced Manufacturing and Design Technologies (CAMDT) in Brampton. Orangeville and Shelburne may be best placed to be the principal leads with Sheridan as part of their business expansion efforts. The County will likely be the choice to take the lead in the case of the University of Guelph.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.4 NURTURING THE GROWTH OF NEW FIRMS AND AGRICULTURAL ENTERPRISES				
Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.4	<p>GOAL: Encourage and support a climate for entrepreneurship and innovation</p> <p>OBJECTIVE: Create a collaborative, constantly-evolving ecosystem populated with a entities that support and facilitate entrepreneurship, innovation and scaling-up of local ventures</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Support the Orangeville and Area Small Business Enterprise Centre and the expansion of its programs and presence in the County 2. Define and pursue a relationship with Innovation Guelph 3. Engage other organizations involved in innovation and entrepreneurship and orchestrate connections with appropriate Dufferin County companies and new ventures (e.g. OCE Inc., IRAP-NRC, University of Guelph, Sheridan College’s Brampton Campus, etc.) 	<p>B</p> <p>B</p> <p>B</p>	<p>2018 & On-Going</p> <p>2018 & On-Going</p> <p>2018 & On-Going</p>	<p>DCED, OASBEC & DC8</p> <p>DCED, DC8, OASBEC & IG</p> <p>DCED, DC8, OASBEC, IG, OCE, IRAP, UG, SC, GC & HC</p>
<p>Funding:</p> <ul style="list-style-type: none"> • The Orangeville & Area Small Business Enterprise Centre (OASBEC) is financially supported by the Ontario government. • Dufferin County has increased funding for the Orangeville & Area Small Business Enterprise Centre (OASBEC) • Federal and Provincial funding for initiatives that will contribute to a dynamic Dufferin County innovation ecosystem will often only be available as matches for local County, municipal and post-secondary funding, thereby requiring investments by the County and municipalities 				

Performance Metrics:	
<ul style="list-style-type: none"> • Performance Metrics will generally be developed and data gathered by the organizations to which the County is providing funding • As a funder, the County should monitor these metrics closely – especially the outcomes rather than just activities – and ensure that they drive the organizations strategies and operations 	
NOTES AND ABBREVIATIONS	
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² Abbreviations	
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5. Attracting New Investment

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

Investment attraction is exceptionally competitive. 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.

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.

Promoting the area to external businesses and investment attraction ranked highly – number four and five – in the public survey about economic development which asked where the County should focus its efforts to support the growth of its economic base and its businesses.²³

The first phase of involvement by the County in investment attraction should be to ensure investment readiness on its part, building on and adding to what Orangeville, Shelburne and other municipalities have. The basic requirements have been addressed earlier.

²³ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

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. Fundamentally, the County needs to be in a position from the outset to act as the prime point of contact and be able to respond fully and promptly to enquiries. Currently in many cases, only Orangeville or Shelburne may in the end be the only locations able to address a prospect's requirements. Where this is the case, either or both economic development teams can then take on prime responsibility.

A second phase of investment attraction activity will be to approach the Ministry of Economic Development and Growth's Ontario Investment Office in Toronto and the Business and Investment Development Unit of the Ontario Ministry of Agriculture, Food and Rural Affairs in Guelph to brief them fully on Dufferin County as a location for new investment and on the County's economic development and investment attraction priorities and plans. The Ontario Ministry of Tourism, Culture and Sport also has an Investment Development Office focused on attracting investment in the province's tourism sector. In addition, local realtors involved with industrial and commercial properties and the industrial and commercial real estate and development community in the Greater Toronto Area (GTA) that have dealings in the County are further target groups meriting cultivation. At some point in the future, wider outreach to the GTA realty community may be merited through involvement in events held by the Society of Industrial and Office Realtors (SIOR) Central Ontario Chapter. Another specific step to consider is a joint meeting with Shelburne and Orangeville colleagues with executives at Honda of Canada Manufacturing in Alliston who are likely to be the point of contact with any new suppliers that may win Honda business and need to establish a plant locally. The objective would be to ensure that they are made aware that Dufferin County has potentially suitable sites and buildings for such new suppliers.

Beyond these first two phases, the County – in consultation with its partners – will need to establish the extent to which opportunities and the County's ability to meet the requirements justify a commitment to focused pro-active investment attraction initiatives. An initiative to target selected Greater Toronto and Hamilton Area (GTHA) businesses in a high priority sub-sector or niche might be an appropriate initial choice. Another avenue which would be more ambitious but which can be relatively cost effective is participation in a collaborative international investment attraction initiative involving other jurisdictions. Headwaters Tourism is an example of collaborative effort focused on that sector. These cooperative efforts among economic development agencies in Ontario – sometimes labelled co-opetition or competi-mating – have increased and are now common. 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 local 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 and not draw it into activities peripheral to its core interests. Dufferin County's economic interests seem likely to align most closely over time with Wellington and Grey Counties and with Guelph. The development of meaningful collaboration and trust often is built on success with individual projects first.

Neither the County nor its Orangeville or Shelburne partners should be hesitant to travel elsewhere in Canada or internationally to pursue a well-defined and promising lead. Broader efforts to identify national or international prospects will generally, however, require a level of research, preparation and targeting that is likely to be beyond the near-term economic development resources in the County.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES

D.5 ATTRACTING NEW INVESTMENT

Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.5	<p>GOAL: Attract new investment to Dufferin County</p> <p>OBJECTIVE: Lead collaborative initiatives with the municipalities to identify, target and pursue priority investment prospects</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Define sub-sectors of highest priority to target, develop selected value propositions, and decide upon optimum investment attraction approaches 2. When investment ready, reach out to the Ontario Ministry of Economic Development and Growth (Ontario Investment Office) and OMAFRA (Business & Investment Development Unit) to present the case for investment in Dufferin County 3. Assess opportunities for mutually beneficial collaboration with likeminded economic development entities pursuing common investment attraction goals 	B	2018 & On-Going	DCED & DC8
		B	2018 & On-Going	DCED, DC8, MEDG & OMAFRA
		C	On-Going	DCED & DC8

Funding:

- Global Affairs Canada’s Invest Canada Community Initiatives (ICCI) provides matching funding to upper-tier municipal governments for Foreign Direct Investment (FDI) related projects on a competitive basis

Performance Metrics:

- Performance Metrics should concentrate on outcomes (the number of new investments and the jobs and amounts and how they continue to grow), supplemented by measures of activities likely to lead to the outcomes (investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where DCED has influenced outcomes)

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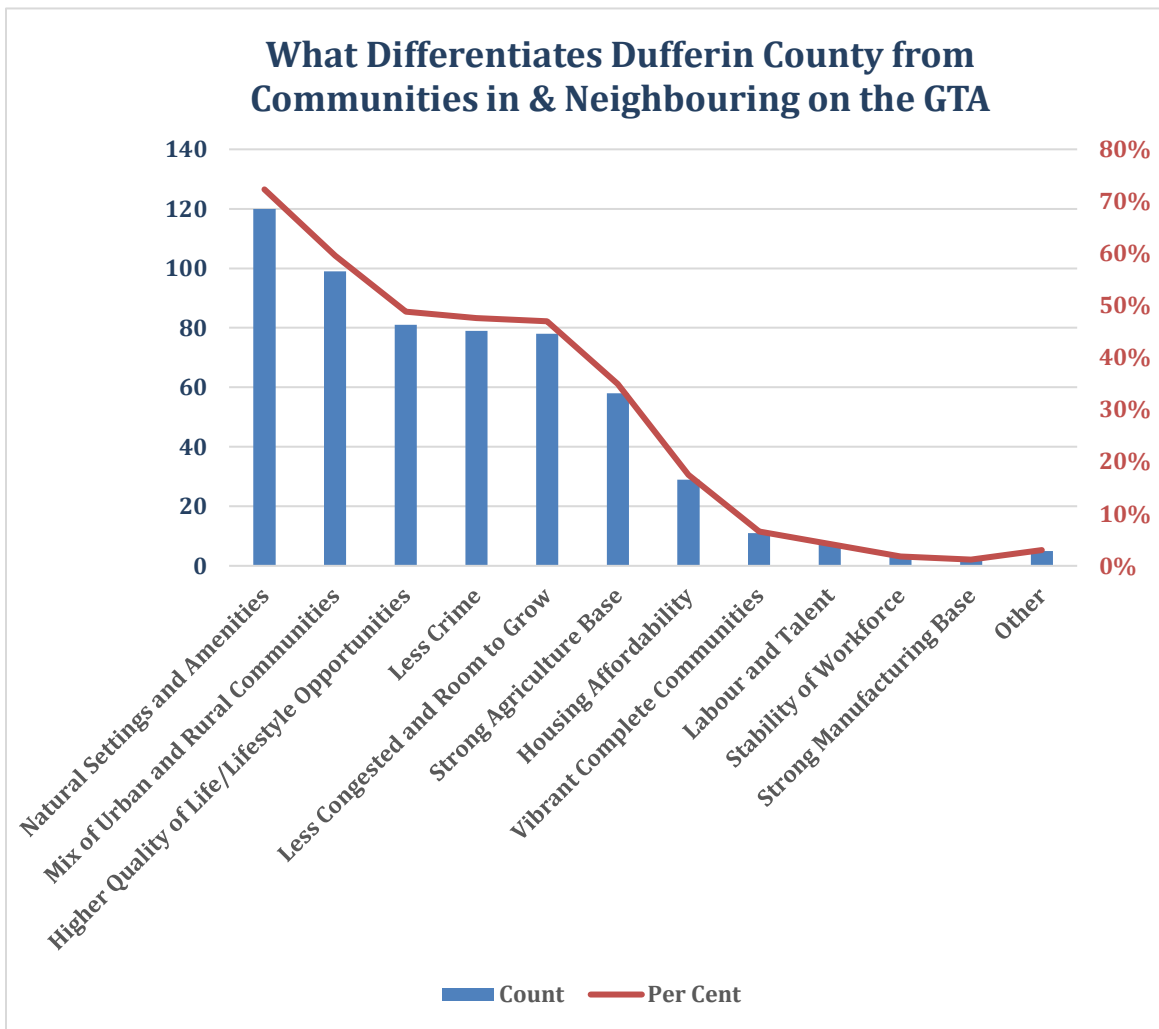
6. Marketing Dufferin County

The marketing of a community to attract businesses and people is founded upon well-defined advantages and attractions. The central objective is to identify and articulate a unique and authentic identity that will differentiate the offering and capture the attention of companies, talent and tourists whose interests coincide with the community’s strengths. Similarly, branding, as a key component of marketing, brings coherence and delivers a credible and carefully crafted promise on which the community must be able to deliver. In economic

development, websites have become the marketing centrepieces. They are linked to and given added functionality through social networking and e-marketing tools.

In the public survey undertaken as part of the development of the Strategic Plan, respondents singled out quality of life factors as the ones that differentiated Dufferin County from other communities in and neighbouring on the Greater Toronto Area (GTA). The top five choices were natural settings and amenities; mix of urban and rural communities; higher quality of life and lifestyle opportunities; less crime; and less congested and room to grow, as shown in Exhibit 11.²⁴

Exhibit 11
Summary of Dufferin County Economic Development Survey Results
Choices of Respondents



²⁴ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County). See Appendix 2 for the detailed results.

Websites: Websites are essential economic development and tourism marketing tools today. 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 investment attraction messaging is directed largely to business and therefore adopts a more factual tone. The economic development website will also be visited by individuals – including immigrants – who are contemplating relocation and are wondering about business, jobs and lifestyle prospects. 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. Tourism messaging tends to be directed to individuals. Headwaters Tourism, the regional tourism marketing organization, provides the web-based window to the world for Dufferin County. The interests of the County, the municipalities and the tourism sector lie in ensuring that Headwaters Tourism has full information and support from the Dufferin County tourism sector.

Dufferin.biz: The website, Dufferin.biz, has been a central element of a joint project that was initiated by representatives from local economic development committees who came together in 2009. Following a County financed study, the County commenced funding annual Dufferin.biz operations in 2011, as a joint project with member municipalities and local groups. The overall Dufferin.biz goals were to:

1. Build the capacity of member municipalities to deliver economic development services and to support the local business community;
2. Develop and implement a branding strategy to enhance the image and reputation of the County;
3. Focus efforts on selected target markets including the creative class, the agricultural sector (with an immediate focus on equine), and the small and medium enterprise (SME) sector; and
4. Work closely with partners to support local business and to nurture quality of life activities.

The website was the visible representation of the Dufferin.biz initiative, but not the only aspect of the project.

County Council supported the amalgamation of Dufferin.biz and Dufferin Board of Trade (DBOT) at the beginning of 2015, as the two organizations identified benefits from closer collaboration that could adopt a more holistic approach. The Dufferin.biz material is now part of the Board of Trade's website and people using the <http://dufferin.biz/> URL are automatically transferred to the DBOT website.

Economic Development Website: Where a municipality has its own economic development program and staff, a website is in many ways its core infrastructure. The website is the home of the economic development brand and the repository of comprehensive and detailed site selection-related data and information. Social networking, newsletters, media releases, and marketing campaigns will be integrated with the website.

As the County adopts an economic development role, a priority investment needs to be in a new County economic development website. Common practice in economic development circles is that municipal sites should be developed to stand-alone, so that they are not subject to necessarily rigorous municipal government design standards and policy constraints. There should be multiple, prominent links from the main municipal site – both to the main economic development site and the tourism site – and amongst all of them and the other municipal partners. As a County economic development role is established, a plan to transition the existing Dufferin.biz material housed on the DBOT website to a new website will need to be established. This is made easier by having had Dufferin.biz as a stand-alone predecessor.

The new Dufferin County economic development website should include the following features and information:

- Ability to download information;
- Ability to obtain translations of material;
- A specific tab for site selection professionals giving access to detailed downloadable data;
- Integration with social media tools and e-marketing initiatives;
- Detailed socio, economic, and demographic information;
- Detailed workforce availability;
- Strong value propositions for the most promising sub-sectors and niches, supported with factual information;
- Area, provincial and North American maps with concentric circles showing distances from major cities;
- A searchable real estate data base, with full profiles of available sites, industrial and commercial buildings, and emerging development situations;
- A fact sheet and more detailed community profile;
- In-depth information on post-secondary institutions, including numbers of graduates, co-op programs, research centres and facilities;
- Potential for impactful and cost-effective research, development and commercialization operations, especially in partnerships with universities and colleges;
- A Business Directory, with separate material providing profiles of foreign-affiliated companies and the largest private-sector employers;
- Applicable County, municipal, Ontario and Federal tax rates and incentives;
- Information on water, sewage and utilities, including charges;
- Road, rail, air, water and transportation infrastructure, with maps;
- Functioning links to websites of key partners; and
- Contact information for the Economic Development team.

Proactive marketing of a jurisdiction should only be launched once the community is fully investment 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.

Tourism: The Dufferin County economic development website should, as the County site now does, devote a page on the site that briefly highlights the major tourism attractions in the County and provides a link to Headwaters Tourism and any other secondary sites.

The other elements that feature prominently in tourism and economic development marketing are branding, marketing collateral, social media, video content, media relations, testimonials, and advocacy. A regular e-newsletter that captures all the significant economic development related news ensures a shared base of information. The County and municipalities can support Headwaters Tourism in the development of Dufferin County content.

Though tourism and talent and investment attraction involve fundamentally different audiences, channels, products and offerings, many themes may be similar. Each will benefit from interest that the other generates. As such, neither's marketing should be developed in isolation.

Branding: Early decisions should also be taken on County economic development branding. As noted, branding should be founded on well researched and defined differentiators, strengths, advantages, and

deliverable benefits. It therefore should not be undertaken in haste. It is also desirable that economic development branding take account of existing and anticipated branding on the part of the County, municipalities, Headwaters Tourism and entities such as the Small Business Enterprise Centre (SBEC).

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES

D.6 MARKETING DUFFERIN COUNTY

Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.6	<p>GOAL: Brand and market Dufferin County</p> <p>OBJECTIVE: Present a consistent, focused and current brand and image for Dufferin County that will heighten and enhance its profile as a locale for business, agricultural ventures and tourism</p> <p>Actions:</p> <ol style="list-style-type: none"> Engage a qualified firm to develop economic development branding Create a new Dufferin County economic development website, transitioning and augmenting material from the Dufferin.biz website and adding social media and marketing automation capability Develop economic development and tourism marketing collateral, social media and video content 	A	2017-2018	DCED & DC8
		A	2017-2018	DCED, DC8 & DBOT
		A	2018	DCED, DC8 & HT

Funding:

- Funding will be needed to contract for the economic development branding
- Budgets are required for the websites, social media and marketing collateral, a good portion of which will involve upfront costs

Performance Metrics:

- Website, social media, news release, and print, TV and radio metrics

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)	IRAP = Industrial Research Assistance Program – National Research Council
DAC = Dufferin Arts Council	MEDG = Ontario Ministry of Economic Development & Growth
DBOT = Dufferin Board of Trade	MCI = Ontario Ministry of Citizenship & Immigration
DC8 = Eight Dufferin County Municipalities	MTCS = Ontario Ministry of Tourism, Culture & Sport
DCED = Dufferin County Economic Development	NEC = Niagara Escarpment Commission
DFA = Dufferin Federation of Agriculture	OASBEC = Orangeville & Area Small Business Enterprise Centre
FEDDEV = FedDev Ontario	OCE = Ontario Centres of Excellence Inc.
GAC = Global Affairs Canada	OEDT = Orangeville Economic Development & Tourism
GAN = Georgian Angel Network	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs
GC = Georgian College	SC = Sheridan College, Brampton Campus
HC = Humber College	SED = Shelburne Economic Development
HELG = Headwaters Equine Leadership Group	UG = University of Guelph
HT = Headwaters Tourism	VRIC = Vineland Research & Innovation Centre
IG = Innovation Guelph	WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

7. Talent and 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 Canadian-born population entering the labour force plateaus.

The World Economic Forum's (WEF's) 2016 Human Capital Report underlines the important role of talent and adaptation to technology shifts: "A nation's human capital endowment – the knowledge and skills embodied in individuals that enable them to create economic value – can be a more important determinant of its long-term economic success than virtually any other resource. This resource must be invested in and leveraged efficiently in order for it to generate returns – for the individuals involved as well as an economy as a whole." With an eye to the future, the report points out, "as today's economies become ever more knowledge-based, technology-driven and globalized, and because we simply don't know what the jobs of tomorrow will look like, there is a growing recognition that we have to prepare the next generation with the capacity for lifelong learning. The idea of a one-time education providing people with a lifelong skillset is a thing of the past."²⁵

Educational Attainment: 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 for the development of the strategic plan. However, data from the 2011 Census provides 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 12, 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 County had attained this level of education. The Dufferin County attainment levels for apprenticeships and college completion 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. Recent estimates of educational attainment for Dufferin County from Manifold Data Mining were also reviewed and found to be comparable.

²⁵ World Economic Forum, "The Human Capital Report 2016," June 28, 2016 (<https://www.weforum.org/reports/the-human-capital-report-2016>). Accessed on February 11, 2017.

Exhibit 12 Highest Educational Attainment by Type, Aged 25 – 64 Years, 2011 Census 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

Dufferin Workforce Development Committee: An important collaborative initiative on Dufferin workforce issues was launched in early 2017 with the Workforce Planning Board of Waterloo, Wellington and Dufferin (WPBWWD). The role of the new Dufferin Workforce Development Committee is to engage community partners in labour market research and planning processes that lead to finding local solutions to local issues. The processes are designed to encourage a more formalized network for information gathering and decision making and to inspire cooperative efforts among partners.

The Committee is comprised of about 10 members, each of which will have connections to other community partners and will share two-way communication by reaching out to and getting input from the broader community.

The Dufferin Workforce Development Committee will be a key forum for coordination on skills and workforce issues and initiatives. The County's participation is central to its economic development role and to ensuring a collaborative County-wide approach. The Workforce Planning Board has access to rich statistical sources but often lacks the funding to maximize the full analytical potential. Prospects of increased Ontario government funding for WPBWWD are limited through to early 2019, meaning that the willingness of others to contribute to studies will be important.

**Exhibit 13
Dufferin County Workforce Development Committee**



Detailed Workforce Data: The consultations and interviews associated with the Economic Development Strategic Plan indicated that Dufferin County employers face challenges in finding qualified workers. Discussions about workforce shortages also bring forward apparently puzzling conundrums – workers looking for jobs while employers are having difficulty finding new hires; and local residents who are commuting to work but who might be attracted to unfilled jobs closer to home.

In the consultations, reference was made to the “invisible workforce” of commuters who are not apparent to companies considering a Dufferin County location. This underlines the importance of having detailed information on the available workforce and its characteristics, including commuters who can be attracted to take jobs closer to home.

The new 2016 Census data on labour, journey to work, language of work, and mobility and migration, which will be released in late November 2017, will provide fresh insights. Dufferin County and its municipal partners should arrange a thorough analysis of this comprehensive data which becomes available every five years. Its release is likely to provide timely data that will be a focus for discussion in the new Dufferin County initiative with the Workforce Planning Board of Waterloo, Wellington and Dufferin (WPBWWD). Given the significant population growth, especially in Shelburne, since the previous 2011 Census, the new data will likely reveal labour force changes and new commuting patterns. Of particular importance is information on the occupations and industries in which commuters and the growing population work. This will provide the basis

to organize job fairs and other targeted matching initiatives to assist local businesses to reach commuters with the skills they need. The data will also assist in making the strong case to particular investors that a resident workforce is available if their investment will create jobs that are closer to their homes in the County. The consultations drew attention to the fact that residents who work locally are more committed and engaged in the community, including as volunteers and donors for community causes. Dufferin County should also develop supplementary data on the skills of residents in the immediately neighbouring jurisdictions from which talent may be attracted.

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. Both of the college campuses in Orangeville are providing specially tailored in-house training to progressive employers in the County. The opportunity for a company to partner with and access talent from post-secondary educational institutions is a vital important component that will give a community an advantage. A focus within the community on lifetime learning is also a definite plus.

Keeping and Attracting Talent: In common with many other jurisdictions in the Greater Golden Horseshoe, Dufferin County faces the constant tasks of retaining youth and attracting talent.

Youth retention is especially challenging, as younger people tend to seek out post-secondary education that is not available locally and a wider and more interesting array of entry-level jobs. The presence of two college campuses in Orangeville – Humber and Georgian – is a starting point, though program offerings still offer modest choice. Frequent GO Transit service may facilitate commuting arrangements to some GTA campus or at least retention of ties to Dufferin roots on weekends. Wider availability of affordable high-speed broadband may also support students and younger workers whose jobs allow them to tele-commute from home at least some days of a week. Expansion of incubation and shared office facilities in the County may also attract younger entrepreneurs – especially those with ties to the area – to choose to start or accelerate their businesses locally. Programs that reach students in secondary schools are invariably necessary to ensure that they are made aware of the full range of local employment opportunities and do not assume that the only exciting jobs are in downtown Toronto.

While retention initiatives aimed at youth are essential, the greatest opportunities and returns may be to target 25- to 40-year olds who previously lived in or near Dufferin County, who have family connections, and who are now raising their own families. This group may welcome the chance to move back to a more affordable, family-oriented, recreationally-rich environment to be closer to aging parents and even to launch their own businesses or agriculturally-oriented ventures. Spousal employment is often an important consideration that community resources can be marshalled to support. Sufficient availability of rental accommodation is also a factor, as some people choose to rent until they are confident about their move and have identified a home to purchase. There is, however, currently only a limited selection of rental properties. Initiatives to attract talent back to a community frequently capitalize on high school reunions. Social networking with former classmates operates on a similar premise to spread the word. Talent attraction initiatives must be based on well focused value propositions and careful audience targeting.

Shelburne's rapid growth demonstrates that the exceptionally high cost of housing and the small-spaces that are on offer in Toronto and many other parts of the GTA will make Dufferin County attractive to many, whether they have previous connections or not. As newcomers settle in the area but continue to commute to jobs that are more distant still, early efforts are needed to introduce them to employment opportunities closer to their new homes. This is where 2016 Census data will reveal trends and supply data that will allow decisions about job fairs, advertising and other initiatives that will heighten awareness of local options.

Immigration: Future growth in the Canadian labour force will be largely dependent on immigration as the number of people born in Canada entering the workforce is plateauing. One-third of immigrants to Canada land initially in the Toronto area. The best opportunity for Dufferin County and its municipalities is to attract these immigrants as they begin to consider their future by alerting them to the skill and occupation demands and lifestyle choices in the County. Immigrants are influenced by articles and ads in their ethnic media in Toronto, by word of mouth, and by members of their diaspora already in Canada. The Ontario Ministry of Citizenship and Immigration offers some funding to communities for activities to attract and integrate immigrants, while OMAFRA has a Community Immigrant Retention in Rural Ontario (CIRRO) program that provides strategies and analytical tools to help communities support their economic development initiatives by attracting and retaining newcomers. Shelburne has accessed this program.

Public Transit: Public transit is necessary to facilitate travel to workplaces and post-secondary campuses. In the County, only the Town of Orangeville currently has a public bus system, and GO buses offer service from Orangeville to Brampton only. Orangeville’s bus service is provided under contract with First Student Canada with the buses owned by the Town. Is this a model that can readily be extended to inter-urban area public transit? In the consultations and interviews, the need for public transit service that links Orangeville with other locations in the County, especially Shelburne, was stressed. The Town of Shelburne indicated to GO Transit that it would support a two-year GO bus trial, but this was turned down. The exploration of additional GO Transit and other options becomes increasingly pressing. The advent of ride-sharing services has opened many innovative mobility options. Community transit systems have partnered with ride-sharing companies, especially for so-called “last mile” connections with transit routes. In Canada, attention has been attracted to a decision by the Town of Innisfil (population 36,500) to partner with Uber and local taxi companies to offer service on main routes and for special needs passengers, rather than investing in creating a new municipal bus system. Fuller exploration of possible transit needs and choices and the development of persuasive business cases will benefit greatly from the 2016 Census data on commuting and places of work. The public transit needs of post-secondary students and people with health care needs are also important components.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.7 TALENT AND WORKFORCE AVAILABILITY AND DEVELOPMENT				
Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
D.7	<p>GOAL: Talent and workforce availability to grow the Dufferin County economy</p> <p>OBJECTIVE: Attract, retain and adapt the workforce to meet the evolving requirements of existing and new businesses</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Participate in and support the Dufferin County Workforce Development Committee and collaborative research and projects that respond to economic development priorities 2. Develop strategies and programs to attract and retain talent, including immigrants 3. Encourage and support public transit solutions that facilitate travel to and from workplaces and post-secondary campuses 	B	2017 & On-Going	DCED, WPBWWD & CTTEE
		B	2018 & On-Going	DCED, DC8 & WPBWWD
		C	On-Going	DCED & DC8

Funding:

- County involvement in joint studies with the WPBWWD will require financial contributions to share costs
- Projects involving workforce attraction, retention and development may be eligible under OMAFRA’s Rural Economic Development (RED) program
- The Ontario Ministry of Citizenship and Immigration helps fund local programs to attract and integrate new immigrants

Performance Metrics:

- The key product sought in terms of talent and workforce information is compelling, detailed data that identifies attractive and accessible talent pools that align with the interests of new investors or local business seeking to expand
- Initiatives to attract talent, entrepreneurs, creative professionals and immigrants should include metrics that set goals and measure the response

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)

DAC = Dufferin Arts Council

DBOT = Dufferin Board of Trade

DC8 = Eight Dufferin County Municipalities

DCED = Dufferin County Economic Development

DFA = Dufferin Federation of Agriculture

FEDDEV = FedDev Ontario

GAC = Global Affairs Canada

GAN = Georgian Angel Network

GC = Georgian College

HC = Humber College

HELG = Headwaters Equine Leadership Group

HT = Headwaters Tourism

IG = Innovation Guelph

IRAP = Industrial Research Assistance Program – National Research Council

MEDG = Ontario Ministry of Economic Development & Growth

MCI = Ontario Ministry of Citizenship & Immigration

MTCS = Ontario Ministry of Tourism, Culture & Sport

NEC = Niagara Escarpment Commission

OASBEC = Orangeville & Area Small Business Enterprise Centre

OCE = Ontario Centres of Excellence Inc.

OEDT = Orangeville Economic Development & Tourism

OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs

SC = Sheridan College, Brampton Campus

SED = Shelburne Economic Development

UG = University of Guelph

VRIC = Vineland Research & Innovation Centre

WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

E. 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.

Cross-Cutting and Converging Technologies: Traditionally, economic development strategies identify priority sectors on which to concentrate inevitably scarce resources. 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. These are often called platform technologies. Targeting of limited resources remains crucial nevertheless, though the focus may need to be less fixated on conventional sectors.

The growing convergence of platform 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 Analytics, the Cloud, 3D printing, 3D visualization, imaging, robotics, GPS, cyber security, augmented and virtual reality, machine learning and artificial intelligence. 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.

Another cross-cutting factor is the emergence of major thematic public 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 emphasis by governments on innovation and infrastructure are other themes that cut across sectors.

Blended Interests: 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.

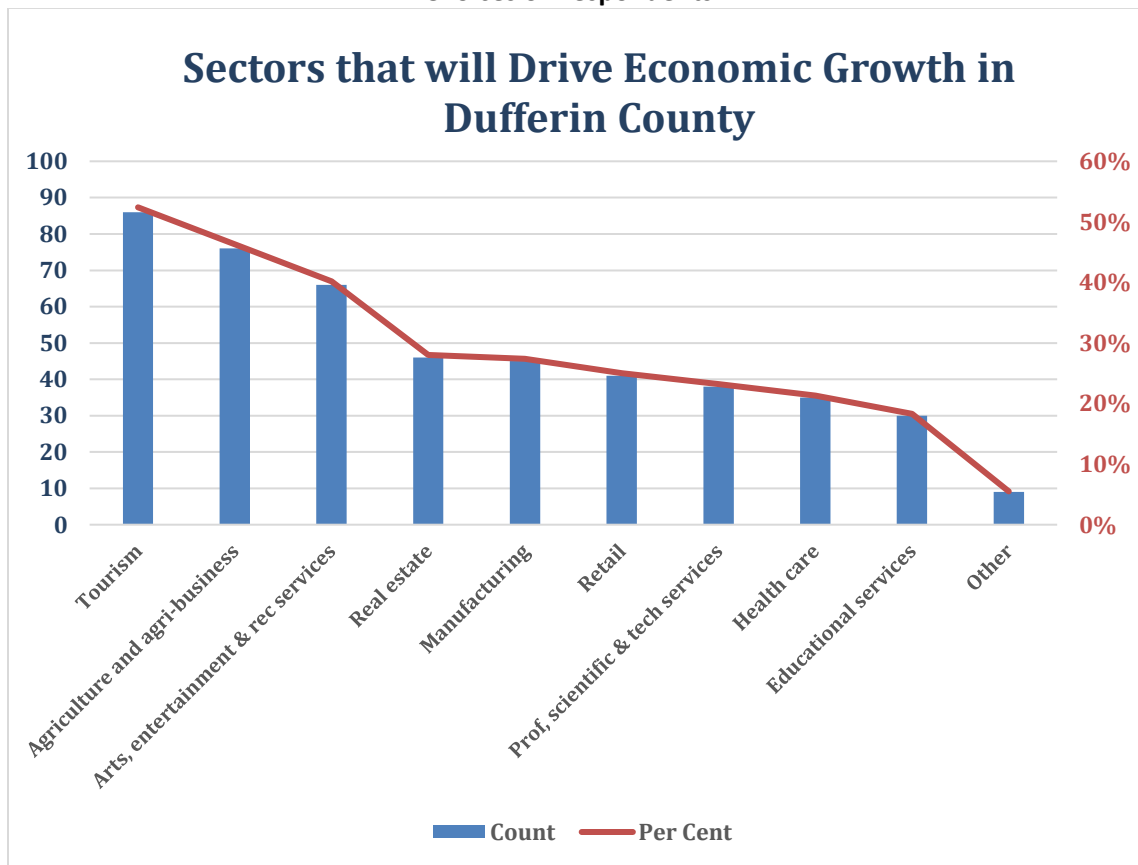
Selection of Sectors of Focus: The selection of sectors of focus involves qualitative judgements as much as it does quantitative analysis. The principal considerations that are weighed in the selection of the sectors of focus include:

- The relative strength of existing sectors and sub-sectors, as shown in:
 - Location Quotients,
 - Recent and apparent growth prospects,
 - Employment trends, and
 - Decisions by firms to locate or expand in the County;

- Sectors and sub-sectors that can take advantage of and build upon Dufferin County assets and characteristics that differentiate and distinguish the County;
- Broader trends and general expectations about potential for growth in individual sectors and sub-sectors;
- Talent availability, including the expectation that the area is likely to be attractive to the types of people that sector or sub-sector employs; and
- Availability of desirable buildings or sites, including the extent to which the County offers locations and a sense of place that matches what businesses in the sectors or sub-sectors would be seeking.

Public Survey – Sectors that will Drive Economic Growth: In the public survey conducted as part of the development of the Strategic Plan, respondents were asked to choose which sectors they thought will drive economic growth in Dufferin County. The top three (Exhibit 14) were: (1) tourism, (2) agriculture and agri-business, and (3) arts, entertainment and recreational services.

Exhibit 14
Summary of Dufferin County Economic Development Survey Results
Choices of Respondents²⁶



NOTE: A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

²⁶ See Appendix 2 for the detailed results.

Goals for Sectors of Focus: For all the sectors of focus, the common goal is to retain and grow existing talent, businesses and tourism, and to attract qualified talent, new businesses and tourists. The objectives and actions that are identified are in pursuit of that goal.

1. Agriculture, Food and Beverages

Dufferin County's diverse agriculture sector makes a substantial economic contribution, centred on cattle, dairy, hogs and mixed farming in the western part and potatoes in the northeastern quadrant. It also extends to a notable equine industry and burgeoning farm gate and local food sector.

The County is positioned within one of North America's largest metropolitan regions and has access to a transportation network to competitively serve this market and others beyond along the Eastern Seaboard and into the US Mid-West. The population of the Greater Toronto Area is among the most ethnically diverse in the world, opening opportunities for produce and foods that cater to particular needs, but whose adoption spreads more widely.

From an economic development perspective, important goals and objectives for the sector are to (1) support the health and growth of primary agriculture with policies and regulations that reflect a sensitivity to agriculture's need to compete nationally and internationally; and (2) encourage innovation, entrepreneurship, diversification and growth, especially where it can add value in terms of further local processing.

Agriculture's importance to the County was widely recognized in the public survey undertaken as part of the development of the Strategic Plan. Agriculture and agri-businesses ranked second among the choices of respondents as to sectors that will drive future economic growth in Dufferin County.²⁷

Total gross farm receipts from Dufferin County's 690 farms were \$157.5 million, up nearly 20% from 2011 to 2016

2016 Census of Agriculture

Farming and Primary Agriculture: Dufferin County's agricultural sector is founded on prime agricultural land, including the prized Honeywood silt loam, a high-quality class 1 soil. Roughly 70% of the land base in Dufferin County is classified as prime agricultural land, in accordance with the Canadian Land Inventory for Agricultural Lands.²⁸

According to the 2016 Census of Agriculture, the total gross farm receipts from Dufferin County's 690 farms were \$157.5 million, up nearly 20% since the 2011 Census. The number of farms in the County declined, however, by 13.2% from 795 in 2011. The reductions in the number of farms were concentrated in Grand Valley, Melancthon and Mono (Exhibit 15). The total amount of land farmed in Dufferin County has decreased steadily from a peak in the 1996 Census of 89,914 hectares, to 78,170 hectares in 2001, 77,136 hectares in 2006, 69,745 hectares in 2011, and 63,371 in 2016 – a decline of nearly 30% over two decades.²⁹ Of the 690 farms, 618 or almost 90% had a capital value of \$500,000 and up. Compared to the provincial average, the amount of rented or leased agricultural land in Dufferin County was higher, and proportion of owned land that was farmed was lower.

²⁷ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

²⁸ Dillon Consulting, for Dufferin County, "Growth Management Study," 2008.

²⁹ Ontario Ministry of Agriculture, Food and Rural Affairs, "Area of Census Farms by County, 1991, 1996, 2001, 2006 and 2011," based on the Censuses of Agriculture in these years.

Exhibit 15 Dufferin County - Number of Farms and Total Gross Farm Receipts 2011 and 2016 Censuses (\$ Million)				
Municipality	2011 Census		2016 Census	
	Farms	Gross Farm Receipts	Farms	Gross Farm Receipts
Amaranth	141	\$14.6	149	\$33.4
East Garafraxa	91	\$19.6	107	\$23.0
Grand Valley	95	\$17.3	69	\$22.7
Melancthon	201	\$39.2	124	\$34.1
Mono	149	\$21.6	119	\$36.0
Mulmur	118	\$18.8	122	\$8.4
DUFFERIN COUNTY	795	\$131.3	690	\$157.5

Source: Statistics Canada, 2016 Census of Agriculture

The most recent reduction in number of farms would appear to be due, at least in part, to consolidation. The number of Dufferin County farms with 760 acres (308 hectares) or more increased from 32 in 2011 to 38 in 2016, including 6 that have 2,240 acres (906 hectares) or more. A similar pattern appears in terms of farm receipts, with the number of farms with total gross farm receipts of \$1 million or over rising from 26 to 32 farms.

Though long renowned for its potato production, Dufferin County has a well-diversified agriculture sector. The land planted in potatoes declined markedly, according to the 2016 Census of Agriculture. Where potatoes grew on 2,522 hectares in 2011, this dropped to 1,327 hectares in 2016, reducing Dufferin County's share of the provincial land devoted to potatoes from 17% to 9%. Other dominant crops were hay (13,135 hectares in 2016), soybeans (10,693), winter wheat (6,627), corn for grain (6,173), and barley (2,523). The lands planted to soybeans, winter wheat and corn for grain in 2016 were all up considerably from 2011. The County's livestock inventory included 23,704 cattle and calves, 27,007 pigs, and 12,429 sheep and lambs in 2016. The number of cattle and calves were down considerably from 2011; pigs about the same; and sheep and lambs slightly lower.

A total of 139 farms reported having paid agricultural workers in 2015 – a total of 536 paid workers (182 full-time employees, 75 part-time employees, and 279 seasonal or temporary workers). A third of the paid workers were family members.

Equine: Dufferin County is known as horse country. The County is a prominent component of the successful Headwaters Horse Country initiative that has taken root and grown over the last 10 years.

Recognizing the importance of the equine sector to the economy of the Headwaters region and its draw for tourists, Headwaters Tourism facilitated the formation of a collaborative venture, the Headwaters Equine Leadership Group (HELG) in 2012, as a committee. HELG brings together committed regional stakeholders to promote the Headwaters region as a centre of equine excellence and to support, grow and advocate for the sector.

A central focus for the Headwaters Horse Country initiative was the 2015 Pan American Games equestrian events which were held in the region. Financial support from the Ontario Trillium Foundation covering 2013 to 2015 was an important aspect of the project, along with other sponsorship, in-kind and government funding that was leveraged. A dedicated website was launched and Headwaters Horse Country was prominently

featured in the 2015 Headwaters Visitors Guide which reached 100,000 Southern Ontario residents. A Horse Country signature arts contest was followed by an ambitious award-winning Headwaters Parade of Horses, featuring 26 whimsical and unique fiberglass horse sculptures brought to life by local artists and support financially by patrons.

Headwaters Horse Country (HHC) covers Dufferin, Caledon, Erin and King. Among the four jurisdictions, Dufferin has nearly 6,000 horses, amounting to a third, or the largest share, of the horse population.³⁰ An even higher proportion of the Headwaters Horse Country (HHC) horse farms are in Dufferin – nearly half (46%) or 202 farms, according to the 2016 Census of Agriculture.

In Headwaters Horse Country, the horse population is spread in roughly equal numbers among horses used for racing, sport competition, pleasure riding and driving, and breeding stock. The annual on-farm expenditures for the Dufferin County horse population would be in the order of \$33 million, applying region-wide estimated averages cited in a 2014 HELG report. According HELG, over 200 businesses in the Headwaters Horse Country region support the equine sector.³¹ The boarding and feeding of horses takes a significant share of expenditures. Other related areas are breeding, training, grooming, farrier services, tack supply, coaching, veterinarian services, chiropractic therapy, specialized vehicles and trailers, insurance, and riders' outfitting. On-farm capital expenditures for barns, fencing, enclosure, security and competition venues also present consequential economic development opportunities.

The exceptional attention that has been drawn over the past five years to Headwaters Horse Country and to Dufferin County's equine sector represents an important platform from which to build. Apart from the impetus to tourism which Headwaters Tourism will be seeking to reap, there are opportunities to support the expansion of existing equine and equine-related ventures and to attract incremental business and residential investment and attractions. Headwaters Tourism's municipal economic development partners have the front-line responsibility to assist the existing equestrian sector ventures to grow and develop greater capacity, while contributing and coordinating needed infrastructure and addressing opportunities related to municipal assets such as the Dufferin County Forests. The approaches adopted by municipal governments can impact the growth of the equine industry. Examples include policies related to severances, land taxes, definitions of commercial activity, access to trails and conservation areas, and the availability of arenas, show rings and race tracks.

The County's economic development efforts can support the Headwaters Equine Leadership Group (HELG) to promote and develop the County's equine sector, including related businesses and its role in attracting tourism. Situations could include opportunities to showcase Headwaters Horse Country at the time of special events and further initiatives to learn from established and emerging equine clusters elsewhere, as was done earlier in the case of Kentucky by a HELG group. The equine sector, especially areas such as horse breeding and equestrian events, tend to attract an above average number of individuals of financial substance who may happen to be among business people more than casually keeping their eyes open for new opportunities and locations for their primary non-equine related businesses. As such, there can be opportunities to engage in "soft" investment attraction initiatives that raise the County's profile as a place to do business.

³⁰ Estimate based on 2016 Census of Agriculture reporting of 1,529 horses and ponies in Dufferin County multiplied by industry multiplier of 3.9 which is the standard multiplier used in the Ontario equine sector to account for underreporting.

³¹ Headwaters Equine Leadership Group (HELG), "HELG Economic Impact Report: A Baseline Report on the Economic Impact of the Equine Sector in the Headwaters Region," April 2014 (<http://thehillsofheadwaters.com/wp-content/uploads/sites/3/2012/07/Equine-Sector-Economic-Impact-Report-April-2014.pdf>). Accessed on April 9, 2017.

Agriculturally-Related Innovation: The use of digitally-enabled, technologically-advanced equipment and systems continue to grow on farms, in packing and processing operations, as sources of market intelligence and weather data, in the gathering of information on soil quality and moisture, and in the marketing of products. Examples include robotic dairy barns equipped with sensors and monitors; GPS-guided farm equipment for seeding, fertilizing, harvesting; and the use of drones to gather data on soils and crops and to monitor animals and fields. The sector is severely handicapped without affordable access to high-speed broadband, underlining the critical importance of providing broadband connections as soon as possible. As broadband becomes available, conferences and seminars on the growth of innovation and leading-edge technologies can provide valuable information and offer a forum to share experiences.

The level of adoption of technologies in the Dufferin County agricultural sector is evident from data gathered for the first time as part of the 2016 Census of Agriculture. In the County, 376 farms reported using computers or laptops for farm management, with 288 indicating smart phones and/or tablets were used. GPS technology was applied on 137 farms, automated steering at 77, and GIS mapping for soils at 40. Twenty-five have automatic animal feeding and four robotic milking.

The County economic development role, working with the agriculture and agri-food sector, should be to ensure that Dufferin County farmers, producers and processors are aware of relevant applied research being undertaken at the Vineland Research and Innovation Centre in Niagara, Potato Research Centre at Agriculture and Agri-Food Canada's Fredericton R&D Centre, and by various research groups and centres at the University of Guelph (including Equine Guelph and as part of the multifaceted \$77 million Canada First Research Excellence Fund "Food from Thought" research project).

Entrepreneurship in the Agricultural Sector: Entrepreneurship goes hand-in-hand with farming. Every farm is a significant risk-taking business. Many spawn other on-farm businesses. Encouraged by County economic development resources, the Orangeville and Area Small Business Enterprise Centre can expand its reach to the rural sector by offering programs, mentoring and resources throughout the County. Better access to other innovation and entrepreneurship resources – including Innovation Guelph and resources based in Guelph – can also be developed.

Starting and Growing New Food Processing Ventures: The development of links with food and culinary incubators in Toronto, Guelph and other urban areas can present Dufferin County as a location for a food accelerator for start-ups with promising, commercially-viable products and model to grow their enterprises where space will be less constrained and locally-grown inputs directly accessible. Broadband is of course a prerequisite to such a venture. Examples of Toronto incubators with whom relationships might be cultivated include the City of Toronto's Food Business Incubator and privately-run Kitchen24.

Building on the growth of the food sector and the success of an earlier 2015 full-day seminar for food entrepreneurs,³² there should be opportunities for further collaborative sessions that provide insights, mentoring, connections and support for new ventures oriented to food and beverages.

Food Trends: Direct involvement in the larger Greater Golden Horseshoe market positions the Dufferin County agricultural community to be responsive to shifting food trends, such as health and wellness, farm-to-fork, ethnic foods, traceability, organic, free range and sustainability. Suppliers can build on the local availability of

³² "Food Entrepreneurs: Preserving Our Heritage; Creating Our Future," February 25, 2015 (<http://orangevillebusiness.ca/event/food-entrepreneurs-preserving-our-heritage-creating-our-future/>). Accessed in May 28, 2017.

freshly produced products and enjoy “100 Mile” status within the densely populated Greater Golden Horseshoe.

The number of craft breweries, micro-distilleries and hard cideries have grown significantly, with no slowdown in sight. According to the Ontario government, there were more than 140 operating breweries in 2016, half of whom were selling through the LCBO. More than 1,500 people were employed in direct brewery jobs generating \$70 million in sales. The annual revenue increase was nearly 35% in 2015-2016.³³ Though relatively speaking still in its infancy, the micro-distilling industry is growing with just over 20 having opened their doors by the end of 2016. Nearly 50 hard cideries have been started in Ontario by the end of 2016, some as part of existing wineries. As with craft beer, hard cider was authorized for sale in selected grocery stores in 2016.

Dufferin Farm Gate Sales: According to the 2016 Census of Agriculture, over 100 Dufferin farms were selling direct to consumers, using farm gate sales, stands, kiosks and U-Pick. Twenty-seven farms reported using farmers’ markets. The 2017 listing of farm gate businesses by the Headwaters Food and Farming Alliance (HFFA) has about 30 Dufferin County farms listed.

The “Dufferin Farm Fresh” map and website are an initiative of the HFFA. The HFFA was formed, under the not-for-profit Headwaters Communities in Action (HCIA), following a Headwaters Food Summit in 2012, funded by Wellington-Dufferin-Guelph Public Health. Key priorities are growing awareness; culinary tourism; school-based food, farming and literacy programs; linking producers to consumers; and support sustainable regional food policies.

Direct-to-market opportunities that come through local farm markets or through wholesale food hubs will enhance farm access to consumers, while also enriching the offerings that will attract tourists to the County.

Wayfinding Signage: The growth of on-farm ventures, local markets, craft breweries, micro-distillers, hard cideries, culinary ventures, equestrian facilities and suppliers and other rural attractions invites early attention to the development of attractively and informatively designed wayfinding signage to draw more people into the rural experience.

Protecting Agriculture - Aggregate Production: A major issue in Ontario agriculture that is a constant threat is conversion of rich agricultural land to gravel production. Dufferin County has already successfully turned back a massive plan to access extensive aggregate resources. In terms of medium- to longer-term economic development within the County the suggestion has been advanced that it would be desirable to adopt a proactive stance by identifying the optimal locations for gravel pits where there are willing landowners but where the interference with agriculture will be the least.

Advocacy for Agriculture: The agriculture sector is represented by the Dufferin Federation of Agriculture which arranges familiarization sessions with municipal councils to directly acquaint them with the importance of the sector, its successes, the challenges that it faces, and issues to be addressed. Some of the issues which were raised in consultations and meetings that have been part of the development of the economic development strategic plan, apart from affordable high-speed broadband, include the availability of natural gas; tiling and the maintenance of municipal drains; narrow sections of rural roads that create danger when

³³ Government of Ontario, Media Release, “Provincial and Federal Governments Investing Over \$1.6 million in Craft Beer Sector,” (<https://news.ontario.ca/omafra/en/2016/06/provincial-and-federal-governments-investing-over-16-million-in-craft-beer-sector.html>). Accessed on February 15, 2017.

farm equipment is being moved; and decisions on pesticide regulations taken with insufficient professional input.

Annual Agricultural Summit: Working with the Dufferin Federation of Agriculture and others, opportunities may exist to support the convening of a regular Dufferin County agricultural summit that brings together a wide spectrum of the County’s rural sector with those whom they partner and on whom they depend. In addition to bringing greater attention to the sector’s importance, the objective would be to inform, involve, energize, and celebrate those engaged with agriculture. Among the themes and topic areas that might be considered are broadband, rural energy needs, market trends, farm succession, precision farming developments, agricultural research and development, funding sources, and smarter rural regulation. Awards could form part of the proceedings. An example from a neighbouring jurisdiction that may provide learnings was Grey County’s Ag 4.0 Summit and Innovation Tour in November 2016 which drew 140 farmers and tech experts to highlight creative technological innovation in agriculture.

Succession Planning: Succession planning by owners is an important business issue in farming, not least to ensure continued stewardship and productive long-term use of valuable agricultural land. For the first time, the 2016 Census of Agriculture asked farmers to indicate if they had a written succession plan for their operation. In the case of Dufferin County, 37 reported having a succession plan, 36 of which involve a family member. This appears to be a lower proportion than nationally or provincially, suggesting that it is an issue to address.

E. SECTORS OF FOCUS				
E.1 AGRICULTURE, FOOD AND BEVERAGES				
Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
E.1	<p>OBJECTIVE: Support the retention, growth and diversification of Dufferin County agricultural enterprises, and grow and attract beverage and food processing operations</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Develop marketing initiatives to support farm gate sales, farmers’ markets, food processing ventures and craft beverage producers throughout the County 2. Identify and target opportunities to attract beverage and food processing facilities, including by providing local food incubation and acceleration spaces 3. Establish a County advocacy agenda for agricultural and rural issues 4. Support and build upon initiatives to grow the Dufferin County equine sector 5. Develop initiatives to facilitate access to resources supportive of entrepreneurship, research and innovation in agriculture, food and beverages 6. Support consideration of an annual agricultural summit 	<p>A</p> <p>A</p> <p>B</p> <p>B</p> <p>C</p> <p>C</p>	<p>2018 & On-Going</p> <p>2018 & On-Going</p> <p>2018 & On-Going</p> <p>2018 & On-Going</p> <p>2018 & On-Going</p> <p>On-Going</p>	<p>DCED, DC8, DFA & HT</p> <p>DCED & DC8</p> <p>DCED & DC8</p> <p>DCED, DC8 & HT/HELG</p> <p>DCED & DC8</p> <p>DCED, DC8 & DFA</p>
<p>Funding:</p> <ul style="list-style-type: none"> • OMAFRA’s Rural Economic Development (RED) program may be a potential source of funding • The new Federal, Provincial and Territorial Agricultural Framework to be launched in 2018 should be studied as a potential source of funding 				

Performance Metrics:

- The results of BR&E calls will be reported and data included in regular reporting
- Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR&E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where DCED has influenced outcomes)

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)

DAC = Dufferin Arts Council

DBOT = Dufferin Board of Trade

DC8 = Eight Dufferin County Municipalities

DCED = Dufferin County Economic Development

DFA = Dufferin Federation of Agriculture

FEDDEV = FedDev Ontario

GAC = Global Affairs Canada

GAN = Georgian Angel Network

GC = Georgian College

HC = Humber College

HELG = Headwaters Equine Leadership Group

HT = Headwaters Tourism

IG = Innovation Guelph

IRAP = Industrial Research Assistance Program – National Research Council

MEDG = Ontario Ministry of Economic Development & Growth

MCI = Ontario Ministry of Citizenship & Immigration

MTCS = Ontario Ministry of Tourism, Culture & Sport

NEC = Niagara Escarpment Commission

OASBEC = Orangeville & Area Small Business Enterprise Centre

OCE = Ontario Centres of Excellence Inc.

OEDT = Orangeville Economic Development & Tourism

OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs

SC = Sheridan College, Brampton Campus

SED = Shelburne Economic Development

UG = University of Guelph

VRIC = Vineland Research & Innovation Centre

WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

2. Tourism

Travel, a key component of economic development, is one of the largest and fastest growing economic sectors in the world, and, despite continued global uncertainties, increases in global travel revenue have exceeded GDP growth in recent years. The outlook is for above average growth.

Canada's travel and tourism sector struggled to find growth between 2002 and 2012 for a variety of reasons including air access, traveller documentation issues and thickening of the border with our largest market, the US, due to the imposition of new US passport requirements. Tourism has been growing strongly recently, however, as the recovery has taken hold and Americans have become more aware of the extra value they can obtain because of the low Canadian dollar. Travel in Canada by Canadians has also been spurred by the higher US dollar.

Dufferin County, as part of the Headwaters region, has grown significantly as a tourism destination, centred on arts, culture, culinary attractions, scenery and the outdoors, recreational pursuits and equestrian offerings. There is substantial potential to grow the tourism sector further, and, with it, many of the supporting agriculture, food, recreational and creative sector activities on which the area can build its reputation. In the public survey conducted as part of the Strategic Plan development, tourism was the number one choice as to the sector that they thought will drive future economic growth in the County. Respondents also saw the County's natural setting and amenities as the top economic development strength.³⁴

³⁴ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

Headwaters Tourism, the collaborative destination marketing initiative, encompasses Caledon and Erin, in addition to Dufferin County. Mono and Shelburne are also financial contributors and have Board representation. Dufferin County's participation in Headwaters Tourism is covered by a municipal services agreement covering the four-year period from January 2016 to December 2019. The annual amount, set on a per capita basis rises from \$86,459 in 2017 to \$89,872 in 2019. In addition to its municipal support which amounts to about \$231,000 in 2017, Headwaters Tourism also gets program revenue from market-ready partners under its "Leading with the Best" marketing partnership program. The Headwaters Tourism marketing programs, such as the annual Visitor Guide, are essentially funded on a breakeven, cost-recovery basis. The Parade of Horses was fully funded by patron contributions. Overall, Headwaters Tourism is a very lean organization.

Headwaters Tourism's award-winning campaign, "Where Ontario Gets Real," distinguishes the area with its focus on people and their connection to the land. The organization focuses on five segments: horse country, fresh and local, arts and heritage, fun and festivals, and nature. As part of its special equine focus, Headwaters Tourism has encouraged and supported the development of Headwaters Horse Country, emphasizing the area's distinctive equine character. The Headwaters Horse Country component also includes King Township. The new winery associated with the Hockley Valley Resort should also add a further dimension to the area's profile as it competes with Muskoka, Niagara Region, Prince Edward County and a host of other destinations for market share and mind share in the Greater Golden Horseshoe.



Dufferin County accounts for an estimated 45% of tourism in the Headwaters region which translates into:

- Over 390,000 visitors annually;
- Nearly \$30 million in annual visitor spending; and
- An estimated contribution of \$788,400 to municipal tax revenues in the County.³⁵

Headwaters Tourism functions as a Destination Marketing Organization (DMO). Headwaters Tourism's prime role is to brand, package and market the region's tourism assets externally. Working with their local businesses and Business Improvement Areas (BIAs), the local municipalities take the responsibility to identify and inventory the tourism assets in their jurisdiction, service visitor enquiries, build the capacity and readiness of businesses to cater to visitors, and address infrastructure and common needs (such as signage and public facilities). The local municipalities, with County support, can work with Headwaters Tourism to ensure it has needed information on local attractions and tourism businesses and that these players have tourism-ready product. In addition, the lead for the attraction of tourism-related investment rests with the County and municipalities. Where strong business cases for investment in tourism-related facilities have been developed, the Ontario Ministry of Tourism, Sport and Culture's Investment Development Office can be a potential partner in developing outreach to prospective investors.

These relationships are outlined more fully in Exhibit 16.

³⁵ Headwater Tourism Presentation to Dufferin County General Government Services Committee, "Dufferin County: Investing in regional tourism," January 2017.

**Exhibit 16
TOURISM SECTOR ROLES**



Source: Headwaters Tourism

Dufferin County Tourism Strategy: The municipal-level effort and interface with Headwaters Tourism will be strengthened where the municipalities have developed multi-year strategic plans for the tourism sector in concert with their partners and in consultation with Headwaters Tourism. A tourism strategy has not yet been developed for Dufferin County. It should be a near-term objective. Orangeville has such a strategy which was done in 2010 with a ten-year horizon. Dufferin County could choose to develop its first strategy somewhat in parallel with the renewal of Orangeville’s.

Areas that merit attention as part of the Strategy include the contribution that County assets, lands and facilities make to tourism; visitor servicing (presently being provided by Orangeville from its Visitor Information Centre at Highway 10 and Broadway/Buena Vista); wayfinding signage; social media; and attracting investment in accommodation and hotels.

Dufferin Food and Accommodation Sector: Notable tourism-related employment is apparent in Dufferin County’s accommodation and food services sector which accounted for 2,146 jobs in 2016. This represented growth of 12.9% between 2011 and 2016, a rate slightly lower than for Ontario (16.1%). The concentration of Dufferin County jobs in the sector exceeds the provincial average however, with a Location Quotient (LQ) of 1.31. By far the greatest share and concentration of jobs is found in the full-service restaurant and limited-service eating place segment where there was employment for 1,751 people in 2016 and an LQ of 1.46. The rate of job growth in this category from 2011 to 2016 nearly equalled the provincial average.

E. SECTORS OF FOCUS

E.2 TOURISM

Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
E.2	<p>OBJECTIVE: Grow and expand tourism offerings and capacity, and welcome increased numbers of tourists to Dufferin County</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Contribute financially and support the governance and activities of Headwaters Tourism 2. Participate in the creation of Dufferin County content for the Headwaters Tourism website 3. Develop a multi-year Dufferin County tourism strategy in concert with the municipalities and Headwaters Tourism 4. Support development of tourism capacity and assets, and supportive marketing such as wayfinding signage 5. Support training for the hospitality workforce and operators in order to enhance the Dufferin County visitor experience 6. Attract additional accommodation investment 	A A B B B C	On-Going 2018 & On-Going 2018 & On-Going 2018 & On-Going 2018 & On-Going On-Going	DCED, DC8 & HT DCED, DC8 & HT DCED, DC8 & HT DCED, DC8 & HT DCED, DC8 & HT DCED, DC8, HT & MTCS

Funding:

- Annual contributions to Headwaters Tourism from January 2016 to December 2019 have been set by a municipal services agreement
- Tourism promotion involves extensive matching funding, including with local travel trade partners
- Funding will be required for strategy development

Performance Metrics:

- Reliable tourism statistics are generally not available at the County or municipal level other than for some specific attractions. The latter statistics can be a guide nonetheless.
- Data should be kept on visitor enquiries, material distributed, and website and social media statistics

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)	IRAP = Industrial Research Assistance Program – National Research Council
DAC = Dufferin Arts Council	MEDG = Ontario Ministry of Economic Development & Growth
DBOT = Dufferin Board of Trade	MCI = Ontario Ministry of Citizenship & Immigration
DC8 = Eight Dufferin County Municipalities	MTCS = Ontario Ministry of Tourism, Culture & Sport
DCED = Dufferin County Economic Development	NEC = Niagara Escarpment Commission
DFA = Dufferin Federation of Agriculture	OASBEC = Orangeville & Area Small Business Enterprise Centre
FEDDEV = FedDev Ontario	OCE = Ontario Centres of Excellence Inc.
GAC = Global Affairs Canada	OEDT = Orangeville Economic Development & Tourism
GAN = Georgian Angel Network	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs
GC = Georgian College	SC = Sheridan College, Brampton Campus
HC = Humber College	SED = Shelburne Economic Development
HELG = Headwaters Equine Leadership Group	UG = University of Guelph
HT = Headwaters Tourism	VRIC = Vineland Research & Innovation Centre
IG = Innovation Guelph	WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

3. Creative Industries

Dufferin County has an impressive array of festivals and cultural assets which appear to have reached the critical mass that attracts growing attention. Prominent among them are Theatre Orangeville and other productions in the Orangeville Opera House, the Shelburne Heritage Music Festival, the Orangeville Blues and Jazz Festival, and the Orangeville Art Group. Culinary and craft beverage offerings blend well and enhance festivals and cultural events, making them a valuable part of the mix. Arts, entertainment and recreation services ranked third among the sectors that should drive future Dufferin County economic growth, according to the choices in the public survey undertaken as part of the development of the Strategic Plan.³⁶ Building and energizing an ever-growing creative cluster should be an economic development focus led by the local municipalities but supported by the County.

The success and growth of the cultural sector is reflected in the fact that Dufferin County's arts, entertainment and recreation sector accounted for 575 jobs in 2016. A notable increase was apparent from 2011 to 2016 as employment grew by nearly 28.9%, compared to a provincial average of 11.8%. Key segments were performing arts companies and independent artists, writers and performers. The highest number of jobs in 2016 – 119 – was in the independent artists, writers and performers category, up by 11.2% since 2011 (compared to a 2% decrease for Ontario). In the case of jobs with performing arts companies, Dufferin County saw a 45.5% increase in employment (six times the provincial average) between 2011 to 2016 to 112 jobs. Both categories have strong Location Quotients (LQs) – at 1.49 and 2.84 respectively.

Dufferin County's arts, entertainment and recreation sector registered strong employment growth from 2011 to 2016, outdistancing provincial growth in many categories.

A strong arts presence has been established in selected other southern Ontario communities such as Stratford, Niagara-on-the-Lake and Drayton, while many others have grown successful festivals. Media coverage has reported on an apparent outflow of creative talent from Toronto, allegedly driven by the high cost of living and accommodation and the number of performance spaces unable to survive financially in the face of rising rents. Dufferin County's proximity to Toronto should work in its favour.

Information on best municipal-level practices in integrating and growing the creative industry component can be accessed through membership in the Creative City Network of Canada. In the US, the Pittsburgh Technology Council's Creative Industries Network is viewed as being a state-of-the-art program. If an evaluation shows either or both networks to be of value, a County membership would likely be an economical and efficient way to involve all municipal players.

Film and Video Production: Dufferin County is beginning to build a niche in film and video, one that can grow substantially with access to high-speed fibre optic cable. Dufferin County has attractive and varied locations for film and productions.

In 2016, the Dufferin County motion picture and video industries employed 116, a marked 152% increase in jobs since 2011. The concentration of jobs in this area is reflected in the Location Quotient of 1.67.

³⁶ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

Because Dufferin County is just outside the Greater Toronto Area (GTA), productions that are undertaken benefit from enhanced refundable tax credits under the Ontario Film and Television Tax Credit (OFTTC). The OFTTC is generally calculated as 35% of the eligible Ontario labour expenditures incurred by a qualifying production company with respect to an eligible Ontario production. Productions that are shot in Ontario entirely outside of the Greater Toronto Area (GTA), or that have at least five location days in Ontario (or in the case of a television series, the number of location days is at least equal to the number of episodes), and at least 85% of the location days in Ontario are outside the GTA, receive a 10% bonus on all Ontario labour expenditures incurred for the production. Wholly animated productions which create at least 85% of key animation in Ontario outside of the GTA qualify for the regional bonus.³⁷

E. SECTORS OF FOCUS																																
E.3 CREATIVE INDUSTRIES																																
Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²																												
E.3	<p>OBJECTIVE: Support growth, greater recognition, and audience attraction for Dufferin County’s creative industries</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Participate in the development and support earned media, publicity and social media campaigns to draw Greater Golden Horseshoe attention to the growing critical mass and excellence of Dufferin County’s arts and entertainment sector 2. Develop a Dufferin County film and video attraction strategy based on identification of strengths and principal opportunities that will be effective in attracting film and video production crews 3. Build linkages among the arts and culture, tourism and food and culinary sectors 	B	2018 & On-Going	DCED, DC8, HT & DAC																												
		C	2018 & On-Going	DCED & DC8																												
		B	On-Going	DCED, DC8, DAC, DFA & HT																												
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Arts and entertainment performance metrics will principally be the metrics reported by the venues and festivals • Establishment of a film and video production attraction strategy will establish unique performance metrics for the segment, such as number of production shootings attracted, type of production shooting, hours shot, expenditures, etc. 																																
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³⁷ Ontario Media Development Corp. website (http://www.omdc.on.ca/film_and_tv/tax_credits/ofttc.htm). Accessed on April 15, 2017.

4. Health and Wellness, Well-Being and Recreation Destinations

Dufferin County is a potential location in which to offer a diverse range of specialized, often professionally-offered services that address people's health and wellness, well-being, education and engage them in recreational and outdoor activity. Such facilities would typically be run by private sector or not for profit entities and be staffed with well-qualified professionals. In most cases, they would be drawing participants and clients from the GTHA to Dufferin County, though the County's proximity to Toronto Pearson may allow facilities to have national or North American reach. The County's natural setting makes it an ideal location for facilities that often seek to create a retreat like environment with access to trails and recreation areas. Historic properties that become available may represent attractive opportunities to repurpose the location.

There are examples of existing facilities in Dufferin County known widely for their excellence:

- Pine River Institute, near Shelburne, a renowned, pioneering, residential treatment centre and outdoor leadership experience for youth 13 to 19 who are struggling with addictive behaviours and often other mental health issues; and
- The Athlete Institute Basketball Academy in Mono which has become the top high school basketball program in Canada and one of the best in North America.

Other types of facilities that would represent an appropriate fit are:

- Wellness spas;
- Integrated medical clinics and lifestyle transformation retreat centres;
- Sports evaluation, conditioning, physiotherapy and training facilities;
- Corporate and institutional retreats;
- Recreational retreats;
- Reflection and meditation centres; and
- Experiential educational facilities.

Though some of these locations may be less dependent on broadband, high-speed connections are likely to be desirable.

Successful existing facilities should be catalogued and prospective sites and locations identified as a basis for well targeted campaigns to present Dufferin County locations.

E. SECTORS OF FOCUS																																
E.4 HEALTH & WELLNESS, WELL-BEING & RECREATION DESTINATIONS																																
Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²																												
E.4	<p>OBJECTIVE: Attract facilities that address health and wellness, well-being, and education and capitalize on recreational and outdoor activity</p> <p>Actions:</p> <ol style="list-style-type: none"> Catalogue successful existing ventures and assess factors favouring a Dufferin County location Identify prospective locations and facilities that align, as a basis for the development of a targeted attraction campaign 	B B	2018 & On-Going 2018 & On-Going	DCED & DC8 DCED & DC8																												
<p>Performance Metrics:</p> <ul style="list-style-type: none"> Performance metrics should concentrate on outcomes (the number of facilities attracted and the associated jobs and investments), supplemented by measures of the activities likely lead to the outcomes (calls and meetings, events, contacts established by category, and categorization of leads in terms of demonstrated degree of interest) (In situations where DCED has influenced outcomes) 																																
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5. Manufacturing

Manufacturing is the third largest sector in Dufferin County by employment, after retail and health care and social services. The manufacturing sector accounted for 2,511 jobs in Dufferin County in 2016, which is 407 jobs (19.3%) higher than the 2011 level. The Dufferin County jobs gain was relatively strong between 2011 and 2016. The percentage growth in this sector was markedly higher in Dufferin County as compared to Ontario. While there was only 0.9% job growth in Ontario, the growth in Dufferin County was 19.4%.

Viewed over a longer ten-year time span, however, the 2016 level was about 1,000 jobs lower than the 2006 level of 3,512. Between 2006 and 2016, the percentage job loss in manufacturing in the County was higher than the comparable rate for Ontario - a job loss of 28.5% compared to 19.9%. Two sub-sectors accounted for 90% of the job loss over the ten year period. The largest decline was in the transportation

The Dufferin County jobs gain in manufacturing was 19.4% from 2011 to 2016, well ahead of the 0.9% growth in Ontario.

equipment manufacturing sub-sector (principally motor vehicle parts manufacturing, with a loss of 604 jobs), followed by fabricated metal products sub-sector (mainly spring and wire products, where 297 jobs were lost). Most manufacturing sub-sectors in Dufferin County lost jobs during the ten-year period, but saw increases from the 2011 and 2016 period. Still, the 2016 job levels in most manufacturing sub-sectors remained lower than the 2006 levels.

Ninety percent of Dufferin County's manufacturing employment was in Orangeville and Shelburne in 2016. Over three-quarters of the jobs were in Orangeville, totalling 1,906 people or 76% of the jobs in this sector. This is an increase of 301 between 2011 and 2016 – accounting for about 74% of the County's job growth 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 (LQs) in this sector – both 1.4. Mono's location quotient for the sector is much lower at 0.63.

The strongest manufacturing sub-sectors (those with Location Quotients of 1.3 or higher, and employment levels of over 100 jobs) include:

- Plastics and rubber products;
- Machinery;
- Furniture and related products;
- Transportation equipment manufacturing; and
- Chemical manufacturing.

The strongest manufacturing segments in Dufferin County in terms of number of jobs, job growth and concentrations as measured by Location Quotients (LQs) are:

- Plastics products with 564 jobs in 2016, an increase of 12.4% from 2011 (compared to a 3.2% job increase for this segment in Ontario), and a Location Quotient (LQ) which is over five times (5.3) the provincial average.
- Motor vehicle parts 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 (LQ) 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 products with 144 jobs, and a job increase of 45.5% between 2011 and 2016 (compared to 4.9% for Ontario), and a Location Quotient (LQ) of 4.65;
- Beverages with 84 jobs, and a job increase of 58.5% between 2011 and 2016 (compared to 23.8% for Ontario), and Location Quotient (LQ) of 1.95;
- Rubber products with 82 jobs, and job increase of 18.8% between 2011 and 2016 (compared to 3.5% for Ontario) and Location Quotient (LQ) of 3.88;

- Office furniture with 72 jobs, and job increase of 56.5% between 2011 and 2016 (compared to 11.3% for Ontario) and Location Quotient (LQ) of 2.59;
- Metalworking machinery, with 62 jobs in 2016 and job increase of 113.8% (compared to 19.3% for Ontario), and Location Quotient (LQ) of 2.10.

Orangeville’s strong plastics sectors is part of a wider cluster reaching into Caledon and the GTA. The Orangeville Brampton Railway freight service is important to companies in the sector.

In the public survey done as part of the Strategic Plan development, manufacturing ranked fifth among respondents in terms of the sectors that they thought would drive future growth in the County.³⁸

Dufferin County’s challenge is to retain and grow an important manufacturing sector that has evidenced its competitiveness through its rebound since the global recession. New investment is most likely to involve expanding GTHA firms that have insufficient space at their present location, or foreign firms that are getting assistance from Ontario officials to identify suitable sites. Expanding GTHA firms will likely put a premium on finding a site that is reasonably proximate to their existing facility, either to facilitate interaction with the present plant or, if it is to be replaced, to be able to retain the existing workforce. BR&E calls on existing Dufferin County manufacturers should also be used to gain insights about supply chain partners that could be prospects to establish a local presence.

Shelburne has a major Honda supplier, KTH Shelburne Manufacturing. Orangeville also is the site of Honda related operations. Honda of Canada Manufacturing in Alliston is one of the company’s major global operations. Though there is no current expectation of an expansion, Dufferin County needs to be positioned to be a candidate location for any new Honda supplier establishing a plant through contact with Honda of Canada executives involved in purchasing decisions and Ontario government officials who deal with Honda.

E. SECTORS OF FOCUS				
E.5 MANUFACTURING				
Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
E.5	OBJECTIVE: Support retention and growth of Dufferin County’s manufacturing sector, and attract new investment Actions:			
	1. Participate in extending future Orangeville or Shelburne manufacturing BR&E calling programs to other municipalities	B	On-Going	DCED & DC8
	2. Meet with Honda of Canada Manufacturing jointly with Orangeville and Shelburne economic development officers	B	2018	DCED & DC8

³⁸ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

E.5	3. Collaborate with Orangeville and Shelburne economic development officers to extend initiatives to access research and innovation resources for manufacturers to firms in other municipalities	B	2018 & On-Going	DCED, OECT & SED
	4. Encourage training and development programs to meet the identified needs of manufacturers	B	On-Going	DCED, OECT & SED

Performance Metrics:

- The results of BR&E calls will be reported and data included in regular reporting
- Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR&E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where DCED has influenced outcomes)

NOTES AND ABBREVIATIONS

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6. Professional, Engineering, Information Technology and Financial Services

The continued shift in all advanced economies from manufacturing to services puts the spotlight on Dufferin County as a potential location for specialized services business and operations. The general availability of affordable high-speed fibre optic broadband access in Dufferin County has been a constraint, however, to the growth and attraction of companies in many of these sub-sectors.

Realistically, even with high-speed broadband availability, the initial growth is most likely to come from regionally focused operations that see an opportunity to tap into Dufferin County’s population growth and central location. Some examples might be home-grown and regional engineering firms specialized in environmental, planning, infrastructure and municipal projects; credit union headquarters or regional offices; regional offices of human resources, payroll and accounting firms; insurance brokers’ regional offices; architectural and design firms; and software, data processing and communication providers.

Dufferin County could also aspire to be the base of operations for some of the contractors, designers, engineers and technicians that will build the new net zero carbon emission buildings and homes that the updated Building Code will mandate by no later than 2030. The government will also be retrofitting social housing apartments, providing funding for educational institutions to improve the energy efficiency of their buildings, and supporting research and pilot programs for innovation, including design and engineering of tall

wood-frame buildings. The government also says it will focus on helping the agri-food sector adopt low-carbon technologies, for example for greenhouses and grain dryers.

Close analysis of workforce availability is needed to identify the professional service sub-sectors where Dufferin County can advance its strongest case. Accessing people with the appropriate qualifications is the driver for engineering, information technology, architectural, accounting, human resource, and financial and insurance firms. Detailed data on the residency and place of work for these (and other) occupations has been provided by Census data. As noted earlier (Section D.7), the valuable new 2016 Census data on labour, commuting, mobility and migration will be released in late November 2017. Service sector firms will be prime candidates for Class A commercial office space, the availability of which will be a requirement. Mixed-use commercial development offers attractive settings. Gentrified historic buildings will also attract interest.

In 2016, Dufferin County firms offering professional, scientific, engineering and technical services accounted for 1,195 jobs. This represents a 6.3% increase from 2011, lower than the Ontario average of 10.4%. The concentration of employment in this sector in the County is less than the provincial average, as shown by a Location Quotient of 0.70. In addition, firms involved in data processing, hosting, and related services provided 274 jobs in 2016, a level that was 53.1% higher than 2011. The finance and insurance sector accounted for 525 jobs in Dufferin County in 2016, a decrease of 14.6%, compared to a job growth of 8.1% for Ontario. The relatively modest level of employment and Location Quotient of 0.51 suggests that the financial and insurance sector is currently mainly servicing local clients.

All these services segments tend to be heavily dependent on adequate and affordable high-speed broadband. Their growth and the attraction of additional firms will be constrained until broadband coverage and capacity can be increased. As this is addressed in the medium-term, there should be potential to grow the professional and technical services area, given the attractiveness of the community as place for workers in these professional fields to live.

In the public survey undertaken as part of the development of the Strategic Plan, the professional, scientific and technical services sector ranked seventh among the choices of respondents as one that will drive future economic growth in the County.³⁹

³⁹ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

E. SECTORS OF FOCUS																																
E.6 PROFESSIONAL, ENGINEERING, INFORMATION TECHNOLOGY & FINANCIAL SERVICES																																
Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²																												
E.6	<p>OBJECTIVE: Attract professional, engineering, information technology, business support and financial services operations to Dufferin County</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Work with municipal colleagues to analyze 2016 Census data on commuting patterns to determine the extent to which there are sufficiently large pools of talent to make a case for locating operations in Dufferin County 2. As affordable high-speed fibre optic access is assured, work with municipal colleagues to identify and target prospects for new operations in Dufferin County 	B	2018 & On-Going	DCED & DC8																												
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F. Resource Implications

Staffing: Implementation of the Dufferin County Economic Development Strategic Plan will rest initially with a full-time economic development officer who will have access to part-time administrative support. At the outset, the economic development officer would rely on contracted resources – part-time staff and consultants – to assist in developing the basic systems, policies, databases, branding and website needed to establish the program’s investment readiness. The County economic development officer would chair the economic development coordination committee and develop the agricultural and rural affairs portfolio.

Later, the need for additional full-time resources can be considered, possibly as soon as for 2019. Comparisons with other jurisdictions, such as Wellington County, suggest that an economic development staff complement of three – a Manager, a second officer and an administrative support position – would still represent a relatively lean economic development and tourism team. A high level summary of the resources devoted to economic development and tourism in Wellington County, Haldimand and Simcoe is included in the Comparative Overview of Economic Development Programs in Nearby Communities (Appendix 6).

The new economic development function should be part of the CAO’s office with the Manager reporting to the CAO. There are several reasons. Economic development will be a prime point of contact for the business and agricultural community and will interface internally with a number of County departments. Economic development will also be the principal group with proactive responsibilities for marketing and promoting the County. These are relations that cut across various County functions, rather than relating mainly to existing organizational groups.

Budgets: Initiation of the new economic development program will entail upfront one-time costs to:

- Acquire and set-up a Customer Relationship Management (CRM) system;
- Establish in-depth site selection databases necessary to be investment ready;
- Develop the economic development and tourism branding for the County;
- Create new stand-alone websites for economic development and tourism; and
- Design and layout marketing collateral.

Branding should commence very early on so that it can be adopted for the websites and marketing materials. The existing Economic Development Reserve may be a source of funding for some upfront one-time investments. Once Dufferin.biz is transitioned to the new County economic development website, the existing financial contribution to the DBOT can be applied to some of the County economic development branding and marketing costs including the websites.

An increased share of funding for the Orangeville and Area Small Business Enterprise Centre (SBEC) is envisaged to expand its reach and presence. An annual contribution to Innovation Guelph is anticipated once the relationship and expectations have been defined. The Dufferin County Workforce Development Committee can be expected to have projects by the end of 2017 that will invite financial contributions from interested partners in 2018 and beyond.

The proposed Dufferin County Economic Development Fund would be launched and offer its first financing in 2018. The County’s contribution to Headwaters Tourism is set through to the end of 2019 under the terms of the current four-year municipal services agreement.

G. Implementation Plan

The principal areas for early action by Dufferin County in implementing the Economic Development Strategic Plan are:

1. Hiring a County economic development officer to head the economic development function;
2. Establishing and initiating the economic development coordinating committee and associated mechanisms;
3. Making the County economic development function investment ready, by putting in place the basic systems, policies, databases, and marketing tools, including development of the County website; and
4. Defining and launching the agricultural and rural affairs economic development program.

Establishing the new economic development unit and undertaking the foundational work can probably be accomplished over a year to a year-and-a-half time span. The remainder of 2017 and all of 2018 will be devoted largely to foundational work, so that it will only be during the course of 2019 that the fuller shape of the County economic development and tourism program will be in place to undertake a full set of proactive initiatives. Part-time staff and consultants will be contracted on a project basis to undertake much of the ground work to establish the economic development function and make the County investment ready.

The initial priorities will be to launch of the County coordinating committee, while beginning to take parallel steps to gather, categorize, and inventory databases that are essential to investment readiness. To kick-start the data gathering, the consultants, the Global Investment Attraction Group (GIAG), will be providing an Economic Profile and will transfer electronic copies of the all statistical data that they have gathered in the preparation of the Strategic Plan. Considerable data from the 2016 Census, which is still being released in phases, will need to be added. Through the coordinating committee, the responsible County economic development officer will also enlist inputs from all the municipalities, including on available sites and buildings and municipal development approval processes. The Committee will need to be fully involved in the decisions about the data that is needed and how it will be assembled and then kept up-to-date. At an early stage, the committee should arrange structured presentations by the prime economic development partners to ensure that everyone has a full understanding as to what services, programs, funding, data and joint programming they can provide. Decisions will be needed on how the County will ensure it has ready access to the information that partners can supply (e.g. website links, keeping information in its own data banks, consolidating partner information, or having a supply of hardcopy brochures). This initial phase should also ensure that appropriate internal structures are put in place, including a Customer Relationship Management (CRM) system. Once the basic tasks are underway, the coordinating committee should look forward and discuss the extent to which parallel structured BR&E programs covering all the County might be undertaken in 2018. As the initial work proceeds to bring the County to investment ready status, increasing attention can be given by the coordinating committee and the County economic development officer to plans for branding and the creation of new County economic development and tourism websites and related marketing material. Funding for the economic development and the tourism branding and the design, development and creation of websites by a suitable firm should be requested for 2018 and work launched as early in 2018 as possible.

During 2017, the new Dufferin Workforce Development Committee will be developing its agenda, priorities and initial areas for action, in parallel to some extent with the development of the new County economic development role. An early time-specific task of special interest to the County, Orangeville and Shelburne economic development officers will be in-depth analysis of the detailed 2016 Census data on labour, journey

to work, language of work, and mobility and migration. This data is to be released in November 2017, and, given its fundamental importance, should be obtained and reviewed as soon as possible.

A County-level agenda for economic development advocacy could be developed within the first six to nine months, though there may be specific issues requiring more urgent, opportunistic action.

The shape of an agricultural and rural affairs economic development program and its initial priorities should be discussed and agreed by the coordinating committee in time to provide initial funding for 2018, even if it will not be fully brought together and staffed until sometime into 2018.

The County has decided to increase its funding contributions for the Orangeville and Area Small Business Enterprise Centre (SBEC). County economic development staff will increasingly work with the SBEC in extending the reach of its programming throughout the County. Somewhat in parallel, a relationship should be defined and developed with Innovation Guelph.

Pro-active investment attraction initiatives will become a priority when investment readiness has been achieved, initial BR&E activities are decided, and the new County economic development website is in place. Readiness to promptly and fully handle investment enquiries should occur early as the County begins to become investment ready.

Appendix

Appendix

Table of Contents

1. Members – Dufferin County Economic Development Steering Committee	1
2. Summary of the Public Survey Results	2
3. Notes from the Stakeholder Consultations	19
4. Selected Economic Base and Sector Analysis Tables – Dufferin County	26
5. Note on the EMSI Analyst Statistical Source	31
6. Comparative Overview of Economic Development Programs in Nearby Communities	32
7. Background Paper on Performance Measurement	36

1. Members – Dufferin County Economic Development Steering Committee

Committee Chair:

Darren White – Warden of Dufferin County; Mayor of Melancthon

Members:

Joe Andrews – Director, Humber College, Orangeville; Past Chair, Dufferin Board of Trade

Jane Aultman – Dufferin Board of Trade – County Rep; Amaranth Deputy Mayor; and County Councillor

Guy Gardhouse – East Garafraxa Mayor; County Councillor

Michele Harris – Headwaters Tourism

Gail Little – Dufferin Federation of Agriculture; Amaranth Councillor

Keith Lowry – Mulmur Economic Development Task Force; Mulmur Councillor

Mary Ann Lowry – Mulmur Economic Development Task Force

Tammy McQueen – Grand Valley EDC (Succeeded David Reimer)

Wade Mills – Shelburne EDC; Shelburne Councillor

Bob Mitchell – Mono Research Advisory Committee and Dufferin Arts Council

Diana Morris – General Manager, Dufferin Board of Trade

Mark Ostrowski – Amaranth EDC

Ruth Phillips – Manager, Economic Development, Town of Orangeville

Pete Renshaw – Chairperson, Dufferin Board of Trade

Laura Ryan – Mayor Town of Mono, County Councillor

Steve Soloman – Grand Valley Mayor; County Councillor

John Telfer – Shelburne Economic Development; Town CAO

Ken Topping – Dufferin Arts Council

Nancy Tuckett – Director, Economic Development, Planning and Innovation, Town of Orangeville

2. Summary of the Public Survey Results

SUMMARY OF DUFFERIN COUNTY ECONOMIC DEVELOPMENT SURVEY RESULTS – TOTAL SAMPLE

A public survey using Survey Monkey was undertaken between March 13 and April 28, 2017, with 168 responses (150 on-line and 18 hard copies completed). Although the survey was open to the public and the sample not statistically random or representative, the results appear to be geographically representative (the portion of responses by municipality were generally consistent with the population distribution by municipality across Dufferin County).

1. Are you a resident in Dufferin County?

Answer Options	Response Count	Response Percent
Yes	149	89.3%
No	19	10.7%

2. If yes, in which municipality do you live?

Answer Options	Response Count	Response Percent
Orangeville	64	43.2%
Mono	23	15.5%
Shelburne	16	10.8%
Mulmur	13	8.8%
Amaranth	10	6.8%
Grand Valley	10	6.8%
Melancthon	7	4.7%
East Garafraxa	5	3.4%

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

Answer Options	Response Count	Response Percent
Yes	111	64.4%
No	55	35.6%

4. If yes, in which municipality is the farm, business or organization located?

Answer Options	Response Count	Response Percent
Amaranth	11	9.6%
Grand Valley	4	3.5%
Mono	18	15.7%
Orangeville	50	43.5%
Shelburne	10	8.7%
East Garafraxa	4	3.5%
Melancthon	2	1.7%
Mulmur	9	7.8%
All areas of County	4	3.5%

5. If yes to Question 3, in which sector?

Answer Options	Response Count	Response Percent
Government	21	17.3%
Agriculture	13	10.2%
Non-profit	9	9.2%
Tourism	8	5.1%
Manufacturing	8	7.1%
Finance or Insurance	7	7.1%
Retail trade	7	2.0%
Professional, scientific or technical services	7	6.1%
Health services	7	6.1%
Education services	5	4.1%
Real estate	3	3.1%
Engineering services	2	2.0%
Construction	2	2.0%
IT/Computer Technology	2	2.0%
Other	17	16.3%
Accommodations	0	0.0%
Legal or accounting	0	0.0%
Food services	0	0.0%

6. What do you think are Dufferin County’s top three economic development strengths?

Answer Options	Response Count	Response Percent
Natural setting and natural amenities	84	50.6%
Location	81	48.8%
Lifestyle opportunities	74	44.6%
Easy access to larger communities	65	39.2%
Agricultural lands and farms	55	33.1%
Highway accessibility	39	23.5%
Recreation	23	13.9%
Housing affordability	21	12.7%
Highway transportation and Rail	12	7.2%
Availability of skilled work force	11	6.6%
Downtowns and shopping	10	6.0%
Health care	8	4.8%
Manufacturing base	7	4.2%
Housing availability	5	3.0%
Other	7	4.2%

7. What are Dufferin County’s top three weaknesses and challenges related to economic development?

Answer Options	Response Count	Response Percent
Cost of living	88	53.7%
High speed internet	87	53.0%
Public transportation	63	38.4%
Labour availability	55	33.5%
Encouraging innovation/entrepreneurship	47	28.7%
Employment lands availability	30	18.3%
Cost of new development	28	17.1%
Development approvals process/timelines	25	15.2%
Lease space availability	21	12.8%
Other	31	18.9%

8. Where should the County of Dufferin focus its efforts to support the growth of its economic base and its businesses?

Answer Options	Response Count	Response Percent
Support entrepreneurship	66	39.8%
Business retention	66	39.8%
Promote area for tourism/culture	63	38.0%
Promote area to external businesses	57	34.3%
Investment attraction	55	33.1%
Workforce development	50	30.1%
Active role of County in economic development	48	28.9%
Communication with business and residents	45	27.1%
Enhance community/county image	39	23.5%
Other	15	9.0%

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

Answer Options	Response Count	Response Percent
Tourism	86	52.4%
Agriculture and agri-businesses	76	46.3%
Arts, entertainment and recreation services	66	40.2%
Real estate	46	28.0%
Manufacturing	45	27.4%
Retail	41	25.0%
Professional, scientific and technical services	38	23.2%
Health care	35	21.3%
Educational services	30	18.3%
Other	9	5.5%

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

Answer Options	Response Count	Response Percent
Natural settings and amenities	120	72.3%
Mix of urban and rural communities	99	59.6%
Higher quality of life/lifestyle opportunities	81	48.8%
Less crime	79	47.6%
Less congested and room to grow	78	47.0%
Strong agricultural base	58	34.9%
Housing Affordability	29	17.5%
Vibrant complete urban communities	11	6.6%
Labour and talent	7	4.2%
Stability of workforce	3	1.8%
Strong manufacturing base	2	1.2%
Other	5	3.0%

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

- Prospering rural communities working together as a county to attract a very significant employer that will offer employment at attractive rate of pay
- Promote Dufferin as a place to do business
- Growing opportunities for Agriculture
- Affordability
- Availability
- Expand on our successes - i.e. Woolwich, Spinach, Ag, Ag tourism
- Technology
- Profession
- Slow and Deliberate
- Sharing economy
- Support farm businesses
- Restaurants/Food
- Better access to training
- Update
- Places for people to work with less travel to the city
- Recreation
- Need to help small businesses
- Promote external investment
- Entrepreneurs
- Growth in the retail, hospitality and commercial sector
- More affordable housing
- Shopping
- Accessibility to neighbouring towns for folks that don't drive
- Better tax base for business
- Strong businesses that are long term
- Keep our young people here
- Tax breaks/incentives for manufacturers
- More Manufacturing companies in Orangeville = Lower taxes

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

I would like to see more manufacturing
More business
Mid-size industrial throughout county
Develop a municipal industrial park
Traffic Congestion
Water
Need access to better education for residents
Clean
Allow local residents to work close to home
Plan group
Entrepreneurship
Eco-friendly businesses
Equivalency in cost of living with wages paid in Dufferin County
Create a strong attraction i.e. reason to come to Dufferin
Tourism
Afro-Tourism
Recreational growth
Jobs
Middle class jobs
Diversity
Local focus on entrepreneur attraction
We need industrial and retail space
Health Care
High-Speed connectivity, reliable, affordable, widespread coverage
Healthy, engaged business community
RECREATION FOR CHILDREN
Employment growth, jobs
Affordable Housing
Small town feel
Promote Tourism and Recreational Opportunities
Tourism Development
Transportation
Not in my backyard or on my farm or my road
Population Growth
Farming and local food
Arts & Culture
Tourism Industry
Supportive small business environment
Move away from manufacturing
Lower taxes
Innovation
Ability for companies to set up reasonably
Sustainable
Value added agri businesses - farm markets, vineyards, high value crops
Local farmers and produce
Developing/ implementing a stronger marketing/communication plan
Whole, integrated economics not just for pure 'growth'
Strengthen the commercial/industrial tax base
Inclusive
Day trippers and tourism
Agriculture
New business, manufacturing, tax incentives

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

Focused managed moderate growth
All municipalities working for a common county plan/goal
Tourism
Nature
Appropriate development for the area
Entrepreneurs
Technology
White collar
Strong, self-sufficient community
Growth and culture
Vibrant beautification
Restrict urban growth and urban sprawl
Build up not Out
Bring in business to lower household taxes
Need more corporate jobs, not just manufacturers
Self-sufficient – i.e. more people LIVE (not just sleep) and WORK here
Balance rural and urban settings
Tourism
More industry
Expand educational opportunities
Cultural investment
Sustainable
More business/manufacturing
Sustainable
Smart Connected Communities
Tourism
Enabling economic development through progressive policy
Building the capacity of local assets i.e.: arts/culture/agri-food
Solid infrastructure
Arts & Culture destination
Sustainable agriculture
Dynamic and sustainable
"Stuffed" with too many "sleeper" people
Define thematic approaches to the vision: settlement core iconic design; complete arterial collector, streets and corridors, regional airport, supportive employment centres
Maintain our natural heritage, keep it a strong blend of rural and urban (close to GTA) offer the escape from the GTA. GTA Playground.
We have it all - Big City Thinking, Small town feel
Create positive business environment, local government run more as a business other than social services, education, tourism, culture, protect agriculture as it requires, high speed internet
Healthy people (labour force and residents) and healthy lands
Dufferin County as an Agribusiness hub
Rural and urban all in one
Potential to break free from a bedroom community mindset
Potential opportunity - entice corporations of build-shared office space for professionals, i.e... head office - banks, insurance - downtown satellites
Green
Agri business
Sustainable
Innovation and heritage
More support of home industry
Environment (nature areas)

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

Promote natural foods and products
Stability
Education of skilled workers
Small, home based professional businesses
Update small towns
Controlled measured growth
Real estate investment opportunities
Better availability to major highways
Retail
Restaurants
Retail growth
Better hydro rates
Attractive incentives for businesses to relocate and commit to staying for long periods of time, something for everyone in the family (lifestyle options for relocating families, executive and top talent)
Provide employment
Continued viability of the rail line
Must improve Internet in Manufacturing/Industrial area immediately
Need labour to support the businesses
Better transportation
Higher taxes
Wind
Need better transportation
Innovative
Not a strain on resources such as water
Transit
Arts
Retaining cultural charm of communities
Maintaining property taxes with cost of living for residents working in Dufferin County vs. commuters
County, Towns work together instead of in competition to show united front to investors/ businesses
Retirement opportunities/activities
Eat-Music-Play (Grand Valley, Shelburne, Oville)
Infrastructure improvements
Recreational centre
Hotels
Investment
B2B communication and cooperation
No more residential building
Education
Business Start-up Incubator
Access to stable, reliable workforce
More/diversity of job opportunities
Community service oriented
Big town product
Increase High Speed Internet and make connecting affordable
Younger workforce opportunities
Affordable housing
Community
Better Public transportation to other areas
Arts & Culture Promotion
Developing serviced employment lands
Dynamic
Support small business

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

Holistic & integrated approach (at a County level)
Infrastructure upgrades
Visionary, foresight
Tourism with accommodation - Caledon has missed the boat on this
Save our farms
Training/support for current business owners - taking their companies to the next level
Solid base in terms of longer term vision
Attract postsecondary institution
Diverse
Heritage support
Let's just do it!
Recreation
Enhanced eco-tourism and farming supportive options
Sustained business growth and retention
Ecological preservation of quality of life attraction
Tourism
Better infrastructure
Small Business
Business
Green technology
Not a bedroom community for large cities
Togetherness - One for all, and all for one
Urban development must be sustainable and have a positive net effect
Attract manufacturing
Higher education
More French Immersion programs/schools
Sustainable growth
Professional jobs
Arts & Culture
More housing
Expand recreational opportunities
Youth retention
Innovative
More local jobs
Diverse
Central to all southern Ontario
Skilled workforce
Connected to the world with high speed internet and cell service
Strengthening "urban" core of Orangeville for business development/employment
High speed internet
Growth of the creative economy/employment
Sustainable Health Care
A place professionals want to move (greenspace, high end food and beverage, cultural attractions all coordinated)
Full college campus
Close to main cities but far enough away
Potential to better service Ag
Development
Harvest technology opportunities everywhere - requires UHS internet
Agri-business
Maintain and grow standard of living
Arts and culture
Public transportation connecting the Towns

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

Arts, events - make Dufferin County a destination - not just Orangeville
More retail to keep people shopping local
Tourism
Make it warm and welcoming
Promote county differentiators
Strong cultural heritage
Tourist attractions
Job growth
Entertainment
Skilled trades in high schools
Community - community first thinking, more than profit based
Keep our farm land
Improved access to training for workers
More promoting Orangeville as the best place in Ontario to operate your business
Growth
Destruction to the rural and quaint feel
Energy
Need more shopping and restaurants
Central
Integrity
Recreation
Niche tourism (mud bog, rodeo, etc.)
Maintaining an affordable lifestyle for residents of Dufferin County
No empty commercial spaces
Arts and culture
Eat local farming
Exposing our natural setting
Highway improvement
Tourism
Leadership
Coherent planning and bylaws across the County
Roads
Business retention
Readily accessible information on serviced land locations, ready for development
High speed Internet for all businesses and residents
Serviced employment land
Healthy Lifestyle Opportunities
Bring in Water from Great Lakes somehow
Promotion of Dufferin County
Job creations
Real estate
Affordable housing
Attracting new business
Encouraging tourism and agri-tourism
Viable
Bring in a few big businesses
Leadership
Innovative businesses and creative well paid jobs
A near city area that attracts the GTA to stay, eat, purchase in an almost completely natural environment
Grants for people interested in farming
Creating a beautiful place to live
Sustainable for all aspects of life

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

Attract businesses that pay higher municipal tax rates
Green
Urban retirees
Agriculture processing - value add
Tourism
Enhanced settlements through "complete streets / corridor" design
Employee base with the necessary skills to meet demand
Agricultural sustainability and continuity of business
Accessibility
Diversity
Boosting manufacturing
Affordable housing
Maintain the rural atmosphere and outdoor activities
Paradigm Shift - Embrace Change
Think outside the box and do not create another location that reflects an expansionist environmental worldview
Rural to Urban Public Transportation
Professional services
More retail, i.e. mall
A sought-after place to live
Cost of living
Senior Care
Council that works together for the good of the electorate
Expand retail choices
Advanced education facilities
Progressive
More tourism
Rural Innovation
Retaining businesses
Green and low impact industries providing good quality employment
Maintaining rural/natural landscape for nature tourism of the rest of the county
Stable costs
Support for new entrepreneurs & businesses
Sustainable housing

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

Coordinated efforts between businesses (leadership single voice needed)
NIMBY attitude towards new business ventures
Hi speed internet
Affordable, reliable broadband internet
Affordability for entrepreneurs to start up
Good jobs for youth to stay in the community, not just food and retail low end jobs
Better paying jobs
Internet - affordable, accessible to everyone in the county
Local jobs for our youth
High speed internet
Incursion of Brampton, anticipated congestion and its impact on quality of life
High speed connectivity
Helping rural communities grow and prosper
There are no commercial businesses in Shelburne (nowhere to eat/shop)
Bring in business to lower tax base

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

Dufferin County is behind the times

Education

How do we get high-speed internet?

Helping to bring in retail to small towns

Affordable and reliable high speed internet access for all

Cultural diversity

Retail/hospital availabilities

We need affordable housing

Building a second high school

Transit

Industrial tax rates

Attracting businesses with an employee base and local hiring policies

Jobs

High property taxes

Internet critical, otherwise no manufacturer can operate here!

Affordable housing to purchase to attract labour force

Affordable housing

Develop a municipal industrial park

Preventing urban growth

Add industry to support housing growth

Education

Lack of Public/Mass Transit to/from GTA

High speed internet

Promote manufacturing

High speed Wi-Fi

Communications and Marketing professionals to support growth

Maintaining property taxes & Dufferin County wages paid

Affordable High Speed internet

Weak leadership from Council

Image

Upgrading roads and bridges

Highway improvement

Taxes

High speed internet

Reduced tax burden on residents

Clear articulation of what ec dev is/is not

Industrial and Retail Space

Grand Valley Medical building

Skills Gap - Employers have a hard time attracting and hiring the skilled employees they need

Keep the business community's voice heard

HOUSING

Availability of serviced employment land

Comprehensive Collaboration of Business & Community

Size of community

Lack of Water for Industrial Development

Affordability of Business Set up

Transportation

Protect farmland

Business loans

Lack of industries & higher income employment

Local Jobs

Jobs

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

Attracting new business
Lack of services employment lands
Cost of housing
Lower small business taxes
County-wide approach
High speed internet
Skilled labour
Planning to achieve the above
Gravel pits and location
Hire Marketing/Communications/Event staff
Public transportation
Municipalities need to work together
Co-ordinating efforts with lower tiers
Property taxes
Preserve agriculture land
Bringing new business to the area
Tax base sustainability
Lower residential taxes
Infrastructure- High Speed Internet, Natural gas
Internet speed and e-commerce potential supporting role
Transportation
Serviced land
County approach vs. individual municipal approach to ED
Marketing and communication with outside areas
Attracting new types of business
Increasing cost of housing
Maintaining our heritage through growth and historic awareness
Top down leadership - honesty and integrity from our leaders
Controlled urban growth in Orangeville - water issues of quantity and quality are key - Food and Water First
Loss of Agricultural land to housing
Do not want sprawling suburbia
Developing tourism and cultural opportunities through county investment
Professional Jobs
Access to Internet
Industry
Education
Need a dedicated cultural component to economic development
Using tax dollars wisely
Provision of work opportunities in the County
Affordable housing - ownership and rental
High speed internet
Limiting unsustainable growth
Building a strong technology based infrastructure
Education opportunities
Complete connected communities, with high quality workplaces
Identify current assets that realistically can be leveraged
Better political leadership
No Cultural Plan
Re-open the NEC act and update it to current times
Transportation, education, workforce, high speed internet
Too many people; infrastructure - can it handle all these extra houses??
In Grand Valley, installation or expansion of water plant

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

Balanced tax base; rural land division pressures

Collaboration - promote available industrial, commercial and retail opportunities in cooperation with all Dufferin municipalities - work together to promote the whole county

More industry

Cost to live and do business; politicians, municipal council and provincial

High speed internet, improve transportation, and listen to business community more here, selective development that strengthens economic base, promotion of tourism

Fill in the gaps for businesses currently missing

Consistent county message vs. inconsistent lower tier messages

Setting aside land for commercial development without impacting the environment

Better rural distribution of natural gas to ease high rural energy costs

Bring business to area without losing the small town/community values that either brought/kept people living here

A Senior friendly community; Seniors spend in the community but don't compete for jobs

Supporting current businesses/shop local

Road safety - accessibility - more regulations on truck traffic

Encouraging business to do business in Dufferin

Transportation

Limited Infrastructure, roadways, advanced Teleco support

Lack of serviced lands

House developments going up too fast that the infrastructure can't support them (Shelburne, Grand Valley)

Offer the right training programs in Colleges, link to universities

We need innovation

Encourage people to work locally

Healthcare

Public consensus on main economic growth elements

Promoting buy local

Easier access to other municipalities

Retail in smaller communities

Shopping

Hydro costs

Costs - taxes, utilities

Youth activities

Lack of manufacturing strategy

Make incentives to off-set initial costs to move business to Orangeville

Availability of affordable rental housing

More business

Preventing traffic congestion

Transportation

Lack of Rail

Costs of development

Transit

Retention of the greenbelt

Maintaining cost of living with population increase

Public meeting hub for businesses with high speed internet

Economic growth at expense of rural beauty

Awareness

Invest in conservation area developments

Jobs

High cost of doing business in Ontario

Highway 10 too narrow

Increased employment opportunities

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

Developed understanding that growth requires investment
Aging Community
Housing
Lack of focus on export development - need to encourage companies to export
Attract new workers to the community (and affordable houses for them to live in)
HEALTH CARE
Additional sewage capacity
Business/Service Development Opportunities
Available jobs
Increase Recognition of Dufferin County/Part of GTA
Promotion of Available Businesses
Affordable Housing
Protect environmentally fragile land
More dollars for staff training outside of Ontario
Poverty
Keeping business in the areas
Public transport
Supporting Arts & Culture
Lack of high speed internet
Lack of training opportunities for youth
Lower rent for small businesses
High speed internet
Infrastructure that takes Ag business into consideration
Entrepreneur- mentoring for succession
Ensure entrepreneurship that fits into the above is supported
Saving our farms
Provide funding/training to encourage innovation/entrepreneurship/new business
Supporting a switch to subsidizing organic farming
Regional approach to economic development
Promoting Dufferin County
Tourism
Attract Food processors
Tourism development
Demand for enhanced services including high speed internet
Don't be afraid to take some risks in the plan
Sustainability of the Ag business
Taxes
Identify and promote benefits of Dufferin
Creating a stronger Dufferin County image for attraction to the area
Encourage reasonable and co-operative municipal governance among county stakeholders
Improve recreation opportunities
Retention of existing businesses
How to keep house prices low enough so that young people have a chance to own their own home - real estate values are absurd
Lack of Manufacturing
Keep historic charm
Quality high speed internet
Affordable Housing
Transportation (Roads & Transit)
Housing
Recreation
Need to find more opportunities to retain youth within region, more technical/innovation jobs would help with this
Working closer with existing businesses to determine needs

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

More business/manufacturing
Promoting local activities and business ties
Passenger rail - lower the burden on the roads
Tourism
Enabling entrepreneurship/innovation
Supporting manufacturing industry in providing comparable wages to bigger communities
More long term planning
Limited Economic Development Focus/Plan
Carefully planned development and infrastructure
Ensuring Dufferin is in the game for prov/fed activities (investment attraction)
Broadband - high speed internet county wide
Self-promotion
Municipalities that work with not against their largest economic sector
Give businesses great internet connections and reasonable hydro costs so setting up in a low cost area becomes more attractive
More job options
Innovation for new business, attention to youth
Cohesive plan that leverages the strengths of each/all townships
New opportunities
Keep the farms and natural areas preserved!
Develop the entire County.....not just Orangeville
Help business become competitive in a world market
Encouraging the use of local businesses
Protection of the unique environmental qualities
Job growth opportunities
Transportation for city access
Jobs
Skilled trade education in Schools
Increased wages - local businesses have paid too little while expecting top talent
Business retention
Lack of skilled labour
Promote Orangeville for Business
Attraction of businesses to expand industrial park
Retaining and supporting the agricultural sector
Support to business new and existing
Constrained sewage and water supplies
Make development of lands more streamlined
Assisting in agricultural development
Keeping affordability for residents working in Dufferin County
Work with Dufferin Board of Trade to bring business communities of Dufferin together
Lack of support for farming community
Protect green space
Postsecondary institutions
No Go Train service
Promote and strengthen tourism
Role of positivism in local politics vs. complacency
If more residential building, then we need to work on upgrading roads
Headwaters Hospital Expansion
Affordability of housing when compared to wages, need a better range and mix of housing types
High speed Internet
LABOUR
Health/Wellness Community Development Opportunities
Cost of life

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

Lobby for GO Train extension to Orangeville/Shelburne
Coordination between Municipalities
Protect our watershed
Promote local farming & food
Public transit/ highway expansion
Affordable housing
Supporting agri-tourism
Water/sanitary capacity
Lower utility costs for small business
Workforce (development & retention)
Encouraging growth up instead of out to maintain the high degree of natural settings/opportunities that draw people here
Telling our stories - great businesses, support growth - tourism
Keep approval processes to a reasonable time line and cost
Provide funding to beautify the towns (tear down old buildings, fix trails and water treatment plants etc.)
Promoting alternative energy for all businesses
Decide what's important regionally
Promoting green initiatives
Industry
Keep the city in the city
Infrastructure and servicing sustainability
Plan for sustained growth with our proximity to the GTA
Maintaining the desirability of living in the region
Differentiate Dufferin from the GTA
Expansion that enhances what we already have, not take away
Create innovative and new ways by which to attract non-manufacturing businesses into Dufferin County so as to lower taxes
Lack of infrastructure
Focus on smaller businesses with highly trained employee bases
Promoting the Dufferin lifestyle to attract creative class & tech based businesses
Attracting Business
Industry
Jobs for youth
Attracting retail business
Need to attract full post-secondary education partners, not just satellite campus
Supporting and growing the existing agri-food opportunities
More jobs
Better Road infrastructure
Strong Community leadership
Increase resources for business looking to come to community or expand their business
Don't be afraid of innovation and change
Too many silos - independent municipalities, tourism etc.
Health care

3. Notes from the Stakeholder Consultations

Dufferin County Economic Development Strategy Stakeholder Consultation Notes, Dufferin Oaks Auditorium, Shelburne, April 4, 2017

Dufferin County's Economic Development Related Competitive Strengths

- Proximity to the GTA
- Recreation, walking trails
- Lifestyle; calm compared to the GTA, slow pace, beauty
- Close to Blue Mountain, Collingwood, Wasaga Beach
- Highway access – very accessible for people to drive north
- Bruce Trail, Dufferin forests, Mulmur, cyclists
- Hunting, fishing
- Friendly, family orientated, safe to raise families
- Industry transportation links
- Relatively close to airport
- Abundance of land, affordable and lower cost to develop compared to the GTA
- Rich in arts and culture, studios, music
- Dufferin music festival
- Cheese factory
- Talent pool, new residents, new entrepreneurs, people from all walks of life moving in and some are opening small businesses
- Agriculture

Dufferin County's Greatest Weaknesses & Challenges related to Economic Development

- Willingness to develop or not develop land
- Absentee landowners
- Lack of Internet service in some areas, connectivity and cost issues
- Public transportation
- No Uber in area
- Dufferin County needs a stronger voice at senior levels of government
- Lack of healthcare services outside Orangeville
- New residents don't have realistic expectations on municipal services
- Unrealistic salary expectations
- Doctor recruitment
- Lack of labour for unskilled jobs
- Low education levels
- Education – a lot of kids are not going on to higher education – need more trade schools
- Affordability issues as costs increasing
- Lack of affordable housing in some areas
- Lack of Retirement communities and housing
- Lack of infrastructure
- Low tax base – the townships don't have enough of a population base to afford extras
- Water (food processing)
- Retail diversity
- Dilemma – how to grow without changing the status quo

Greatest External Threats to Future Economic Growth in Dufferin County

- No influence with senior government
- Amalgamation
- Global economy (energy etc.)
- Diversity of economy – competition
- Economic development beyond local control (GTA?), no control over their own destiny
- GTA/Brampton almost at Dufferin’s doorstep – urban sprawl from the south will impact the attractiveness of Dufferin
- Sustainability for agriculture (e.g. Honda takes labour, crop mix and conflicts, McShops)
- Carbon tax
- Agriculture is in conflict with urbanization
- Corporate farms
- There are other good trading areas outside Dufferin County
- Toronto still needs aggregate for construction; massive gravel pit development interests which could spoil the area
- Corporate greed – Bay St. needs to make money on farmland they invested in
- ‘Big business is the biggest threat’
- Outside interests – raising rents on agricultural land, doubling the rent prices – no longer viable for growing corn given costs of renting agricultural land
- Interest rates/gas hikes could impact attractiveness of Dufferin for new residents – too expensive to commute

Further Opportunities/ Sectors and Sub-sectors that will Drive Growth in Dufferin

- AgTech
- Ecology, Alternative Energy
- Outdoor Education Programs (Pine River Institute); Centres of Excellence – strength in social services, Youth & Adult treatment
- Dufferin County as an apprenticeship hub for above programs
- Indigenous population?
- Foster innovation for wellness, tourism, green industry, history, arts – leader/hub of excellence
- Better education to attract technology – engineering/technology for agriculture
- Workforce development
- Retail development – special shopping evenings/events; open at 11a.m., close later
- Peer to peer groups; learn from others, go to where the people are
- BIA should run workshops
- Collaboration, festivals etc.
- New entrepreneurs
- Dufferin County as a “boutique” to be discovered
- History, roots, storytelling
- Internal / external partnerships / alliances
- County management of communities
- Access to reliable communications
- Business plans – make sure the numbers make sense – has to be sustainable and profitable
- Learn from other communities – not unique
- Encourage people to invest in the community
- Improving highways (paved shoulders for slow moving vehicles) and infrastructure
- Need succession plans for farms and tradespeople that will be retiring in 6 to 8 years
- ‘Think of people not things’

Vision for Dufferin County's Economic Development

- A vision of measured, sustainable growth
- Measured growth with a tax base to support infrastructure
- Opportunities in a shared economy, respecting heritage and natural resources
- Healthy competition and collaboration of municipalities
- Vision is just the first step – have to say what it will cost

**Dufferin County Economic Development Strategy Stakeholder Consultation Notes
Session at Monora Park Pavillion, Mono, April 5, 2017****Dufferin County's Economic Development Related Competitive Strengths**

- Location – GTA, transportation, airport, CP rail
- Postsecondary institutions
- Geography: Bruce Trail, other trails, nature, skiing, lots of recreation
- Quality of life
- Rail and water
- Railroad in Orangeville
- Small town – big city access
- Hospital
- Health services
- Physician recruitment – doing well in Shelburne
- Seniors – wealth of knowledge – untapped
- Entrepreneurial culture – supports start-ups – above average entrepreneurial spirit – wants to build something
- Housing affordability vs GTA
- Safety/small town community feel
- Orangeville and Shelburne have economic development committees
- Community volunteer base, service clubs
- Orangeville has a full-fledged French language public elementary school (École élémentaire des Quatre-Rivières), part of the Conseil scolaire Viamonde; French immersion is also available in the English schools.
- Local food system – farmers' market, school food program
- Strong vibrant arts and culture community
- Strong emergency response plan – includes hospital, police, fire fighters

Dufferin County's Greatest Weaknesses & Challenges related to Economic Development

- Not near any major highway
- Internet – availability, affordability, connectivity
- Property taxes
- Development charges – too high
- Loss of industrial land – redesignated to residential
- Lack of servicing; lack of industrial grade servicing
- Grand Valley – lack of serviced land
- Amaranth – no sidewalk; no way to get people to businesses
- Can't accommodate major water users - too far from lakes to access water
- Servicing capacity issues – need to expand capacity
- Challenge to get all the municipalities talking to each other
- No cross-boundary cooperation
- Lack of a sense of urgency

- Bureaucracy – layers of red tape
- Need to stop playing politics – Province, Peel Region
- Inconsistency in where Dufferin fits for services – some are aligned with Peel, others with Wellington
- Navigation of services – overlap/duplication
- Perfect storm – multiple layers of government - municipal, provincial such as Environment – development applications have to be approved for various aspects by different departments – inconsistencies – needs to be integrated. Plans of subdivisions – Towns have their own process but Townships have to go through Province.
- Greenbelt and Escarpment restrictions impacts Agri-businesses – can’t build secondary residential buildings for staff
- Divergent views/mixed message – ‘Places to Grow’ vs. Environment – no growth
- Shortage of housing to satisfy demand – example, 15 people camped overnight to buy a home (at opening day for purchase at model home site)
- Need education for trades workers
- Education –need to train people for where they need to be
- Regional public transit void
- 50% of people commute – not using all the brain power – commuters are too tired to contribute locally
- Falling per capita assessment

Greatest External Threats to Future Economic Growth in Dufferin County

- Changes in NAFTA
- Automation – can’t compete internationally; will impact industrial base – jobs at risk
- Cost of Hydro
- General political environment
- Payroll tax
- Residential growth will paralyze if you don’t have industrial/commercial growth
- Collapse of the housing prices in the GTA – bubble bursting
- People (commuters) give donations where they work and it is spent there, not in Dufferin – United Way can’t get donations locally because people are donating in the city where they work
- Lack of leadership at Ontario and Federal levels
- Agricultural uncertainty – commodity prices, TPP
- More pressure on land development – higher cost for farmland
- Province – overall agricultural policy
- Land banking – purchase and hold for 20 years – not even leasing to farmers

Workforce and Talent Aligned with Future Requirements of Agriculture & Business?

- Young people are going elsewhere for education and not coming back
- We want the kids to come back – need ways of communicating we want them back – Dufferin County needs to be seen as an attractive place
- No transportation – no Go Train – No Internet – this is what stops young people from coming back
- Low level of affordable connectivity limits the level of on-line learning
- Less than an hour’s drive from Guelph University – Agriculture program – could work with Guelph to bring in agriculture incubator firms
- Ongoing learning – where are the technology hubs?
- Create environment to attract talent and retain people
- Schools and Hospital should be instrumental in getting higher speed internet for Dufferin
- Can’t get engineers because we don’t have what they need - connectivity

Further Opportunities/ Sectors and Sub-sectors that will Drive Growth in Dufferin

- Land in the northern part of the county – land for agricultural incubators associated with University of Guelph

- Aggregates and gravel pits – the White Elephant in the room
- Agri-business – organic, specialty, breweries, wineries
- Alternative energy – wind, solar, attract and educate
- Equine
- Food processing
- Grow food, animals – only when completed do we ship
- Orangeville – location wonderful for business (given transportation)
- Need to know how to do technology stuff
- Service industry has to be top notch to attract tourism
- Upscale tourism
- Estate development
- Elliot Lake attracts seniors – maybe could do something like that
- Get young people to move back for outdoor lifestyle
- Opportunity for a Food Hub
- Grow clean safe reliable food
- Expand the public's knowledge that safe food is grown here
- Partnerships
- Collaboration at the staff levels between municipalities – doing like things, working together
- High technology – but long way to go
- Investment Ready Ontario – certified sites
- Need offices, not warehouses
- Need white collar workers
- More small businesses
- Mind set change for politicians
- Access to talent
- Dufferin County bank of ideas – incubator of people that come together to develop ideas
- Take advantage of those transportation arteries that go through Dufferin County
- Need to do something to get people to stop here
- Creative class like Prince Edward County – food, restaurants, arts – need to steal ideas from Prince Edward County
- Need to stand the test of time

Vision for Dufferin County's Economic Development

- Tourism – share what we have, package it, but don't have them living here
- Want tourists to visit and then have them go home
- Quality of life – better not bigger – not growth for the sake of growth
- Keep local people here
- Dufferin County – collectively working together

Dufferin County Economic Development Strategy Stakeholder Consultation Notes Session at Grand Valley Community Centre, Grand Valley, April 5, 2017

Dufferin County's Economic Development Related Competitive Strengths

- Rural area
- Very close to the GTA – lots of customers close by
- Good at Agriculture – niche area

- Land availability
- Cost of land – relatively cheap for those coming from the south
- A lot of different types of people coming in – blend of talent
- Lifestyle – recreation, trails – people are interested in the community and would work here if they could
- Retiring people
- Kids like the community – want to stay and want their kids to experience it
- People move here for the slower pace of life – lots to do if you like the outdoors
- Attractive place to raise a family
- Close commute to airport
- Administration staff of the municipalities work together – sharing information

Dufferin County’s Greatest Weaknesses & Challenges related to Economic Development

- Rural area (challenge as well as strength)
- Only three municipalities have services
- Land is expensive compared to the north
- Lack of affordable internet; not enough being done – need affordable high speed internet for everyone
- Need alternative source of energy – natural gas for rural areas
- Workforce is a challenge – in professional services, expectation is Toronto wages
- Struggle to find labour
- Retail positions declining – hard to compete (against Amazon)
- People with higher education (such as Master’s degree) are overqualified for jobs in Dufferin – can’t find work in area
- Hard to find low skilled jobs
- People who don’t have skills will have a hard time finding jobs (digitization took jobs away)
- Lack of affordable housing – people leaving because of that
- Need more professional jobs for people
- Traffic and trucks – safety and trying to get somewhere is a challenge (maybe design specific routes for trucks)
- Marketing and communication
- Nothing connecting newcomers to the community
- Capacity issues in water filtration
- Lack of shovel ready serviced industrial land in Grand Valley
- No media covers the whole county
- Resistance to change
- Rural slow life mentality – if it was okay in the 80’s, okay now

Greatest External Threats to Future Economic Growth in Dufferin County

- US Trade deals
- Dairy and poultry farmers will be affected by trade deals
- Agriculture – succession issue (children of farmers want to away to school and jobs elsewhere– not manage farm); affordability issue for new people that want to farm – land is too expensive.
- Province is pushing Agriculture into ‘mega farms’, away from the family farm
- Farming used to be considered a way of life; now considered an Industry
- Farmers can’t afford the legislated changes and upgrades
- Competition from everyone elsewhere

Further Opportunities/ Sectors and Sub-sectors that will Drive Growth in Dufferin

- Agriculture – niche markets – honey, cider; people want to know where food is grown – willing to take the drive
- Agriculture Hub market; all year farmers market

- Farmers markets for farmers with all of the produce going to one location (similar to St. Jacobs Market)
- Ethnic farmers – growing veggies, crops, and spices aimed at the ethnic market
- Opportunities to talk to corporations and open satellite offices in Dufferin
- A centre north shared office facility supported by several corporations; example - attract Royal Bank and another company has space for staff on another floor
- Filming – great hub for the Toronto film industry for rural scenes
- Niche area: Athlete Institute Basketball Academy in Mono - the Athlete Institute is young but it has already produced top NBA picks
- Headwaters Farm Fresh web site/newsletter coming out soon
- Better communication
- Distillery
- Agriculture or other start-ups that need a place to grow
- Educational institutions – something that could be done to increase the presence of Humber
- Talent, incubation, research
- Warehousing in rural areas

Dufferin County as a Location for New Investment in Business & Agriculture

- Will try to work with new businesses so we can be competitive – question is whether we can afford it
- Labour access is a big deal
- Problem is that the work force is not visible (e.g. Target saw no work force in Dufferin and went to Milton)
- Talk to Agricultural universities and link with farming jobs in Dufferin
- Woolwich Cheese and Sheldon Creek farms are good examples
- Cheaper land needed for Agriculture

Vision for Dufferin County's Economic Development

- All 8 municipalities have different visions
- If the south wants to grow and the north doesn't, there is nothing wrong with that but the municipalities need to support what the others want to do – need to get on the same page
- All the different areas are in different stages of evolution; need to support and not compete
- Can't just be a County in isolation – needs to consider adjacent municipalities
- Need to make sure we are open to new development and ideas

4. Selected Economic Base and Sector Analysis Tables – Dufferin County

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 2016.3 Version

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

Source: EMSI 2016.3 Version

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

Source: EMSI 2016.3 Version

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 2016.3 Version

Exhibit 5: Number of Farms in Dufferin County by Industry Group

Industry Group	Number	Percent
Cattle ranching and farming	154	22.3%
Hog and pig farming	15	2.2%
Poultry and egg production	16	2.3%
Sheep and goat farming	33	4.8%
Horse and Equine production	81	11.7%
Apiculture	13	1.9%
Animal combination farming	48	7.0%
All other miscellaneous animal production	7	1.0%
Oilseed and grain farming	146	21.2%
Vegetable and melon farming	22	3.2%
Fruit and tree nut farming	3	0.4%
Greenhouse, nursery and floriculture production	36	5.2%
Hay farming	80	11.6%
Other crop farming	40	5.2%
Total Number of Farms	690	100.0%

Source: Statistics Canada, Census of Agriculture, 2016

5. Note on the EMSI Analyst Statistical Source

EMSI Analyst

The prime statistical source for detailed sector analysis in the Dufferin County Economic Development Strategic Plan is the EMSI Analyst online database. 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 at the time of the analysis, and 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. The EMSI Analyst program has the advantage of offering the most current data. In addition, it can be sorted for a variety of municipal jurisdictions, allowing data to be tailored to specific geographies. Its coverage of all of Ontario allows for ready comparisons of one or more municipal jurisdiction with many others.

The limitations of the EMSI Analyst data must also be taken into account. As data available through EMSI are estimates for most years, building on the results of the Census program for 2011 and the data released so far from the 2016 Census. The employment projections are essentially extrapolations based on past data and trends but 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.

EMSI Analyst was made available on a complimentary basis to Dufferin County by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA). Those involved in developing the Strategy express their appreciation to OMAFRA.

6. Comparative Overview of Economic Development Programs in Nearby Communities

	Wellington Economic Development	Simcoe Economic Development	Haldimand Economic Development & Tourism
Staffing	6	6 Economic Development & 5 Tourism (please note Local Immigration Partnership is in Social Services Division)	5.5
Municipalities	7	16 (not including Barrie / Orillia/Base Borden)	5 major population centres
Programs	BR&E Tourism - Festivals & Events Investment Attraction Taste Real Workforce Development including Talent Attraction	BR&E Tourism – Visitor Attraction Growing & Supporting Investment Attraction Talent development	BR&E Downtown Development Investment Attraction Rural Development Tourism
Projects	<ul style="list-style-type: none"> • Signage • SWIFT • Connect to Innovate Program (Innovation, Science and Economic Development Canada) for internet • BR&E Implementation Fund - \$175K - \$25K/Twp. annually for BR&E, local CIP's, cultural plans, local signage etc. • CIP evaluation - \$50K consultant from 2016 • Talent Attraction – Immigrants / International Students - \$100K/ 2 yrs • Youth/Rural Labour Market -\$63.5K 	<ul style="list-style-type: none"> • Land inventory • Investment Attraction – Value Proposition and Lead Generation projects • Market investment readiness • Familiarization tours • Food entrepreneurship support through education and training • Commercial kitchen mapping • Job Central • Skilled trade recruitment/Labour Market Partnership/Skilled Trades Expo • Manufacturing Forums • In-Market Entrepreneurship support pilot • Support the municipal ecosystem • After care investment program 	2017 ICCI Funding approved for: <ul style="list-style-type: none"> • Community Profile • FDI Training • FDI Website

	Wellington Economic Development	Simcoe Economic Development	Haldimand Economic Development & Tourism
Incentives	Evaluating a CIP Program that allows for support to lower tier municipalities individual CIP Programs.	<ul style="list-style-type: none"> • Transitional Funding Program for municipalities (for municipal partners only) • Destination Marketing Funding (for municipal partners only) • County’s Industrial Abatement Program • Town of Innisfil CIP • Town of Bradford-West Gwillimbury CIP • Town of New Tecumseth CIP • Town of Midland CIP • Partner municipalities also have arts/culture or community development grants 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	Maple Leaf Foods, Jefferson Elora, TG Minto, Musashi Auto Parts Inc, Nestle	<ul style="list-style-type: none"> • Honda expansion (2015, 2016) • MedReleaf (2016) • PharmaCan (Peace Natures) • Georgian College new center in Advanced Technology and Research • Georgian Bay Biomed 	200 Wind Turbines, Samsung Solar 1,000 acre project
Budgets	\$1,120,000 \$600K – core funding \$520K – auxiliary projects	\$2.6 million including staffing and a \$1.384 million transfer to reserves for future economic development initiatives/\$400,000 for the Transitional Funding Program to the local municipalities Please note tourism is a separate independent budget	\$630,000

	Wellington Economic Development	Simcoe Economic Development	Haldimand Economic Development & Tourism
Other Funding	<p>RED Program, ICCI</p> <ul style="list-style-type: none"> • \$100K from Ministry of Citizenship & Immigration for a Program to Facilitate Talent Attraction for Immigration and International Students (2 years) • \$63,500 from the Canada 150 Fund for Youth and Rural Communities Labour Market 	<p>ICCI</p>	<p>ICCI, OMAFRA</p>
Formal external partnerships	<ul style="list-style-type: none"> • Waterloo Wellington Community Futures - \$30K • Innovation Guelph - \$20K • Business Centre Guelph-Wellington - \$25K • Saugeen Economic Development Corporation - \$5K • Western Ontario Wardens Caucus • Ontario Food Cluster - \$4K • University of Guelph, City of Guelph, Wellington County – Vitagora trade mission, Dijon, France; hosted Ontario-European Forum: Connecting Agri-Food Businesses for Investment and Trade 	<ul style="list-style-type: none"> • EDCO Investment Alliance • Ontario Food Cluster • BruceGreySimcoe (RTO7) • Excellence in Manufacturing (EMC) • Canadian Manufacturers and Exporters (CME) • EDCO Manufacturing Network • Georgian College • Lakehead University • Simcoe Muskoka District Workforce Development Board • Local Community Development Corporations (4) • Local Business Enterprise Centres (2) • Henry Bernick Entrepreneur Centre (Georgian College) 	<ul style="list-style-type: none"> • EDCO Investment Alliance (previous, no longer a member) • South Western Ontario Tourism • Cruise the Coast
Targeted sectors	<p>Agriculture Creative Healthcare Manufacturing</p>	<p>Agriculture and Agri-Food Manufacturing Tourism</p>	<p>Agribusiness Heavy, Service and Selected Light Industries Food, Film, Tourism</p>
Reporting Structure	<p>CAO's Office</p>	<p>CAO - Engineering, Planning & Environment Division - Planning, Development & Tourism Department - Individual Offices of Economic Development or Tourism</p>	<p>General Manager, Planning & Development</p>

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.

7. Background Paper on Economic Development Performance Metrics

An Overview of the Rationale and Approaches to Performance Measurement

Performance measurement is an important part of economic development that is used for:

1. measuring and benchmarking the economic performance of regional and local economies;
2. measuring the progress toward achieving the goals and objectives of an economic development strategy; and
3. measuring the performance of the organization.

The metrics will vary for the three purposes, with the first one generally consisting of best practice metrics in economic dashboards; the second consisting of metrics explicitly linked back to the objectives and actions in the Economic Development Strategic Plan and annual business or action plans; and the third addressing metrics associated with the internal functioning of the organization and performance of its employees.

1. Metrics for Economic Dashboards

An economic performance dashboard is a useful way to monitor economic trends and growth in a region over time and could include comparative data on GDP growth, employment, labour force, population, construction activity, housing starts, etc.

These are broad economic measures which are effected by many factors which municipal level economic development activities do not directly impact or influence.

When developing an Economic Dashboard, consideration needs to be given to the type of data to be collected, format, sources, frequency of updates, responsibilities for data collections and updates, and reporting. Data sources for an Economic Dashboard for Dufferin County include the County, area municipalities, Statistics Canada, Conference Board of Canada, etc. The availability of some Statistics Canada data may be complicated by the fact that the Towns of Orangeville and Mono are included in the Toronto CMA.

2. Metrics for Economic Development Strategies

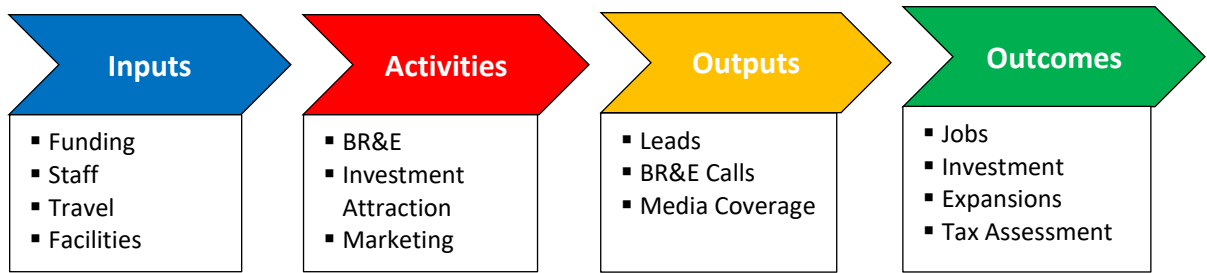
Performance measurement of economic development strategies is important not only for measuring progress in implementation and meeting goals and objectives, but also for assessing where the strategy needs to be tweaked or fine-tuned. As these metrics are linked to the economic development strategy and annual plans, they are ones that the organization's activities aspires to influence.

While it is important to objectively assess the progress in meeting key goals and objectives of an economic development strategic plan, it is not realistic to measure the progress toward every single objective particularly when there are a multitude of objectives and the measurement would be onerous, and involve substantial time and resources. Rather, the most important objectives, in terms having a significant effect on the progress toward achieving the key goals, should be measured.

Metrics used for measuring the progress of the economic development strategy need to be SMART:

SMART Metrics
Specific – Measurable – Achievable – Relevant – Time-based

The focus of measurement should be on Outcome metrics, that is on changes that show progress toward achieving the Economic Development Strategy’s objectives (such as the new investments or expansions in which the organizations was involved, along with the jobs and tax assessments associated with the projects). In addition, selected Activity metrics (actions and initiatives taken to achieve results) should be tracked and reported upon, along with Output metrics (such leads generated, calls and earned media coverage).



In addition to choosing which objectives to be the focus of performance measurement and what data will be collected to measure performance, it will be important to develop a sound, yet practical, performance measurement plan to identify how often the data will be collected and updated, the origin of the data, a definition of each metric, responsibilities for data collection and updates, and the reporting processes. Some of the data can be generated by the organization’s Customer Relationship Management (CRM) system.

3. Other Metrics

In addition to metrics for measuring progress toward meeting the goals and objectives of the Economic Development Strategy, Dufferin County may want to consider some organizational performance metrics not directly associated with the strategic plan. In this regard, a useful reference includes: *Making It Happen - Metrics for High Performing EDO’s*, IEDC, 2011