

Final Report

County of Perth, Town of St. Marys and City of Stratford

Economic Development Strategy and Action Plan: 2010-2014

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1 Introduction

1.1 Purpose of the Report

As a result of the current Economic slowdown, it is clear that a current Economic Development Strategic Plan is needed with dedicated resources to implement this plan. The County of Perth, in partnership with the City of Stratford, the Town of St. Marys, the Perth CFDC, and the Technical Training Group have partnered to develop a united strategy to lead the communities through a challenging economic slowdown. The economies are intertwined and efforts must be aligned to develop a plan that will prepare all of the communities by identifying gaps, building capacity and discovering new opportunities. Each community has strengths that can be leveraged to define their roles in the new economy and this strategy is key to positioning Perth County, Stratford and St. Marys for success.

This Strategic Plan looks beyond the traditional industrial landscape to identify ways to diversify the economies and explores new sectors employing new technologies, such as digital media. The role of post secondary education, centres of excellence and technology play a strong role in the growth of the communities. This plan aligns human capital with the needs of a knowledge based economy.

Together, the County of Perth, City of Stratford and the Town of St. Marys have a population of approximately 76,000 and have a significant commuter-shed spanning many neighbouring communities.

This Economic Development Strategy Action Plan includes an Economic Base Analysis and Implementation Action Plan that provides direction for the short, medium and long term. The recommendations will help to strengthen, diversify and enhance the local economy. Actions are identified for the three municipalities to take on together as well as work on individually.

The project partners would like to acknowledge the Ontario Ministry of Economic Development and Trades' Communities in Transition program for its generous contribution that has made this project possible.

1.2 How Was the Strategy Developed?

Strategic planning is a means for establishing and maintaining effective programs based on economic, social, cultural and environmental opportunities and constraints. It also:

- helps to shape a community's future
- provides structure for mutually accepted goals and a common agenda
- defines the purpose of the community at large and its role in achieving stated goals
- balances community goals with realistic local resources.

A critical step to developing this plan is first developing an understanding of the region in terms of its existing assets and its potential.

Project Study Team

This project was overseen by a Project Steering Committee. This group guided the overall process and included the following people.

- Larry Appel, Director of Economic Development, City of Stratford
- Bernia Wheaton, Economic Development Officer, County of Perth

- Robert Brindley, Chief Administrative Officer, Town of St. Marys
- Jaret Henhoeffer, General Manager, Perth CFDC
- Randy Mattice, Economic Development Officer, City of Stratford.

This team provided background materials to consider when developing the strategy and insight into local initiatives, opportunities and barriers. During project meetings, the group also offered input and suggestions to the work plan, strategy for public consultation and feedback on interim findings reports.

Community Input

Further consideration in regards to vision, desired directions, strengths, weaknesses, opportunities and solutions was offered through the opinions and thoughts of the business community, stakeholders and citizens. These individuals provided an excellent source of current information. The community response to the project was exceptional. Over 230 people participated in the consultations.

Background Review and Reconnaissance

A comprehensive review of available background literature and studies provided the Project Team with a strong understanding of the current socio-economic conditions in the region. Using the literature and data provided by the steering committee in conjunction with data obtained from Statistics Canada and other key sources, a current demographic and community profile of the region was completed. This also allowed for key patterns of change and trends to be identified for the period 2001-2009.

In developing an economic profile, an important consideration was the region's relative competitive position or distinction in southwestern Ontario, as well as that of the broader provincial economy. In completing this portion of the analysis and the location quotient analysis that followed, we used southwestern Ontario and that of the Province as a baseline for our comparison and evaluation of the region's competitive position as appropriate.

Our literature review included: relevant municipal documents (e.g. Official Plans, Development Charges Background Study, reports to Council) as well as any relevant regional and provincial publications (e.g. Four County Training Board Trends, Opportunities, Priorities (TOP) report), relevant existing Statistics Canada data and other select data sources (e.g. Canadian Business Patterns data) as it related to the region. Particular attention was given to reports and publications that provided insight into the high level and local trends that impacted the region's key business, culture, environmental and social sectors.

Identification of Key Sectors and Opportunities

Using current and historical data obtained from multiple sources, including Statistics Canada, the industry and business base of the region was profiled. This process illuminated growing and emerging sector based opportunities as it related to business investment and attraction efforts as well as employment activity. The location quotient and shift-share analysis provided an assessment of the economic performance of the region.

Relying on data obtained from Statistics Canada, two digit location quotients were also calculated for 2001 and 2006. The results of a more detailed location quotient analysis illuminated the relative degree of concentration or specialization of a specific industrial/business sector as well as the emerging opportunities relative to the broader region.

The Shift-Share analysis then took these calculations and compared them to changes in the same industries across Ontario and Canada. The resulting difference indicated how effective the local economy has been in attracting/losing more than its share of investment.

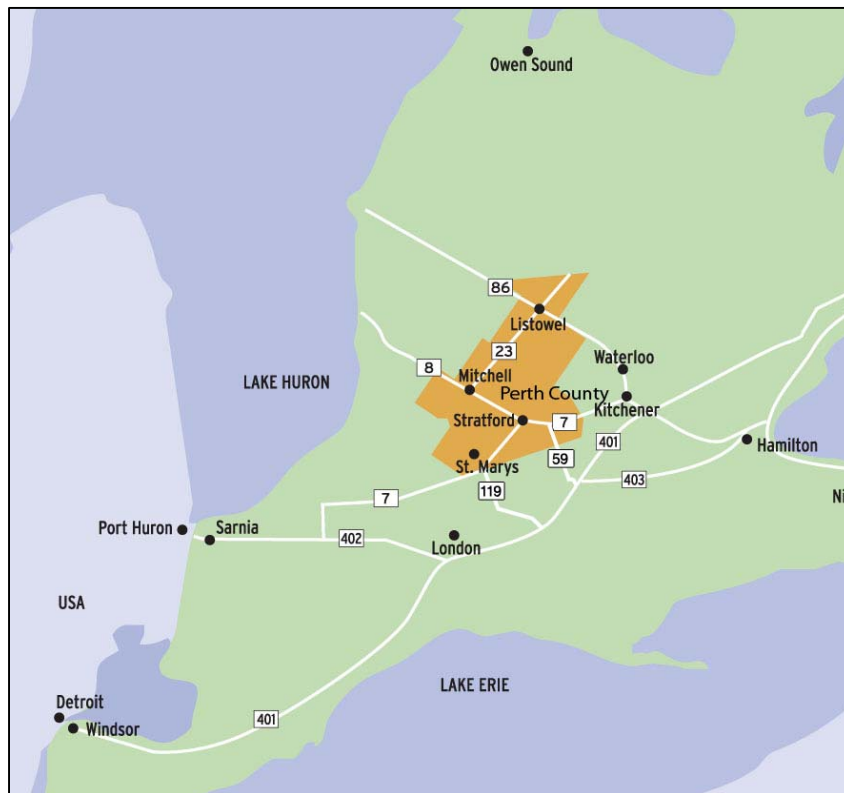
Using the profile information compiled and analyzed earlier along with the results of the analyses, we identified the key or dominant business/industry sectors that comprised the region's economy.

1.3 Location in Southwestern Ontario

The County of Perth, Town of St. Marys and City of Stratford (herein referred to as `the region`) are nestled in southwestern Ontario (Figure 1). The region has an agricultural heritage since much of the land base and climatic conditions are suited for agricultural and farming activities. The City of Stratford has developed as the largest urban centre in the region and a unique city in Canada, with a mix of manufacturing and arts/cultural industries with its world renowned Shakespeare Festival. St. Marys is a local centre with an historic core of its own and an economy that has diversified overtime.

The region's proximity to several cities in southwestern Ontario has been a benefit to the region. Many of the region's agricultural and manufacturing industries started by initially servicing these large local markets and then grown by establishing larger markets. This proximity has also resulted in an opportunity for a post-secondary institution to expand into Stratford – the University of Waterloo Stratford Institute. This exciting initiative will be a research, education and convergence centre that will draw researchers, businesses and entrepreneurs to create, examine and commercialize opportunities in the digital media field of the global economy.

Figure 1 – Location in the Southwestern Ontario









Source: County of Perth, 2009.








2 Labour Market Analysis Summary of Findings






A Labour Market Analysis (LMA) was completed for the partner communities. The LMA identifies the skills base in the region and determines the competitive position of the labour force in relation to southwestern Ontario and the Province. In addition, this project identifies key considerations and opportunities to build and strengthen the labour force and draws conclusions that require action for labour force retention and development.

Demographic, labour force and business data was collected for the 2001 to 2009 period. The following table provides the key findings from the analysis, a positive or negative indication for the future economy and an implication for the future economy.

Figure 2 – Key Findings from Labour Market Analysis

Finding	Positive and/or Negative Finding	Implication for the Future Economy
Community Demographics and Households		
<p>The region is not attracting immigrants compared to the rest of southwestern Ontario and Ontario. Immigrants can be either others from outside of the region or new Canadians. In addition, the local visible minority population is actually declining. Given that immigration is the primary source of population and labour force growth in Canada, this will have implications for the region's future labour force.</p>		<p>Other people in Ontario need to be attracted to or back to the region. Immigration support services and programs need to provide effective services to integrate immigrants into the region's labour force.</p>
<p>Compared to the province and southwestern Ontario, the region has a lower percentage of households earning greater than \$100,000. Lower disposable income impacts the region's capacity for retail/personal services business.</p>		<p>Retail and personal service businesses need to become less dependent on the local population base.</p>
<p>The region is experiencing modest population growth. The City of Stratford accounts for much of this growth.</p>	 	<p>If trends continue, Stratford will be driving future population and labour force growth.</p>
Labour Force		
<p>The region experiences higher participation rates and lower unemployment rates than southwestern Ontario and Ontario suggesting the region has more successfully weathered the recent economic recession.</p>		<p>History of economic resiliency is a marketable aspect of the region.</p>
<p>There is a high proportion of residents in the region working in the region (low commuter out flow of labour).</p>		<p>Excellent opportunities for grassroots skills development programs.</p>

Finding	Positive and/or Negative Finding	Implication for the Future Economy
Proportionately more people work in occupations in manufacturing, utilities, agriculture, trades, transport and equipment occupations. Conversely, the region has proportionally fewer people working in occupations in social science, education, government service, religion, natural and applied sciences, business, finance, administration and management.		Key labour force asset is the high concentration of agricultural, manufacturing and trades skills. Create training programs for developing business and finance skills.
The region has a much lower percentage of the population working in creative class occupations and much higher percentage of the population in the working and agricultural class of occupations.		This small creative class reality puts the region at a disadvantage in attracting and developing the creative industries that are predicted to lead economic growth and wealth generation in Ontario.
The manufacturing sector is the largest sector with double the employees of the next largest, retail trade.		Manufacturing is a large and important economic sector, but it is a declining industry on a Canadian scale.
Education		
The region has comparatively low levels of population who have attained some form of post-secondary education. However, the region performs well with respect to percentage of the population with an apprenticeship or college diploma.		Labour development efforts need to continue stressing the importance of obtaining a high school education and providing local apprenticeship or post-secondary education opportunities.
The region has a comparatively high rate of workers with education in architecture, engineering and related technologies, health, parks, recreation and fitness.		Concentration of labour force skills in growing creative class occupations like architecture and engineering.
The local training institutions and the proximity to several colleges and universities facilitates access to education and the region's ability to attract skilled workers.		Need to improve access to new training and education initiatives.
Recent Economic Activity		
The region has recently attracted the University of Waterloo's Stratford Institute for Digital Media.		A post-secondary institution will be established. Opportunities for spin off businesses will be created.

Finding	Positive and/or Negative Finding	Implication for the Future Economy
Erie Meats has recommissioned the former Campbell Soup plant in Listowel for full production.		The agri-food manufacturing is resilient and opportunities continue to exist in this steady sector.
RBC is developing a data centre in Stratford.		There is potential for more services related to this industry sector in the region.
While the largest number of businesses are in agriculture, construction and retail trade, the industries with the fastest growth are educational services, finance and insurance and information/cultural services.		Current strengths are not necessarily aligned with future opportunities.
The automotive parts manufacturing and assembly sector has been hard hit with layoffs, closures and over-capacity. Stratford, St. Marys and Perth have not been spared.		Employment levels in auto manufacturing are unlikely to return to previous highs. The labour force must be adaptable.
Small business is important to the regional economy. Of local businesses with employees, 50.3% have 1-4 employees and 22.7% have 5-9 employees. Only 26.9% have more than 10 employees.		Small business owners are creating employment. Consideration needs to be given to the ability of smaller employers to develop in-house training programs as well as work with training providers in developing programs.

3 Local Situational Analysis

The Sector Analysis begins with a broad quantitative analysis of the local economy using two different techniques: Location Quotients and Shift Share Analysis. The section follows with a description of the County of Perth Business Retention and Expansion project findings and a summary of consultation findings through the five project methods to engage the community.

3.1 Location Quotient Analysis

In order to determine the level and degree of business and industrial specialization, thus the economic diversity that may be developing in the region, location quotients (LQs) have been calculated to identify and measure the concentration of industry/business activity by major sector and/or sub-sectors.

Location quotients are a commonly used tool in local/regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purposes of this study we have calculated location quotients that compare the region's industry sector employment concentration relative to the province of Ontario.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region (either Ontario or any other region) and may be an indication of competitive advantage with respect to the attraction of that industry sector. Location quotients equal to 1.0 for a given sector suggest that the study area has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 suggests that the community does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching regional average may also represent the export base of the participating municipality (both in terms of products or services). Businesses that make up this export base may have chosen to locate in the community due to certain local or regional competitive advantages. These competitive advantages can be used to attract additional investment, in the same or complementary industries.

The industry concentration in the region relative to Ontario and Southwestern Ontario reveals the highest concentration of labour in the following sectors in 2006:

- **Agriculture, Forestry, Fishing and Hunting (LQ Ontario- 5.61, Southwestern Ontario- 2.28)**
- **Manufacturing (LQ Ontario- 1.59, Southwestern Ontario- 1.11)**
- **Arts, Entertainment and Recreation (LQ Ontario- 1.25, Southwestern Ontario- 1.28)**
- **Wholesale Trade (LQ Ontario- 1.11, Southwestern Ontario- 1.26)**
- **Construction (LQ Ontario- 1.09, Southwestern Ontario- 1.07)**

Three major industries exhibit LQs within the 'high' range, with values in excess of 1.25 or greater. (Figure 3). This labour force measurement is the number of residents in the labour force, but who may not be employed in the region.

Figure 3 – Perth County, St. Marys and Stratford Labour Force Location Quotient, 2001 to 2006

LQ Classification (2001 and 2006)	Ontario	Southwestern Ontario
Very High	Agriculture	Agriculture
High	Manufacturing	Wholesale trade
	Arts, entertainment and recreation	Arts, entertainment and recreation
Average	Wholesale trade	Manufacturing
	Construction	Construction
	Accommodation and food services	Accommodation and food services

Source: Statistics Canada: REDDI, 2001 and 2006.

The very high LQ in the region's Agriculture, Forestry, Fishing and Hunting industry is a clear indication of the strength of agriculture, farming and support activities in the region.

For the manufacturing industry compared to Ontario in 2006, there was significant labour force concentration in:

- Animal food (LQ 17.30)
- Rubber product (LQ 13.39)
- Boiler, tank and shipping container (LQ 5.76)
- Navigational, measuring, medical and control instruments (LQ 4.77)
- Dairy product (LQ 4.47)
- Cement and concrete product (LQ 3.83)
- Aerospace product and parts (LQ 3.05).

For the manufacturing industry compared to Southwestern Ontario in 2006, there was significant labour force concentration in:

- Fibre, yarn and thread mills (LQ 12.62)
- Spring and wire product (LQ 6.08)
- Animal food (LQ 5.96)
- Aerospace product and parts (LQ 5.06)
- Rubber product (LQ 4.95)
- Navigational, measuring, medical and control instruments (LQ 4.01)
- Boiler, tank and shipping container (LQ 3.00)
- Cement and concrete product (LQ 2.56)

Many of these industries listed also experienced labour force growth during the five year (2001-2006) time period. This finding suggests local competitive advantage for being located in the region.

There is labour force concentration in the Arts, Entertainment and Recreation industry. This is driven by the Stratford Shakespeare Festival. The performing arts companies had very high location quotients

(compared to Ontario 9.23, compared to southwestern Ontario 10.25) in 2006. The labour force LQ has remained constant during the five-year time period.

Overall, the LQ analysis suggests that the region's growth has been driven by a strong agricultural and manufacturing economy mixed in with a unique arts, entertainment and recreation industry. The remaining industries have average or low labour force concentration relative to the province. The classification of LQs (either very high, high, average or low) has stayed consistent during the five years. This finding indicates economic stability for the region.

Figure 4 provides further regional economic analysis for the performance of the region's employment base. These results suggest a consistent performance of the five industries. The five consistent industries were:

- **Agriculture, Forestry, Fishing and Hunting (LQ Ontario- 5.52, Southwestern Ontario- 2.13)**
- **Manufacturing (LQ Ontario- 1.84, Southwestern Ontario- 1.28)**
- **Arts, Entertainment and Recreation (LQ Ontario- 1.28, Southwestern Ontario- 1.27)**
- **Wholesale Trade (LQ Ontario- 1.15, Southwestern Ontario- 1.37)**
- **Construction (LQ Ontario- 1.13, Southwestern Ontario- 1.05)**

Employment measures the number of people employed within the region, but who may not be residents of the region. Clearly, the region's Agriculture industry is a dominant employment industry. Despite the declining employment growth in this industry, any further economic development efforts need to include agriculture and farming.

For the manufacturing industry compared to Ontario in 2006, there was significant employment concentration in:

- Animal food (LQ 18.84)
- Rubber product (LQ 16.31)
- Boiler, tank and shipping container (LQ 7.75)
- Navigational, measuring, medical and control instruments (LQ 5.36)
- Cement and concrete product (LQ 4.83)
- Dairy product (LQ 3.98)
- Aerospace product and parts (LQ 3.41).

For the manufacturing industry compared to Southwestern Ontario in 2006, there was significant employment concentration in:

- Fibre, yarn and thread mills (LQ 21.71)
- Spring and wire product (LQ 8.48)
- Animal food (LQ 6.42)
- Aerospace product and parts (LQ 6.15)
- Rubber product (LQ 5.96)
- Navigational, measuring, medical and control instruments (LQ 4.60)
- Fruit and vegetable preserving (LQ 4.11)
- Boiler, tank and shipping container (LQ 4.00).

Figure 4 – Perth County, St. Marys and Stratford Employment Base Location Quotient, 2001 to 2006

LQ Classification (2001 and 2006)	Ontario	Southwestern Ontario
Very High	Agriculture	Agriculture
High	Manufacturing	Wholesale trade
	Arts, entertainment and recreation	Manufacturing
		Arts, entertainment and recreation
Average	Wholesale trade	Construction
	Construction	
	Accommodation and food services	

Source: Statistics Canada: REDDI, 2001 and 2006.

Many of these industries listed also experienced employment growth during the five year (2001-2006) time period. This finding suggests local competitive advantage for being located in the region. These employment LQ results were very similar to the labour force LQ results, reconfirming the strong relationship between jobs in the region being filled by the local labour force.

There is employment concentration in the Arts, Entertainment and Recreation industry. This is also driven by the Stratford Shakespeare Festival. The performing arts companies had very high location quotients (compared to Ontario an LQ of 12.92 and southwestern Ontario an LQ of 12.99) in 2006.

The next section will build on this location quotient analysis using a shift-share analysis.

3.2 Shift-Share Analysis

A shift-share analysis (SSA) compares local growth or decline of an industry with provincial (and regional) growth or decline in that industry, as well as provincial (regional) growth overall. The method separates the growth occurring locally in an industry that could be explained by the influence of provincial (regional) growth for all industries combined, the influence of growth in the industry at the provincial (regional) level and the influence of local factors. SSA compares actual growth or decline to the growth that would have occurred if the local industry had followed provincial (regional) growth trends and if the local industry had followed growth trends in the provincial (regional) industry.¹

Three values are produced through SSA: Southwestern Ontario/Provincial Effect, Industrial Effect and Differential Shift Effect.

- *Southwestern Ontario/Provincial Effect* – the number of local jobs lost or gained due to the influence of southwestern Ontario/provincial growth overall
- *Industrial Effect* – the number of local jobs lost or gained due to the influence of growth in the sector at the province/nation.
- *Differential Shift Effect* – the number of local jobs lost or gained due to local factors.

¹ Spreadsheet Tools for Local Economic Analysis, Ontario Ministry of Municipal Affairs & Housing – Rural Development Division, March 2004.

The LQ analysis identified five industries with high employment concentration:

- **Agriculture, Forestry, Fishing and Hunting**
- **Manufacturing**
- **Arts, Entertainment and Recreation**
- **Wholesale Trade**
- **Construction**

Based on the SSA, the Agriculture, Forestry, Fishing and Hunting industry could have lost 668 jobs due to the influence in the sector in southwestern Ontario or 684 jobs due to the influence in the sector in the province.

The Manufacturing industry could have lost 1,138 jobs based on southwestern Ontario's influence or 1,711 jobs based on the province's influence. Instead job losses in the region totalled 1,005. Employment in the Arts, Entertainment and Recreation industry grew in southwestern Ontario and Ontario. Based on the SSA, all of the study region's growth can be attributed to growth in this industry in southwestern Ontario and the province.

Wholesale trade is a strong industry for the region. Sixty-seven or 38 jobs could be attributed to growth in southwestern Ontario and the province respectively, but there were 505 additional jobs in the region.

The region's construction industry grew by 220 jobs. Southwestern Ontario and the province's construction industry grew during this time period at a higher rate than many of the other industries. . Compared to Southwestern Ontario and the province, the region did well in terms of creating employment in this industry.

Figure 5 – Perth County, St. Marys and Stratford Shift-Share Analysis, 2001 to 2006

	Southwestern Ontario				Ontario			
	Southwestern Ontario Effect	Industrial Effect	Differential Shift Effect	Regional Change	Provincial Effect	Industrial Effect	Differential Shift Effect	Regional Change
All industries	2,772	-746	-1,001	1,025	3,299	-1,375	-899	1,025
11 Agriculture, forestry, fishing and hunting	296	-668	82	-290	352	-684	41	-290
21 Mining and oil and gas extraction	3	4	8	15	4	6	5	15
22 Utilities	9	7	-41	-25	11	1	-37	-25
23 Construction	168	121	-68	220	199	193	-173	220
31-33 Manufacturing	694	-1,138	-561	-1,005	826	-1,711	-120	-1,005
41 Wholesale trade	116	67	322	505	138	38	329	505
44-45 Retail trade	283	0	-133	150	337	-35	-152	150
48-49 Transportation and warehousing	110	49	111	270	131	28	111	270
51 Information and cultural industries	28	-6	-17	5	33	-30	3	5
52 Finance and insurance	99	21	-96	25	118	1	-94	25
53 Real estate and rental and leasing	23	30	77	130	27	28	75	130
54 Professional, scientific and technical services	86	166	-257	-5	102	24	-131	-5
55 Management of companies and enterprises	2	-12	20	10	2	0	8	10
56 Administrative and support, waste management and remediation services	75	177	-332	-80	89	157	-326	-80
61 Educational services	114	150	-9	255	136	148	-29	255
62 Health care and social assistance	242	245	-92	395	288	252	-145	395
71 Arts, entertainment and recreation	72	-30	18	60	86	80	-106	60
72 Accommodation and food services	175	53	12	240	208	30	2	240
81 Other services (except public administration)	124	-6	-128	-10	148	57	-215	-10
91 Public administration	53	24	83	160	63	42	55	160

3.3 The County of Perth Business Retention + Expansion Project

In 2007, the County of Perth launched a two phased BR+E project. Phase I saw the Retail and Business sector surveyed in 2007; the Manufacturing, Industrial and Trades sector were surveyed in 2008 in Phase II for a total of 284 business participants. The purpose of the project was to capture a picture of the economic climate of Perth County and to determine the issues and obstacles faced by businesses in all sectors.

Short term objectives included:

- To provide community support for local businesses
- To identify and address immediate business concerns.

Long term objectives included:

- To increase the competitiveness of local businesses
- To establish an Economic Development Strategic Action Plan
- To increase business growth and job creation
- To increase community capacity.

There were surprisingly many similarities between the two groups:

1. Work force development issues were common to both groups. For example more than 75% of all businesses in both groups ranked the availability of labour as *Very Important* in ensuring their competitiveness – skilled labour in particular.
2. Training and business support was identified as a key impediment to business growth.
3. Communications was identified as a key issue. Most businesses were unaware of economic development initiatives in their municipality or County.
4. Future plans were a positive indicator for all sectors. The vast majority of businesses indicated plans to expand, which will affect an increase in the workforce.
5. The challenges for expansion were largely based on financing and availability of labour.

Phase I of the report was the catalyst leading to the establishment of an Economic Development Department to serve its member municipalities. This department was created in July of 2008.

3.4 Summary of Community Consultations

As mention earlier in the report, the community response to the project was exceptional. Over 230 people participated in the consultations. The participants broke down as follows.

- 6 focus groups (119 attendees)²
- an online survey (61 business owner surveys were completed)
- 28 business and community development stakeholder interviews
- 10 institutional stakeholder interviews
- 5 public open houses in Stratford, Mitchell, Milverton, Listowel and St. Marys.

Focus Groups

Six focus groups sessions were held on February 9-10, 2010 with a total of 119 participants. The facilitation of the visioning sessions was conducted by the Queen's Executive Decision Centre who are well known leaders in strategic facilitation workshops utilizing a unique software program designed to ensure participation and valuable input combined with frank discussion on community goals and objectives.

The six focus groups were comprised of representatives from the following sectors:

1. Council and municipal staff
2. Agriculture and rural development
3. Entrepreneurs and export oriented companies
4. Manufacturing and automation
5. Green energy
6. Tourism, culture, health and wellness

The groups were asked three questions regarding economic development in Perth County:

1. Looking ahead five years, what would Perth County, Stratford and St. Marys be like if you had the power to make it any way you wanted? Perth County, Stratford and St. Marys will have been successful when we have the following in place...
2. What are the major differences between now and your vision for the future?
 - a. What needs to stay the same?

² Tourism & Arts/Culture session - 39 attendees, Alternative Energy session – 23 attendees, Agriculture and Rural Development – 16 attendees, Councillors and Municipal Management – 16 attendees, Manufacturing & Automation – 15 attendees, Lone Eagles/Entrepreneurs – 10 attendees.

- b. What needs to change?
3. Understanding what these differences are, how do we get from where we are now to where we want to be? What key actions should be included in Perth County, Stratford and St. Marys economic development strategy?

Emerging from an analysis of the focus group sessions were seven predominant themes or visions for the future of the region:

1. Quality of life
 2. Business and industry
 3. Population growth
 4. Agriculture
 5. Government and regulations
 6. Environment
 7. Downtown revitalization
1. **Quality of Life and Place** – By far, this theme was most often cited as **the** asset for the area and the reason that there is confidence towards new and continued economic growth. People appreciate their healthy, active and safe lifestyle with access to hospitals, schools, recreation, theatre, culture, recreation, park areas, heritage facilities and events. The small town atmosphere was considered a treasure and one that is carefully guarded from urban practices and a big box mentality. There was a desire to create more events in the off seasons to make the area a four season destination.
 2. **Business and Industry** – Community members are proud of the unique mix of businesses, educational, cultural and tourism enterprises in the area. The area is an anomaly in the sense of having a reputation as a strong manufacturing area as well as being equally well known for its theatre and unique retail experiences. Participants want to keep the diversity of business and culture and to encourage both the small business operator as well as larger more industrial type of ventures. It was also felt, however, that it is much healthier for the area to attract small and medium sized manufacturing companies with a focus on new technologies than larger employers who create a false sense of security for the employment base. There was consensus on the importance of making good use of brownfields and empty properties and focus efforts on the attraction on the creative economy, light manufacturing, new technologies and providing business support in terms of mentorship, research and financing.
 3. **Population Growth** – Each group spoke on the importance of population growth in order to make the area attractive to new business and residents. It was felt that it is most important to attract the return of young families to the area and develop community services to entice a younger work force. This would include enhancing educational offerings, health services, recreational assets, encourage a cultural diversity and invest in services for a younger demographic. This theme works in tandem with ‘business and industry’ and ‘quality of life’ as the availability of employment is paramount to attracting a new and younger resident.
 4. **Agriculture** – Strong support was given for the protection of agriculture in the County and the retention of agricultural lands. Concern was expressed for the lack of abattoirs in the area and the government regulations surrounding their establishment. It was felt that agriculture should proceed towards more modern and technology based methods while advancing value added processing. While encouraging local residents and businesses to buy locally was felt to be very

important, there was also expressed concern that the supply of local product is poor, whether through poor distribution channelling or total lack of availability.

5. **Government and Regulations** – Participants in all sessions recognized the need for a regional approach to municipal management and delivery of economic development services. They felt that there was a need for more coordination of efforts at all levels of government in order to realize efficiencies of management and stronger reach for both business and tourism marketing efforts. In all sectors, there was a strong desire to reduce the amount of ‘red tape’ and bureaucracy currently surrounding the permits and approvals process both at a municipal and county level. Simplifying the development process would encourage development and create a more welcoming atmosphere for potential business development. In general, stakeholders were looking for forward thinking leadership, regional management and a streamlined development process.
6. **Environment** – Due to the strong agricultural sector in the region as well as its history and excellence in manufacturing, there was support for being a leader in ‘green’ alternate energy practices, clean renewable energy, bio gas digester projects, green house gas reduction and recycle and reuse programs. There is a high level of awareness for protection of the environment given the area’s dependence on the land and its recognition of the importance of conservation and sustainable efforts.
7. **Downtown Revitalization** – Community members felt a loyalty to their ‘downtown’ areas and wanted them to again be the centre of activity and the ‘heart’ of their municipality. This included beautification, theatre/culture/arts, boutique and unique shopping and local business development.

The following is a summary of the focus group findings based on the individual sector responses. **Note that the following summary outlines the main points but does not describe all of the results.** A complete report of the findings and a list of the participants is contained in Appendix I.

Figure 6 – Summary of Focus Group Findings

Question 1 - Looking ahead five years, what would Perth County, Stratford and St. Marys be like if you had the power to make it any way you wanted? Perth County, Stratford and St. Marys will have been successful when we have the following in place...

Focus Group Session	Common/High Priority Responses from the Group
Council and Municipal Staff	Diversity in employment with a variety of new industries coming to our area
	An environment which encourages our young people to return home to raise a family and have meaningful employment
	A solid base of small businesses in our community and supporting local buying
	Keeping our industries including manufacturing; encourage new development
	A well trained young labour force
Agriculture, Rural Development	Healthy self-sustaining rural agricultural community
	Small abattoirs in the community to serve the need for farmers and the demand for local food
	More rural based small businesses serving both the local and regional markets
	Investment in further processing of food beyond primary agriculture; value added processing businesses for our local food
	Attract and retain young people; entrepreneurial opportunities for our youth
Entrepreneurs and Exporters	Mix of industries that would make the area self sustaining and not be vulnerable to single industries
	Community of choice for professionals to operate a business in the 'creative economy'
	Recognized as a leader of innovation especially in digital media
	Community with 'green' alternate energy practices
	Vibrant town centres which encourage new business growth
Manufacturing and Automation	More new manufacturing employers that can compete globally employing a significant workforce
	Sustainable industries providing gainful employment
	Substantially lower business/property taxes
	Green energy focus; bio energy development; low cost energy
Alternate Energy	Centre of Excellence in alternative energy including educational offerings
	Promotion of clean renewable energy
	Politically driven mandate driving renewable projects
	Large scale bio gas/bio digester projects on agricultural properties
	Retain existing and create new and sustainable employment throughout the County i.e. sales, installation, manufacturing, maintenance, design etc.
	Retention of agricultural lands
Tourism	Healthy vibrant downtown cores
	Designated venue for community performing and visual arts
	Recognition of tourism as an economic driver
	Participation in the 'new economy' – creative industries
	Municipal governments working together
	Emphasis on healthy living and promoting an active lifestyle
	Sufficient family health teams Canadian culinary destination with an educational element

Question 2. What are the major differences between now and your vision for the future? (a) what needs to stay the same?

Focus Group Session	Common/High Priority Responses from the Group
Council and Municipal Staff	Sense of community
	Vibrant tourism industry including theatre, arts/culture
	Maintain services i.e. schools/health care to make it attractive for newcomers
	People with a strong work ethic
	Protected environment
	Strong rural roots with an agricultural background
	Clean and well maintained properties
Agriculture, Rural Development	Innovation in agriculture
	Small, safe community atmosphere
	Agricultural events – fairs, festivals, farmers markets
	Rural schools and hospital care
	Agricultural lifestyle with easy access to urban amenities
	Clean lifestyle
	Arts and cultural events/activities/assets
Entrepreneurs and Exporters	Small town atmosphere – safe, friendly people, demographic mix of people
	Diverse arts and theatre/heritage community with strong volunteer base
	Well developed service infrastructure
	Natural settings – trees, gardens, rivers, trails
	Strong sports and recreation facilities including supporting organizations
Manufacturing and Automation	Diversity of sectors i.e. light manufacturing, tourism, theatre, agricultural; not highly unionized
	Entrepreneurial spirit
	Rural lifestyle – live here work elsewhere – close proximity to urban centres
	Skilled labour force and good wages
	Beautiful natural surroundings
	Small and unique stores – no big box stores – good restaurants
Alternate Energy	Sense of community with strong heritage roots – simple lifestyle, safe
	Viable agricultural sector
	Diversity of industry – not a one horse town
	Promotion of renewable energy
	Good health care and school system
	Support of local farmers – farm to table thinking
Tourism	Creative minds
	Built heritage, theatre and arts
	Strong healthy downtowns throughout the region
	Schools including chefs school
	Rural lifestyle – family farms – countryside
	Natural setting – waterfront, parks, trails, clean air, safe
	Good accommodations and restaurants
	Diverse community events, volunteers and philanthropy
Good transportation system i.e. roads, trains	

(b) What needs to change?

Focus Group Session	Common/High Priority Responses from the Group
Council and Municipal Staff	Increased training options in new emerging industries
	Better Co-operation between municipalities; more coordination of efforts at all levels of government
	Less red tape, rules and regulations and all levels of government
	Internal population growth – newcomers and young families returning
	More use of technology and information communications
Agriculture, Rural Development	Raise awareness of importance of buying locally and consuming local products
	Updating of rules and regulations – modernized – especially for agriculture
	More funding for small farms/small businesses so they can survive and thrive
	Preservation of class 1 and 2 farmlands – address brownfield issue
	Focus on green – reforestation, organic choices
	Address one size fits all regulations re abattoirs and other food processing based businesses
	More regional coordination of the area – less division of municipalities
Entrepreneurs and Exporters	More support of entrepreneurship and incubation of new businesses with mentorship and financial assistance
	Less reliance on imports of energy and products from outside – prevents self-sustainability and enables branch plant mentality – encourage locally made approach
	Year round activities in our downtowns
	Urban regeneration i.e. storefronts brownfields, former gas stations etc.
	Visionary investment leading to industries and greater cultural diversity
	More regional thinking – consolidation of planning and governments
Manufacturing and Automation	More focused efforts to bring good manufacturing jobs to the city – more manufacturing incentives and R&D competitiveness
	Develop more attractions to the city and area that appeal to all citizens. More off season Festival activities.
	Increase awareness of manufacturing, supply chain networking – bring players together
	Marketing and more recognition of industry – success stories
	Focus and action on greenhouse gas reduction – environmental planning
Alternate Energy	More cooperative community based renewable projects
	Forward thinking leadership from local politicians regarding energy planning
	Recycle and reuse plans on community scale – coordinated waste program throughout the county
	Reduce red tape for energy projects
	Focus on attracting smaller businesses rather than large ones
	Increased educational offerings to retain and attract students/population
	Produce bio energy from our resources – better collection and conversion
Tourism	Healthy, vibrant downtowns, avoiding sprawl
	More collaboration across region and sectors – stop competition between small towns – should promote each other
	Protect natural areas
	Municipal support and funds for the arts with strong community co-operation and support
	Proactive visionary and less reactive governance and political decision making
	Utilization of current empty space, brownfields and empty storefronts
	Broader definition of economic development including culture, tourism, creative class jobs, culinary sector, knowledge based and entrepreneurial sector

Question 3. Understanding what these differences are, how do we get from where we are now to where we want to be? What key actions should be included in Perth County, Stratford and St. Marys economic development strategy?

Focus Group Session	Common/High Priority Responses from the Group
Council and Municipal Staff	Increased training in new industries
	Better co-operation between municipalities and more coordination of efforts between all levels of government
	Less red tape, rules and regulations from all levels of government that cause delays in encouraging business development
	Internal population growth; attract newcomers and young families returning home
	More and better use of technology and information communications
Agriculture, Rural Development	Raise awareness of the consumer to consume locally produced items
	Old rules and regulations need to be revised and made current to speed up the approval process; agricultural regulations need to be maintained and monitored
	More funding for small farms/small businesses so they can survive and thrive; allow for more diversity of scale and room for future generations of farmers
	Preserve Class 1 and 2 farmland in Perth County
	Focus on green choices
	Address the one-size-fits-all mentality surrounding abattoirs
Entrepreneurs and Exporters	More premises that support entrepreneurship and incubation of new businesses along with mentor and financing assistance
	Reduce reliance on imports of energy and jobs; encourage made locally approach
	Visionary investment leading to industries and a talent pool that encourages relocation to our area; greater cultural diversity
	Lack of regional thinking – work together towards a common vision
	Infrastructure i.e. roads, sewer, water, parks
	Increase post secondary training to increase skill levels
Manufacturing and Automation	Continued support to increase good manufacturing jobs to the area
	Continue to bring more attractions to city that appeal to all citizens of the area – off season events
	Bring players together to increase awareness of manufacturing/ supply chain networking
	More recognition of industry and values added; need to communicate the impact/success
	Focus and action on greenhouse gas reduction allowing for readily available low cost energy
Alternate Energy	More community based renewable projects; accessible energy opportunities
	Forward thinking leadership from local politicians regarding energy planning
	Recycle/reuse plans on a community scale
	Less red tape for energy projects; simplify paperwork
	Focus on attracting multiple small businesses rather than single large ones
	Education needed to retain and attract students
Tourism	... the tourism group was not able to adequately address this question in the available time...

Online Survey

An on-line survey ran concurrently with the stakeholder and focus group sessions. The survey provided an opportunity for the broader business community to provide input on human resource issues, business investment opportunities and regional collaboration opportunities. The framework was consistent with the discussions used for the focus groups and one-on-one stakeholder interviews. The key findings were as follows.

1. **Small business a key part of the economy** - Over half (52.6%) of respondents reported revenues of less than \$500,000. Over half (53.6%) of respondents reported that they had 1-4 permanent employees. Over half (52.7%) of the businesses had temporary or contract workers. Most of these businesses (38.2%) had 1-4 temporary or contract workers.
2. **Employment growth stable** – Half (50.9%) of the business stayed the same in terms of number of employees. Over half (52.6%) of businesses anticipate the number of employees will stay the same over the next 3 years. Over half (51.6%) of the businesses are not anticipating a workforce shortage; however, for those anticipating a workforce shortage the greatest shortage will be trades, transport and equipment operators.
3. **Business interest in collaboration and professional development** – Over half (52.3%) of the survey respondents were interested in collaboration/networking. There is a strong interest in using the Internet for marketing and e-commerce. The largest interest for how local business associations and economic development offices could assist the business sector is through professional development (i.e. workshops, training).
4. **Business investment opportunities are in technology (i.e. digital media), tourism and the green economy.**
5. **Stabilize taxation and limit government bureaucracy** – Local tax rates (4.34 out of 5) was the most important factor in ensuring the growth of their businesses followed by the availability of telecommunications (4.31). The three factors scoring the lowest for level of satisfaction were local development charges (2.06 out of 5), local tax rates (2.28) and local permit process (2.34).

Further details of the labour market and economic development survey findings is presented in Appendix II.

Stakeholder Interviews

Stakeholder interviews were held in the community during the week of February 8th, 2010. The following themes emerged.

- **The region is a successful place for business** - The region is a successful place for a business to operate from because there is an available skilled labour force, larger markets are accessible, technology infrastructure is largely in place and there is an unmatched quality of life that the region provides its residents.
- **Stratford is a key economic driver** - The City of Stratford is a key driver for population growth and business investment to the region.
- **Need more local training** - There is a need to provide more training within the Perth County boundaries. Although there are some local training opportunities, many other training programs are available in cities such as London, Kitchener-Waterloo or Guelph. People have to travel to these cities for training and this becomes an issue if people do not have access to a car.
- **The economic barriers are municipal governments, business community and labour force mindset** – Municipal government decision makers need to understand that any economic growth within the Perth County region is good for the entire region. The business community needs to embrace change and adapt to new ways of doing business. Many of the people who have lost

their jobs in manufacturing need to be retrained for different jobs. The skill sets of the people who have lost manufacturing jobs are not necessarily transferable for new jobs.

- **Local need to further diversify the economy** – Sectors that should be developed include: value added agriculture/ agri-food; advanced manufacturing (i.e. green energy technologies); arts, culture and tourism; education (i.e. University of Waterloo Stratford Institute for Digital Media); and construction (new housing development) sectors.
- **Local entrepreneurs need to be developed** - The business community needs to step up its involvement with entrepreneurs by developing business incubation and mentoring programs.
- **Vision for the region includes progressiveness, integration and entrepreneurialism** - The vision for Perth County, St. Marys and Stratford is to become a community with a strong economic mix of agriculture, manufacturing, culture/tourism and educational businesses. The area will be known for a progressive outlook, its economic integration, a willingness to embrace change and an entrepreneurial forward thinking mind set.

Further details of the results from these interviews are provided in Appendix III.

Institutional Stakeholder Interviews

Stakeholder interviews were held with institutional leaders during the month of January 2010. The key themes that emerged from the discussion were are follows.

- There is a **need for more local training programs** in the region. The training programs that are in need include educational courses, apprenticeships and skills upgrading. Stakeholders stated that the Technical Training Group has made progress to provide welding and construction trades training in the region, but more training can be provided locally. A common complaint mentioned was that people have to travel to larger cities like London or Kitchener-Waterloo to access specialized training programs.
- **Youth are migrating out of the region** and not returning for employment. Mixed with this trend is the fact that the labour force is aging.
- There is **potential to enhance industry leader partnerships and collaborations** and build, develop or attract skilled labour. The Perth County Manufacturers Association and Perth County HR Association are examples of industry collaborations. These networks should be encouraged to develop in the region. Another example provided was the Kitchener-Waterloo Manufacturers Innovation Network, which is a virtual manufacturing association.

Further details of the results from these interviews are provided in Appendix IV.

Town Hall Meetings

Town hall meetings were held in Listowel, Milverton, Mitchell, St Marys and Stratford during the week of February 8th, 2010. These sessions were sparsely attended but lively discussions were held regarding the project goals. The same questions were posed as the focus group sessions with similar results.

4 Infrastructure Assessment

There are two aspects to the Perth County region's capacity to retain, expand and attract economic investment: physical infrastructure and new economy infrastructure.

4.1 Physical Infrastructure

Once a prospective investor understands the availability, quality and cost of labour, their attention turns to the availability and cost of real estate and the quality, availability of physical infrastructure. Physical infrastructure in this assessment included:

- Employment lands
- Municipal servicing infrastructure
- Utilities infrastructure
- Telecommunications infrastructure
- Transportation infrastructure.

Employment Lands

Perth County, St. Marys and Stratford were contacted to determine the availability and cost of the available supply of employment lands. In Perth County, employment land is available for business expansions. Listowel has the largest amount of serviced employment land totalling 215.5 acres (87.2 ha). Land is zoned for general industrial and the cost to purchase land ranges from \$42,000 per acre to \$60,000 per acre. All of these 215.5 acres (87.2 ha) are serviced with water, sanitary sewer, electricity and natural gas lines.

In the Municipality of Perth South, there are a total of 175.1 acres (70.9 ha) of available employment lands. Much of these lands (107.1 acres or 43.4 ha) are also zoned for general industrial development and can be serviced with water, sanitary sewer, electricity and natural gas lines. The cost of real estate ranges from \$35,000 per acre to \$83,500 per acre.

For West Perth, there are available employment lands in Mitchell (14.0 acres), Bornholm (16.6 acres) and Monkton (3.7 acres). Much of these lands are zoned for future development, with the exception of the lands in Mitchell which are zoned general industrial. The lands in Mitchell have municipal water and sanitary sewer services whereas the lands in Bornholm and Monkton have private well and septic services. Real estate costs were estimated at \$27,250 per acre in Bornholm.

The Municipality of Perth East has 231.3 acres (93.6 ha) of land with the potential of being used for employment. All of these lands were not serviced with water and sanitary sewer systems.

In St. Marys there are 259.5 acres (105.1 ha) of vacant general industrial land, including vacant industrial building properties. The real estate costs for vacant industrial land are estimated at approximately \$70,000 per acre.³

³ In conversation with Town of St. Marys staff, March 2010.

Figure 7 – Perth County Available Employment Lands

Municipality	Community	Acres Hectares		Zoning Types	Real Estate Costs	
					(per acre)	Servicing Status
Perth East	Brunner	14.0	5.7	Future Development	Unavailable	Unserviced
Perth East	Brunner	30.0	12.1	Future Development	Unavailable	Unserviced
Perth East	Millbank	21.0	8.5	Future Development	\$33,500	Unserviced
Perth East	Milverton	24.0	9.7	Future Development	Unavailable	Unserviced
Perth East	Milverton	45.0	18.2	Future Development	Unavailable	Unserviced
Perth East	Milverton	23.0	9.3	General Industrial	\$50,000	Unserviced
Perth East	Newton	4.0	1.6	Future Development	Unavailable	Unserviced
Perth East	Sebringville	4.0	1.6	Future Development	Unavailable	Unserviced
Perth East	Sebringville	17.5	7.1	Future Development	Unavailable	Unserviced
Perth East	Shakespeare	0.8	0.3	General Industrial	\$109,900	Unserviced
Perth East	Shakespeare	48.0	19.4	Future Development/Agriculture	\$48,600	Unserviced
Perth South	St. Marys	51.9	21.0	General Industrial	\$50,000	Serviceable
Perth South	St. Marys	7.2	2.9	General Industrial	\$83,500	Serviceable
Perth South	St. Marys	22.0	8.9	General Industrial	\$35,000	Serviceable
Perth South	St. Marys	26.0	10.5	General Industrial	Unavailable	Serviceable
Perth South	Sebringville	29.0	11.7	Future Development	Unavailable	Unserviced
Perth South	Sebringville	39.0	15.8	Future Development	Unavailable	Unserviced
West Perth	Bornholm	0.7	0.3	Future Development	Unavailable	Unserviced
West Perth	Bornholm	4.9	2.0	Future Development	Unavailable	Unserviced
West Perth	Bornholm	5.5	2.2	Agriculture/Commercial/Industrial	Unavailable	Unserviced
West Perth	Bornholm	5.5	2.2	Future Development	\$27,250	Unserviced
West Perth	Mitchell	14.0	5.7	General Industrial	Unavailable	Serviced
West Perth	Monkton	3.7	1.5	Future Development	Unavailable	Unserviced
North Perth	Listowel	2.4	1.0	General Industrial	\$42,000	Serviced
North Perth	Listowel	2.5	1.0	General Industrial	\$42,000	Serviced
North Perth	Listowel	11.0	4.5	General Industrial	\$50,000	Serviced
North Perth	Listowel	23.7	9.6	General Industrial	\$43,000	Serviced
North Perth	Listowel	29.0	11.7	General Industrial	\$50,000-\$60,000	Serviced
North Perth	Listowel	50.0	20.2	General Industrial	\$50,000-\$60,000	Serviced
North Perth	Listowel	54.0	21.9	Future Development	Unavailable	Serviced
North Perth	Listowel	4.9	2.0	General Industrial	\$42,000	Serviced
North Perth	Listowel	10.7	4.3	General Industrial	\$42,000	Serviced
North Perth	Listowel	7.3	3.0	General Industrial	\$55,000	Serviced
North Perth	Listowel	20.0	8.1	General Industrial	\$42,000	Serviced
Total		656.0	265.6			

Source: Perth County Economic Development Department, 2010.

Available employment lands in the City of Stratford totals 451.0 acres (182.6 hectares), which is the largest amount of land in the region. The industrial lands owned by the City total 144.5 acres (58.5 ha). Twenty-six acres (10.5 ha) are serviced and the remaining lands are unserviced. A total of 306.5 acres (124.1 ha) are privately owned. Much of this land is unserviced.

Figure 8 – City of Stratford Available Employment Lands, 2009

Location	Gross (Acres)	Gross (Hectares)
Industrial lands owned by the City of Stratford		
Wright Business Park (WBP) - Between Westcast & Scotia bank	4.0	1.6
WBP - Between Magest & FAG Aerospace	16.0	6.5
WBP - Wright & Packham	6.0	2.4
WBP - South of Wright Blvd	93.5	37.9
Lands off of Crane Avenue	25.0	10.1
Sub Total	144.5	58.5
Industrial lands privately owned		
Northwest of Wright Business Park	95.0	38.5
Southwest of Wright Business Park	100.0	40.5
East side of Erie Street at Gibb Road (Van Ness)	36.0	14.6
East side of Erie Street at Crane Avenue (Hyde)	27.0	10.9
North of Lorne Ave, East of Humber St. (Hyde)	2.0	0.8
South of Lorne Ave, West of Downie St. (Steelcraft)	2.0	0.8
North of Lorne Ave, West of Erie St. (Festival City Truck)	1.5	0.6
Lands at East end of Park Street (Walsh)	43.0	17.4
Sub Total	306.5	124.1
Total	451.0	182.6

Note: The figure excludes underutilized parcels, which are occupied by existing industrial uses. Also excluded are approximately 70 acres of land in separate parcels, which are not considered marketable for industrial purposes.

Source: City of Stratford, *Management Report: Business Plan – Business Park Extension*, January 23rd, 2009.

In all communities there are also available industrial properties with buildings on them. These properties also provide opportunities for business expansion in the region.

Development Charges

Expansions or improvements to municipal servicing infrastructure (i.e. water, wastewater and sewer) can increase a community's capacity to support business expansions. The availability of information from Perth County's member municipalities, the Town of St. Marys and City of Stratford differs. For Perth County's member municipalities, North Perth is the only one that has development charges. These development charges recover costs for wastewater services (i.e. treatment and trunk sewers), water services and storm water management services for the Listowel urban area. At the time of writing this report, the Town of St. Marys was preparing a Development Charges Background Study that would outline municipal servicing infrastructure investments for future years.

The City of Stratford's *Development Charges Background Study* (2008) identifies increased service needs attributed to development for the O'Laine Avenue trunk, Vivian, Mornington trunk, Forman Avenue sewer upgrading, Sanitary Trunk, Quinlan sanitary pumping station and force main and sanitary trunks to Quinlan pumping station. The timing for these projects are from 2008 to 2012 at a gross capital cost estimate of \$16.5 million.

Utilities Infrastructure

In 2009, the federal government's infrastructure stimulus funds were directed to several projects in the region. Municipal infrastructure projects that will increase the infrastructure capacity for growth include:

- the Southside Storm Sewer system in Stratford

- St. Marys water tower realigning and major expansion to wastewater management facility
- construction of Shakespeare wastewater servicing (Perth East)
- Listowel wastewater and water infrastructure renewal (North Perth).

Telecommunications Infrastructure

The availability of high-speed internet is important to the competitiveness and diversity of an economy as it allows businesses to utilize wider range applications and services and provide citizens with easier access to information and educational resources. In August 2007, Perth County was one of 18 communities to receive funding as part of the Ontario government's Rural Connections: Ontario Municipal Rural Broadband Partnership Program, a one-time \$10-million dollar program to expand broadband access to under-serviced municipalities. The total program cost of \$2.5 million was cost-shared between the province, County, private partners and telecommunications providers. The telecommunications network is available to 99.9% of residents, and the infrastructure tower build-out includes 10km radius WiFi 'hot spots' at each site. The network also enables Voice over Internet Protocol (VoIP) and IPTV services.

The County is serviced by a number of smaller regional telephone and Internet providers including OmniGlobe, Quadro Communications Co-Op Ltd., Wightman Telecom Ltd. and Mornington Communications. Major national telecommunications carriers servicing the area include Bell and Rogers.

Transportation Infrastructure

Road: The region's provincial roads include Highways 7, 7/8 and 23. Highway 7 is four lanes between Kitchener and the eastern border of Perth County. Regional traffic traveling easterly connect to Highway 401 through Highway 7. The regional traffic can connect to Highway 401 westerly through Embro Road. Highway 23 runs north/south connecting Perth County to the London area. The County owns and maintains many of the other roads leading to the rural communities.

The federal government's infrastructure stimulus funds have been directed to Perth Road 135 rehabilitation.

Public transit is limited in the region to Stratford Transit. Regional bus service provides limited service to St. Marys, Stratford, Listowel and Milverton. The two bus service providers are Greyhound Canada and Cherry Bus Lines.

Rail: The region is serviced with passenger rail service through St. Marys and Stratford with VIA Rail. Freight services are provided by CN Rail, CP Rail and Goderich-Exeter Railway.

Air: The closest airports are the London International Airport, Waterloo Region International Airport, John C. Munro International Airport in Hamilton and Lester B. Pearson International Airport in Mississauga. These airports have scheduled passenger air service and air cargo facilities.

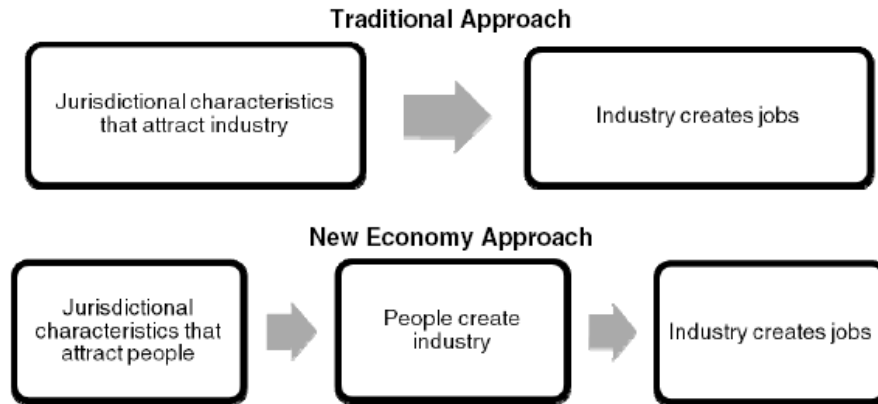
4.2 New Economy Infrastructure

There is broad recognition that the drivers of growth in advanced knowledge-based economies are evolving away from goods-producing industries towards service-based sectors. This shift foregrounds the importance of a talented, creative labour force and innovative small and medium-sized businesses to the

economic growth and prosperity of cities and regions. The implications for economic and business policy are significant.

Whereas a traditional approach to investment attraction was primarily a function of a jurisdictional cost/benefit package centred on taxes, land development costs, and linkages to markets, growth in the new economy emphasizes the quality of place attributes that attract people, which in turn drive growth. This difference is illustrated in the following diagram.

Figure 9 – Traditional vs. New Economy Approach



While there remains significant debate in both the theory and practice of economic development on the question of whether people are more likely to follow jobs than jobs are to follow people, it is clear that an emphasis on new economy infrastructure can be an important differentiator for a community. This is especially true in the case where traditional site selection tools are homogenous across regions and offer little added value to prospective residents and businesses.

Ultimately, as Richard Florida has argued in his book *Who's Your City*, certain places have different appeals for different people, depending on a variety of characteristics; age, marital and family status, income and education among them. For example, Perth County has an aging population, as do many other communities; according to projections by the Ontario Ministry of Finance, the population aged 65 and over is expected to more than double from 2006 through 2031. There is research to suggest that smaller communities with vibrant cultural environments often have greater appeal for seniors and retirees than purely rural or urban communities.

Half of the wealth in Canada is in the hands of the 50+ age group. Perth County may be well positioned as a destination for this demographic. Overall, a key task for Perth County will be to uncover the optimal mix between its demographic profile, new economy assets, and business development priorities to generate a cohesive approach to economic development and labour market planning.

The following assessment examines the Region's new economy; those assets and qualities of place that make a community a viable and creative place that will attract and retain residents.

Information and Education Infrastructure

The two school boards have primary responsibility for delivering public education in Perth County: the Avon-Maitland District School Board and the Huron-Perth Catholic District School Board. In total, there

are 34 schools that serve youth in the County including 11 private schools that operate outside of the above boards⁴.

The labour market analysis identifies the local educational training initiatives in the region, These initiatives include the Technical Training Group`s welding and construction trades training program, Conestoga College`s presence in Stratford and Listowel to provide high school equivalency and job finding programs, theatre trades training and culinary trades training.

Furthermore, the Perth County region is located in the midst of some of Ontario`s leading post-secondary institutions. It is less than 75 km from Conestoga College, Fanshawe College, University of Waterloo, Wilfrid Laurier University and University of Western Ontario, which between them offer a huge number of leading-edge programs in trades-based and professional disciplines. In addition, the University of Waterloo announced in 2009 that it will be establishing a campus in Stratford to be focused on digital media and related technologies.

Cultural and Recreational Attractions

The anchor of the region`s cultural attractions is the world-renowned Stratford Shakespeare Festival, which started in 1953. It is the third largest repertory theatre in the English-speaking world and the largest in North America. There are four distinct venues with the grandest being the 1,826-seat Festival Theatre.

This region also has a number of other seasonal and year-round cultural events for residents and tourists, including:

- Stratford Summer Music Festival
- Gallery Stratford (art gallery)
- DocFest Stratford (documentary and digital media exhibition)
- Historic downtowns of Stratford and St. Marys
- Canadian Baseball Hall of Fame in St. Marys
- Theatre 3-11 in Listowel
- Stratford-Perth Museum
- St. Marys Community Players
- St. Marys Museum and Archives.

This region is also fortunate to have abundant green space and recreational opportunities. Over 90% of the county`s land remains classified as prime agricultural land. The County boasts 50.2 km of hiking trails and 262 km of biking trails, including the Grand Trunk Trail, Grand Valley Trail, Thames Nature Trail and portions of the 104 km Avon Trail. The Wildwood Conservation area and `The Quarry` in St. Marys are also popular swimming and leisure areas.

Though this region has a number of cultural and recreational amenities that make it an appealing community for residents and visitors alike, it faces significant competition from regional centres for creative workers and businesses. While London, Kitchener-Waterloo and Toronto have well-developed sector strengths and economic bases, they also sustain a higher density and variety of amenities and services – restaurants and clubs, sporting events, museums, galleries – that are attractive for a young and skilled labour force. While this region may not be seeking to compete directly on the scale of the large

⁴ Voices of Youth: An Inventory of Programs and Services for Youth in Perth County. Perth County Research and Planning Council, 2007

metropolitan areas, it nevertheless faces challenges from them in attracting skilled workers and independent entrepreneurs.

Health Care Infrastructure

There are four hospitals serving the region's residents, along with 24-hour emergency services based out of Stratford General Hospital. Stratford General Hospital and St. Marys Memorial Hospital are all administered under the regional Huron-Perth Healthcare Alliance; Listowel Memorial Hospital and Mitchell Medical Centre also offer health care services to the region's residents. The table below provides further information on the level of care offered.⁵

Figure 10 – Regional Health Care Services

Facility	# of Beds	Main Services
Stratford General Hospital	146	General and specialized short-term care, diagnostic, long-term treatment, emergency and outpatient services
Listowel Memorial Hospital	51	Patient activation, advance directives, speech pathology, physiotherapy, diabetes/nutritional counselling, prenatal classes, breast feeding clinics, accredited mammography unit, Breast Health Centre, Digital Imaging, Ultrasound services.
St. Marys Memorial Hospital	21	Physiotherapy, occupational therapy, speech therapy and recreational therapy, diagnostic imaging and laboratory services.

Source: *Quality of Life in Perth County: A 2008 Profile Report*. Perth County Social Research and Planning Council.

In addition, Stratford General Hospital is in the process of a significant expansion that will see it add new units in Intensive Care, Medical Imaging, Mental Health and Emergency Services.

Though there is a strong regional health network serving the region, this area is still slightly underserved with respect to access to primary care. A 2008 report demonstrated that the total number of physicians for the County as a whole results in a ratio of one physician (GP) to 1,429 people. While this ratio is an improvement over the last measurement taken in 2004, it still exceeds the minimum ratio of 1 GP to 1,380 people used to determine under-served areas⁶. As the population as a whole continues to age, ensuring consistent access to primary and emergency care will become a greater challenge.

Digital Media Convergence

The University of Waterloo is establishing a campus in Stratford, which will be the home to leading-edge, innovative programs related to digital media, a field with applications in a wide range of sectors, from entertainment and education to health care and finance. In February, 2010 the City of Stratford secured a site for the construction of the Stratford campus. The campus will be a leader in education, research,

⁵ Information about healthcare services is derived from the Perth County Community Profile 2009.

⁶ Quality of Life in Perth County: A 2008 Profile Report. Perth County Social Research and Planning Council.

innovation and commercialization in digital media-related study and enterprise, with an explicit focus on extending the educational mandate of the school to foster connections with business and government partners.

On-site classes are scheduled to begin in the fall of 2010 in the Masters of Business, Entrepreneurship and Technology Program at a satellite office in Stratford while construction is ongoing.

It is expected that the growth of this campus will have significant synergies and spin off benefits with the business, theatre and education communities, strengthening the region's position as an attractive place for young workers and creative enterprise. As one example, Stratford's DocFest, an annual documentary film festival held in September, initiated a one-day 'No Boundaries' intensive digital media workshop and career fair for students in 2009. The development of similar initiatives will have a large impact on the region's ability to retain creative talent.

Small Business Development

Currently, 89% of the businesses in the region are classified as small businesses, having less than 10 employees, and those businesses employ over 14,000 people.⁷ These smaller businesses have a greater degree of flexibility and mobility in terms of their location decisions. By strengthening and better promoting the strong new economy infrastructure assets it currently possesses, there is potential to further increase the level of small business growth and entrepreneurship, thereby generating more jobs and investment.

Youth Programs and Services

A 2007 Report entitled *Voices of Youth: An Inventory of Programs and Services for Youth in Perth County* consulted young people aged 12 to 17 to determine the level of services and resources available for them. The report found that more local youth programs and services were needed, both in terms of recreation and health and counselling services, and especially for older teens. Ensuring that the local youth have opportunities for high-quality recreation, education and leisure are necessary for cultivating a sense of attachment to the community. Being able to retain these youth and ensure their effective transition into the local workforce must be a key priority.

4.3 Competitive Advantages and Competitive Disadvantages

Competitive advantages and disadvantages are different than strengths and weaknesses. Strengths and weaknesses may be common to many communities, while competitive advantages and disadvantages differentiate communities from competitors. The communities have a better chance of continued success if it can target its economic development activities to serve sectors best able to capitalize on its competitive advantages while not suffering from its competitive disadvantages.

Competitive advantages form the nucleus for the region's unique value proposition. This is the "wow factor" that motivates potential investors and/or their agents to give the community further consideration. Competitive disadvantages are those elements that the communities need to fix (or become less of an obstacle) if it is critical to the site selection decision or needs to stray away from in its promotion/ selling efforts. The region's competitive advantages and disadvantages are identified as follows.

⁷ Perth County Community Profile, 2009

Competitive Advantages

- **Stratford Shakespeare Festival:** As the largest repertory theatre in North America, the Stratford Shakespeare Festival is a unique cultural asset for Stratford and Perth County and a driver of tourism and retail investment. It is the anchor of a growing creative and cultural milieu in the region, and should continue to be leveraged to generate spill-over tourism spending for other parts of the region. There are also potential synergies between the Festival and the University of Waterloo's Stratford Institute in growing unique creative business.
- **University of Waterloo Stratford Institute:** The introduction of a permanent campus in Stratford with a concentration in digital media will be a boon to Stratford, St. Marys and Perth. The campus will be a leader in education, research, innovation and commercialization in digital media-related study and enterprise, with significant impact on the region's business, theatre and education communities. The presence of the Institute will also create further employment in support sectors.
- **Diversity of Businesses:** While Perth County's employment is still heavily concentrated in manufacturing and other secondary industries, it is by no means a 'one-horse' county. There is growth in creative and cultural industries, driven by the theatre community, local festivals, and the introduction of the UW Stratford Institute. This will be a key new economy supplement to the existing agricultural and manufacturing base, making the region's economy more stable and sustainable.
- **Low commuter out flow of labour:** Many of the people who live in the region also work in the region despite being located close to the cities of London, Kitchener-Waterloo and Cambridge. As the online survey indicated, many local companies (71.0%) do not actively recruit outside the region to fill local positions. This finding suggest, many local labour needs can be met by the local residents.
- **Skilled Workforce:** There is a high concentration of agricultural, manufacturing and trades skills and a high concentration of people with apprenticeship training or a college diploma. The community has demonstrated that they have invested in their skills and training.
- **Available industrial land and buildings:** The region has a wide selection of available industrial lands and buildings in the Perth County towns, St. Marys and Stratford. These assets provide opportunities for local companies to expand their business operations and allows for businesses outside of the area to expand into the region.
- **Telecommunications Infrastructure:** High-quality rural wireless and broadband availability is increasingly important for business processes, specifically the 'lone eagles' (explained later) and small rural businesses. A wired and wireless connectivity infrastructure is needed in both rural areas and urban centres, to support growth in the knowledge based economy. A fact that the region is as technologically advanced as many Canadian cities and serviced with a selection of local telecommunications service providers besides Bell and Rogers puts the area at a competitive advantage. The telecommunications capabilities of the area has been noticed by the site selection community. RBC is building a data centre in Stratford.

Competitive Disadvantages

- **Governance and Coordination:** There is a perceived lack of regional thinking affecting the municipalities, with a growing divide between rural and urban locations in terms of their business development priorities. Administrative divisions between and within Perth County, Stratford and St. Marys can lead to difficulty coordinating for marketing, business attraction or funding applications. The region stands to benefit from a centralization of resources for certain aspects of municipal and economic development services, community information and marketing efforts. This can also improve communications and liaisons with higher levels of government with respect to issues surrounding business regulations and funding/grant applications, which are often difficult to negotiate for smaller municipalities and individual businesses.
- **Youth and Newcomer Retention:** As the population in the region continues to age, retaining young people and attracting new Canadians and ensuring their effective transition into the local workforce must be a key priority. For youth, the advanced learning and professional experience programs available through local school boards are being centralized, and are more inaccessible to rural areas. More broadly speaking, there is a dearth of local youth programs and facilities, immigrant settlement services, and training programs for new growth industries in the region. Both anecdotal and Statistics Canada labour flow patterns indicate that workers in these groups often leave for Kitchener-Waterloo and London in pursuit of employment opportunities; generating more opportunities for them in Perth County must be a key priority.
- **Local Training or Education Facilities Limitations:** Post secondary institutions (i.e. universities and colleges) are located in the region, but the available programs are limited. For people to upgrade education or training requires them to travel to larger centres. These limitations for local training or education facilities was stated repeatedly in the interviews with institutional stakeholders. By having more training and education facilities in the region improves accessibility to upgrade or develop new skills.
- **No 400 Series Highway** – There is no direct Highway 400 series access in the region,. In addition, there are no four lane roads. Highway 401 is located to the south of the region and the closest four lane access point is to the east, close to New Hamburg. Access to larger markets is important for businesses where a large part of their operations are dependent on continually moving products to customer markets.

5 Identifying Economic Opportunity

A sound Economic Development Strategy builds upon the unique assets and resources of a community, communicating those characteristics to potential investment and development partners in a way that demonstrates an inherent value proposition that is unique.

In the increasingly networked world of the global economy, such community brands can increasingly be used to build dynamic external linkages that enhance the ability to interact with and compete in the global market. A growing number of entrepreneurial 21st Century communities are utilizing their local advantages and emerging technology tools to create international networks designed to spur innovation, investment and job creation, while retaining the cultural and environmental assets of their communities.

While combining these trends in local economic development, the selection of economic development opportunities is rooted in the philosophy that initiatives must ultimately increase the total wealth within a community. There are two main ways to do this:

1. Export Development – any initiative that brings new money into the community:
 - Starting/attracting a business that sells products/services outside the community
 - Attracting visitors who then buy local products/services
 - Encouraging existing business to sell their product/service outside the community.
2. Import Substitution – any initiative that keeps money in the community:
 - Encourage people and businesses to buy their goods/services locally rather than importing them from another community
 - Start or attract new businesses that recognize the leakage and provide a product/service to stop it.

The highest priority initiatives are those that directly increase wealth (e.g. the retention or attraction of a business, receiving a visitor). This is an aggressive work plan and to be implemented effectively there should be little distraction on non-core issues.

Based on the analysis of Perth, Stratford and St. Marys' economies and trends in the macro-economy, the recommended directions for economic growth are, in priority order:

Figure 11 – Priority Economic Targets

Perth County	Stratford	St. Marys
<ul style="list-style-type: none"> • “Lone Eagles” • Value Added Agriculture • Green and Technology Based Manufacturing • Arts, Culture and Tourism • Main Street Commercial Development 	<ul style="list-style-type: none"> • Green and Technology Based Manufacturing • Arts, Culture and Tourism • “Lone Eagles” • Regional Centre Commercial Development 	<ul style="list-style-type: none"> • “Lone Eagles” • Green and Technology Based Manufacturing • Main Street Commercial Development • Arts, Culture and Tourism

These opportunities put focus on the communities' current core strengths and maximize use of underutilized assets. It also gives aim to new directions that have the potential to shape the region for decades to come.

The traits of the recommended target sectors are summarized in the following table.

Figure 12 – Description of Selected Economic Drivers

	Lone Eagles	Arts, Culture and Tourism	Agriculture and Agri-Food	Green and Technology Based Manufacturing	Mainstreet and Regional Centre Commercial
Estimated near-term sector growth	Very Strong	Moderate	Strong	Strong (Green) and Moderate (Technology Based Manufacturing)	Moderate
Complement to existing local base	Very Strong	Very Strong	Very Strong	Very Strong	Very Strong
Have a significant and sustaining impact on local economy	Very Strong	Very Strong	Very Strong	Very Strong	Moderate
Municipal capital investment requirement to attract investment	Low	Moderate to High	Moderate	Moderate to High	Moderate to High (downtown improvements)
Current state of the sector?	Key economic driver in the region is growth in small businesses. Significant growth is occurring in real estate & leasing, finance & insurance, health care & social assistance among others.	Sector is stagnant. Stratford Shakespeare Festival appears to have reached market maturity. Additional arts/culture and tourism product offerings are needed.	Great diversity in agriculture but most non-supply controlled sectors are struggling badly. Strong community desire to add further value to products.	Marginal growth in the number of firms in this sector. Green economy movement is creating business and employment opportunities.	Marginal improvements or decline in the rural Main Streets. Vacant storefronts in Stratford with some businesses only operating from April to October. St. Marys has experienced decline.

	Lone Eagles	Arts, Culture and Tourism	Agriculture and Agri-Food	Green and Technology Based Manufacturing	Mainstreet and Regional Centre Commercial
What is the region's current ability to capitalize on the sector?	<p>Strong. Great quality of life with wide selection of housing properties and location near larger urban nodes.</p> <p>The region is considered by many to be an entrepreneurial community.</p>	<p>This sector has become an extremely competitive market, but because of Stratford (largely) the area retains a strong external image. Continued investment needs to be made to diversify tourism product.</p>	<p>The region has potential to capitalize on this sector. There is a strong increase in the number of operators.</p>	<p>The region has held its own for retaining firms. Tremendous potential to expand businesses in green industries.</p>	<p>Stratford can add value by attracting more non-residents of the region and keeping the resident retail spending within the region. With stagnant/declining population in rural areas it will be difficult to retain business selection. St. Marys has potential but needs a centralized vision.</p>
Desired future situation	<p>A 10% increase in the number of firms being established in the region. Firms expanding from no employees to 1-9 employees.</p>	<p>An expansion of the tourism product offerings available in the region. An increase in total visitation.</p> <p>Integration of product offerings between Stratford and the rest of the region.</p>	<p>Integration between small and mid-sized agriculture operators and the arts, culture and tourism economy.</p> <p>Agri-food processors will expand in the region.</p>	<p>Business and job growth by local innovators.</p>	<p>Stratford's commercial nodes will provide different and complementary products and services. St. Marys, Mitchell, Listowel, etc. will have minimal vacancies.</p>

Based on the labour market analysis, industry analysis, community consultation, previous site selection experience and further research, the following is a weighted matrix of site location criteria – one for each of the recommended sectors. The weighted matrix identifies all site selection criteria and gives more points for important criteria.

Figure 13 – Site Selection Criteria for Recommended Targets

Investment Factors	Lone Eagles		Arts, Culture and Tourism & Commercial		Value Added Agriculture		Green and Technology Based Manufacturing	
	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance
Labour Force Characteristics		-		-		-		-
Age Profile		L		M		M		M
Commuting Patterns		L		L		L		L
Household Income		M		M		H		M
Ethnicity Profile		M		M		H		L
Size of total labour force/Participation rate		L		M		H		H
Unemployment Rate / Employment Rate		L		H		H		H
Availability of Skilled Workers	5	M	10	M	17	M	16	H
Cost of Skilled Workers		M		L		M		H
Availability of Unskilled Workers		L		M		H		M
Cost of Unskilled Workers		L		L		H		M
Competition for Required Skill Sets		L		H		M		H
Turnover / Absenteeism		L		M		M		H
Labour-Management Relations		L		L		H		H
Language Skills		M		H		M		L
Local Industry		-		-		-		-
Largest Employers		L		L		M		M
Locally Targeted Industries		H		L		M		M
Companies new to the area	5	H	6	L	8	M	8	M
Local Industry Cluster		M		H		M		M
Presence of Supplier/Support Businesses		M		M		H		H
Existing Research Base		H		L		L		L
Transportation / Distribution		-		-		-		-
Proximity to Current/Future Customers		M		H		H		H
Proximity to Suppliers/Raw Materials		L		L		M		L
Proximity to Highways		H		H		H		H
Proximity to Airports	12	H	13	H	13	L	10	L
Proximity to Railways / Intermodal		L		L		M		H
Proximity to Port Facilities		L		L		L		M
3rd Party Trucking Availability		L		L		H		H
3rd Party Warehousing Availability		L		L		M		H
Taxes		-		-		-		-
Local Property Rates	6	M	10	M	8	M	7	M
Provincial Tax Rates		L		L		M		M
Federal Tax Rates / Corporate Tax Rate		L		L		M		M
Utilities		-		-		-		-
Electricity (Capacity, Availability, Rate)		L		L		H		H
Natural Gas (Capacity, Availability, Rate)		L		L		M		M
Water (Capacity, Availability, Rate)	11	L	9	M	12	H	12	M
Water Quality		M		M		M		L
Sewer (Capacity, Availability, Rate)		L		M		H		M
Waste Management/Hazardous Facilities		L		L		L		M
Telecommunications		H		H		L		L
Local Business Environment	3	-	10	-	8	-	8	-

Investment Factors	Lone Eagles		Arts, Culture and Tourism & Commercial		Value Added Agriculture		Green and Technology Based Manufacturing	
	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance	Category Weight %	Location Factor Importance
ED involvement in local business community		L		H		H		H
Environmental Policies		M		L		H		H
Costs - Permits, Construction, Occupancy		L		M		H		H
Time to Process Permits, Site Plan		L		H		H		H
Recent Level of Development Activity		L		M		M		M
Property Availability and Cost		-		-		-		-
Industrial Building Availability		L		L		M		M
Serviced Industrial Land Availability		L		L		H		H
Commercial Building Availability		M		H		L		L
Commercial Land Availability		M		H		L		L
Cost of Land / Lease Rates		H		H		H		H
Incentives/ Support Programs		-		-		-		-
Business Financing		M		M		M		H
Provincial and Local Incentive Programs		L		M		H		H
Int'l Resources / Government Services		L		L		L		H
Local Chambers of Commerce		H		H		M		M
Education & Training		-		-		-		-
Elementary School Performance		H		L		L		L
Secondary School Performance		H		L		L		L
Community Colleges - Quality		H		M		M		H
Universities - Applicable Programs		H		L		L		M
Local Employment and Training Services		H		H		H		H
Quality of Life		-		-		-		-
Health Care Facilities		H		H		L		M
Emergency Services (Police, Fire, EMS)		H		H		L		M
Crime Rate		H		H		L		L
Recreation and Cultural Facilities		H		H		L		L
Climate		M		M		L		L
Housing Availability and Cost		H		M		M		M
Perception of Attractiveness to Incoming Employees		M		L		L		L
	100		100		100		100	

5.1 Very Strong Future Economic Driver: “Lone Eagles”

Freelance professionals, also known as ‘Lone Eagles’, are knowledge workers with highly transportable skills, such as writers, analysts, artists, accountants, trades people, sales professionals, manufacturers’ representatives and other advisors. Most live in large cities but many are moving to small towns and rural areas for better quality of life. An increasing number of rural areas that are near metropolitan cities are considering this approach. For example, Prince Edward County is centring much of their economic development campaign around this class of individual as well as agri-food producers and tourism operators (see www.buildanewlife.ca).

Lone Eagles’ infrastructure requirements are few, which means limited investment by the region. However, the following are essential: efficient telecommunications (mobile phone coverage, broadband access), reliable courier service and reasonable access to an airport with commuter flights.

By definition a Lone Eagle is someone who:

- Generates 75% or more of their income from outside the local area
- Mobile and can live where they want
- What they are fleeing:
 - Urban environment
 - Rapid development
 - Environmental degradation
- What they want to find:
 - Quality of the natural environment
 - High quality telecommunications services
 - A place closer to relatives (sometimes means returning “home”)
 - Outdoor recreational activities
 - A safer place to live
 - Employment for their spouse (if applicable)

Many fledgling entrepreneurs and Lone Eagle professionals would prefer to begin business ventures in their homes where they have fewer expenses and less risk. In response, many communities allow restricted home occupations as permitted uses in many residential zoning districts. When Lone Eagles are successful they expand their operations by leasing office space and hire staff or contract out work to other Lone Eagles (e.g. sub-consulting, bookkeeping, etc.).

Although the quality of these considerations is based on an individual’s tastes, it appears that Perth, Stratford and St. Marys can provide most of these essential requirements to someone living in another part of the Ontario, particularly the Greater Toronto Area. To ensure an appropriate openness to home occupations, the municipalities should review, on a regular basis their own local by-laws and policies as they pertain to home occupations.

The benefits to the community of a strong Lone Eagle presence are many.

1. Their dependence on local infrastructure is minimal.
2. The business operators may become the key skilled labour that is required for larger investors to feel confident in the region.
3. They provide services and supplies to larger businesses.
4. They provide a needed level of diversification which keeps it stable in tough economic times.
5. They are the same businesses that will grow quietly or quickly into 5, 10 or 50-person operations.

6. Spouses and/or children of these small business operators offer a ready supply of local employees.
7. People are much more likely shop where they work which increases economic spin-off.
8. People are much more likely to feel a sense of community if they live and work in the same place. This contributes greatly to the social side of the community by way of increased volunteerism, participation in local debates and financial donations to local non-profits/charities.
9. The types of recreational amenities, community improvements and physical environment they pursue are generally consistent with the desires of tourists or visitors from neighbouring communities. This means that an investment in attracting Lone Eagles will also attract visitors/tourists.
10. Business leaders have a way of attracting other business leaders. These Lone Eagles will be the region's ambassadors for new investment.

Figure 14 depicts the business establishments that are classified as having no employees (the best available approximation for Lone Eagles). The establishments in the “no employees” category include the self-employed and cottage industries, (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). In June 2009, 4,077 (59.5%) business establishments in the region were classified as having no employees. The highest numbers of business establishments were in:

- agriculture (1,817 establishments or 82.2% of the industry total)
- real estate and rental and leasing (361 or 83.2%)
- construction (316 or 45.5%)
- professional, scientific and technical services (207 or 57.0%)
- retail trade (187 or 33.3%)
- finance and insurance (181 or 67.3%)
- transportation and warehousing (171 or 60.6%)
- management of companies and enterprises (158 or 86.8%).

Figure 14 – “No Employee” Business Growth for Perth, St. Marys and Stratford, 2003 to 2009

Time Period	June 2009		% Increase/Decrease for No Employees from June 2003 to 2009		
	Total	No Employees	% of Total	% Growth	Growth Classification
All Industries	6,847	4,077	59.5%	8.9%	Strong Increase
11 Agriculture, forestry, fishing and hunting	2,211	1,817	82.2%	8.8%	Strong Increase
21 Mining and oil and gas extraction	11	0	0.0%	-100.0%	N/A
22 Utilities	9	2	22.2%	0.0%	N/A
23 Construction	694	316	45.5%	-3.4%	Marginal Decrease
31-33 Manufacturing	286	96	33.6%	-10.3%	Significant Decrease
41 Wholesale trade	225	96	42.7%	5.5%	Strong Increase
44-45 Retail trade	561	187	33.3%	-13.0%	Significant Decrease
48-49 Transportation and warehousing	282	171	60.6%	9.6%	Strong Increase
51 Information and cultural industries	56	37	66.1%	54.2%	Significant Increase
52 Finance and insurance	269	181	67.3%	79.2%	Significant Increase
53 Real estate and rental and leasing	434	361	83.2%	26.2%	Significant Increase
54 Professional, scientific and technical services	363	207	57.0%	8.4%	Strong Increase
55 Management of companies and enterprises	182	158	86.8%	58.0%	Significant Increase
56 Administrative and support, waste management and remediation services	153	60	39.2%	-23.1%	Significant Decrease
61 Educational services	50	26	52.0%	100.0%	Significant Increase
62 Health care and social assistance	257	43	16.7%	79.2%	Significant Increase
71 Arts, entertainment and recreation	146	105	71.9%	-9.5%	Large Decrease
72 Accommodation and food services	239	72	30.1%	-14.3%	Significant Decrease
81 Other services (except public administration)	412	142	34.5%	-10.7%	Significant Decrease
91 Public administration	7	0	0.0%	0.0%	N/A

Source: Statistics Canada, Canadian Business Patterns, 2003 & 2009.

Over the six year time period, there was growth of 334 of these types of establishments, or an 8.9% increase. The three industries with the largest amount of growth were in the agriculture (+147 establishments or an 8.8% growth rate), finance and insurance (+80 or 79.2% growth rate) and real estate and rental and leasing (+75 or 26.2% growth rate) industries.

Figure 15 – SWOT for Lone Eagles

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong community support for small business development and incubation • Well developed rural service infrastructure • Predominant in the region’s economy based upon proportion of businesses with ‘no employees’ • Home-grown business development is an employment driver and discourages diversification 	<ul style="list-style-type: none"> • Lack of incubation, small business service hubs and facilities and local business incentives • Low availability of inter-city transportation • Little flexibility for farm property severance and multiple on-site businesses could limit rural business development/expansion
Opportunities	Threats
<ul style="list-style-type: none"> • Self-propagating sector – Lone Eagles tend to support other local businesses • Attractive mix of urban/rural location and amenities for small, creative businesses • Develop business/training networks through Fanshawe, Conestoga, etc. to strengthen educational opportunities in the region • Invest in development of mentorship programs for entrepreneurs and small businesses • Mutual benefit for Lone Eagles and local youth in developing apprenticeship and on-the-job training programs through the schools 	<ul style="list-style-type: none"> • Comparative limitations in high-speed telecommunications could prohibit rural small business development re: internet marketing, social networking, research, communication with clients, etc. • Limited access to major transportation infrastructure – competition from areas closer to markets, airport, etc.

5.2 Very Strong Future Economic Driver: Arts, Culture and Tourism

The Arts, Culture and Tourism Sector provides 3,935 jobs in Perth, Stratford and St. Marys (Figure 16). Many of the jobs are in food services and drinking places (2,215 jobs) and performing arts, spectator sports and related industries (750 jobs). The labour force trends largely match the jobs in the art, culture and tourism sector with 3,945 residents in this sector. In total, the region is a slight net exporter of labour in this sector (-10 jobs to match the labour force) suggesting the industry is self sustaining by local entrepreneurs and businesses.

The very high LQs for performing arts is a direct reflection of Stratford's Shakespeare Festival. There was no other industry that had a high LQ outside of performing arts. Supporting industries such as full service restaurants and accommodation services have an average employment and labour force values. The average-to-low values in this sector suggest the Arts, Culture and Tourism Sector has reached market maturity. Efforts will need to be made to add tourism product offerings other than the Shakespeare Festival if employment and labour growth is to occur in this sector (and this has been clearly recognized by local tourism organizations such as the Stratford Tourism Alliance).

Figure 16 – Location Quotients for Arts, Culture and Tourism Sector, 2006

Sub-Industry	Jobs	Labour Force	Net exp(-) /imp(+) of labour	LQ - Jobs	LQ - Jobs Level	LQ - Labour Force	LQ - Labour Force Level
511 Publishing industries (except Internet)	200	185	15	0.65	Low	0.61	Low
512 Motion picture and sound recording industries	40	35	5	0.28	Low	0.22	Low
711 Performing arts, spectator sports and related industries	750	740	10	3.38	High	2.85	High
712 Heritage institutions	40	40	0	0.71	Low	0.71	Low
713 Amusement, gambling and recreation industries	290	305	-15	0.52	Low	0.56	Low
721 Accommodation services	400	410	-10	0.99	Average	1.06	Average
722 Food services and drinking places	2,215	2,230	-15	0.99	Average	1.04	Average
Total	3,935	3,945	-10				

Source: Statistics Canada, REDDI Tool: Labour Flow Analysis, 2006.

Market maturity is also evident through the review of the business formation data over a six-year period from 2003 to 2009. Between this time period, there was a decrease of 5 businesses (-1.2%) of the total number of businesses within the Arts, Culture and Tourism Sector (Figure 17). The strongest growth in the sub-industries had been in motion picture and sound recording (+14 establishments or 107.7% growth rate) and amusement, gambling and recreation industries (+11 or 39.3% growth rate).

Figure 17 – Businesses in Arts, Culture and Tourism Sector, Perth, St. Marys and Stratford, 2003-2009

Sub-Industry	2009	2003	Increase/ Decrease	% Increase/ Decrease
511 Publishing Industries (except Internet)	11	12	-1	-8.3%
512 Motion picture and sound recording industries	27	13	14	107.7%
711 Performing arts, spectator sports and related industries	105	110	-5	-4.5%
712 Heritage institutions	2	2	0	0.0%
713 Amusement, gambling and recreation industries	39	28	11	39.3%
721 Accommodation services	67	76	-9	-11.8%
722 Food services and drinking places	172	187	-15	-8.0%
Total	423	428	-5	-1.2%

Source: Statistics Canada, Canadian Business Patterns Data, 2003, 2009.

An estimated 4,385 residents that make up the region's Arts, Culture and Tourism Sector⁸. Nearly two-thirds (64.5%) of this industry is comprised of people employed in accommodation and food services occupations (2,830) followed by a quarter (25.8%) of the industry employed in arts, entertainment and recreation occupations (1,130). The majority of the people are employed in sales and service occupations (2,700), followed by occupations in art, culture, recreation and sport (655).

Accommodation and food services – Of the 2,830 residents in accommodation and food services, 2,370 of them are employed in sales and service occupations. There were 590 people serving as chefs and cooks. Many of the 2,370 people would be employed as waiters and other occupations typical to this industry. A total of 385 people serve management roles in this industry.

Arts, entertainment and recreation – Of the 1,130 residents in arts, entertainment and recreation, half (555) of residents have occupations in art, culture, recreation and sport. More specifically, there were 310 people employed in technical occupations and 240 people employed in professional occupations. There were also 275 residents employed in sales and service occupations.

Information and cultural industries – Of the 425 residents in information and cultural industries, 110 people are employed in business, finance and administrative occupations, followed by 85 people employed in art, culture, recreation and sport occupations.

Digital Media Centre

In March 2008, the University of Waterloo (UW), City of Stratford, Province of Ontario and Open Text Corporation announced the establishment of a Stratford Institute for digital media and global business. The investment by these organizations will allow UW to create the Open Text Centre for Digital Media Research. The centre will see researchers and students from around the world immersed in digital media applications and will forge a path for commercialization efforts in this sector

⁸ This analysis includes all sub-industries (515 – Broadcasting (except Internet), 516 – Internet Publishing, 517 – Telecommunications, 518 – Internet Service Providers and 519 – Other Information services) in Information and cultural industries, which the previous tables did not include.

The UW Press Release states:

“The Stratford Institute will be a forward-looking research and commercial convergence centre that will drive the next generation of digital media technologies, applications and content models. The institute will draw leading researchers, businesses and entrepreneurs to create, examine and commercialize opportunities in the digital media field in a global economy. It will quickly become a centre piece for collaboration, learning and sharing through conferences and workshops.”⁹

The press release continues to state that the institute will be a forward-looking research and development convergence centre that will drive the next generation of digital media technologies, applications and content models. The establishment of a digital media centre and the potential growth it may have to the region is an exciting opportunity. Digital media is a fast-paced sector and Stratford will be vying for a position as these technologies and applications advance.

Figure 18 – SWOT for Arts, Tourism and Culture

Strengths	Weaknesses
<ul style="list-style-type: none"> • Stratford Shakespeare Festival • DocFest Stratford • Stratford/Perth County is the 3rd most popular tourist destination in Ontario • Built form and architectural heritage – St. Marys and Stratford • Music & culinary festivals; Stratford Summer Music Festival, Release of the Swans, Savour Stratford • Waterfront, parks, trails • Low-cost destination with variety of amenities • Recent growth in private sector, municipal and provincial tourism and marketing funding – Stratford Tourism Alliance • Recreational tourism – The Quarry 	<ul style="list-style-type: none"> • Lack of suitable performance space for community-based arts groups (SSF inaccessible) • Decline in youth involvement and retention • Much skilled labour is imported from London and Kitchener-Waterloo – need more live-work in knowledge-based industries
Opportunities	Threats
<ul style="list-style-type: none"> • Emerging digital media concentration; opportunity for education, entrepreneurship, talent attraction • Development of University of Waterloo Stratford Institute – draw for young knowledge workers • Fund the creation of an Arts Council, cultural mapping projects • Maximize use of facilities, schools, community spaces for cultural programming geared toward youth • It’s “on the way” to Cottage Country • Develop more training for non-university digital economy jobs; more information technology, computer skills • Opportunities to grow local tourism and ‘staycations’ 	<ul style="list-style-type: none"> • Potential over-specialization in theatre and performing arts – aim to diversify cultural industries • Lack of cultural diversity and immigration/settlement services – could limit in-migration, opportunities to access new ideas and businesses • Lack of creative financing • Cultural and tourism-based labour force is transient – need to develop a ‘home grown’ cultural industry • Perception of cleavage between arts/culture/knowledge class and working class; need to broaden appeal

⁹ UW and Stratford celebrate key milestones in plans for university campus. University of Waterloo Communications and Public Affairs, last modified on March 27th, 2008.

5.3 Strong Future Economic Driver: Value Added Agriculture and Agri-Food

This sub-section examines the region's agricultural products and value added opportunities by examining sector employment & labour force, business establishments and occupations.

The Agriculture, Value Added Agriculture and Agri-Food Sector provides 5,535 jobs and employs 5,340 residents in the region. This region is a net importer of 195 agriculture-related jobs. Many of the jobs are on farms (3,775) and in food manufacturing (1,610).

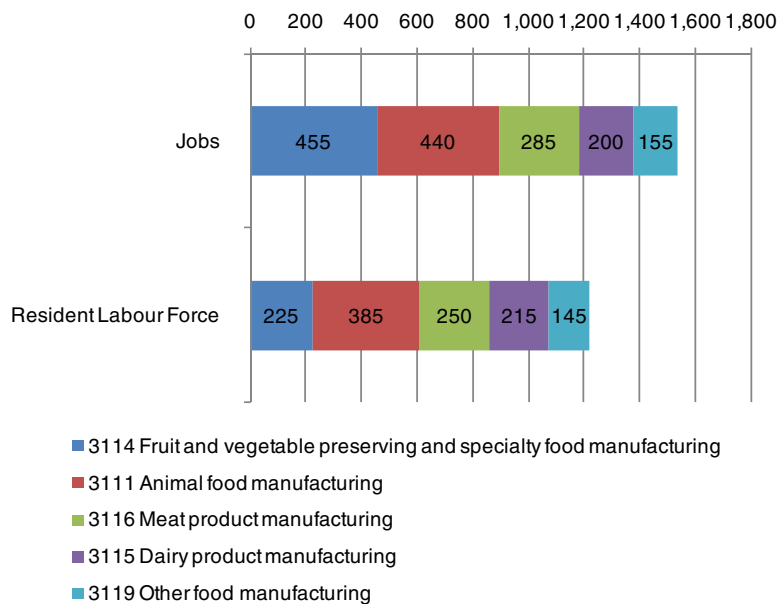
In the local agricultural industry, there are generally two types of operators:

- Large farm operators with several hundred head of animals or acres of crops and contracts with intermediaries or with large processing facilities.
- Mid-sized and small farm operators who may provide more value added agricultural products.

In the industry as a whole, food processors are recognizing the value of consumer diversity and providing more ethnic, organic and artisanal food. It is estimated that the specialty food sector has been growing by 9% annually and expected to rise to 12% in the next five years.¹⁰ Reacting to this trend are the local mid-sized and small farm operators. Locally, there has been growth in the number of entrepreneurial firms serving unique specialty markets – largely made possible by the region's proximity to a large population base in the Greater Golden Horseshoe and their growing immigrant communities.

The region has an employment and labour force concentration in food manufacturing. Specifically, jobs are highest in fruit and vegetable preserving (455) and animal food manufacturing (440) (Figure 19). With the closure of the Campbell's Soup Manufacturing plant in Listowel, the jobs in fruit and vegetable preserving are expected to have declined substantially. The recent announcement of Erie Meats using this processing space for meat product manufacturing will increase the number of jobs in this industry.

Figure 19 – Food Manufacturing Industry, 2006



Source: Statistics Canada, REDDI Tool: Labour Flow Analysis, 2006.

¹⁰ Donald, Betsy, (2009). 'From Kraft to Craft: Innovation and creativity in Ontario's Food economy.' Martin Prosperity Institute.

Business Establishments

Based on the region's unique climate and growing conditions, stakeholders have addressed an interest in pursuing the attraction of more agri-food producers, by capitalizing on the local success of the agricultural industry. There is diversity in the industry, as the results in the following table confirm. The largest number of farms are being used for dairy cattle and milk production (431), hog and pig farming (379), other grain farming that excludes soybeans, corn or wheat (329) and beef cattle ranching and farming (319). These results suggest there are opportunities to embark on value-added operations such as the production of specialty foods and biofibres.

Figure 20 – Farming Type, Region and Ontario, 2006

	Project Region	Western Ontario Region	Ontario
Total farms	2,438	18,498	57,211
Dairy cattle and milk production	431	1,849	4,937
Hog and pig farming	379	1,274	2,222
Other grain farming	329	1,617	4,420
Beef cattle ranching and farming, including feedlots	319	4,535	11,052
Soybean farming	227	1,135	5,812
Corn farming	126	425	1,694
Livestock combination farming	93	1,002	2,464
Horse and other equine production	88	1,455	4,297
Hay farming	77	1,447	5,917
Broiler and other meat-type chicken production	59	378	834
Wheat farming	59	280	953
Chicken egg production	50	227	599
All other miscellaneous crop farming	48	600	2,179
Sheep farming	30	417	1,021
Other vegetables (except potato) and melon farming	24	279	1,526
Goat farming	23	131	344
Dry pea and bean farming	16	58	152
Floriculture production	11	177	968
Fur-bearing animal and rabbit production	10	57	112
Nursery and tree production	9	411	1,474
Fruit and tree-nut farming	6	275	1,892

Note: Farm types of five or fewer were not included in the sector summary.

Source: Statistics Canada, Census of Agriculture, 2006.

The top five highest concentrations of farms are:

- Hog and pig farming (LQ 2.26)
- Corn farming (LQ 2.25)
- Dry pea and bean farming (LQ 2.09)
- Dairy cattle and milk production (LQ 1.77)
- Chicken egg production (LQ 1.67).

These high concentrations suggest a potential to further develop and grow value-added agricultural processing operations in the region. In particular, the high concentration of hog and pig farming suggests

an opportunity to explore pork processing markets. In addition, the high concentration of corn farming suggests an opportunity to explore bio-materials or renewable energy markets.

Figure 21 – Region Location Quotient Calculations, compared to Western Ontario, 2006

Farming Type	Location Quotient	Classification
Hog and pig farming	2.26	High
Corn farming	2.25	High
Dry pea and bean farming	2.09	High
Dairy cattle and milk production	1.77	High
Chicken egg production	1.67	High
Wheat farming	1.60	High
Other grain farming	1.54	High
Soybean farming	1.52	High
Goat farming	1.33	High
Fur-bearing animal and rabbit production	1.33	High
Broiler and other meat-type chicken production	1.18	Average
Livestock combination farming	0.70	Low
Other vegetables (except potato) and melon farming	0.65	Low
All other miscellaneous crop farming	0.61	Low
Sheep farming	0.55	Low
Beef cattle ranching and farming, including feedlots	0.53	Low
Floriculture production	0.47	Low
Horse and other equine production	0.46	Low
Hay farming	0.40	Low
Nursery and tree production	0.17	Low
Fruit and tree-nut farming	0.17	Low

In order to pursue further local economic development opportunities in the farming categories, it is essential to bring together the resources of potential entrepreneurs and individuals already working within the agriculture and agri-food industry. An initial pursuit may include the production of value added products for the local and regional population and eventually extending these products to outside of the region.

There are 4,095 residents in the region with occupations in the Agricultural Industry. A significant portion of the residents employed in this industry are in occupations unique to the primary industry (3,490 residents or 85.2% of the total industry). The majority of the occupations are unique to agriculture, but exclude labourers (3,405 residents). Residents are also employed in business, finance and administrative occupations (160) and sales and service occupations (140) in this industry.

Figure 22 – SWOT for Value Added Agriculture

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong agricultural heritage and history of innovation • Agricultural festivals, local fall fairs and popular support for local agriculture 	<ul style="list-style-type: none"> • Grocery outlets showing little support for local sourcing – high competition • Little local education and training resources for the industry • Restrictive regulations do not allow for alternate/secondary on-farm businesses
Opportunities	Threats
<ul style="list-style-type: none"> • Leverage growing interest and support for local/regional food supply chains • Develop local distribution network to add jobs, facilitate local food supply, and avoid re-directing through Toronto Food Terminal • Encourage grocery stores to implement Buy Local campaigns • Allow more flexible business regulation for farmers to conduct value-added activities on farm premises – enabling diversification • More incentives, tax credits and services for local business in agriculture and food processing • More agricultural apprenticeship – leverage government programs (e.g. OYAP) 	<ul style="list-style-type: none"> • Will require increased local technical training in agriculture to ensure youth participation • Agricultural rules and regulations, approvals process • Diversion of uses – without a focus on brownfields and intensification for industrial development, it is difficult to retain agricultural land • Trend towards consolidation threatens small operators – consideration of support programs, municipal tax abatements, etc. • Inflexible regulation (provincial) threatening small operators, abattoirs

5.4 Strong Future Economic Driver: Green and Technology Based Manufacturing

In order to better understand the capacity of the green energy and technology based manufacturing sector within the region, it is essential to identify employment levels, number of businesses and the skills capacity for the sector. A set of industries were selected from the North American Industrial Classification System (NAICS), which comprise this sector. A list of industry classifications have been identified which allows for an understanding of the range of labour force activity that is occurring in the region.

The green and technology based manufacturing sector covers a wide range of activity that includes electricity generation, waste and sewage treatment, fabricated metal product manufacturing and transportation equipment manufacturing. The following figure uses the list of industries to determine the size of the region's employment base and labour force in this sector, sub-industry location quotient value and the number of workers that either travel into the region for employment or travel outside of the region for employment.

There are five sub-industries that stand out as having large numbers of jobs and a resident labour force. These sub-industries are as follows:

1. 3363 Motor vehicle parts manufacturing (1,940 jobs, 1,305 resident labour force)
2. 3262 Rubber product manufacturing (1,225 jobs, 950 resident labour force)
3. 3261 Plastic product manufacturing (955 jobs, 695 resident labour force)
4. 3329 Other fabricated metal product manufacturing (670 jobs, 565 resident labour force)
5. 3345 Navigational, measuring, medical and control instruments manufacturing (455 jobs, 385 resident labour force).

The region is a net importer of labour for all of these five sub-industries.

Five subsectors had very high location quotient values:

1. 3262 Rubber product manufacturing (LQ – jobs 16.31, LQ – labour force 13.39)
2. 3326 Spring and wire product manufacturing (LQ – jobs 15.87, LQ – labour force 11.73)
3. 3329 Other fabricated metal product manufacturing (LQ – jobs 9.23, LQ – labour force 8.16)
4. 3324 Boiler, tank and shipping container manufacturing (LQ – jobs 7.75, LQ – labour force 5.76)
5. 3345 Navigational, measuring, medical and control instruments manufacturing (LQ – jobs 5.36, LQ – labour force 4.77).

The very high LQs in these industries suggest that the region has developed a specialization. These industries are drawing people from outside of the region to fill jobs in these sub-industries.

In total, there are approximately 8,500 jobs in the green and technology based manufacturing sector. The sector is a significant net importer of labour with over 1,300 jobs.

The review of the number of businesses in this sector reveals stagnant growth. Industries where there was business growth were limited to fewer than 10 businesses over the six-year time period. There was close to no growth in utilities, printing and related support activities manufacturing, chemical manufacturing, computer and electronic product manufacturing and electrical equipment manufacturing. The sub-industry with the largest business growth was fabricated metal product manufacturing, growing to

55 businesses from 48 in 2003. Other fabricated metal products grew by six firms, followed by machine shops (two) and coating activities (two).

In total, there was net business growth in this sector of four firms (a 1.9% increase), growing from 211 to 215 firms.

Figure 23 – Number of Business Establishments, Green and Technology Based Manufacturing, Perth County, St. Marys and Stratford, 2003-2009

Industry (NAICS)	2009	2003	Increase/ Decrease	% Increase/ Decrease
221 Utilities	9	8	1	12.5%
322 Paper manufacturing	2	2	0	0.0%
323 Printing and related support activities	12	13	-1	-7.7%
324 Petroleum and coal products manufacturing	2	0	2	0.0%
325 Chemical manufacturing	8	7	1	14.3%
326 Plastics and rubber products manufacturing	12	14	-2	-14.3%
327 Non-metallic mineral product manufacturing	13	15	-2	-13.3%
331 Primary metal manufacturing	0	3	-3	-100.0%
332 Fabricated metal product manufacturing	55	48	7	14.6%
3321 Forging and stamping	0	1	-1	-100.0%
3322 Cutlery and hand tool manufacturing	0	0	0	0.0%
3323 Architectural and structural metals manufacturing	8	10	-2	-20.0%
3324 Boiler, tank and shipping container manufacturing	7	6	1	16.7%
3325 Hardware manufacturing	1	2	-1	-50.0%
3326 Spring and wire product manufacturing	2	2	0	0.0%
3327 Machine shops, turned product, and screw, nut and bolt manufacturing	21	19	2	10.5%
3328 Coating, engraving, heat treating and allied activities	3	1	2	200.0%
3329 Other fabricated metal product manufacturing	13	7	6	85.7%
333 Machinery manufacturing	34	31	3	9.7%
334 Computer and electronic product manufacturing	3	2	1	50.0%
335 Electrical equipment, appliance and component manufacturing	3	4	-1	-25.0%
336 Transportation equipment manufacturing	14	18	-4	-22.2%
337 Furniture and related product manufacturing	27	25	2	8.0%
339 Miscellaneous manufacturing	21	21	0	0.0%
Total	215	211	4	1.9%

Source: Statistics Canada, Canadian Business Patterns Data, 2003, 2009.

A further review of the occupational data for the region's utilities and manufacturing industries provides an indication of the type of jobs in the local green and technology based manufacturing sector. Of the 9,380 occupations in these two industries, the five largest occupations are:

1. Machine operators (1,760 residents)
2. Assemblers in manufacturing (1,715 residents)
3. Labourers in processing, manufacturing and utilities (1,095 residents)

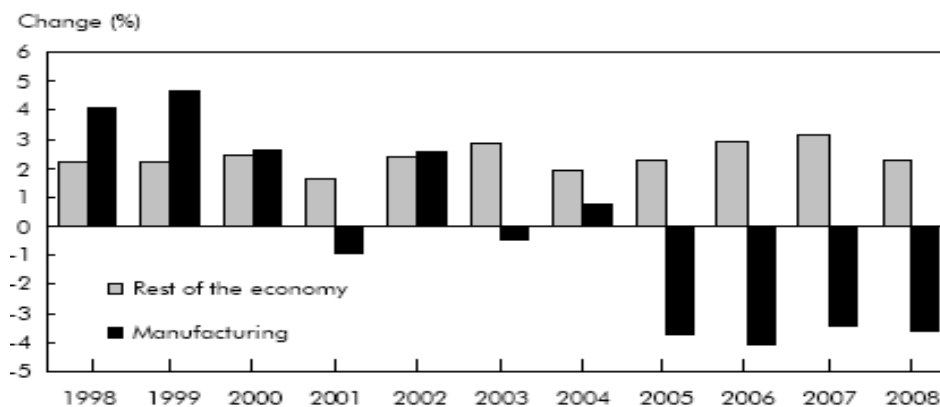
4. Clerical occupations (715 residents)
5. Machinists, metal forming, shaping and erecting occupations (670 residents).

Components of a successful manufacturing sector include:

- Strong technology associations to promote and foster networks that generate entrepreneurship and company alliances
- Presence of original equipment manufacturers (OEMs) and mid- to small-tier companies including related activities in research, design, manufacturing, product testing, sales and operations. These companies create jobs and the innovation behind technologies that result in the origination of new customer markets
- Transportation (air, sea, highway) and telecommunications infrastructure are imperative to the supply chain
- Demonstrated ability to attract private and public dollars for research and spawn new companies, including funding from government contracts and grants to provide dollars for jobs, manufacturing, R&D and facilities
- Post-secondary academic institutions with established communication channels to industry for the development of curricula and training programs to upgrade workforce skills.

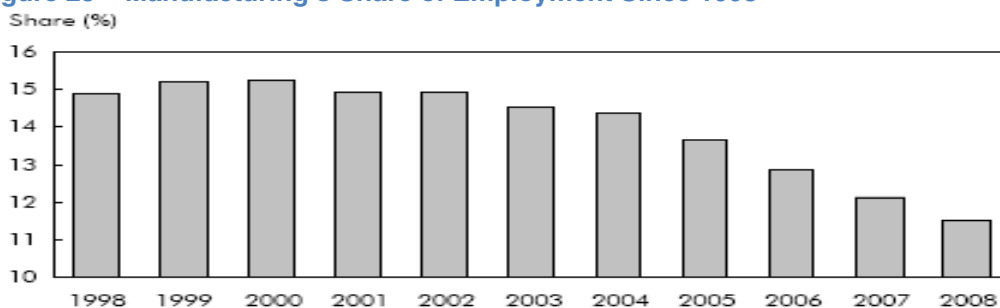
Manufacturing has really struggled in Canada over the last decade and the short term picture, due to broad based over-capacity in operating facilities, does not look overly promising for new investment. Consider the following figures published in February, 2009 by Statistics Canada.

Figure 24 – Change (%) in Employment, Manufacturing vs. Rest of the Economy, 1998-2008



Source: Statistics Canada, Labour Force Survey.

Figure 25 – Manufacturing's Share of Employment Since 1998



Source: Statistics Canada, Labour Force Survey.

While no province has been completely immune from manufacturing's downward cycle over the last decade, Ontario has fared the worst. It lost 198,600 manufacturing jobs between 2004 and 2008, a decline of 18.1%.

Growth in Green

One of the sole exceptions to the sector's bleak outlook in Ontario is in the alternative energy manufacturing cluster where Ontario's *Green Energy Act* is positioning the province as a North American destination for new investment. And to emphasize the future importance of this industry, the United Nations Environment Program (UNEP), the International Labour Organisation, and the International Trade Union Conference collaborated on the 'Green Jobs Initiative' which gives some indication as just how significant the green sector is likely to become. Global investment in green energy, excluding large scale hydro, has increased from \$10 Billion USD in 1998, \$20 Billion USD in 2003, \$28 Billion USD in 2005, \$50 Billion USD in 2006, to an estimated \$66 Billion in 2007.

All indicators point to further growth. Clean Edge, a U.S.-based research and advocacy group, believes that global investment in green energy will reach more than \$210 billion by 2016¹¹. Clean Edge and others forecast substantial further growth (Figure 26).

Figure 26 – Growth in Global Investment in Renewable Power Generation

Projected Growth in Global Investment			
Technology	2003	2006	2016
Wind Power	\$8 Billion	\$17.9 Billion	\$60.8 Billion
Solar PV	\$4.7 Billion	\$15.6 Billion	\$69.3 Billion
Biofuel		\$20.5 Billion	\$80 Billion
Fuel Cells/Hydrogen		\$1.4 Billion	\$15.6 Billion

In comparing renewable energy to fossil fuel power plants, a report by Kammen, Kapadia and Fripp reviewed several studies from the US and Europe and found that renewable energy power plants generate more jobs per average megawatt of power manufactured and installed, per unit of energy produced, and per dollar of investment (Figure 27).

¹¹ Clean Edge retrieved from, <http://www.cleaneedge.com/spotlight/>

Figure 27 – Jobs Created in Renewable Power Generation¹²

Average Employment over Life of Facility (Jobs per megawatt of average capacity)			
	Manufacturing, Construction, Installation	Operations & Maintenance / Fuel Processing	Total
Solar PV	5.76-6.21	1.2-4.8	6.96-11.01
Wind Power	0.43-2.51	0.27	.70-2.78
Biomass	0.40	.38-2.44	.78-2.84
Coal Fired	.27	.74	1.01
Natural Gas Fired	.25	.70	.95

It is estimated that Ontario's new feed-in-tariff for solar PV installation alone could result in as many as 100,000 household/rooftop solar installations. This would be the equivalent of 1,200 MW of installed capacity. According to the above chart this level of installed capacity for solar would generate 6,912 to 7,452 jobs in Ontario, assuming all of the manufacturing, construction and installation was done by Ontario workers (the feed-in-tariff program insists that 40% of all services and parts must be "Made in Ontario" and that figure will rise to 60% in 2011).

Similarly, industry Canada expects installed wind capacity in Canada to increase by 3,050 MW by 2012¹³ generating an estimated 1,311 to 7,655 manufacturing, construction and installation jobs. Current investment in renewable energy projects (complete and under construction) in Ontario already amounts to \$4 Billion¹⁴. The Ontario Government expects the following green collar jobs to be created through the Green Energy Act:

- Manufacturing and Assembly
- Manufacturing components and supply
- Construction and Engineering
- Maintenance and Servicing
- Architecture and Design
- Education and Skills Training
- Installation and Inspections
- Home Audit and Retrofitting
- Transportation and Logistics
- Finance and Accounting
- Computer Software and Hardware Development

The Local Sector Supply Chain

In order to identify potential investment opportunities related to the region's green and technology based manufacturing sector, a methodology developed by Dr. Edward Feser, the head of the Department for Urban and Regional Planning at the University of Illinois at Urbana-Champaign, can be used to study the supply chain of a target sector. In the course of his work on regional economic analysis, Dr. Feser has

¹² Putting renewable to work retrieved from, <http://rael.berkeley.edu/old-site/renewables.jobs.2006.pdf>

¹³ Industry Canada Wind Power retrieved from, http://www.ic.gc.ca/eic/site/rei-ier.nsf/eng/h_nz00001.html

¹⁴ ibid

done detailed analysis on national level US statistical data related to input/output of sales, in order to develop a measurement of the relative strength of inter-industry linkages. Feser’s work shows the connection between ‘Core’ and ‘Linked’ Industries. The average propagation length (APL) is used to note the strength of the industry connection, both forwards (linked industries that ‘purchase’ from the core industry) and backwards (linked industries that ‘supply’ the core industry). Generally speaking, the average propagation length is the average number of steps or time it takes a stimulus in one industry to propagate and affect another industry¹⁵. The lower the APL value, the tighter the linkage between a specific industry and the core industry. The relationship is noted by the figure below.

Figure 28 – Dr. Feser’s Linked Industries Model



Related to the above, it is important to note that the analysis provides the strength of the industry linkage, but little information about how the industries are linked, or through what products. In some cases, a connecting product or service between the core and linked industries can be assumed based on their core activities. For example, the relationship between pharmaceutical and medicine manufacturing as a core industry and basic chemical manufacturing as a supplier. However, the exact relationship may be slightly less evident in other cases, like the presumably weak linkage between religious organizations as a supplier, and metalworking and machinery manufacturing core industries. What is missing is an explicit indication of what products or services link different industries, which could be useful when looking at industries with weak relationships.

Dr. Feser’s framework and calculation of APL values can be applied to the region to assess the extent to which the region is capturing value along the supply chain for this target sector. The advantage to this model is the identification of opportunities both upstream and downstream to the core industry. Figure 29 shows the 10 closest linked industries both upstream and downstream of the motor vehicle parts manufacturing industry. The diagram shows the specific 4-digit NAICS as well as the relative strength of that industry in the region as defined by its employment location quotient and number of jobs. Upstream and downstream industries with LQs less than 1 theoretically offer the greatest potential for investment in the region. In both the backward (supplier) and forward (customer) linkages the motor vehicle parts manufacturing industry was ranked in the top 10 indicating that these firms are supplying product to businesses in the same industry.

¹⁵ Dietzenbacher, E. and Romero, I. Production Chains in an Interregional Framework: Identification by Means of Average Propagation Lengths. *International Regional Sciences Review*, 2007

Figure 29 – Motor Vehicle Parts Manufacturing Upstream and Downstream Linked Industries

4-Digit NAICS	Supplier Industries	Core Industry	4-Digit NAICS	Customer Industries
3363	Motor vehicle parts manufacturing (Employment LQ = 3.15, Jobs = 1,940)	Motor vehicle parts manufacturing	3361	Motor vehicle manufacturing (Employment LQ = 0.20, Jobs = 75)
3161	Leather and hide tanning and finishing (LQ = 3.63, Jobs = 10)		8111	Automotive repair and maintenance (LQ = 1.27, Jobs = 495)
3315	Foundries (LQ = 0.00, Jobs = 0)		4851	Transit and ground passenger transportation (LQ = 0.13, Jobs = 15)
3361	Motor vehicle manufacturing (LQ = 0.20, Jobs = 75)		4911	Postal service (LQ = 0.63, Jobs = 130)
3321	Forging and stamping (LQ = 1.16, Jobs = 55)		3363	Motor vehicle parts manufacturing (LQ = 3.15, Jobs = 1,940)
3323	Architectural and structural metals manufacturing (LQ = 1.39, Jobs = 215)		4411	Retail trade (i.e. Automobile Dealers) (LQ = 1.36, Jobs = 500)
3133	Textile and fabric finishing and fabric coating (LQ = 0.91, Jobs = 10)		3369	Other transportation equipment manufacturing (LQ = 2.07, Jobs = 30)
3262	Rubber product manufacturing (LQ = 16.31, Jobs = 1,225)		3331	Agricultural, construction and mining machinery manufacturing (LQ = 1.33, Employment = 65)
3327	Machine shops, turned product, and screw, nut and bolt manufacturing (LQ = 1.58, Jobs = 220)		4841	Truck transportation (LQ = 1.18, Jobs = 390)
3362	Motor vehicle body and trailer manufacturing (LQ = 1.33, Jobs = 60)		4931	Warehousing and storage (LQ = 0.54, Jobs = 55)

Source: Dr. Feser Linked Industry Model.

Note: LQs come from the Province of Ontario's REDDI Local Economic Analysis Tool, 2006.

In Figure 29 above, there is no distinction, from the supplier side, between the provision of goods and services to the core industry. The chart presented here supports the suggestion made in community consultation that there are opportunities to further develop technology based manufacturing by further developing the sector value chain.

In some of these industries, the region already has a competitive advantage to build on. The industries with a pre-existing competitive advantage are those with an employment LQ > 1 and an employment base of more than 200 employees include:

- Rubber product manufacturing (LQ = 16.31, 1,225 jobs)
- Motor vehicle parts manufacturing (LQ = 3.15, 1,940 jobs)
- Machine shops, turned product, and screw, nut and bolt manufacturing (LQ = 1.58, 220 jobs)
- Architectural and structural metals manufacturing (LQ = 1.39, 215 jobs)
- Retail trade (i.e. Automobile Dealers) (LQ = 1.36, 500 jobs)
- Automotive repair and maintenance (LQ = 1.27, 495 jobs)
- Truck transportation (LQ = 1.18, 390 jobs).

Although the specialized design, engineering and technical services industries did not rank as the top 10 backward and forward linked industries, there are opportunities for these types of firms to supply these services to the local motor vehicle parts manufacturing industry.

The results shown in Figure 29 can be supplemented with the business patterns work, also completed as part of this project, to reveal not only the industries of focus and their relative strength, but also an indication of the businesses active in the region in that industry.

Figure 30 shows the 10 closest linked industries both upstream and downstream of the motor vehicle manufacturing industry. This industry was included because of the region's proximity to motor vehicle assemblers in Woodstock (Toyota), Cambridge (Toyota), Ingersoll (CAMI) and Alliston (Honda). The diagram shows the specific 4-digit NAICS as well as the relative strength of the supplier and customer markets in the region as defined by its employment location quotient and number of jobs. Again, upstream and downstream industries with LQs less than 1 theoretically offer the greatest potential for investment in the region. In both the backward (supplier) and forward (customer) linkages the motor vehicle body and trailer manufacturing industry was ranked as the top industry indicating that firms in this industry have the strongest link to motor vehicle manufacturing.

Figure 30 – Motor Vehicle Manufacturing Upstream and Downstream Linked Industries, 2006

4-Digit NAICS	Supplier Industries	Core Industry	4-Digit NAICS	Customer Industries
3362	Motor vehicle body and trailer manufacturing (Employment LQ = 1.33, Jobs = 60)	Motor vehicle manufacturing	3362	Motor vehicle body and trailer manufacturing (Employment LQ = 1.33, Jobs = 60)
3141	Textile furnishings mills (LQ = 3.13, Jobs = 65)		3331	Agricultural, construction and mining machinery manufacturing (LQ = 1.33, Jobs = 65)
3363	Motor vehicle parts manufacturing (LQ = 3.15, Jobs = 1,940)		8111	Automotive repair and maintenance (LQ = 1.27, Jobs = 495)
3343	Audio and video equipment manufacturing (LQ = 0.00, Jobs = 0)		4871	Scenic and sightseeing transportation and support activities for transportation (LQ = 0.00, Jobs = 0)
3336	Engine, turbine and power transmission equipment manufacturing (LQ = 0.74, Jobs = 10)		3365	Railroad rolling stock manufacturing (LQ = 0.00, Jobs = 0)
3361	Motor vehicle manufacturing (LQ = 0.20, Jobs = 75)		3361	Motor vehicle manufacturing (LQ = 0.20, Jobs = 75)
3345	Navigational, measuring, medical and control instruments manufacturing (LQ = 5.36, Jobs = 455)		4851	Transit and ground passenger transportation (LQ = 0.13, Jobs = 15)
3272	Glass and glass product manufacturing (LQ = 0.57, Jobs = 20)		4821	Rail transportation (LQ = 0.00, Jobs = 0)
3262	Rubber product manufacturing (LQ = 16.31, Jobs = 1,225)		4411	Retail trade (i.e. Automobile Dealers) (LQ = 1.36, Jobs = 500)
3325	Hardware manufacturing (LQ = 0.24, Jobs = 10)		3363	Motor vehicle parts manufacturing (LQ = 3.15, Jobs = 1,940)

The industries with a pre-existing competitive advantage are those with an employment LQ > 1 and an employment base of more than 200 employees . The supplier industries are limited to three industries with a competitive advantage. They include:

- Rubber product manufacturing (LQ = 16.31, Jobs = 1,225)
- Navigational, measuring, medical and control instruments manufacturing (LQ = 5.35, Jobs = 455)
- Motor vehicle parts manufacturing (LQ = 3.15, Jobs = 1,940).

Employment in the region`s top 10 supplier industries to motor vehicle manufacturers totals 3,860 in 2006. In 2001, total employment in these industries was 3,805. Over the five year time period, employment increased by 1.4%.

Figure 31 – SWOT for Green and Technology Based Manufacturing

Strengths	Weaknesses
<ul style="list-style-type: none"> • Excellent management-labour relations • Diversity of industries and manufacturing businesses • Proximity to major markets, transport networks (Highway 401, 7), suppliers • Use, maintenance and expansion of Ontario’s FIT and microFIT programs • Wider range of tools and incentives available through the <i>Green Energy and Green Economy Act, 2009</i> 	<ul style="list-style-type: none"> • Perception of little support from the municipalities for manufacturing • Difficulty finding skilled labour – need more training for skilled trades (HVAC, heavy equipment, etc.) • More incentives for local manufacturing and research and development • Provincial ministry regulations and red tape regarding labour, environmental issues • Poor recycle/re-use plans on regional scale, both residential and industrial
Opportunities	Threats
<ul style="list-style-type: none"> • Encouraging local businesses and government to support and utilize alternative energy – municipalities to lead by example • Opportunity for energy production and resale through waste re-use (i.e. coordinated regional waste strategy) • Improved supply chain networking, local buying groups, etc. • Emphasize community/co-op based green energy projects to generate community buy-in – more P3s • Champion regional businesses to demonstrate international leadership in green energy, biotech, energy (Festival Hydro, Nuhn, Energrow, etc.) • More apprenticeship – leverage government programs 	<ul style="list-style-type: none"> • Regional and global decline in manufacturing value chain • Labour force downsizing among older workers – more skills training, literacy and numeracy for undereducated is required • Lack of local ‘up-training’ facility • Also need to increase skilled trades among youth – training mainly in Kitchener-Waterloo and London • Zoning issues – lack of an integrated land use policy that increases residential/commercial density and designates areas for industrial growth • Reliance on imports of energy and goods threatens local export base and self-sustainability of region • Need to ensure ongoing availability of serviced land

5.5 Moderate Future Economic Driver: Main Street/Regional Centre Commercial Development

Municipal economic development offices across Ontario give different weight to directing effort towards the retail/commercial industry. In some areas it is given low priority because it is not seen as a wealth-generating industry. In other words, its growth is seen as dependent on the growth of industries that bring new money into the community (e.g. technology based manufacturing, business services, tourism, agriculture, etc.).

City of Stratford

In some instances retail and services does bring a substantial amount of new money into the community. This is the case for “regional hubs” such as Stratford. Businesses in the city serve a market population well beyond that of the city alone. The location quotients for retail employment were 1.02 and 0.97 in 2006 and 2001, respectively. This means that while the city is looked upon as a shopping destination for visitors and people in the regional vicinity (which would push the LQ above 1) there is also significant leakage of retail spending to even larger regional centres such as Kitchener and London. (which would push the LQ below 1).

In two respects, this strategy is emphasizing the importance of maintaining the city’s regional importance by ensuring products and services that are offered here will attract and keep people to spend their dollars. This will maintain employment and commercial property tax revenue.

While the commercial economy is strong, as stated above, one can be sure that money is still leaving in the form of residents shopping in other communities. Whether this is Waterloo, Kitchener or London, people naturally take advantage of broader selection and perceived or real lower prices when in these cities.

The City should put effort towards determining the leakage out of Stratford by store type. This information could be shared with existing operators and/or used to encourage investment from new operators in an attempt to fill product gaps.

At the same time, there are special considerations in working in this sector:

- It is important to try and differentiate the retail and services offered in the city’s commercial nodes: Downtown, Festival Marketplace, Stratford Mall and others.
- Through the economic development website, the City can offer tools to the private sector as well as those organizations working with investors (e.g. BIA, CFDC, real estate agents) that offer valuable site location information. These can include comprehensive available properties data, market threshold data, community profiles, etc.
- Working with downtown retailers is one of the best ways for the City to show value to the entire community.

“Main Streets” for St. Marys and Perth County’s Villages

Main streets in rural communities represent the centre of commercial activity and the ‘heart’ of the community. The quality of the Main street built environment and public spaces indicates the municipality’s interest and investment in making the area an attractive place for private sector business investment. Many of the retailers and commercial businesses in the rural areas provide products and services for the local population. Added to the mix of retailers and commercial businesses are vacant

storefronts. These vacancies suggest a current over supply of retail and commercial space in the rural communities.

Participants in consultations stated there is an interest in promoting all main street downtowns in the region instead of competing against each other for local retail spending. Region wide main street promotion will be necessary for small town retailers to remain viable. The decreasing population base in the rural communities will make retailing and population serving commercial more difficult to remain viable unless the local population purchases more product. Efforts will need to be made to integrate arts, culture and tourism product with offerings in small towns, including St. Marys and across Perth County.

Figure 32 – SWOT for Value Main Street and Regional Centre Commercial Development

Strengths	Weaknesses
<ul style="list-style-type: none"> • Unique shopping (Stratford and St. Marys) • Attractive mix of retail, arts and culture and natural attractions • Establishment of County BIAs (e.g. Mitchell, Listowel) 	<ul style="list-style-type: none"> • Lack of off-season destination events – largely driven by festival season • Market Square underutilized – needs to be redeveloped
Opportunities	Threats
<ul style="list-style-type: none"> • More designated downtown venues for performance, retail, arts • More year-round activity in the downtowns – bars, pubs, shops open year-round, supported by new business development • More year-round recreational activities • Focus on building a ‘creative commons’ in downtowns • Presence of new University of Waterloo building will support more year-round retail in Stratford • WiFi access in the downtowns • Downtown investment program through OMAFRA/RED funding • Coordinate business associations among the lower-tier municipalities for funding 	<ul style="list-style-type: none"> • Underutilization of spaces – ‘greyspace’ and empty storefronts discourages growth • Need to also maintain local greenspace and parks as part of downtowns • Wider selection of goods, longer store hours, and more competitive costs in larger centres (Stratford, Kitchener-Waterloo, London) continue to draw more shopping away from smaller downtowns • 2009 Retail Gap report identified primary gaps in shoes and family apparel, youth activities, and brand/value chains for commercial areas in Perth County

5.6 Industry Sector Convergence

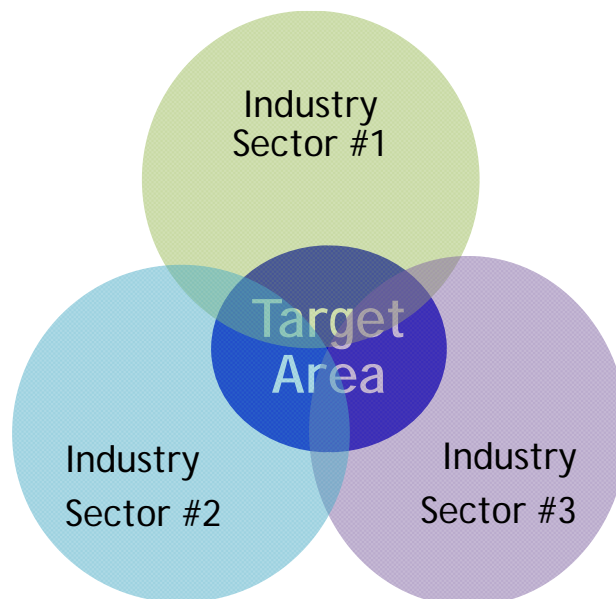
Most communities have several business sectors where a concentration of business ventures, community organizations, educational institutions and other organizational structures overlap or converge in their areas of focus and expertise.

The development of a genuine cluster-growth strategy is a nuanced approach that allows communities to identify those specific areas of convergence that are complimentary to each other, and thus identify the point(s) at which the community has a unique regional, national or global competitive advantage. In essence, the cluster development process is built on the notion that where several areas of competitive advantage and strength converge in an economy, there is an opportunity for aggressively driving additional investment and business growth. Further, because the bulk of this growth is located at the point where strong sectors converge, it requires a diversity of sectoral strength that few other communities can hope to match or replicate.

It is at the points of convergence, where the fringes of multiple sectors begin to merge, that a community has unique competitive advantages. For example, while many communities are strong in the life sciences sector or strong in digital media, very few are strong in both. This means immediately that this community should be able to outcompete other communities for investments that rely on or are linked to both of these sectors (e.g. bio-informatics).

IF it is possible to add a third pillar (such as technical/professional services) (e.g. medical devices) then there is a highly focused nexus of competitive advantage where virtually no other community can outcompete in this space – hence, it is the “sweet spot” for cluster development and investment attraction efforts. This concept is shown in the graphic below.

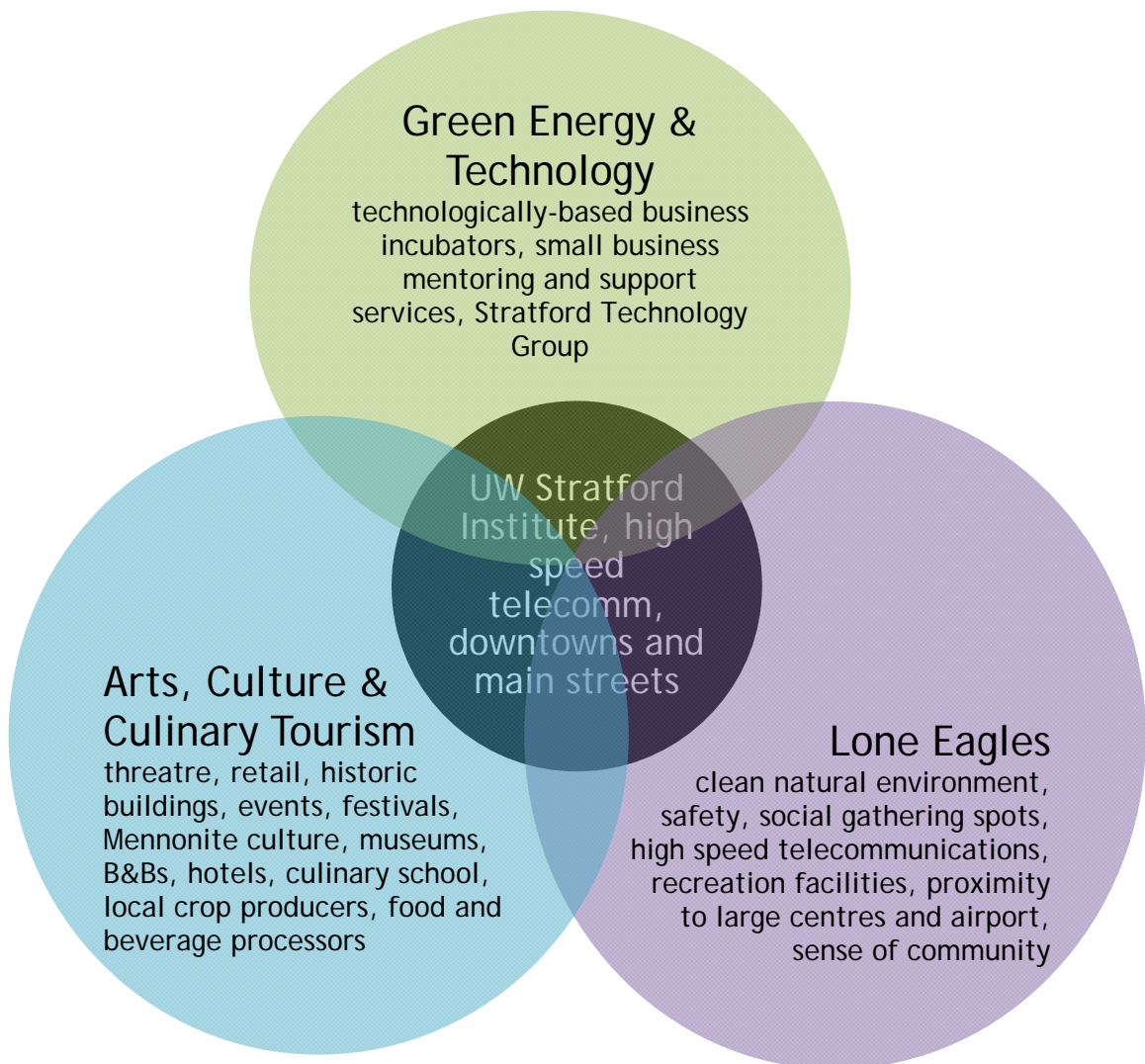
Figure 33 – Industry Sector Convergence and the “Sweet Spot”



At a practical level, this approach suggests to the region that the area of greatest competitive advantage lies in activities that incorporate elements of activity from each of the three supporting sectors.

As Figure 34 indicates, there are several areas of multiple industry concentration and where the convergence creates unique opportunities. There is a strong interconnection between the heritage tourism, arts and culture facilities and culinary tourism industry. The region also has unique natural features, which cannot be duplicated in any other region such as the St. Marys Quarry, Avon River and Thames River. The economic impact the University of Waterloo’s Stratford Institute for Digital Media will have on the interconnection of the target sectors remains uncertain, but it will converge onto the target markets eventually.

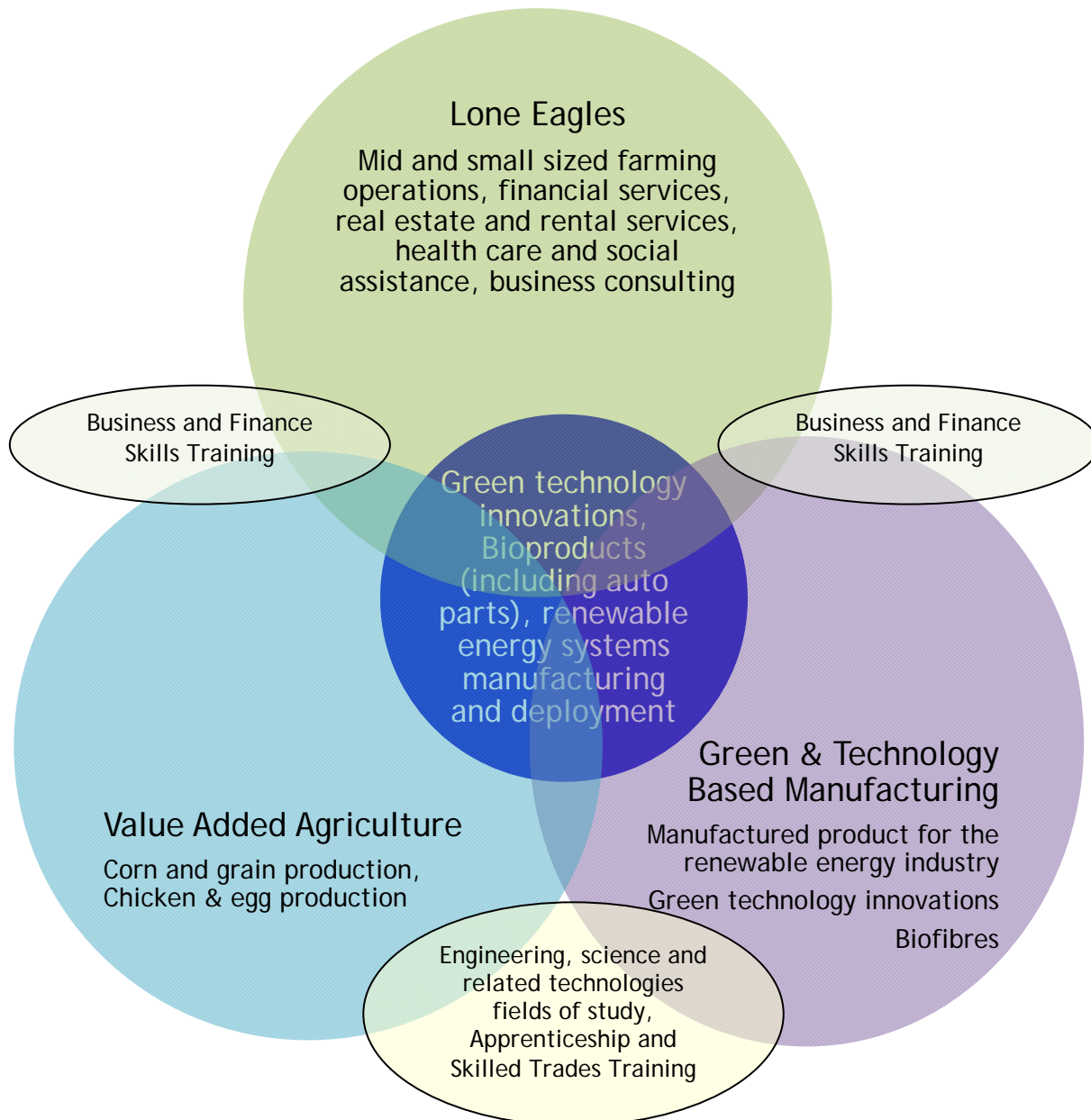
Figure 34 – Getting Focused: Interconnection of Quality of Place, Tourism and Business



The figure points to arts, culture and tourism opportunities, but it also points to challenges since tourism product is not completely in place. The sector remains seasonal. Festivals and events do not occur year round and rural main streets are not integrated with the tourist/visitor experience to Stratford.

There is also a very strong interconnection between the product and services of Lone Eagles, Green & Technology Based Manufacturing and Value Added Agriculture as displayed in Figure 35.

Figure 35 – Local Strength in Converging Sub-Sectors



6 Five Year Marketing Action Plan

The Marketing Action Plan looks at a medium-term time frame with achievable short-term goals. With limited dollars and people to carry out the mandate it is very important to remain focused.

In addition, Economic Development does not act in isolation – it impacts and is impacted by the community’s environmental, cultural and social objectives. Also, with the exception of St. Marys, tourism services/marketing is fulfilled by non-municipal agencies. As a result, the municipalities must be open to partnerships: accepting them when approached by others and being proactive about establishing them.

Speaking of partnerships, throughout the consultation process there has been an indicated desire to have the region’s economic development service deliverers work more closely together. Keeping this in mind, within each of the sector-based action plans will be an indication of how the municipalities and other agencies can work together. There are three levels of “working together” that are indicated:




1. Collaborate- Working together on issues that are naturally regional in nature such as labour force development and cultural mapping.
2. ‘Co-opetition’- Working co-operatively at a regional level to attract investment and attention with the full understanding that each municipality will enact its own resources to compete for the final decision.
3. Full Co-operation.- Working together with a full understanding of issues and the benefit to the whole of the region.

























6.1 Improve Investment Fundamentals Marketing Action Plan














There are a number of fundamentals that need to be addressed to take the leap into a more aggressive sector attraction campaign. Mainly these need to be taken care of in the first year, but dealing with them does not have to happen (and should not happen) at the expense of all of outward marketing initiatives.

Strategic Objective #1: Regularly achieve a high standard of services delivery and maintain top quality promotional presence in target markets and in social media.

Figure 36 – Strategic Directions – Economic Development Services Delivery

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Annual Planning	Adequate resources dedicated to investment retention and attraction. Review budget for spending that is not associated with accomplishing these action plans. Reallocate appropriately. Similarly for human resources.	annual			

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
	Complete annual one-year Marketing Action Plans/Business Plans/Work Plans that will focus human and financial resources for all initiatives during the upcoming year. The plans will make an objective assessment of the previous year's efforts, relating the outcomes to the targets that were set at the beginning of the year and how they fit with the directions identified in the Strategy. Development of plan will determine the promotion and measurable strategies to be implemented.	annual			
	Maintain a detailed and current source of community data including skills inventory, available property information and labour market statistics. Ongoing updates (minimum quarterly for all but skills inventory which is annual).	annual			
Capacity Building	Identify communities with "Best in Class" or "Best Practice" success stories, and invite them to the region to share the stories of their success in sessions open to the community	semi-annual			
Workforce Development	Develop an immigrant settlement services program using the Huron County Immigration Partnership Project and the Waterloo Region Immigration Network as models.	2010-2014			
	Enhance local labour force training initiatives such as the Technical Training Group, theatre trades training and culinary trades.	2010-2014			
Branding, Marketing and Promotion	Develop a common marketing identity for St. Marys, Perth and Stratford. Local political boundaries have very little bearing on how businesses choose where to invest and taking advantage of each community's strengths and assets presents a more competitive product.				
	Enhance website to be dedicated to the above sector priorities.	2010			
	Continue/investigate to possibilities of using Wiki technology or applications such as Facebook to establish online communities of residents and "alumni". Use this capability to deliver message and establish a continuous feedback for improving outreach.	2011			
Service Delivery – Department	Enhance the website to project investment information based on the sectors herein. More can be done to convey information that is relevant to potential investors (see weighted site selection rankings).	2010			
	Put all economic development materials online and make them readily available either as the user is browsing alone or on the phone with the economic development office	2011			
	Make all applicable municipal services and information available on-line, including delivery of all permitting, approvals, and licensing through the municipal websites.	2010			

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
	Establish an “open data” environment aimed at promoting and providing access to municipal data that can be freely used, re-used and distributed to anyone, subject to privacy and security concerns.	2011			
	Continue to enhance the ability to provide immediate email responses with relevant attachments, including community profile, available properties, mapping and labour force information	2011			
	Develop an “exit strategy” to track unsuccessful projects. This can be as simple as a survey with companies that leave the region or prospects that did not come to the region.	2010			
Retention & Expansion	Have an ongoing business retention and expansion program. Establish annual measurable expectations on the number of business owners and managers to meet with in each sector. Expand the program to include a specific set of questions that are asked of everyone with good opportunity to probe.	2012			
	The retention and expansion initiative (and many others included herein) depend on a comprehensive inventory of businesses that are located in the region. Establish a joint business directory.	2010			
	Develop an inventory of products and services that existing business require for business operation to create more business to business opportunities within the local market.	2011			
Contact Management	Transition to a robust and user friendly Contact Relationship Management system.	2012			

6.2 Lone Eagles Sector Marketing Plan







Strategic Objective #2: Promote the region to Lone Eagles as the preferred destination for small business in southwestern Ontario through reaping the opportunities available from the region’s many quality of place advantages.




Figure 37 – The Messaging for Lone Eagles Target

The Approach	Timetable for			
	Further Investigation	Partnership Development	Product Development	Promotion
We’re ready. Let’s go out and get the investment!	Those people in our community who can deliver the message of “strong community” along with “individualism” and “opportunity” must be brought into the initiative.	Social media and public relations strategies are key to success. Small business groups must be contributing. Community’s message must be well-coordinated.	Public profile needs to be energized. Additional measures like investment in ‘quality of place’ infrastructure will assist.	Currently, the main emphasis of the initiative. Distribution list of alumni, website and public relations are key.

The heaviest emphasis for the Lone Eagle sector is in the public relations and internet/website strategies. Most of the required direction is identified there (Section 5.1).

Figure 38 – Recommended Lone Eagles Sector Initiatives

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Investment Attraction	The heaviest emphasis for the Lone Eagle sector is in the public relations and internet/website strategies (see Appendix V).	2011			
	The most likely future investors are those who have previous ties to the community or those in the urban centres that are within 2 hours. Consistently distribute information to this group and involve them in social media. <ul style="list-style-type: none"> Establish distribution lists of existing citizens and business owners, graduated high school students, people who once worked in the community Dedicate significant resources to providing ongoing information to this target group through social/interactive media networking, email distribution, website postings, newspaper/radio/television appearances 	2011			
	Work with media to promote success stories of young persons and New Canadians who have chosen to make their homes/careers in the area	2011			















Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
	Undertake periodic surveys of local Lone Eagles (on a statistically representative basis) that identifies aspects they feel would improve the quality of life; implement as required	2011			










6.3 Arts, Culture and Tourism Action Plan

Strategic Objective #3a: Better integrate tourism product offerings across Perth County, St. Marys and Stratford and become a leading overnight destination in Ontario.

Strategic Objective #3b: Develop the beginnings of a digital media cluster into a growth node that has spin off benefits with the business, theatre and education communities, strengthening the region's position as an attractive place for young workers and creative enterprise.

Figure 39 – Recommended Arts, Culture and Tourism Sector Initiatives















Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Capacity Building	Integrate Stratford Tourism Alliance and Perth Visitors Association into the dialogue with the municipal economic development offices in an ongoing manner.	2010			
Workforce Development	Identity training and skills upgrading needs in the sector: <ul style="list-style-type: none"> develop a training needs assessment group comprised of economic development/tourism organizations and industry identify options for training and skills upgrading that could be provided through the local CFDC develop and deliver courses and programs as required for the sector (e.g. business and finance skills for small business owners) 	On-going			
	Hold information and awareness-building session on 'upgrading your tourism business' to keep businesses aware of tourism and cultural opportunities. <ul style="list-style-type: none"> undertake background work with successful tourism operators who can attest to the payback of investments in improvements (inspiring stories) and would be prepared to let their experiences stand as examples to others. Invite all tourism operators in the region to attend 	On-going			
	Continue with social and digital media training programs and conferences/seminars that are aimed at educating the general public and business community on opportunities that are available.	On-going			
	Enhance and encourage theatre trades training programs such as Off the Wall in Stratford.	2010-2014			
	Complete a cultural mapping exercise to better understand the linkages between tourism products.	2011			




Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Product Development	Diversify tourism product beyond theatre that uses local assets such as historic buildings, Mennonite culture and agriculture.	2011			
	Develop unique events and festivals that embrace the rural heritage of villages and ensure that they occur throughout the year.	2012			
Young Adult Engagement	Use local facilities and community spaces to showcase young adult success stories.	2011			
Retention & Expansion	Explore business development opportunities between the UW Stratford Institute for digital media and the arts, culture and tourism sector organizations.	2012			
	Network with the CFDC and lending institutions to better understand business financing requirements.	On-going			

6.4 Agriculture and Agri-Food Action Plan

Strategic Direction #4: Create higher value added agricultural opportunities that build off of the region's quality farming practices.

Figure 40 – Initiatives: Agriculture and Agri-Food Action Plan































Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Product Development	Organize a 'trade team' to visit communities that have developed value added agriculture economies. Include local food processors, farmers, CFDC and advisory committee members.	2011			
	Arrange a follow up where product developers visit the region to work with local people to develop new products.				
	Expand local production and access to local food through the development of farm gate sales, farmers markets and a more robust food distribution network.	2011			
	Liaise with local institutions such as schools, municipal offices and hospitals to local farmers and buy local products for their facilities.	2011			
	Evaluate the municipal by-laws and food support programs and make adjustments to grow home-based and farm-based small business in this sector.	2011			
Workforce Development	Build a cooperative program with local schools to grow interest in youth in the areas of food production, processing, marketing/retailing and distribution.	2012			
	Enhance and encourage local trades training programs in culinary arts, charcuterie and artisan cheese preparation.	ongoing			
Government Processes	Advocate to provincial and federal regulators the inflexible regulations that threaten small value added agricultural operations	2010			
Investment Attraction / Development	Assemble a value added agriculture sub-committee. Identify source funds for agri-food investment.	2012			
	Continue to identify potential processors in southern Ontario who are expanding and need industrial space that can be provided in the region. Target these processors for local business expansion.	2010			

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Marketing & Promotions	Continue to develop marketing campaigns that put the region on the food map. Include websites, in store displays in targeted markets, local advertising in targeted markets, etc.	2012			
	Promote the agriculture and agri-food success stories that make the region resilient to changes in the sector.	2011			

6.5 Green & Technology Based Manufacturing Action Plan

Strategic Direction #5: Build off of the region`s traditional manufacturing strengths to create an environment that nurtures development in green and technology based manufacturing.















Figure 41 – Initiatives: Green & Technology Based Manufacturing Action Plan








Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Workforce Development	Encourage skilled trades training and engineering technologies study to youth and the local employment opportunities present in the region.	2011			
	Support Technical Training Group initiatives to provide accessible skills up-training.	2010			
Government Processes	Support and utilize alternative energy solutions with municipalities leading by example through their own procurement and capital spending projects.	2010			
	Provide an ongoing supply of available “shovel-ready” industrial lands.	2010			
	Build flexibility into planning policy, zoning by-laws and other municipal policy to allow for diverse energy and manufacturing uses.	2011-2014			
	Provide local businesses and industry with information about federal and provincial government programs that support the adoption of green technologies.	ongoing			
Business Retention & Expansion	Develop local sector networking and professional development (i.e. workshops, training) opportunities.	2012			
	Formalize a Business Retention and Expansion program between the three municipalities.	2011			
Investment Attraction / Development	Explore the opportunity of district heating, local energy production and resale of waste.	2013-2014			
	Build the value proposition or the interconnection between value added agriculture, renewable energy and strong entrepreneurial base in promoting the region.	2013-2014			
	Develop the value chain by targeting businesses for expansion.	2011-2014			
Marketing & Promotions	Promote the local success stories of companies that have demonstrated leadership in green initiatives (e.g. Energrow) or high tech manufacturing.	2011			
	Encourage local businesses to support and utilize alternative energies	2011			

6.6 Regional Retail/Services Marketing Action Plan

Strategic Direction #6: Ensure the viability of all main streets, the “hearts and souls” of their community through ongoing capital investment as well as brands/promotional campaigns and retail/services mixes that differentiate them.

Figure 42 – Initiatives: Regional Retail/Services Marketing Action Plan

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
Planning	Repeat Market Threshold Analysis, Residents Survey and Push/Pull Factor Analysis every three years to determine whether retail/commercial conditions have changed and if priority to this element should change	2012			
	Focus on creating more vibrant main streets and downtowns through events and festivals, investments in free access wireless internet, cafe culture, and ‘creative commons’.	2012			
Product Development and Investment Attraction/Retention	Build off of the findings of the Perth County Retail Gap Report to assist local merchants to expand products and services that are available to local consumers.	2011			
	Encourage retail merchants and business associations to join together and offer convenient hours of operation which meet the needs of the local community.	2010			
	Ensure all available commercial properties are identified and updated in website properties guide	2011			
	Work with local associations to undertake a more formal business retention initiative that includes an annual visit to every business.	2011			
	Develop up-to-date mobile internet access that covers as much of the region as possible and is available to all businesses, citizens and visitors. For initial roll out concentrate on downtown cores.	2013			
Marketing and Promotions	<p>Some of the most likely future investors are those who have previous ties to the community. Consistently distribute information to this group and involve them in social media.</p> <ul style="list-style-type: none"> Establish distribution lists of existing citizens and business owners, graduated high school students, people who once worked in the community Dedicate resources to providing ongoing information to this target group through social/interactive media networking, email distribution, website postings, newspaper/radio/ television appearances 	2011			

Strategic Category	Recommended Initiative	Time-frame	Level of Interaction between Service Deliverers		
			Collaborate	Co-opetition	Full Co-operation
	Look to bring all of the Perth County main streets and St. Marys and Stratford together under one common marketing banner that also aims to differentiate the communities. Similar to Madoc, Marmora, Stirling and Tweed's <i>Explore the Four</i> concept (www.comfortcountry.ca).	2011			
	Based on the development of a commercial recruitment strategy, implement a communications plan to reach out to important influencers.	2012			
	Educate municipal staff and politicians on the role of the commercial recruitment strategy, its objectives and the importance of them constantly speaking to the initiative.	2011			
	Develop a lure package and distribute at community events and retention visits. Many of the people starting new retail/commercial operations will be locals, not people from out of town. These are good venues to educate the local public that the community is interested in and needs a more diverse set of services and retail.	2012			

7 Conclusion

The economic development plan provides the County of Perth, Town of St. Marys and City of Stratford with clear direction that can help these communities develop their economies strategically.

The target sectors to help focus regional efforts include:

1. Lone Eagles
2. Arts, Culture and Tourism
3. Agriculture and Agri-Food
4. Green and Technology Based Manufacturing
5. Regional Retail/Services.

The strategic objectives provide purpose for economic development and tourism efforts. They are realistic in that they reflect the local resources available. They are as follows.

1. Regularly achieve a high standard of services delivery and maintain top quality promotional presence in target markets and in social media.
2. Promote the region to Lone Eagles as the preferred destination for small business in southwestern Ontario through reaping the opportunities available from the region's many quality of place advantages.
3. For the unique Art, Culture and Tourism sector:
 - a. Better integrate tourism product offerings across Perth County, St. Marys and Stratford and become a leading overnight destination in Ontario.
 - b. Develop the beginnings of a digital media cluster into a growth node that has spin off benefits with the business, theatre and education communities, strengthening the region's position as an attractive place for young workers and creative enterprise.
4. Create higher value added agricultural opportunities that build off of the region's quality farming practices.
5. Build off of the region's traditional manufacturing strengths to create an environment that nurtures development in renewable energies and technology based manufacturing.
6. Ensure the viability of all main streets, the "hearts and souls" of their community through ongoing capital investment as well as brands/promotional campaigns and retail/services mixes that differentiate them.

The establishment of the University of Waterloo Stratford Institute for Digital Media is an exciting development for the region. As the Institute advances, the region will need to showcase itself as a leading centre of digital media and global business.

With an action plan laid out and an understanding of the potential of social media the County of Perth, Town of St. Marys and City of Stratford has the tools it needs to capitalize on its opportunities.

Appendix I

Focus Group Results and Interview Participants

PERTH COUNTY, CITY OF STRATFORD TOWN OF ST MARYS

**ECONOMIC DEVELOPMENT FOCUS GROUP HIGHLIGHTS
FEBRUARY 9-10, 2010**

Participants:
See participant list
In Association with:
Millier, Dickenson, Blais
Queen's University Executive Decision Centre
Facilitator: Erik Lockhart
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Executive Summary

Attached are meeting proceedings from the Perth County, Stratford, St Marys focus groups held on February 9-10, 2010. The purpose of the sessions was to solicit input and advice from the broader community on economic development. The group explored the following questions:

1. Looking ahead 5 years what would Perth County, Stratford, St Marys be like if you had the power to make it any way you wanted? Perth County, Stratford, St Marys will have been successful when we have the following in place...
2. What are the major differences between now and your vision for the future? (a) What needs to stay the same? (b) What needs to change?
3. Understanding what these differences are, how do we get from where we are now to where we want to be? What key actions should be included in Perth County, Stratford, St Marys economic development strategy?

There were six focus groups comprising representatives from the following sectors:

1. Council and Staff
2. Agriculture, Rural Development
3. Entrepreneurs and Export oriented companies
4. Manufacturing and Automation
5. Alternate Energy
6. Tourism, Culture, Health & Wellness

Q1. Vision for 2015. We will know we have been successful when...

1. **Full employment.** There is full employment with quality, sustainable jobs and a highly skilled, well trained workforce ready and adaptable to the market demands
2. **Opportunities for our young.** Young families find good jobs and return home to raise families.
3. **Thriving agriculture.** Our agricultural community is financially self sustaining and we have invested in value-added food processing opportunities
4. **Not a one horse town.** The region has a mix of diverse industries that are not vulnerable to economic swings.
5. **Magnet for knowledge workers.** We are recognized as the community in Canada to come to if you are a professional seeking smaller urban/rural setting to locate your creative business.
6. **New media mecca.** We are seen as a source of innovation and talent haven for digital media.
7. **Green Centre of Excellence.** We are a hotbed for green with alternate energy all pervasive and local companies developing new environmentally friendly energy products and services in areas such as wind, solar, geothermal.
8. **Political will and public engagement in green.** There are high adoption rates of renewable energy across the region and politicians “walk the talk” with respect to enacting green legislation.
9. **Vibrant downtowns.** Our downtown cores are healthy, active and breeding grounds for new business. We have thriving, pedestrian friendly market places and no empty store fronts.
10. **Best in class arts and culture.** We have: a new performing arts centre; facilities that are accessible to all; a strong educational component perhaps linked with college or university; a strong and fair arts decision making governance body.
11. **Regional municipal cohesion.** Our local governments realize there is strength in numbers and regularly collaborate at a regional level.

Q2. What to keep, maintain, stay the same?

- Sense of community: friendly, everyone knows each other, and feels safe
- Rural schools: need to ensure we keep schools in rural settings and avoid buses
- Diversity: arts, culture, theatre, rural, urban,
- Lifestyle: urban/rural, countryside
- Beautiful surroundings: parks, green space, trails, trees, gardens, rivers.
- Health care access: excellent hospitals
- Lots of creative minds with entrepreneurial spirit
- Community engagement: good philanthropic base and many grassroots volunteers
- Agricultural emphasis: we need to protect our farming lands and heritage
- Chef school

Q3. What to change in the next 2-3 years	Group						Sum
	1	2	3	4	5	6 *	
1. Support for small business (incubation, entrepreneurs, financing, mentoring)		11	6	4	10	5	36
2. Green awareness: community reuse/recycle	4			6	14	12	36
3. Co-operation across municipalities -> need regional approach	9	6	4			13	32
4. Renewable energy thrust: coop, support, networking		8		6	16		30
5. Red tape: rules, regulations, approvals process	9	11				7	27
6. Skills training, education facilities	13		3		10		26
7. Agricultural support: funding, resources		11	3		10		24
8. Buy local: raise awareness of local products		12	6	5			23
9. Downtown revitalization: year round, store fronts, facades, brownfields			6			14	20
10. More attractions year round (beyond festival, summer, symposiums)				12			12

* Note: group 6 results were cut in half to give more equal weighting across focus groups.

Q4. Ideas for immediate implementation
(see section 4.1-4.6 for detail)

Editor's Notes:

- The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
- The symbol // indicates that two similar ideas have been merged together.
- This document contains the meeting proceedings and is not intended as a "Final Report"

1.0 – Vision 2015

Looking ahead 5 years what could Perth County, Stratford, St Marys be like?
 What would be the key indications/evidence that your Entrepreneurs & Exporters has been successful?
 We know we have been successful when...

1.1 – Group 1 (Council & Staff)

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 26

Total number of voters (N): 15

Total

- 8 1. Full employment ...create more employment
- 7 2. Diversity in employment ...new economy firms coming to our area
- 7 3. Keeping the young people in our communities to make them grow ...allowing young people to return home and work raise families
- 6 4. New industries throughout the area ..variety in new industries
- 6 5. maintain infrastructure
- 6 6. young people going into skilled trades
- 5 7. well trained and fully employed labour force
- 5 8. innovation and new ideas being generated by local businesses
- 5 9. To be able to keep our small businesses in our Community growing.
- 4 10. steady growth ...population growth of 5% ...keep the growth of our communities
- 4 11. our university and college grads being able to move back to good jobs
- 4 12. All three working together as if we were one
- 4 13. manufacturing development in smaller communities
- 3 14. keeping our industries
- 3 15. Balanced population.
- 3 16. To encourage new development with medium employment and not larger employers.
- 2 17. affordable housing ..affordable housing for lower income families
- 2 18. more education offerings
- 2 19. education for our youth
- 1 20. Perth county governance gone, municipalities reorganized into functional, strategic regions of near-equal strengths
- 1 21. smooth cohesive recreation facilities and activities
- 1 22. make more industry
- 0 24. basic focused retraining facilities for workers
- 0 25. maintain our development charges
- 0 26. more laptops

1.2 – Group 1 (Refinement of top 10)

Note: the group took the top 16 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

1. **XXX diversity in employment ...new economy firms coming to our area ...new industries throughout the area ..variety in new industries**
2. **XXX keeping the young people in our communities to make them grow ...allowing young people to return home and work raise families ...our university and college grads being able to move back to good jobs**
3. **XXX To be able to keep our small businesses in our Community growing.**
4. **XXX keeping our industries ...manufacturing development in smaller communities (includes value added areas such as processing)...To encourage new development with small/medium employment and not larger employers.**
5. **XXX well trained labour force ... young people going into skilled trades**
6. full employment ...create more employment ... 4 - 5 %
7. maintain infrastructure
8. innovation and new ideas being generated by local businesses
9. Steady growth ...population growth of 5% ...keep the growth of our communities ..Balanced population (age)
10. Alignment & cohesion. All three working together as if we were one

1.3 – Group 2 (Agriculture, Rural Development)

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 46

Total number of voters (N): 17

Total

- 6 1. Healthy self sustaining rural agriculture community ...financially stable agriculture sector
- 6 2. small abattoirs in the community to serve the need of farmers and the demand for local food
- 5 3. We need to look to the future at alternative energy including wind power, solar and geothermal ...More focus on Climate Adaptation
- 5 4. be model for economic development without sacrificing farmland
- 5 5. More rural based small businesses serving both the local and regional markets
- 5 6. Investment in further processing of food beyond primary agriculture
- 5 7. More flexibility with rural based businesses
- 4 8. Value-added processing businesses of our local food
- 4 9. Highway 7/8 development needs to be finalized and they made hard decisions
- 4 10. thriving farmers' markets across the county, including in small towns
- 3 11. Entrepreneurial opportunities for our youth - tied in with Stratford campus
- 3 12. transfer of family farms between generations to become more viable than has been in last generation
- 3 13. attract high school youth to Perth county aside from just agricultural families
- 3 14. Better linkages between Stratford, St Marys and rural businesses/education and tourism
- 3 15. Make local food more available
- 3 16. farmers' markets with the financial resources they need to promote the market, local food available at them
- 3 17. Easier rules for new "green" technology and practices e.g.: straw bale building construction
- 3 18. renewable energy co-ops producing electricity
- 3 19. continue to protect agricultural lands, within reason
- 3 20. visioning beyond five year terms
- 3 21. supporting existing small businesses in Perth County
- 3 22. Well trained labour force
- 2 23. Daycare for rural dwellers - before and after school programs close to home
- 2 24. Local food tourism
- 2 25. producing to fill specific needs of clients overseas
- 2 26. creating partnerships with countries of similar characteristics.
- 2 27. vibrant local schools overflowing with children
- 2 28. to work together better - our county is VERY divided (I know we did our own focus group last year)
- 2 29. Water and utilities for outlying areas that don't have municipal services
- 2 30. Funding/resources for small farm operations
- 2 31. to be known and be thought of the # 1 agricultural county in the province
- 2 32. Perth county becomes a regional government
- 2 33. Financial stability of non-supply managed commodities
- 2 34. communities have a say re. large scale energy projects in their community
- 2 35. to have more people move here ...more people living in our rural areas
- 1 36. Community gardens that allow villagers with small lots to grow their own vegetables and fruits
- 1 37. to keep our young people here - they go off to university and don't return as we don't have the jobs here to attract them
- 1 38. apprenticeship program for culinary crafts fleshed out
- 1 39. More jobs.

- 1 40. Re-localization of resources to become sustainable
- 1 41. Perth county is the Parma of North America
- 0 42. farmers make an adequate income from their farms to stay on their farms
- 0 43. satellite secondary education opportunities
- 0 44. zoning bylaws relaxed in villages to allow for a mix of residential and commercial/industrial
- 0 45. Buying local from private farms what are the concerns and ramifications

1.4 – Group 2 (Refinement of top 10)

Note: the group took the top 22 (>3 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

- 1. XXX Healthy self sustaining rural agriculture community ...financially stable agriculture sector**
- transfer of family farms between generations to become more viable than has been in last generation
- 2. XXX small abattoirs in the community to serve the need of farmers and the demand for local food**
- 3. XXX More rural based small businesses serving both the local and regional markets ...More flexibility with rural based businesses ..supporting existing small businesses in Perth County**
- 4. XXX Investment in further processing of food beyond primary agriculture ...Value-added processing businesses of our local food**
- 5. XXX Attract & retain young people**
- Entrepreneurial opportunities for our youth - tied in with Stratford campus
- Attract high school youth to Perth county aside from just agricultural families
- 6. XX We need to look to the future at alternative energy including wind power, solar and geothermal ...More focus on Climate Adaptation ...Easier rules for new "green" technology and practices e.g.: straw bale building construction ...renewable energy co-ops producing electricity**
7. be model for economic development without sacrificing farmland ...continue to protect agricultural lands, within reason
8. Highway 7/8 development needs to be finalized and they made hard decisions
9. Make local food more available
- thriving farmers' markets across the county, including in small towns
farmers' markets with the financial resources they need to promote the market, local food available at them
10. Better linkages between Stratford, St Marys and rural businesses/education and tourism
11. visioning beyond five year terms
12. Well trained labour force

1.5 – Group 3 (Entrepreneurs & Exporters)

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 38

Total number of voters (N): 10

Total

- 4 1. We would have rail commute between Stratford, KW, Toronto
- 4 2. We were self sustaining with a great mix of industries that could, as a whole, weather storms for the region
- 4 3. Highly skilled People came to the region in droves because of the unique blend of community, arts and economic landscape we represented
- 3 4. Community town centres would be vibrant and breeding grounds for new local business
- 3 5. We become recognized as THE COMMUNITY in Canada that you locate to if you are a professional seeking a smaller urban/rural setting to locate your creative industry business. ... the region is perceived as a viable option for knowledge workers
- 3 6. We would lead Canada as the new, new media Mecca
- 3 7. Financing and mentorship for new entrepreneurs would be available through a network of existing, successful local angel investors/entrepreneurs.
- 3 8. Young people would stay because of the entrepreneurial support and spirit of entrepreneurialism throughout the County ...We would be more recognized for entrepreneurship and innovation than for artistic excellence
- 2 9. we will have a new mentality in the way we spend our money, the consumers will be more discerning giving priority to products produce in the county
- 2 10. Like minded entrepreneurs would work together
- 2 11. Alt Energy would be everywhere, visually and behind the scene
- 2 12. we would be recognized as a source of innovation especially in digital media
- 2 13. Local entrepreneur's success will be recognized both internationally and locally.
- 2 14. act as a family unit recognizing the distinct differences that make each community unique
- 2 15. we will join in export ventures in partnership with overseas countries
- 2 16. Taxes would be lower due to a larger tax base
- 2 17. we will became a green county developing new energies environmentally friendly
- 2 18. ... the region is perceived as a hotbed of creative collaboration in its chosen verticals: i.e. alt energy, performing arts, agri business or ...
- 1 19. Localization would be a recognized bias and shopping local would be entrenched as the SMART thing to do.
- 1 20. There would be social integration across manufacturing and knowledge/cultural industries
- 1 21. the hoped for urban regeneration is fully realized
- 1 22. We experience double digit population growth in all age categories under 40 years old throughout the region.
- 1 23. Lone Eagles would come together in partnerships/consortiums to develop/create virtual companies competing on the international stage with global calibre talent.
- 1 24. We experience double digit economic growth
- 1 25. The region will be a recognized destination for professional immigrants seeking professional and entrepreneurial opportunities in Canada.
- 1 26. There was a synergistic tie between local government, higher education and business
- 1 27. .. there are local talent options: i.e., it's not necessary to run down the highway to purchase top flight business/marketing services
- 1 28. when we become more competitive on the world stage
- 1 29. Technology allows companies to live locally and have global clients
- 1 30. The down town core would be closed to car traffic, and a thriving marketplace and core would be an accelerator for collaboration
- 1 31. we have less provincial govt. intervention,

- 0 32. An economy that isn't seen as being only motivated by tourist revenue
- 0 33. Our leading edge companies are able to source secondary skills and services locally vs. going to India (and other countries)
- 0 35. bussing is an issue no matter where the school is located. Need a new style of school in multiuse facility
- 0 36. Our county was written up in Fast Company (not just businesses but because of the harmony between community elements)
- 0 37. recognize that exports recognize a need in another location
- 0 38. Instead of school closings, we will be having meetings to determine where to locate the new elementary schools throughout the region. ...Young families flock to our region because of excellent schools

1.6 – Group 3 (Refinement of top 10)

Note: the group took the top 18 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

- 1. XXX We were self sustaining with a great mix of industries that could, as a whole, weather storms for the region**
- 2. XXX We become recognized as THE COMMUNITY in Canada that you locate to if you are a professional seeking a smaller urban/rural setting to locate your creative industry business.** ... the region is perceived as a viable option for knowledge workers ..Highly skilled People came to the region in droves because of the unique blend of community, arts and economic landscape we represented ... the region is perceived as a hotbed of creative collaboration in its chosen verticals: i.e. alt energy, performing arts, agri business or ...
- 3. XXX We would lead Canada as the new, new media Mecca ..we would be recognized as a source of innovation especially in digital media**
- 4. XXX Alt Energy would be everywhere, visually and behind the scene ...we will became a green county developing new energies environmentally friendly**
- 5. XXX Community town centres would be vibrant and breeding grounds for new local business**
6. We would have rail commute between Stratford, KW, Toronto
7. Financing and mentorship for new entrepreneurs would be available through a network of existing, successful local angel investors/entrepreneurs.
8. Young people would stay because of the entrepreneurial support and spirit of entrepreneurialism throughout the County ...We would be more recognized for entrepreneurship and innovation than for artistic excellence ..Like minded entrepreneurs would work together ...Local entrepreneur's success will be recognized both internationally and locally.
9. Localization would be a recognized bias and shopping local would be entrenched as the SMART thing to do....we will have a new mentality in the way we spend our money, the consumers will be more discerning giving priority to products produce in the county
10. act as a family unit recognizing the distinct differences that make each community unique
11. we will join in export ventures in partnership with overseas countries
12. Taxes would be lower due to a larger tax base

1.7 – Group 4 (Manufacturing & Automation)

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 38

Total number of voters (N): 14

Total

- 7 1. Offset for keeping manufacturing on shore
- 6 2. Access to local training resources for skilled trades ... well trained workforce
- 6 3. better access to 401 ... better access to markets, i.e. highways
- 6 4. More new manufacturing employers that can compete globally ... No lost manufacturing facilities due to low cost economies - COMPLETELY AGREE
- 5 5. sustainable industries providing gainful employment
- 5 6. Substantially lower business/property taxes
- 4 7. Cooper Standard site converted to university campus
- 4 8. focus on green energy ..promotion of renewable energy projects
- 4 9. advocacy group dealing with government barriers
- 3 10. 1000 new manufacturing jobs in technical or niche markets
- 3 11. bio energy development i.e. methane
- 3 12. High grade internet access
- 2 13. More technology based industry
- 2 14. Easier to access rail line
- 2 15. Ongoing and open communication and sharing of ideas for improving and promoting the area
- 2 16. Low cost energy readily available
- 2 17. Local "future trends" forums
- 2 18. allow farm severances to strengthen the rural population
- 2 19. A more balanced approach to local government spending
- 1 20. No road closures due to "snow"
- 1 21. better flow of traffic around Stratford
- 1 22. greater collaboration between everyone
- 1 23. Affordable housing
- 1 24. fewer American based manufacturers ... emboss a Canadian flag on everything we manufacture
- 1 25. make small town and country living "in" again - encourage and market the lifestyle
- 1 26. recognize and support diversity: green, vegan/vegetarian lifestyles for sustainability and conservation of resources
- 1 27. profiles available of each manufacturer or service provider within Perth county
- 1 28. More visitor attractions/ accommodations in the outward communities
- 1 29. No empty retail spaces in downtown core
- 1 30. Unemployment less than 2%
- 1 31. better communications between small and mediums sized enterprises through newsletters and focus groups
- 1 32. Relocalization of resources - 100 mile
- 1 33. continued clean up of "eyesore" properties in the city of Stratford
- 0 34. financial education for children and youth
- 0 35. better research of consumer needs
- 0 36. allow businesses that are geared to agriculture to operate in rural areas
- 0 37. Facilities to retain and attract younger employees

1.8 – Group 4 (Refinement of top 10)

Note: the group took the top 19 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

1. XXX More new manufacturing employers that can compete globally ... No lost manufacturing facilities due to low cost economies -Offset for keeping manufacturing on shore -> 1000 new manufacturing jobs in technical or niche markets

No lost manufacturing facilities due to low cost economies

2. XXX sustainable industries providing gainful employment

3. XXX Substantially lower business/property taxes

4. XXX focus on green energy ..promotion of renewable energy projects ...bio energy development i.e. methane ...Low cost energy readily available

5. Access to local training resources for skilled trades ... well trained workforce

6. Access to 401 ... better access to markets, i.e. highways

7. Cooper Standard site converted to university campus

8. advocacy group dealing with government barriers

9. High grade internet access

10. More technology based industry

11. Easier to access rail line

12. Ongoing and open communication and sharing of ideas for improving and promoting the area ...Local "future trends" forums

13. allow farm severances to strengthen the rural population

14. A more balanced approach to local government spending

1.9 – Group 5 (Alternate Energy)

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 56

Total number of voters (N): 23

Total

- 10 1. Perth County becomes a Centre of Excellence in alternative energy, with local education institutions offering programs.
- 8 2. promote clean renewable energy ..High adoption rate of renewable energy systems across the region
- 6 3. neighbourhood power generation
- 5 4. politically driven mandate driving renewable projects
- 5 5. on farm bio gas plans
- 5 6. Retain existing and create new and sustainable employment throughout the county in alternative energy : sales, installation, manufacturing.
- 5 7. few people commuting long distances to work
- 5 8. policies to support/mandate green standards in all new facilities
- 5 9. better high school trades training
- 5 10. society that supports green energy thinking ..Citizens educated & knowledgeable about the benefits of sustainable energy (economic, health, environmental) and purchase or subscribe to renewable energy.
- 5 11. coordinated opportunities between industry and education
- 4 12. public educated further about the benefits of implementing alternative energy systems... remove stigmas
- 4 13. Studies regarding the health effects of wind power have been completed
- 4 14. support for existing facilities to retrofit
- 4 15. Retention of agricultural land
- 4 16. large scale co-operative bio-digester
- 4 17. Population retention - keep our youth here as they train
- 4 18. PC/S/SM have all completed energy audits and have maximized conservation within their organizations
- 3 19. Fewer roadblocks from the municipalities regarding tower installations
- 3 20. LED streetlights and LED office lighting is prevalent in all municipal buildings
- 3 21. better infrastructure (roads, bridges, sewers etc.)
- 3 22. balance between work and family
- 3 23. high adoption rate of electric vehicles
- 3 24. clean environment
- 3 25. FIT and MicroFIT projects are evident throughout Perth County
- 3 26. low unemployment
- 3 27. best trained workforce in Canada ..lots of training for everyone
- 2 28. efficient facilities
- 2 29. government grants and funding for renewable energy systems
- 2 30. healthy family life
- 2 31. continue to promote geothermal heating and cooling
- 2 32. Citizens educated in the benefits (economic, health, concern for the environment) of alternative/sustainable energy an
- 2 33. culture of conservation
- 2 34. alternatives to waste diversion
- 2 35. jobs for everyone from labourers, farmers, thinkers, etc.
- 2 36. solar panels on 20% of the rooftops in Perth county
- 2 37. Public education regarding health effects
- 2 38. access to varied leisure activities sport and arts etc.

- 2 39. better job of recycling plastics
- 2 40. reframing our understanding of waste
- 2 41. train youth to be responsible dependable employees
- 1 42. Better regulations with regards to installations from municipalities
- 1 43. Stratford college ..Additional educational programs at local colleges

- 1 44. LED streetlights and Led lighting
- 1 45. repurposing existing facilities
- 1 46. vital downtown
- 1 47. increased business
- 1 48. adequate infrastructure to move materials, workforce to where its required
- 1 49. maintains built heritage
- 1 50. Population retention or growth - keep our youth as they reach adulthood
- 1 51. local high tech education opportunities
- 0 52. Education of public is of primary importance regarding conservation of energy
- 0 53. beat social issues concerning our community
- 0 54. support and promo
- 0 55. values natural beauty of region

1.10 – Group 5 (Refinement of top 10)

Note: the group took the top 18 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

1. XXX Perth County becomes a Centre of Excellence in alternative energy, with local education institutions offering programs. ...better high school trades training ...coordinated opportunities between industry and education

2. XXX Promote clean renewable energy ..High adoption rate of renewable energy systems across the region

- society that supports green energy thinking ..Citizens educated & knowledgeable about the benefits of sustainable energy (economic, health, environmental) and purchase or subscribe to renewable energy.
- public educated further about the benefits of implementing alternative energy systems... remove stigmas

3. XXX Politically driven mandate driving renewable projects (elected politicians behind this!!)

- policies to support/mandate green standards in all new facilities
- PC/S/SM have all completed energy audits and have maximized conservation within their organizations

4. XXX on farm bio gas plants ...large scale co-operative bio-digester ... urban ties

5. XXX Retain existing and create new and sustainable employment throughout the county in alternative energy : sales, installation, manufacturing, maintenance, design.

6. XXX Retention of agricultural land

- 7. neighbourhood power generation
- 8. few people commuting long distances to work
- 9. Studies regarding the health effects of wind power have been completed
- 10. support for existing facilities to retrofit (\$\$, expertise)
- 11. Population retention - keep our youth here as they transition into labour force

1.11 – Group 6 (Tourism)

Voting Results

Multiple Selection (maximum choices = 7) (Allow bypass)

Number of ballot items: 66

Total number of voters (N): 40

Total

- 26 1. An efficient rail system to surrounding cities (KW, Toronto, London)
- 24 2. healthy downtowns ... When we have a sustainable vibrant downtown core. .. No empty store fronts ...cleaning up downtown core of vacancy store fronts ..downtown areas with lots of local support in all seasons ..A vibrant urban core and a downtown marketplace closed to cars and traffic
- 16 3. designated venue for community performing and visual arts ...performing arts centre for local groups with proper facilities ..When we cut the ribbon on our centre for performing arts.
- 15 4. working together to keep visitors within the area, discovering what the smaller communities have to offer, rather than trying to compete against each other
- 12 5. sufficient family health teams ...integrated health care options including alternative, complementary and conventional ...greater use of nurse practitioners and physician assistants
- 10 6. A Canadian culinary destination combined with an educational element
- 9 7. municipal governments working together
- 9 8. A new European style market square.
- 9 9. Strong educational component for arts and culture such as college and alliance with the university.
- 8 10. Stratford is a visionary centre in terms of culture, environment and ethics
- 7 11. recognition of tourism as an economic driver
- 7 12. participation in the "new economy", intellectual economy that's more diversified than the current economy
- 6 13. Autonomous and independent arts decision making body that planned activities and initiatives in the community based on the local arts and culture needs.
- 6 14. younger generations have future opportunities and consider the area as permanent residence
- 5 15. An emphasis on healthy living, promoting an active lifestyle that emphasizes people over cars
- 5 16. a vibrant and healthy network of producers, restaurants
- 5 17. network of bike and/or hiking paths across the county
- 5 18. people in community working together in community projects (collaboration of events)
- 5 19. More attractive to Creative Industry workers.
- 4 20. working to keep youth in the community with gainful employment, curve the exodus
- 4 21. Economic development without negative impact on region's heritage ..restore historical building though out Perth county
- 4 22. national centre for arts - all arts
- 4 23. Skills and education maximized
- 4 24. a strong balance between art and industry
- 3 25. government administration that supports entrepreneurs
- 3 26. Small rural communities remain strong
- 3 27. less than 1% unemployment ...more year round employment
- 3 28. Co-operation & collaboration across the regions leading to synergies
- 3 29. Greater awareness by media of the benefit of the university to the region.
- 3 30. Hotspot for leading-edge tech business
- 3 31. When we have a functioning umbrella organization to represent the aspirations and needs of the cultural groups and artists in Perth County.
- 3 32. Moderately larger population
- 2 33. An arts hub in St. Marys
- 2 34. Established regional planning and governance structure
- 2 35. when we have healthy, vibrant 'hip seasons'.
- 2 36. A successful and beautiful heritage district made up from the three old factories near Factory 163

- 2 37. Successful Stratford Festival of the Arts focussed downtown and non-competitive with other major events.
- 2 38. A wonderful concert hall.
- 2 39. continued support for independent artists and not-for-profit organizations to market and self-sustain
- 2 40. Opportunities for creative use of leisure time, balancing employment opportunities
- 2 41. using arts to explore important issues in society
- 2 42. Strong varied local retail section
- 2 43. A more diverse community, allowing for easier integration of other nationalities
- 2 44. growth in white collar employment
- 1 45. stable industry
- 1 46. Maintain quality of life - small town culture in global sphere
- 1 47. Richer multicultural profile
- 1 48. have grants to B&Bs for upgrades
- 1 49. involve youth in future of Perth county
- 1 50. Population retention - keep our youth here as they train
- 1 51. renewable energy throughout the county
- 1 52. When we have a library that meets the needs of Stratford.
- 1 53. when we all tell the same (consistent) story about our products
- 1 54. More opportunities for regional collaboration.
- 0 55. LED streetlights and Led lighting
- 0 56. Citizens educated in the benefits (economic, health, concern for the environment) of alternative/sustainable energy an
- 0 57. support and promo
- 0 58. When we have enough pianos to serve the needs of our music community.
- 0 59. increase community awareness of the need to support the arts
- 0 60. St. Marys primary destination
- 0 61. integration between creative disciplines
- 0 62. broader definition of wellness - include lifestyle
- 0 63. Attract and retain families
- 0 64. local recognition (i.e. support) of local assets already in place - theatre, restaurants, events, attractions
- 0 66. car sharing options

1.12 – Group 6 (Refinement of top 10)

Note: the group took the top 19 (>4 votes), merged the similar and then identified the most critical, “make or break to our future” items. XXX = make or break critical by 2015

1. XXX healthy downtowns ... When we have a sustainable vibrant downtown core. .. No empty store fronts ...cleaning up downtown core of vacancy store fronts ..downtown areas with lots of local support in all seasons ..A vibrant urban core and a downtown marketplace closed to cars and traffic ...A new European style market square.

2. XXX designated venue for community performing and visual arts ...performing arts centre for local groups with proper facilities ..When we cut the ribbon on our centre for performing arts. ...Strong educational component for arts and culture such as college and alliance with the university. ...Autonomous and independent arts decision making body that planned activities and initiatives in the community based on the local arts and culture needs.

3. XXX recognition of tourism as an economic driver ... working together to keep visitors within the area, discovering what the smaller communities have to offer, rather than trying to compete against each other

4. **XXX participation in the "new economy"**, intellectual economy that's more diversified than the current economy ...More attractive to Creative Industry workers.
5. **X municipal governments working together ..people in the community working together in community projects (collaboration of events)**
6. **X An emphasis on healthy living, promoting an active lifestyle that emphasizes people over cars** ... network of bike and/or hiking paths across the county
7. **X sufficient family health teams** ...integrated health care options including alternative, complementary and conventional ...greater use of nurse practitioners and physician assistants
8. **X A Canadian culinary destination combined with an educational element** ...a vibrant and healthy network of producers, restaurants
9. **An efficient rail system to surrounding cities (KW, Toronto, London)**
10. **Stratford is a visionary centre in terms of culture, environment and ethics**
11. **younger generations have future opportunities and consider the area as permanent residence**

2.0 – What to keep the same, maintain?

What needs to stay the same? Note: these are not prioritized

2.1 - Group 1 (Council & Staff)

In terms of the region, what would you like to maintain, keep?

- Lifestyle ... Sense of community: friendly, everyone knows each other
- Tourism: keep the visitors coming
- Keep local schools: attractive for newcomers
- Good work ethic
- Environment: region is pretty green
- Rural background: unique in what we can offer, produce, market
- Agricultural emphasis
- Theatre, arts & culture
- Recreation: some areas have good facilities & participation
- Health care facilities
- Clean, well kept properties in town & countries

2.2 – Group 2 (Agriculture, Rural Development)

- Agriculture innovation
- Small, safe community atmosphere
- Agricultural fairs, festivals
- Support for local farmers (e.g. Farmers market)
- Rural schools – don't close all our schools!
- Agriculture resources with lots of urban amenities within 2hour drive

- Hospitals: protect proximity to good quality health care
- Clean, well kept, fresh air
- Arts & culture

2.3 – Group 3 (Entrepreneurs & Exporters)

- Small town atmosphere – not big city
- Safe community
- Networks of people: like minded easy to link
- Diversity: arts, theatre, etc..
- Well developed service infrastructure
- Natural settings: Trees, gardens, rivers, trails
- Demographic mix (young – old)... neighbourhood mix
- Hospitals
- Community engagement: lots of grassroots volunteers
- Heritage assets: built environment
- Sports & Recreation facilities
- Organizations - Kids sports / leisure activities

2.4 – Group 4 (Manufacturing & Automation)

- Regional diversity/blend: Light manufacturing, tourism/theatre, agricultural
- Entrepreneurial spirit
- Lots of untapped resources: but live here and work elsewhere
- Relatively good wages, high skilled, underutilized
- Country lifestyle (vs. city!) but still has culture
- Beautiful surroundings – parks, City,
- Lots of boutique shops... Not having big box stores
- Good choice of restaurants... chef school
- 3 High schools – entrepreneurial, specialist programs
- Not a highly unionized community . Not one horse town
- Proximity to major urban centres
- - need support from City for manufacturing

2.5 – Group 5 (Alternate Energy)

- Appealing, built heritage
- Sense of community
- Agricultural sector: viability
- Diverse culture (arts, industry etc): not a 1 horse town
- Promotion of renewable energy
- Keep life simple: sometimes too many changes and Toronto thinking (e.g. regulations, standards etc)
- Safe community
- Health care access
- Protection of Local food sources: farm to table thinking
- Education system

2.6 – Group 6 (Tourism)

- Creative minds
- Friendly, open contact with people
- Built heritage
- Theatre, arts

- Strong healthy downtowns throughout region
- Chef school
- Country side
- Farmers... family farms
- Parks, trails
- Waterfront
- Safe
- Clean air
- Accommodations: B&B, quality restaurants
- Diverse community events
- Unique shopping
- Philanthropy, volunteerism
- Transportation system: train

3.0 – What to Change?

What are the major differences between now and your vision for the future? What needs to change? If we could only focus on X of these, which must we address?
 Criteria: Importance and Ability to influence

3.1 - Group 1 (Council & Staff)

Voting Results

Multiple Selection (maximum choices = 4) (Allow bypass)

Number of ballot items: 11

Total number of voters (N): 15

Total

- 13** 1. Increase training in new industries..Local training facilities- trades
- 9** 2. Better co-operation between municipalities ...more coordination of efforts-Federal, provincial, regional and local
- 9** 3. Red tape, Rules and regulations, Municipal, Provincial and Federal that cause delays in encouraging business development.less barriers by senior governments (micro management)
- 7** 4. Internal population growth (keep, attract newcomers, young families coming back)
- 6** 5. More use of technology & Information communications - mobile, cell, software... systems need to be better designed ... for education and other purposes
- 5** 6. Governance Reorganization of region in terms of function & business size/nature/type (e.g. rural, urban, manufacturing,)
- 4** 7. Improve environment ...improve waste management
- 4** 8. Maintain appropriate development , change view of ever expanding urban land base, high density housing, reuse industrial land
- 3** 9. Appreciate the differences we have and adapt to the immigrant population needs -- need to be clear on what newcomers need & want
- 0** 11. Improved transit system

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

Principles

Help foster economic development/innovation ... Align projects, activities and funding with strategic plan and vision ...view change as a positive

2. Increase training in new industries ..Local training facilities- trades

Local training facilities- trades

Opportunity to enter skilled trades

3.2 – Group 2 (Agriculture, Rural Development)

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 16

Total number of voters (N): 16

Total

- 12 1. Need to raise the awareness of the consumer to consume products grown in our community. Demand from our grocery stores to make available products from Perth, stopping the flow of products produced in China ...need to educate the market in better eating habits i.e. 100 mile diet
- 11 2. Old rules & regulations need to be revised and made current to speed up the approval process. ...Agricultural regulations need to be maintained and monitored and farmers need to take responsibility for these regulations and standards. I.e. waste management
 - Increasing allowed value-added commercial business on farms without changing taxation
- 11 3. More funding for small farms/small businesses so they can survive and THRIVE. ...modify the trend of consolidating farms to larger and larger sizes, to allow more diversity of scale and room for future generations of farmers
- 9 4. Preserve the Class 1 and 2 farmland in Perth county, stop in from being diverted to other uses e.g. subdivisions, roads, factories, etc. ..Address Brownfield issues to help protect agricultural lands
- 8 5. Focus on green
 - We need more trees -> reforestation
 - Subsidize organic choices (natural weed killers, fertilizers, etc.), so that these options are not more expensive than traditional options.
- 8 6. Address the one-size-fits all regulations that are a threat to small abattoirs and other small rural and food processing based businesses
- 6 7. County should consider becoming a regional area, there is too much division amongst County, Stratford & St. Mary's ...coordination of change in an inclusive manner so all areas benefit ..Stratford, St Marys & County working as one
- 5 8. Regional marketing. Co-ordinate resources to market our region better (regional government)
- 3 9. Health threat of wind turbines in neighbouring communities
- 2 10. Not worth starting business in smaller areas - we need to change this thinking ..belief that these are no opportunities local (Better elsewhere)
- 2 11. Telecom infrastructure: Fibre optic cable
- 1 12. Need for farmers to group to produce for specific needs in overseas countries (export coop associations)
- 1 13. Making arts and culture more accessible/less elite
- 1 14. Natural gas in all areas of region
- 0 16. Improving rural roads

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. County should consider becoming a regional area, there is too much division amongst County, Stratford & St. Mary's ...coordination of change in an inclusive manner so all areas benefit ..Stratford, St Marys & County working as one

- The need for small communities to work together to bring quality living for everyone in the community through workshops, programs and financial incentives.

4. Old rules & regulations need to be revised and made current to speed up the approval process. ...Agricultural regulations need to be maintained and monitored and farmers need to take responsibility for these regulations and standards. i.e. waste management

Zoning bylaws need to be simplified and changed, particularly in order to create sustainable communities with a mix of commercial/industrial/residential zonings where people not only live, but also work and play, avoid commuting

6. More funding for small farms/small businesses so they can survive and THRIVE. ...modify the trend of consolidating farms to larger and larger sizes, to allow more diversity of scale and room for future generations of farmers

- More young people going into farming/agriculture to ensure there are farms producing food in the future (support for agricultural intern programs may create interest in this).

3.3 – Group 3 (Entrepreneurs & Exporters)

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 14

Total number of voters (N): 10

Total

- 6 1. More premises that support entrepreneurship/incubation of new businesses along with mentor and financing assistance
- 6 2. Reliance on imports of energy, jobs, \$\$ and product from outside prevents self-sustainability and enables branch plant mentality -> must encourage a made locally approach
- 6 3. Year round activity in our downtowns. Bars and restaurants are full year round, running on alt energy and cultural enthusiasm based on the draw from new companies
- 5 4. Holes in the urban environment are patched - i.e.: urban regeneration (storefronts, brownfields, former gas stations)
- 5 5. visionary investment leading to industries and a talent pool that encourage relocation to the region / greater cultural diversity etc e.g. Stratford institute
- 4 6. Lack of regional thinking: Municipal lines/boundaries that raise annexation/lack of regional thinking, 6 planning departments that aren't necessarily able to progressively, consistently plan ...Three Councils working together towards a common vision
- 4 7. Infrastructure: roads, sewers, water, bus parks
- 3 8. high industrial taxeshigh tax rates (in City), and conversely low tax rates/lack of investment in smaller municipalities
- 3 9. Lack of skills in demand... Lack of post-secondary training, college to increase youth opportunities and prevent out-migration
- 3 10. Smaller, sustainable family farms must become more viable and supported by the community
- 2 11. multi-use facility to provide a meeting place for the exchange of ideas. Combine library, Y and daycare
- 2 12. Inter-city transportation (and beyond)
- 1 13. Lack of youth and cultural representation as a percentage of population in a global world note: aging demographic, schools closing

3.4 – Group 4 (Manufacturing & Automation)

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 14

Total number of voters (N): 15

Total

- 13 1. continued/increased support to increase good manufacturing jobs to the city ...More incentives/focus on Mfg i.e. lower taxes, R&D/competitiveness
- 12 2. Continue to bring more attractions to the city that appeal to all citizens of the city and surrounding areas. (beyond Festival... use facilities off season ... winter activities.. host symposiums on new business development)
- 9 3. Manufacturing, supply chain networking ... bringing players together -> increase awareness of who/what available
- 9 4. Marketing: More recognition of industry and the values added (need to communicate the impact/success)
- 6 5. Focus and action on green house gas reduction and therefore allowing for readily available low cost energy ...Environmental planning to support reduction of GHG/ carbon footprint. Promotion of green energy and energy efficiency.
- 5 6. Relocalization, manufacture products locally. ...Stop or control off-shoring and outsourcing in order to stop the drain of cash and jobs from our economies
- 4 7. Local buying groups ... energy, fuel, etc. (bulk buy economies of scale)
- 4 8. Enhance the rail system so that people could easily commute to major cities at a more flexible schedule and less time. This could give more chances for good employment for local people in major centres. Wages earned, on the other hand would be brought back into our communities.
- 4 9. spend money for the people that live here....more street repairs, infrastructure
- 4 10. Min of Labour: need to work on red tape, costly labour laws
- 2 11. A better understanding of local council's direction - more transparency/ communication
- 2 12. Property taxes - lowered/controlled - MPAC broken
- 1 13. Less government run services, such as PUC or buses: more opportunities for local entrepreneurs.

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. Relocalization, manufacture products locally. ...Stop or control off-shoring and outsourcing in order to stop the drain of cash and jobs from our economies

Stop or control off-shoring and outsourcing in order to stop the drain of cash and jobs from our economies: equalize wages globally or raise costs of goods produced off-shore (Fed-Prov-Local Govts must collaborate)

5. continued/increased support to increase good manufacturing jobs to the city ...More incentives/focus on Mfg i.e. lower taxes, R&D/competitiveness

More support, both financially and with other incentives for new and existing business

6. Continue to bring more attractions to the city that appeal to all citizens of the city and surrounding areas. (beyond Festival... use facilities off season ... winter activities.. host symposiums on new business development)

Promotion of the area for winter activities drawing people and business

3.5 – Group 5 (Alternate Energy)

Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 18

Total number of voters (N): 24

Total

- 16 1. Get renewable projects to be more community (coop) based - network to cut costs ...accessible renewable energy opportunities (everyone can play a part) - possible co-operative models would enable this
- 15 2. Lead by example at political level... Forward thinking leadership from our local politicians regarding energy planning
 - Less lip service, increased adoption, (political will), rates in renewable energy sources and energy and water conservation: we need less strategic plans and more action plans.
 - policy that supports and encourages implementation of these measures
- 14 3. Recycle / reuse plans on community scale ...Poor use of waste, farm and town. better recycling, reuse, energy production and resale ..Co-ordinated waste program throughout the county, and neighbouring counties where appropriate.
- 13 4. Reduce the red tape for some of the promotions - simplify paperwork required ...give developments the ability to act quickly and construct the projects without spending many years appealing different levels of government and ministries ...Remove red tape, by-laws that limit change to implement alternative energy for certified contractors
- 10 5. Focus on attracting multiple small businesses rather than just "one large"
- 10 6. Education, to retain and attract students/ population - promote smaller (satellite) campuses or e-learning opportunities. ..Lack of Higher Education locally, both post secondary university and technical industry specific
- 10 7. Produce bio energy from our resources! we are wasting bio-energy, better collection and conversion of bio-resources
- 8 8. decentralize the decision making process - give the local municipalities more decision making abilities as opposed to carrying out centralized (provincial) policies ..more common sense approach based on community size
- 8 9. Funding Incentives: Maintain viable FIT and Micro-FIT programs, and grant support to promote use. ...work with local utilities to provide low or no interest loans to finance renewable energy and conservation measures
- 7 10. Full education about the benefits and any concern about renewable energy..sustainable living : i.e. fact-based and not hype
- 7 11. need a new vision for land-use: higher density, protection of agricultural land, repurposing of existing infrastructure and architecture
- 6 12. Reuse/leverage facilities.... make greater use of government owned schools / community centres for localized training and meetings ...more off season use of the area as a champion for training utilizing infrastructures in place i.e. restaurants, hotels, etc
- 5 13. Open transportation options (getting supplies in & out from production -> market)
- 5 14. need high visibility renewable energy pilot project to serve as model for other organizations or individuals
- 3 15. focus more effectively to training our youth integrity, responsibility, dependability, & common sense (character)
- 2 16. Drive to lower taxes?
- 0 18. Lower housing costs

3.6 – Group 6 (Tourism)

Voting Results

Multiple Selection (maximum choices = 5) (Allow bypass)

Number of ballot items: 14

Total number of voters (N): 40

Total

- 28** 1. Healthy, vibrant downtowns avoiding sprawl.
 - The Market Square needs to develop - currently an eyesore..no market in the market square!
 - reduction of sprawl at entrances to urban centres - re-visioning of big box retail
- 26** 2. territorialism/silo mentality - more collaboration across region and sectors ...Stop competition between small towns, should promote each other. ...Polarization between special interest groups (agriculture vs. industry vs. creative vs. arts vs. etc..)
- 23** 3. protect natural areas including urban forests in city and surrounding areas ..lower tax (property) green grants - grass vs. parking lot ..Delicate balance between provision of services and not increasing taxes to the point that we become unaffordable
- 23** 4. Municipal support and money for all of the arts with strong community Co-operation and support...
 - No suitable performance space for community arts and culture groups. (SSF rarely available and not affordable. City Hall stage inadequate.).
- 23** 5. Proactive, visionary and less reactive governance and political decision making ...urban planning to encourage active transit (biking, walking, roller-blading, etc.)
- 19** 6. Too much brown space ... Utilization of currently empty space - i.e. brownfields, empty storefronts with absentee landlords
- 18** 7. restricted definition of economic development (don't forget culture, tourism, services) - small job market for creative class, culinary, walk-in clinics, and services. ...More flexible and open development policies toward emerging, creative, knowledge-based sectors -> support entrepreneurs
- 13** 8. Investment in tourism increase to reflect economic impact
- 8** 9. government willingness to risk increased capital expenses to reduce long-term costs and impacts ... need to promote LT benefits (e.g. alt energy, efficiency)
- 7** 10. Pig trucks and other large trucks should be forced to use the ring road around Stratford not the main street..
- 4** 11. Some youth just hanging out downtown. Drugs are an issue. We don't want to be the "meth capital" of Canada.
- 3** 12. Cultural Diversity - look around the room ... Newcomers often have difficulty connecting with the existing community and people should welcome different ethnic groups and not be so xenophobic
- 3** 13. well paying jobs

Note: prior to voting, the group brainstormed ideas and then merged the similar items. Below in non-bold are the merged items. These items are ordered as they were originally brainstormed (i.e. not as they were ranked by the group). Items that did not have any ideas merged are not included.

2. Too much brown space ... Utilization of currently empty space - i.e. brownfields, empty storefronts with absentee landlords

Too much "brown space" (empty lots, buildings) within city and county

Too much brownspace

Too many abandoned buildings, both urban and rural.

empty lots are eyesores on main streets

3. territorialism/silo mentality - more collaboration across region and sectors ...Stop competition between small towns, should promote each other. ...Polarization between special interest groups (agriculture vs. industry vs. creative vs. arts vs. etc..)

Greater understanding, acceptance, and inclusion of regional benefits including rural and smaller communities.

Stop competition between small towns, should promote each other.

Get rid of rural/urban divisional mindset - 'small town small mindedness'

10. Healthy, vibrant downtowns avoiding sprawl.

- The Market Square needs to develop - currently an eyesore..no market in the market square!
a wider variety of entertainment options

4.0 – Action plans

What key actions should be included in Perth County, Stratford, St Marys economic development strategy? How do we get from where we are now to where we want to be? What can the Region do to help achieve this? (see appendix B for brainstorm)

After brainstorming, individuals were asked to brainstorm (within each area for change), the key actions that the Region should take on in the next 2-3 years?

Criteria: High Impact and Realistic

The ideas were not merged before voting, so there are some redundancies.

4.1 - Group 1 (Council & Staff)

Voting Results

Multiple Selection (maximum choices = 10) (Allow bypass)

Number of ballot items: 44

Total number of voters (N): 16

Total

- 9 1. TRAIN: Complete training/skills needs assessment: what are the needs of industry that are out there? clarify exactly what trades/skills are required ... where are the gaps? ...what are the skills that are going to be needed
- 9 2. TECH: encourage use of technology in our day-to-day communications ..TECH: Technology is the way of the future, so we all should figure how to use it for our own communication internally and how to use it to market our communities and other areas.
- 8 3. REDTAPE: Land use planning policies - less complicated for new business (re zoning, other constraints)
- 8 4. TECH: put more info about local government and economic development on web sites, Facebook etc
- 8 5. NEWCOMERS: knowing what jobs are available, or skilled labour required for area industry
- 7 6. NEWCOMERS: need to understand what drives their decision making ...help provide what they want-leisure ...Maintain and enhance facilities (recreation both passive and active)
- 7 7. MUNI COOP: Centralize economic development regionally ... This is an ongoing issue. Perhaps a joint ED person to have us all working from the same page.
- 6 8. NEWCOMERS: employment opportunities come first but we have to stress lifestyle benefits[education, health facilities, etc]
- 6 9. MUNI COOP: set up regional teams to address issues
- 6 10. MUNI COOP: allow region-specific differences in development within county - encourages specialized development
- 6 11. REDTAPE: Simplify the rules... Make zoning applications easier
- 6 12. REDTAPE: Continue pressure with new memo of understanding - tweak with our MP, MPP with what we want to happen
- 5 13. TECH: train people to use what is required - not just everything that is available.
- 5 14. TRAIN: Establish community college branch/satellite in 1+ of our communities
- 5 15. TECH: infrastructure - facilities
- 5 16. NEWCOMERS: encourage affordable housing for young families
- 4 17. TRAIN: Shared training: Coordinate training course/program so that entire area benefits. Leverage needs x region so that training can be done locally
- 4 18. REDTAPE: summary page for people wanting info on planning/zoning etc
- 3 19. TRAIN: encourage apprenticeship
- 3 20. MUNI COOP: CAO create a list of obstacles/solutionspoliticians to see what is doable
- 3 21. REDTAPE: Centralize building permitting ...Building permits: make it easier, faster, hassle free for businesses that we want to attract

- 2 22. NEWCOMERS: improved web sites for attracting newcomers
- 2 23. TECH: encourage use of social media
- 2 24. NEWCOMERS: keep the taxes affordable
- 2 25. MUNI COOP: We have to get on with it and come to a shared services agreement within three months.
- 2 26. TRAIN: We should get the school boards to realize how important it is for them to put useful training programs within their agendas.
- 2 27. TRAIN: working with promoting TTG(technical Training Group)
- 2 28. TRAIN: Spot on the Perth County web site for local business to post job opportunities
- 2 29. TRAIN: Connect with grades 11 and 12 students, let them know what skilled labour is required in our area
- 1 30. REDTAPE: Hold a focus day with County and City planning to use liberal planning not restrictive planning all within the guidelines...Building code: need to ensure the administration of this is not too restricted
- 1 31. PRIORITY: Red tape, Rules and regulations, both Municipal, Provincial and Federal that cause delays in encouraging business development. ...reduce barriers by senior governments
- 1 32. MUNI COOP: If going to keep county organization, then make municipalities equal partners
- 1 33. PRIORITY: better co-operation between municipalities ...more coordination of efforts-Federal, provincial, regional and local ... reorganization?
- 1 34. TRAIN: Pressure education system to ensure graduates have solid basic education - stop making it easy for everyone to graduate
- 1 35. TRAIN: Help college grads find employment - who, when, where... can we play a role
- 0 36. REDTAPE: demand input from municipal level to provincial people before they pass sweeping regulations. e.g. drinking water rules
- 0 37. REDTAPE: be prepared to take responsibility
- 0 38. REDTAPE: continue to push to have municipal implied liabilities reduced -
- 0 39. PRIORITY: internal population growth (keep, attract newcomers, young families coming back)
- 0 40. NEWCOMERS: This is of more importance in different areas. Therefore how, we approach it should be reviewed in a different manner.
- 0 41. NEWCOMERS: Make regulations based on business size so 2nd generation have the ability to take over family business
- 0 42. TRAIN: encourage students to study away from area, then encourage them to return and bring back what they have learned
- 0 43. PRIORITY: More use of technology & Information communications - mobile, cell, software... systems need to be better designed ... for education and other purposes ... work from home
- 0 44. PRIORITY: increase training in new industries ..local training facilities- trades

4.2 – Group 2 (Agriculture, Rural Development)

Voting Results

Multiple Selection (maximum choices = 12) (Allow bypass)

Number of ballot items: 43

Total number of voters (N): 16

Total

- 11 1. ABATTOIRS: Special legislation for small abattoirs ...lobby provincial government for scale and risk appropriate regulations for small abattoirs, (e.g. under 10 employees) etc.; regulations that may be different than for larger plants
- 8 2. GREEN: County should offer incentive programs to plant more trees ...e.g. offer free trees to farm owners
- 8 3. GREEN: county needs to lead by example and put dollars into green projects of all kinds
- 8 4. BUY LOCAL: Lobby for labelling so consumers know if they are buying Ontario/Canadian produce
- 7 5. FARMLAND: Encourage Stratford to build up and not out - encroaching on farmland should not be allowed ...If all of the County were one, a planning boundary could be placed around Stratford as is for Kitchener
- 7 6. FARMLAND: Annexation of land by Stratford -> fix their Brownfield issues first
- 7 7. REG: streamline processes for new and old ventures of all kinds to promote growth of all kinds
- 7 8. SMALL FARMS: Municipal taxation laws (e.g. 10 -> 30% of income)
- 6 9. REG: Other industries are responsible to comply with regulations TSSA, ESA, etc. Farmers need to be aware of the impact they have on the environment, and if they don't comply need to be regulated and monitored by the ruling authority. Our rivers and lakes will not survive if not.
- 6 10. ABATTOIRS: Consumer education on having to pay more for food ...affordability
- 5 11. SMALL FARMS: Buy local campaign
- 5 12. FARMLAND: Province needs to financially aid municipalities with urban redevelopment, but municipalities need to lobby province to make this a priority
- 5 13. REG: many people feel they are overcome by red tape before any of their ideas are barely out of their mouths, we need to find ways to hear people's ideas with an open mind and understand the benefit to the community of proposed projects
- 4 14. GREEN: county should do assessment of its energy usage and find ways to save energy of all kinds
- 4 15. SMALL FARMS: make sure economic development funds coming into the county support a diversity of businesses, farms in the rural areas and small communities
- 4 16. SMALL FARMS: More awareness of CFDC business advisory service and financing to Ag sector
- 4 17. SMALL FARMS: Have a Perth 'Dragon's Den' competition to promote entrepreneurialism in partnership with business funders
- 4 18. BUY LOCAL: focus campaign on encouraging consumer to purchase food outside of the chain supermarkets
- 4 19. BUY LOCAL: provide municipal funding support to farmers' markets across the county
- 3 20. SMALL FARMS: Reconsider local regulations on sq footage, # employees
- 3 21. REG: have planning department be more assistive/creative with promoting new ventures
- 3 22. FARMLAND: Official plans: increase density requirements
- 3 23. BUY LOCAL: Have central distribution for local food from Perth/Huron so it doesn't go into Toronto food terminal and back out
- 3 24. FARMLAND: Push for public transit
- 3 25. FARMLAND: Stratford shouldn't be viewed as the sole location for economic development within the county
- 3 26. BUY LOCAL: expand the farmers market idea (open more often)
- 3 27. GREEN: educate people to value trees, people will take lead then in caring for trees. Municipalities could look at how to support woodlot associations , 4H clubs , etc
- 3 28. BUY LOCAL: Different campaigns to educate the consumer. getting the groceries stores to make available a portion of floor space for Perth products.
- 3 29. ABATTOIRS: Lobby govt for change for farm subsidies

- 2 30. BUY LOCAL: relax zoning bylaw rules to allow for farmer's markets where people are interested in putting them
- 2 31. BUY LOCAL: lobby for a national food policy as Canada does not have one - need to start at the top down
- 2 34. GREEN: look for spaces to increase number of trees in towns and cities as well
- 2 35. GREEN: Strengthen County tree By law where gaps and loopholes exist
- 2 36. GREEN: County website could include schedule of upcoming community green related meetings
- 1 37. PRIORITY: More funding for small farms/small businesses so they can survive & THRIVE.
...modify the trend of consolidating farms to larger and larger sizes, to allow more diversity of scale & room for future generations of farmers
- 1 38. BUY LOCAL: Get more farmers, restaurants involved in Savour Stratford, funded by OMAFRA
- 1 40. PRIORITY: address the one-size-fits all regulations that are a threat to small abattoirs and other small rural and food processing based businesses
- 0 41. SMALL FARMS: look at whether or not severance sizes limit options for fairly small scale farm operations that have the potential to meet local market demands
- 0 42. FARMLAND: If there is demand for the land to be annexed, why doesn't the County develop it and get the tax revenue?

4.3 – Group 3 (Entrepreneurs & Exporters)

Voting Results

Multiple Selection (maximum choices = 15) (Allow bypass)

Number of ballot items: 57

Total number of voters (N): 9

Total

- 5 1. BUY LOCAL: encourage collaboration / support local marketing coops
- 5 2. Invest energy in proactively recruiting/joint-venturing with Fanshawe/Conestoga or other College to develop campus/programs in region
- 5 3. Invest in development of mentorship programs like Community EFFORT, IXC (Australian model for innovation), partnerships with Communitech and/or other models that are viable in communities our size
- 5 4. INFRA: Focus on the core, instead of spreading further out and spending money breaking ground on new infrastructure invest in what's already been established, making it more efficient
- 4 5. INFRA: Highway re-development is essential if we are to get new export-oriented manufacturing industries
- 4 6. VISION\$: Search for post graduates who need support for developing their ideas and support them with financial encouragement
- 4 7. REGTHINK: Have topic based collaboration sessions on a regular basis that tie these groups together with input from business and education. Make these sessions mandatory and view as government reform
- 4 8. VISION\$: target verticals: i.e. alt energy, digital technologies, agri business etc ... assign resources, promote region as destination of choice
- 3 9. SKILLS: University town?!
- 3 10. Establish a "market square" space - a place for creative commons
- 3 11. BUY LOCAL: Provide export training and support services for local entrepreneurs
- 3 12. Leverage our existing reputation for creative and performing arts to support our fledgling new media efforts
- 3 13. BUY LOCAL: Establish venues and places where the products the community makes be it industrial or agricultural can easily be purchased or accessed, even going so far as to offer incentives for locals to buy and support local products
- 3 14. SKILLS: Build linkage between needs of employers and educational institutions -> shaping curriculum
- 3 15. Clearly identify and target 5 specific visionary investments, develop strategies and options and implement plans to attract/develop
- 3 16. Leverage leaders like Festival Hydro for leadership on hybrid/electric recharge infrastructure and Festival/Mornington on next generation communications infrastructure to develop self-sufficiency and export locally produced energy and telecommunications solutions
- 3 17. VISION\$: Make downtown a year-round vibrant centre and have activities for residents year-round - like Victorian Christmas festival, indoor sports (soccer, tennis), Christmas theatre so that Stratford is an interesting place to live all year.
- 3 18. INFRA: lower taxes, lower costs , allow business to compete, and then add infrastructure.
- 3 19. REGTHINK: This plan is a beginning but get the planning departs of each together to develop and implement a regional plan
- 3 20. REGTHINK: hold regional town halls
- 2 21. BUY LOCAL: raising awareness in the importance of becoming self sufficient as a society .
- 2 22. BUY LOCAL: educate the public on what this means for our community. Many people don't even know what we produce as a region and if they did they would ask/shop for it
- 2 23. INFRA: tight focus on winnable strategies -- i.e. retail intensification leading to remediation of downtown etc
- 2 24. SKILLS: Create a productive business commons to aggregate skilled people and most importantly, promote and document that resource.

- 2 25. SKILLS: Support and grow TTG to ensure skills development
- 2 26. SKILLS: bring the base level of skills up in the community in general. great example is social media boot camp and then each person can figure out how to apply to their world. Farmer, teacher, admin, retiree. Other skill areas like this could include alt energy basics
- 2 27. Ensure that Stratford Institute Graduates set up their businesses here - so need the physical premise
- 2 28. Invest energy in proactively recruiting online and/or next generation forms of programs (ex. online MBA with Athabasca, virtual campuses)
- 2 29. Invest and Enable growth and development of Off the Wall and Chef School as internationally recognized professional training in Arts and Culinary
- 2 30. Informal incubator (mentorship program etc.) Maybe not a formal incubator
- 2 31. Support our existing orgs with infrastructure (Stratford HR, etc.)
- 2 32. Develop global leadership in agricultural sectors including expansion of global genetics leadership, agriculture waste/bio technology company leadership (ex. Nuhn, Energrow, Perth Recycling, etc..)
- 2 33. VISION\$: focusing on exporting the products from the community there is a great need of trade missions that will give our entrepreneurs a very valuable exposure and opportunity to establish commercial ties with other countries
- 2 34. REGTHINK: Have one Council and one common master plan that recognizes both urban and rural
- 1 35. SKILLS: Let businesses train in an appropriate skill set .
- 1 36. SKILLS: Have ed. programs match curriculum to where the investment is
- 1 37. SKILLS: Attract new business - that will draw people with skills
- 1 38. SKILLS: Build export orientation into high school curriculum - and easy sell with web-based businesses
- 1 39. VISION\$: need of educating the consumers in healthy leaving and expending habits
- 1 40. VISION\$: fact based visionary investment - have key influencers (who affect outside sources) reach out and land/bring new industry to the region,
- 1 41. Invest and enable growth and development of Technical Training Group programs/capacity
- 1 42. VISION\$: many options, here, BDC, EDC and other initiatives to encourage creative finance.
- 1 43. INFRA: stronger link between economic development and infrastructure. Until there is a direct tie we won't invest to grow
- 1 44. BUY LOCAL: Let us become competitive, it will all fall into place.
- 1 45. Development of angel networks and recognition of value of home-grown/financed businesses
- 1 46. Have a three year mentor/business management programme for new businesses to help get them established, with escalating low rent over the 3 years, up to market value
- 0 47. Explore and develop alternatives to win/lose annexation disputes that enable win/win solutions
- 0 48. SKILLS: tight focus on industry with greatest current strengths and future potential
- 0 49. Invest and Enable growth and development of Stratford Institute Global Business and Media programs, along with possible new, future programs
- 0 50. Complete regional economic development strategies (check) :)
- 0 51. Celebrate and promote the many globally leading, innovative entrepreneurs/companies that are currently under the radar in our communities

4.4 – Group 4 (Manufacturing & Automation)

Voting Results

Multiple Selection (maximum choices = 10) (Allow bypass)

Number of ballot items: 35

Total number of voters (N): 16

Total

- 10 1. P1: Establish manufacturing/supply train networking group
- 10 2. P4: media campaigns with coverage of industries and their contributions to the community
- 9 3. P2: Use of facilities by - concerts, traveling drama groups, company board meetings ...host symposiums on new business development e.g. web 3.0
- 9 4. P4: More awareness of industries and products/services offered.
- 9 5. P3: More communication between industries about their capabilities which in turn could lead to diversification
- 6 6. P1: More incentives/focus on Mfg i.e. lower taxes, R&D/competitiveness
- 6 7. P3: Have a "Manufacturing News of Stratford" web page, and send link and brief description to potential suppliers
- 5 8. P5: training for green initiatives perhaps partnering with suppliers on OPA / OPG vendor list
- 5 9. P4: work closer with local chamber of commerce
- 5 10. P5: Create a permanent resource to facilitate green energy projects (Knowledge of FIT program and other incentives)
- 5 11. P3: Develop a distributed brochure listing companies in the area with a "yellow pages" style index, and an advertisement for each company - could be linked off city website with the ability for companies to post pictures and link to their website
- 5 12. P3: Establish networking group ... Set-up a manufacturing network (online and f2f...) to share or ask... form monthly meetings with interested parties
- 4 13. P4: Career fairs
- 4 14. P5: get into education system to promote new green focus to youth
- 4 15. P5: community/cooperative projects for large biomass or solar generation facilities
- 4 16. P2: Build on the Local Food Initiative with cooking classes, tours etc.
- 4 17. P2: share facilities such as sports complex facilities in St. Marys, Milverton etc for space in summer when hockey is out and festival is in -> better utilization of facilities
- 4 18. P2: promotion of city and surrounding communities
- 4 19. P1: Partner with Stratford Institute to bring in "Manufacturing Symposiums"
- 4 20. P1: Present/Prepare white paper based on the realities of manufacturing in Ontario to the local government in support of going up the chain to regional, provincial & federal support driving initiatives and funding
- 4 21. P1: Municipal and Provincial support of local organizations through co-op marketing, events
- 3 22. P3: Municipal suppliers (hydro, etc) meetings with industry/manufacturing
- 3 23. P2: Better relationship with Festival re: hosting events
- 3 24. P5: Environmental planning to support reduction of GHG/ carbon footprint.
- 3 25. P5: Incentives offered for training and registration to ISO 14064 - GHG standard
- 2 26. PRIORITY: Manufacturing, supply chain networking ... bringing players together -> increase awareness of who/what available
- 2 27. P2: Utilize Festival for "Broadway" type productions during off season
- 2 28. P2: Build a "Stratford & Community" conference facility - i.e. Add on to existing Rotary Complex
- 2 29. P2: Leverage Stratford Institute facilities
- 1 30. P3: services available to other manufacturers
- 1 32. P5: Awareness of all options available to decrease carbon footprint, such decrease in meat and dairy consumption.

4.5 – Group 5 (Alternate Energy)

Voting Results

Multiple Selection (maximum choices = 12) (Allow bypass)

Number of ballot items: 53

Total number of voters (N): 21

Total

- 11 1. REUSE: Co-ordinated waste program throughout the county, and neighbouring counties where appropriate
- 10 2. COOP: each municipality set up a cooperative and invite citizens to become member/owners of renewable energy projects on municipal buildings
- 9 3. POLITICAL: Each of the municipalities ought to go forward immediately with a FIT or MicroFIT installation as it is a money making venture and shows leadership on energy issues
- 9 4. EDUCATE: encourage and fund more trade programs early in the school system
- 8 5. RED: Set standards based on project size in order to streamline
- 8 6. REUSE: A county driven energy from waste project maybe together with bluewater recycling? ... Look at using existing programs (note: Perth East & St Marys Bluewater recycling) as prototype
- 7 7. EDUCATE: Create renewable / sustainable energy programs
- 7 8. COOP: find community partners to model renewable energy and to serve as sites for interested parties to visit
- 7 9. COOP: Educate community on co-operative model ...Education about how to implement alternative energy systems in community
- 7 10. 1HORSE: Provide local incentives to attract more small business - they are the driver for employment
- 7 11. EDUCATE: Local alternative energy organizations to assist school/college/university curricula with program input, field demonstrations, and co-op placements.
- 7 12. RED: Remove red tape, by-laws that limit change to implement alternative energy for certified contractors
- 7 13. REUSE: an openness to look at clean burning technologies for waste incineration and bio-mass applications
- 7 14. POLITICAL: Leadership needs to take managed risk, you can never get all the answers, start action and modify as appropriate. Work like business does.
- 6 15. 1HORSE: change zoning policies to allow some small businesses in rural areas
- 6 16. RED: Create building application plans for renewable energy projects by each type to streamline process
- 6 17. 1HORSE: improve road network to allow goods in/out quickly and efficiently ...Transportation and availability of serviced land concerns for small business. //Improve road links especially to USA
- 6 18. COOP: Already have a Perth-based co-op (Countryside Energy Co-operative, Milverton) that has 117 members and we are about to develop 4 community-owned and managed projects, with more in the pipeline. Membership is open to all.
- 5 19. POLITICAL: include renewable energy where feasible all new government facilities
- 5 20. REUSE: Implement a program to further separate wastes for other uses at the municipal level
- 5 21. POLITICAL: Promote political will and policy creation that supports the implementation of renewable energies and conservation measures.
- 5 22. EDUCATE: Municipalities ought to host public learning forums regarding energy conservation and generation.
- 4 23. POLITICAL: Build into planning codes the structural requirement to support Photo-Voltaic [PV] on roofs, walls and balconies - minimal additional building costs with significant benefits (i.e. economic and environmental).
- 4 24. RED: educate municipalities about alternative energy solutions... make it an easier decision for them to implement
- 4 25. RED: streamline by-laws and regulations and tiers of government involved in decision-making
- 4 26. 1HORSE: improving rail access (people & goods)

- 4 27. 1HORSE: understand what small businesses want/need in a community (e.g. high speed internet) and make sure we can deliver this and promote this via our economic development depts. // have an open dialogue with small business on ways to attract and retain their business in the community.
- 4 28. COOP: Advertise, hold town hall meetings... create networks among those interested.
- 4 29. RED: Bring Federal water, Provincial land use and water, Muni bylaw to table for an integrated one stop decision process //// Get all municipal and provincial departments that have an interest in alternative energy installations to work together and consolidate requirements into a single, streamlined process and to expedite approvals.
- 3 30. POLITICAL: facilitate alternative thinking in reuse models of architecture
- 3 31. EDUCATE: Industry needs analysis
- 3 32. 1HORSE: Opportunities to create sustainable employment, similar to that enjoyed in Europe.
- 3 33. 1HORSE: Low cost space/land for development, tax incentives
- 3 34. COOP: partnerships between schools and industry
- 3 35. RED: no specific permits should be required outside the normal building permit package in residential and small commercial applications
- 2 36. EDUCATE: rent excess facility capacity to local businesses
- 2 37. EDUCATE: inventory of available spaces that could be used to deliver courses and promote these to various post secondary institutions
- 2 38. EDUCATE: support and promote arts education as an underpinning for all forms of learning and forms of employability
- 2 39. RED: allow municipality to adopt standards according to their specific needs
- 2 40. 1HORSE: Don't forget service industries, we have 20-30% more retirees than provincial average
- 2 41. PRIORITY: Recycle / reuse plans on community scale ...Poor use of waste, farm and town. better recycling, reuse, energy production and resaleProduce bio energy from our resources! we are wasting bio-energy, better collection and conversion of bio-resources
- 2 42. POLITICAL: No additional assessment on any renewable energy project up to a certain size.
- 2 43. COOP: work with legal advisors on how to set up "on title" status for all owners of a "system"
- 1 44. 1HORSE: review vacant factories to see which ones could be re-developed into small business campuses
- 1 45. 1HORSE: Better daycare accessibility
- 1 46. PRIORITY: Reduce the red tape for some of the promotions - simplify paperwork required ...give developments the ability to act quickly and construct the projects without spending many years appeasing different levels of government and ministries

- 0 48. 1HORSE: ensure through incentives a diversity of business can operate here
- 0 51. EDUCATE: Ivey school of business local classes for entrepreneurs
- 0 52. RED: build on "call before you dig" model - one call allows access to all necessary protocol

4.6 – Group 6 (Tourism)

Note: These are NOT prioritized

**PRIORITY: Healthy, vibrant downtowns avoiding sprawl.
- i.e. brownfields, empty storefronts with absentee landlords**

2. Complete Market Square Project: The Market Square needs to develop - currently an eyesore..no market in the market square!
3. Reduction of sprawl at entrances to urban centres - re-visioning of big box retail
4. Understand WHY there are empty lots ... figure out alternative uses
5. Beautification plan by City
6. Remove parking meters downtown
7. keep taxes affordable in downtown
8. Lower property taxes
9. change tax ratios - reduce downtown taxes and increase taxes on big box / sprawl areas
10. Encourage downtown residents - by developing attractive apartments above retailers
11. forced clean up/beautification of derelict sites
12. set standards in place for empty storefronts, and empty property that are enforceable - taxes
13. Richer inducements for property owners to improve properties
14. partnership of shop owners in surrounding downtowns exchanging products and developing synergies
15. Develop a specific downtown strategy and policies for each community downtown
16. Downtown core needs a stronger voice expressing its needs
17. More permanent art installations...sculptures', competitions in the region for art...sculpture park...more tourist attractions...
18. contact absentee landlords causing rundown spaces and stores - both a rural and urban issue. Fee system for clean up?
19. Keep taxes more reasonable for businesses in the downtown to make the core economically stronger. Maybe skip the BIA or CCC and give that tax amount back to the business owner
20. create an incentive program for landlords of vacant spaces e.g. use of windows by local artists/groups for display
21. since US\$ is devalued, reduce prices across the board to encourage more tourism for a period of time. This includes stores, restaurants, accommodation, entertainment.

PRIORITY: territorialism/silo mentality - more collaboration across region and sectors ...Stop competition between small towns, should promote each other. ...Polarization between special interest groups (agriculture vs. industry vs. creative vs. arts vs. etc..)

2. Unify planning processes
3. affirm alliance across arts/culture sector and team applying for funding
4. Establish forums for idea sharing and collaboration
5. Board and council cross-pollination
6. co-operative cross-sector marketing
7. continued industry support of cultural and health initiatives
8. Implement a centralized council model
9. engage in county wide activities that benefit all areas
10. Incent community public interest groups to work collaboratively (funding)
11. We need to work on the issues that encompass all of us - not just Stratford parking, Stratford Market...think about cross promotion, focus on each areas strengths, send visitors to each other
12. brand everything as Perth County...sense of belonging to the larger community
13. Take advantage of forums for exchange of ideas and collaborations
14. health fete to promote
15. adequate aquatic facilities
16. venue for exchange of second-hand sporting equipment to make sport more accessible
17. municipalities and Town of St. Marys and City of Stratford support PCVA whole heartedly
18. community groups from different coming together and not be so e.g. St. Mikes vs. Northwestern

19. develop a larger regional organization (e.g. tourism) made up regional community partners
20. communication. The daily "what's on in Perth County" is helpful. We need more info in it

PRIORITY: protect natural areas including urban forests in city and surrounding areas ...Delicate balance between provision of services and not increasing taxes to the point that we become unaffordable ...urban planning to encourage active transit (biking, walking, roller-blading, etc.)

2. Lower tax (property) green grants - grass vs. parking lot
3. look at areas with primarily ash trees planted and add a diverse assortment of trees
4. convert brownspaces to natural areas
5. involve environment groups in high schools and youth programs
6. urban trees cannot be cut down even on private property unless verifiably unhealthy
7. urban agricultural plots available to citizens
8. Meet with city Parks and Recreation and County counterparts, to discuss priorities, ways and means of increasing green space and developing active transit routes.
9. do some guerrilla gardening of derelict lots
10. vote for and support councillors that support green ideas
11. make sure taxes don't outpace the ability of small businesses to be viable

PRIORITY: Municipal support and money for all of the arts with strong community Co-operation and support...

2. Find a suitable performance space for community arts and culture groups. (SSF rarely available and not affordable. City Hall stage inadequate.).
3. brown space to be used for the arts
4. fund the creation of an arts council
5. Strike a committee. Request seed money for a feasibility study on a new performing arts centre. Begin fundraising campaign.
6. cultural mapping and planning
7. more accessible performing arts; lower price point
8. increased local educational opportunities for creative sector
9. Publicize and support regional arts and culture events, not just Stratford
10. Establish an annual festival of the arts in Stratford having municipal and community support
11. Make/encourage affordable use of existing arts facilities
12. Increased public awareness / public education
13. take out parking costs downtown and charge parking fee at malls / big box
14. Work to develop youth projects and mentoring in the arts
15. more available innovative locations for displaying visual arts
16. Solicit community input to identify potential users and needs for the performance space and the equipment (e.g. piano) to be part of it.

PRIORITY: restricted definition of economic development (don't forget culture, tourism, services) - small job market for creative class, culinary, walk-in clinics, and services. ...More flexible and open development policies toward emerging, creative, knowledge-based sectors -> support entrepreneurs

2. At October 25th municipal election, vote for councillors who recognize culture as part of economic development.
3. Use tools such as cultural mapping to prove the value of inclusion in economic planning
4. Pick 3 people in this room and volunteer them to run for city council. Then vote for them and get your friends to vote for them too.
5. Run for city council yourself - we'll vote for you.
6. approach a local media outlet to interview a variety of entrepreneurs
7. continue visionary support of youth education as a means of capacity-building
8. increase bureaucratic understanding of the needs of creative projects
9. Who's running for council??????

Appendices

A - Overview

Project Overview

- Partners: County of Perth, the City of Stratford, the Town of St. Marys, the Perth CFDC. Additional project support is from the Four County Labour Market Planning Board and the Technical Training Group.
- Project: to develop a united strategy to lead the communities through challenging economic times.
- Part 1: Labour Market Analysis
- Part 2: Economic Development Strategic Plan

Labour Market Analysis

- ▲ Gather existing and identify new labour market data
- ▲ Identify labour market/employee skill characteristics of existing and emerging workforce
- ▲ Identify a strategy to transition workforce into existing and future employment opportunities
- ▲ Identify and address immediate business concerns by sector and geography

Economic Development Strategic Plan

- ▲ Consider the results of the Labour Market Analysis
- ▲ Undertake a regional analysis of the economy
- ▲ Undertake a competitive analysis and industry linkages – swot analysis
- ▲ Identify key business trends
- ▲ Identify key industry sectors to target in the future

Stakeholder consultation process

- ▲ Interviews of institutional leaders
- ▲ **Focus Groups - 6**
- ▲ **Stakeholder Interviews - 22**
- ▲ **Town Hall meetings – 5**
- ▲ On-line survey – Feb 15th

Project schedule

- | | |
|--------------------------------------------------------------|----------------------|
| <input type="checkbox"/> Start of Project | November 2009 |
| <input type="checkbox"/> Situational Analysis | Dec/Jan 2009 |
| <input type="checkbox"/> Stakeholder Consultation | February 2010 |
| <input type="checkbox"/> Labour Market Analysis | Feb/Mar 2010 |
| <input type="checkbox"/> Strategic Economic Development Plan | April 2010 |

B – Actions brainstormed (Group 1: Council & Staff)

PRIORITY: increase training in new industries ..local training facilities- trades

2. TRAIN: Complete training/skills needs assessment: what are the needs of industry that are out there? clarify exactly what trades/skills are required ... where are the gaps? ...what are the skills that are going to be needed
3. TRAIN: Help college grads find employment - who, when, where... can we play a role
4. TRAIN: Establish community college branch/satellite in 1+ of our communities
5. TRAIN: Shared training: Coordinate training course/program so that entire area benefits. Leverage needs x region so that training can be done locally
6. TRAIN: encourage apprenticeship
7. TRAIN: Connect with grades 11 and 12 students, let them know what skilled labour is required in our area
8. TRAIN: Spot on the Perth County web site for local business to post job opportunities
9. TRAIN: working with promoting TTG(technical Training Group)
10. TRAIN: encourage students to study away from area, then encourage them to return and bring back what they have learned
11. TRAIN: We should get the school boards to realize how important it is for them to put useful training programs within their agendas.
12. TRAIN: Pressure education system to ensure graduates have solid basic education - stop making it easy for everyone to graduate

PRIORITY: better co-operation between municipalities ...more coordination of efforts-Federal, provincial, regional and local ... reorganization?

2. MUNI COOP: set up regional teams to address issues
3. MUNI COOP: If going to keep county organization, then make municipalities equal partners
4. MUNI COOP: Centralize economic development regionally ... This is an ongoing issue. Perhaps a joint ED person to have us all working from the same page.
5. MUNI COOP: allow region-specific differences in development within county - encourages specialized development
6. MUNI COOP: CAO create a list of obstacles/solutionspoliticians to see what is doable
7. MUNI COOP: We have to get on with it and come to a shared services agreement within three months.

PRIORITY: Red tape, Rules and regulations, both Municipal, Provincial and Federal that cause delays in encouraging business development. ...reduce barriers by senior governments

2. REDTAPE: Continue pressure with new memo of understanding - tweak with our MP, MPP with what we want to happen
3. REDTAPE: Land use planning policies - less complicated for new business (re zoning, other constraints)
4. REDTAPE: Centralize building permitting ...Building permits: make it easier, faster, hassle free for businesses that we want to attract
5. REDTAPE: Simplify the rules... Make zoning applications easier
6. REDTAPE: Hold a focus day with County and City planning to use liberal planning not restrictive planning all within the guidelines...Building code: need to ensure the administration of this is not too restricted
7. REDTAPE: summary page for people wanting info on planning/zoning etc
8. REDTAPE: demand input from municipal level to provincial people before they pass sweeping regulations. e.g. drinking water rules
9. REDTAPE: be prepared to take responsibility
10. REDTAPE: continue to push to have municipal implied liabilities reduced -

PRIORITY: internal population growth (keep, attract newcomers, young families coming back)

2. NEWCOMERS: keep the taxes affordable
3. NEWCOMERS: need to understand what drives their decision making ...help provide what they want- leisure ...Maintain and enhance facilities (recreation both passive and active)
4. NEWCOMERS: knowing what jobs are available, or skilled labour required for area industry
5. NEWCOMERS: This is of more importance in different areas. Therefore how, we approach it should be reviewed in a different manner.
6. NEWCOMERS: improved web sites for attracting newcomers
7. NEWCOMERS: employment opportunities come first but we have to stress lifestyle benefits[education, health facilities, etc]
8. NEWCOMERS: Make regulations based on business size so 2nd generation have the ability to take over family business
9. NEWCOMERS: encourage affordable housing for young families

PRIORITY: More use of technology & Information communications - mobile, cell, software... systems need to be better designed ... for education and other purposes ... work from home

2. TECH: infrastructure - facilities
3. TECH: encourage use of social media
4. TECH: put more info about local government and economic development on web sites, Facebook etc
5. TECH: encourage use of technology in our day-to-day communications ..TECH: Technology is the way of the future, so we all should figure how to use it for our own communication internally and how to use it to market our communities and other areas.
6. TECH: train people to use what is required - not just everything that is available.

C – Actions brainstormed (Group 2: Agriculture, Rural Development)

For each of our top priorities, what exactly should we include in the economic development plan? i.e. what actions, strategies, and initiatives must we pursue?

PRIORITY: Need to raise the awareness of the consumer to consume products grown in our community. Demand from our grocery stores to make available products from Perth, stopping the flow of products produced in China ...need to educate the market in better eating habits i.e. 100 mile diet

2. BUY LOCAL: provide municipal funding support to farmers' markets across the county
3. BUY LOCAL: Different campaigns to educate the consumer. getting the groceries stores to make available a portion of floor space for Perth products.
4. BUY LOCAL: expand the farmers market idea (open more often)
5. BUY LOCAL: focus campaign on encouraging consumer to purchase food outside of the chain supermarkets
6. BUY LOCAL: Get more farmers, restaurants involved in Savour Stratford, funded by OMAFRA
7. BUY LOCAL: Have central distribution for local food from Perth/Huron so it doesn't go into Toronto food terminal and back out
8. BUY LOCAL: Lobby for labelling so consumers know if they are buying Ontario/Canadian produce
9. BUY LOCAL: lobby for a national food policy as Canada does not have one - need to start at the top down
10. BUY LOCAL: relax zoning bylaw rules to allow for farmer's markets where people are interested in putting them

**PRIORITY: Old rules & regulations need to be revised and made current to speed up the approval process. ...Agricultural regulations need to be maintained and monitored and farmers need to take responsibility for these regulations and standards. i.e. waste management
- Increasing allowed value-added commercial business on farms without changing taxation**

2. REG: streamline processes for new and old ventures of all kinds to promote growth of all kinds
3. REG: have planning department be more assistive/creative with promoting new ventures
4. REG: Other industries are responsible to comply with regulations TSSA, ESA, etc. Farmers need to be aware of the impact they have on the environment, and if they don't comply need to be regulated and monitored by the ruling authority. Our rivers and lakes will not survive if not.
5. REG: many people feel they are overcome by red tape before any of their ideas are barely out of their mouths, we need to find ways to hear people's ideas with an open mind and understand the benefit to the community of proposed projects

**PRIORITY: More funding for small farms/small businesses so they can survive & THRIVE.
...modify the trend of consolidating farms to larger and larger sizes, to allow more diversity of scale & room for future generations of farmers**

2. SMALL FARMS: Municipal taxation laws (e.g. 10 -> 30% of income)
3. SMALL FARMS: Buy local campaign
4. SMALL FARMS: Reconsider local regulations on sq footage, # employees
5. SMALL FARMS: look at whether or not severance sizes limit options for fairly small scale farm operations that have the potential to meet local market demands
6. SMALL FARMS: Have a Perth 'Dragon's Den' competition to promote entrepreneurialism in partnership with business funders
7. SMALL FARMS: More awareness of CFDC business advisory service and financing to Ag sector
8. SMALL FARMS: make sure economic development funds coming into the county support a diversity of businesses, farms in the rural areas and small communities

PRIORITY: preserve the Class 1 and 2 farmland in Perth county, stop in from being diverted to other uses e.g. subdivisions, roads, factories, etc. ..address Brownfield issues to help protect agricultural lands

2. FARMLAND: Official plans: increase density requirements
3. FARMLAND: Annexation of land by Stratford -> fix their Brownfield issues first
4. FARMLAND: Push for public transit
5. FARMLAND: Encourage Stratford to build up and not out - encroaching on farmland should not be allowed ...If all of the County were one, a planning boundary could be placed around Stratford as is for Kitchener
6. FARMLAND: Stratford shouldn't be viewed as the sole location for economic development within the county
7. FARMLAND: If there is demand for the land to be annexed, why doesn't the County develop it and get the tax revenue?
8. FARMLAND: Province needs to financially aid municipalities with urban redevelopment, but municipalities need to lobby province to make this a priority

PRIORITY: Focus on green

- We need more trees -> reforestation

- Subsidize organic choices (natural weed killers, fertilizers, etc.), so that these options are not more expensive than traditional options.

2. GREEN: county needs to lead by example and put dollars into green projects of all kinds
3. GREEN: County should offer incentive programs to plant more trees ...e.g. offer free trees to farm owners
4. GREEN: look for spaces to increase number of trees in towns and cities as well
5. GREEN: educate people to value trees, people will take lead then in caring for trees. Municipalities could look at how to support woodlot associations , 4H clubs , etc
6. GREEN: county should do assessment of its energy usage and find ways to save energy of all kinds
7. GREEN: Strengthen County tree By law where gaps and loopholes exist
8. GREEN: County website could include schedule of upcoming community green related meetings

PRIORITY: address the one-size-fits all regulations that are a threat to small abattoirs and other small rural and food processing based businesses

2. ABATTOIRS: Consumer education on having to pay more for food ...affordability
3. ABATTOIRS: Lobby govt for change for farm subsidies
4. ABATTOIRS: Special legislation for small abattoirs ...lobby provincial government for scale and risk appropriate regulations for small abattoirs, (e.g. under 10 employees) etc.; regulations that may be different than for larger plants

D – Actions brainstormed (Group 3: Entrepreneurs & Exporters)

PRIORITY: More premises that support entrepreneurship/incubation of new businesses along with mentor and financing assistance

2. Establish a "market square" space - a place for creative commons
3. Support our existing orgs with infrastructure (Stratford HR, etc.)
4. Informal incubator (mentorship program etc.) Maybe not a formal incubator
5. Invest and enable growth and development of Technical Training Group programs/capacity
6. Invest and Enable growth and development of Off the Wall and Chef School as internationally recognized professional training in Arts and Culinary
7. Invest and Enable growth and development of Stratford Institute Global Business and Media programs, along with possible new, future programs
8. Invest energy in proactively recruiting/joint-venturing with Fanshawe/Conestoga or other College to develop campus/programs in region
9. Invest energy in proactively recruiting online and/or next generation forms of programs (ex. online MBA with Athabasca, virtual campuses)
10. Leverage our existing reputation for creative and performing arts to support our fledgling new media efforts
11. Invest in development of mentorship programs like Community EFFORT, IXC (Australian model for innovation), partnerships with Communitech and/or other models that are viable in communities our size
12. Development of angel networks and recognition of value of home-grown/financed businesses
13. Have a three year mentor/business management programme for new businesses to help get them established, with escalating low rent over the 3 years, up to market value
14. Leverage leaders like Festival Hydro for leadership on hybrid/electric recharge infrastructure and Festival/Mornington on next generation communications infrastructure to develop self-sufficiency and export locally produced energy and telecommunications solutions
15. Develop global leadership in agricultural sectors including expansion of global genetics leadership, agriculture waste/bio technology company leadership (ex. Nuhn, Energrow, Perth Recycling, etc..)
16. Complete regional economic development strategies (check) :)
17. Explore and develop alternatives to win/lose annexation disputes that enable win/win solutions
18. Celebrate and promote the many globally leading, innovative entrepreneurs/companies that are currently under the radar in our communities
19. Ensure that Stratford Institute Graduates set up their businesses here - so need the physical premise
20. Clearly identify and target 5 specific visionary investments, develop strategies and options and implement plans to attract/develop

PRIORITY: Reliance on imports of energy, jobs, \$\$ and product from outside prevents self-sustainability and enables branch plant mentality -> must encourage a made locally approach

2. BUY LOCAL: Establish venues and places where the products the community makes be it industrial or agricultural can easily be purchased or accessed, even going so far as to offer incentives for locals to buy and support local products
3. BUY LOCAL: Let us become competitive, it will all fall into place.
4. BUY LOCAL: educate the public on what this means for our community. Many people don't even know what we produce as a region and if they did they would ask/shop for it
5. BUY LOCAL: encourage collaboration / support local marketing coops
6. BUY LOCAL: Provide export training and support services for local entrepreneurs
7. BUY LOCAL: raising awareness in the importance of becoming self sufficient as a society .

PRIORITY: visionary investment leading to industries and a talent pool that encourage relocation to the region / greater cultural diversity etc e.g. Stratford institute

2. VISION\$: many options, here, BDC, EDC and other initiatives to encourage creative finance.
3. VISION\$: target verticals: i.e. alt energy, digital technologies, agri business etc ... assign resources, promote region as destination of choice

4. VISION\$: Search for post graduates who need support for developing their ideas and support them with financial encouragement
5. VISION\$: focusing on exporting the products from the community there is a great need of trade missions that will give our entrepreneurs a very valuable exposure and opportunity to establish commercial ties with other countries
6. VISION\$: need of educating the consumers in healthy leaving and expending habits
7. VISION\$: fact based visionary investment - have key influencers (who affect outside sources) reach out and land/bring new industry to the region,
8. VISION\$: Make downtown a year-round vibrant centre and have activities for residents year-round - like Victorian Christmas festival, indoor sports (soccer, tennis), Christmas theatre so that Stratford is an interesting place to live all year.

PRIORITY: Lack of regional thinking: Municipal lines/boundaries that raise annexation/lack of regional thinking, 6 planning departments that aren't necessarily able to progressively, consistently plan ...Three Councils working together towards a common vision

2. REGTHINK: Have one Council and one common master plan that recognizes both urban and rural
3. REGTHINK: This plan is a beginning but get the planning departs of each together to develop and implement a regional plan
4. REGTHINK: Have topic based collaboration sessions on a regular basis that tie these groups together with input from business and education. Make these sessions mandatory and view as government reform
5. REGTHINK: hold regional town halls

PRIORITY: Infrastructure: roads, sewers, water, bus parks

2. INFRA: lower taxes, lower costs , allow business to compete, and then add infrastructure.
3. INFRA: stronger link between economic development and infrastructure. Until there is a direct tie we won't invest to grow
4. INFRA: Focus on the core, instead of spreading further out and spending money breaking ground on new infrastructure invest in what's already been established, making it more efficient
5. INFRA: Highway re-development is essential if we are to get new export-oriented manufacturing industries
6. INFRA: tight focus on winnable strategies -- i.e. retail intensification leading to remediation of downtown etc

PRIORITY: Lack of skills in demand... Lack of post-secondary training, college to increase youth opportunities and prevent out-migration

2. SKILLS: Build linkage between needs of employers and educational institutions -> shaping curriculum
3. SKILLS: Support and grow TTG to ensure skills development
4. SKILLS: University town?!
5. SKILLS: Let businesses train in an appropriate skill set .
6. SKILLS: Attract new business - that will draw people with skills
7. SKILLS: Have ed. programs match curriculum to where the investment is
8. SKILLS: bring the base level of skills up in the community in general. great example is social media boot camp and then each person can figure out how to apply to their world. Farmer, teacher, admin, retiree. Other skill areas like this could include alt energy basics
9. SKILLS: tight focus on industry with greatest current strengths and future potential
10. SKILLS: Build export orientation into high school curriculum - and easy sell with web-based businesses
11. SKILLS: Create a productive business commons to aggregate skilled people and most importantly, promote and document that resource.

E – Actions brainstormed (Group 4: Manufacturing & Automation)

PRIORITY: continued/increased support to increase good manufacturing jobs to the city

2. P1: More incentives/focus on Mfg i.e. lower taxes, R&D/competitiveness
3. P1: Establish manufacturing/supply train networking group
4. P1: Municipal and Provincial support of local organizations through co-op marketing, events
5. P1: Present/Prepare white paper based on the realities of manufacturing in Ontario to the local government in support of going up the chain to regional, provincial & federal support driving initiatives and funding
6. P1: Partner with Stratford Institute to bring in "Manufacturing Symposiums"

PRIORITY: Continue to bring more attractions to the city that appeal to all citizens of the city and surrounding areas. (using Festival... use facilities off season ... winter activities.. Promotion of the area for winter activities drawing people and business

2. P2: Better relationship with Festival re: hosting events
3. P2: Leverage Stratford Institute facilities
4. P2: Use of facilities by - concerts, traveling drama groups, company board meetings ...host symposiums on new business development e.g. web 3.0
5. P2: promotion of city and surrounding communities
6. P2: share facilities such as sports complex facilities in St. Marys, Milverton etc for space in summer when hockey is out and festival is in -> better utilization of facilities
7. P2: Build a "Stratford & Community" conference facility - i.e. Add on to existing Rotary Complex
8. P2: Utilize Festival for "Broadway" type productions during off season
9. P2: Build on the Local Food Initiative with cooking classes, tours etc.

PRIORITY: Manufacturing, supply chain networking ... bringing players together -> increase awareness of who/what available

2. P3: More communication between industries about their capabilities which in turn could lead to diversification
3. P3: services available to other manufacturers
4. P3: Establish networking group ... Set-up a manufacturing network (online and f2f...) to share or ask... form monthly meetings with interested parties
5. P3: Develop a distributed brochure listing companies in the area with a "yellow pages" style index, and an advertisement for each company - could be linked off city website with the ability for companies to post pictures and link to their website
6. P3: Have a "Manufacturing News of Stratford" web page, and send link and brief description to potential suppliers
7. P3: Municipal suppliers (hydro, etc) meetings with industry/manufacturing

PRIORITY: Marketing: More recognition of industry and the values added (need to communicate the impact/success)

2. P4: More awareness of industries and products/services offered.
3. P4: Career fairs
4. P4: work closer with local chamber of commerce
5. P4: media campaigns with coverage of industries and their contributions to the community

PRIORITY: Focus and action on green house gas reduction and therefore allowing for readily available low cost energy ... Promotion of green energy and energy efficiency.

2. P5: Environmental planning to support reduction of GHG/ carbon footprint.
3. P5: Awareness of all options available to decrease carbon footprint, such decrease in meat and dairy consumption.
4. P5: Incentives offered for training and registration to ISO 14064 - GHG standard
5. P5: community/cooperative projects for large biomass or solar generation facilities
6. P5: Create a permanent resource to facilitate green energy projects (Knowledge of FIT program and other incentives)
7. P5: get into education system to promote new green focus to youth
8. P5: training for green initiatives perhaps partnering with suppliers on OPA / OPG vendor list

F – Actions brainstormed (Group 5: Alternate Energy)

PRIORITY: Get renewable projects to be more community (coop) based - network to cut costs ...accessible renewable energy opportunities (everyone can play a part) - possible co-operative models would enable this

2. each municipality set up a cooperative and invite citizens to become member/owners of renewable energy projects on municipal buildings
3. Advertise, hold town hall meetings... create networks among those interested.
4. find community partners to model renewable energy and to serve as sites for interested parties to visit
5. Educate community on co-operative model ...Education about how to implement alternative energy systems in community
6. partnerships between schools and industry
7. Already have a Perth-based co-op (Countryside Energy Co-operative, Milverton) that has 117 members and we are about to develop 4 community-owned and managed projects, with more in the pipeline. Membership is open to all.
8. work with legal advisors on how to set up "on title" status for all owners of a "system"

PRIORITY: Lead by example at political level... Forward thinking leadership from our local politicians regarding energy planning

- Less lip service, increased adoption, (political will), rates in renewable energy sources and energy and water conservation: we need less strategic plans and more action plans.
- policy that supports and encourages implementation of these measures

2. Each of the municipalities ought to go forward immediately with a FIT or MicroFIT installation as it is a money making venture and shows leadership on energy issues
3. Promote political will and policy creation that supports the implementation of renewable energies and conservation measures.
4. include renewable energy where feasible all new government facilities
5. Leadership needs to take managed risk, you can never get all the answers, start action and modify as appropriate. Work like business does.
6. facilitate alternative thinking in reuse models of architecture
7. forward-thinking politicians
8. Build into planning codes the structural requirement to support Photo-Voltaic [PV] on roofs, walls and balconies - minimal additional building costs with significant benefits (i.e. economic and environmental).
9. No additional assessment on any renewable energy project up to a certain size.

PRIORITY: Recycle / reuse plans on community scale ...Poor use of waste, farm and town. better recycling, reuse, energy production and resaleProduce bio energy from our resources! we are wasting bio-energy, better collection and conversion of bio-resources

2. Co-ordinated waste program throughout the county, and neighbouring counties where appropriate
3. A county driven energy from waste project maybe together with bluewater recycling? ... Look at using existing programs (note: Perth East & St Marys Bluewater recycling) as prototype
4. Implement a program to further separate wastes for other uses at the municipal level
5. an openness to look at clean burning technologies for waste incineration and bio-mass applications

PRIORITY: Reduce the red tape for some of the promotions - simplify paperwork required ...give developments the ability to act quickly and construct the projects without spending many years appealing different levels of government and ministries

2. Remove red tape, by-laws that limit change to implement alternative energy for certified contractors
3. Set standards based on project size in order to streamline

4. Create building application plans for renewable energy projects by each type to streamline process
5. build on "call before you dig" model - one call allows access to all necessary protocol
6. Bring Federal water, Provincial land use and water, Muni bylaw to table for an integrated one stop decision process //// Get all municipal and provincial departments that have an interest in alternative energy installations to work together and consolidate requirements into a single, streamlined process and to expedite approvals.
7. educate municipalities about alternative energy solutions... make it an easier decision for them to implement
8. streamline by-laws and regulations and tiers of government involved in decision-making
9. allow municipality to adopt standards according to their specific needs
10. no specific permits should be required outside the normal building permit package in residential and small commercial applications

PRIORITY: Focus on attracting multiple small businesses rather than just "one large"

2. understand what small businesses want/need in a community (e.g. high speed internet) and make sure we can deliver this and promote this via our economic development depts. // have an open dialogue with small business on ways to attract and retain their business in the community.
3. Provide local incentives to attract more small business - they are the driver for employment
4. ensure through incentives a diversity of business can operate here
5. improve road network to allow goods in/out quickly and efficiently ...Transportation and availability of serviced land concerns for small business. //Improve road links especially to USA
6. review vacant factories to see which ones could be re-developed into small business campuses
7. change zoning policies to allow some small businesses in rural areas
8. Low cost space/land for development, tax incentives
9. Don't forget service industries, we have 20-30% more retirees than provincial average
10. Better daycare accessibility
11. improving rail access (people & goods)
12. Opportunities to create sustainable employment, similar to that enjoyed in Europe.

PRIORITY: Education, to retain and attract students/ population - promote smaller (satellite) campuses or e-learning opportunities. ...Lack of Higher Education locally, both post secondary university and technical industry specific

2. Industry needs analysis
3. Ivey school of business local classes for entrepreneurs
4. inventory of available spaces that could be used to deliver courses and promote these to various post secondary institutions
5. rent excess facility capacity to local businesses
6. encourage and fund more trade programs early in the school system
7. Create renewable / sustainable energy programs
8. Municipalities ought to host public learning forums regarding energy conservation and generation.
9. Local alternative energy organizations to assist school/college/university curricula with program input, field demonstrations, and co-op placements.
10. support and promote arts education as an underpinning for all forms of learning and forms of employability

Focus Group List of Participants

The following are the stakeholders who provided input into the six focus groups held during the week of February 8th, 2010.

Manufacturing and Automation

Name	Organization
Julia Opie	Owner, Bonza Training Solutions
Ang Neill	RDO, Perth County
Kirby Rae	Kirby Electric
Mike Valiquette	Plant Manager, Curtiss Wright/Novatronics
Tom Schur	CFDC
James Steed	Steed Standard Transport
Mark Booker	Advanced Design Solutions
Doreen Myers	Myers Hamilton & Assoc./TTG
John Heunemoerder	JMS Automotive
Rita Binns	Pretty Wings Web Projects
Rosanne Allen	Aisin Canada Inc.
Bill Boon	Aisin Canada Inc.
Gary Martin	Magest Inc.
John T. Wildonson	Demaek Learning Solutions
Mark Roth	Technical Training Group, Stratford North Western S.S.

Alternative Energy

Name	Organization
Doug Fyfe	General Manager, Countryside Energy Co-op
Joel Anderson	Install/Sales, Buchanan and Hall
Eugene Elliott	
Roger Fuhr	Councillor, Perth South
Neil Nicholson	President, Powerhouse Solar
Ang Neill	RDO, Perth County
Todd Melville	Tradewinds Energy Solutions
Robert Shantz	personal
Jack Vanderbaan	VP Eng. - Festival Hydro
John Bosman	Bostech Mechanical Ltd.
Nick Terpstra	Birchlawn Farms Ltd.
Mark Roth	Technical Training Group, Stratford Northwestern S.S.
Kirby Rae	Kirby Electric
Stuart Arkett	Councillor, Perth South
Eileen Smith	Hermione Presents
Kerry McManus	AMDSB - Stratford Central
John Heunemoerder	JMS Automotive
Chris Hall	Owner, Discovery Geo Energy
Lloyd Crawford	Lloyd Crawford Consulting
Mike Doupe	McLean Taylor Construction Ltd.
Mike Tam	West Perth Council/Perth Concrete Sales
Bill Mustard	Town of St. Marys
Shawn Bontaine	Technical Training Group

Councillors and Municipal Management

Name	Organization
Ron McKay	Perth South Reeve
Bill Arthur	CAO Perth County
Bob Wilhelm	Perth South Deputy Reeve
Ed Hollinger	North Perth Mayor
Don Brunk	Perth East Councillor
Stuart Arkett	Perth South Councillor
Bob McTavish	Perth East Councillor
Bob McMillan	Perth East Councillor
Terry Seiler	North Perth Councillor
Rhonda Ehgoetz	Perth East Councillor
Julie Behrms	County Warden
Michael Gornyiczki	Deputy Fire Chief
Ian Forest	Perth East Councillor
Jeff Marshall	West Perth Councillor
Bert Vorstenbosch	West Perth Councillor
John Van Bakek	West Perth

Agriculture and Rural Development

Name	Organization
Gerald H. Kolkman	Perth County Pork Producers Association
Maria Garcia	Perth County
Wendy Dempsey	Art Trillium Foundation
Shawna Stonehouse	OMARA
Bert Vorstenbosch	Perth County Pork Industry
Jamie Gibb	Self employed farmer
Bev Rock	Beverly Rock Media
Rose Warren	Beverly Rock Media
John Nyenhuis	Perth County Port Producers
Ann Slater	Perth/Oxford Nutritional Farmers/St. Marys Farmers Market
Pam Riehl	Stratford Ag Society
Rose Anderson	Buchanan and Hall
Helen Dowd	Ag Society Milverton
Roger Fuhr	Perth South Council
Ruth Klahsen	Monforte Dairy
Tom Schell	CFDC

Lone Eagles/Entrepreneurs

Name	Organization
Ruth Klahsen	Monforte Dairy
Deb Krizmanich	Projects that Ignite
Trevor Paetkau	Sling Creative
Keith Waldron	Sling Creative
Maria Garcia	Perth County
Keith hillier	REDMA consultants
Daniel Szoller	Monforte Dairy

Jim Jantzi	NFT
Shawna Stonehouse	OMAFRA
Rob Brown	Perth CFDC

Tourism & Arts/Culture

Name	Organization
Eugene Zakreski	Stratford Tourism Alliance
Neville McNaughton	Monforte Dairy
Barbara Montgomery	Hal and Barb's Festival Guest House
Eileen Smith	Hermione Presents
Kerry McManns	Stratford Central
Sue Hyatt Griffiths	St Marys BIA
Ted Boniface	Docfest/Stratford Public Library
Michele Boniface	Kiwanis Festival of the Performing Arts
Martine Becu	Dramatically Different Consulting
Terry Fowler	
Daniel and Ruth Klahsen	Monforte Dairy
Rob Brown	Perth CFDC
David Forrster	Stone Willow Inn
Danielle Brodhagen	STA
Kimberley Payne	Stratford Chefs School
Ara Jane Ready	St. Marys Museum – volunteer
Susan Starkweather	Off the Wall
Cathy Bieman	Perth County Visitor Association
Kelly Baird	St. Marys
Lesley Spencer-Cooper	Stratford Summer Music
Jo-Dee Burbach Tuling	Enhance Graphics / Stratford Health and Wellness
John David Sterne	Stratford Symphony
Jeff Schmidt	Schmidt Consulting
Sam Coghlan	Stratford Library
Maryann W. Cox	Factory 163
Lesley Walker-Fitzpatrick	Mayafair.ca
Nancy Fallis	Ministry of Tourism
Dianne Josling	Ritz Villa BD
Carol McLeod	St. Marys Storytelling
Irene Miller	
Stuart Arkett	Physiotherapy Associates
Sandra Huntley	PAC
Diane Lyoness	Dunn-Drae B&B
John Lyoness	Dunn-Drae B&B
Mary Smith	St. Marys Museum
Kristin Sainsbury	Perth CFDC
Lize Tanner	
Sylvia Pietras-Gorczewski	Perth County visitors
Carol Miller	Ind. Contractor

Appendix II

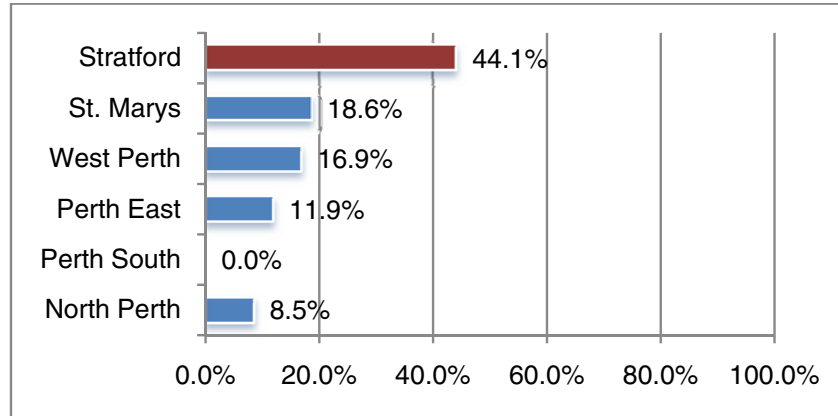
Labour Market and Economic Development Survey Findings

Perth County, St. Marys and Stratford Regional Collaboration
Survey Responses: Summary

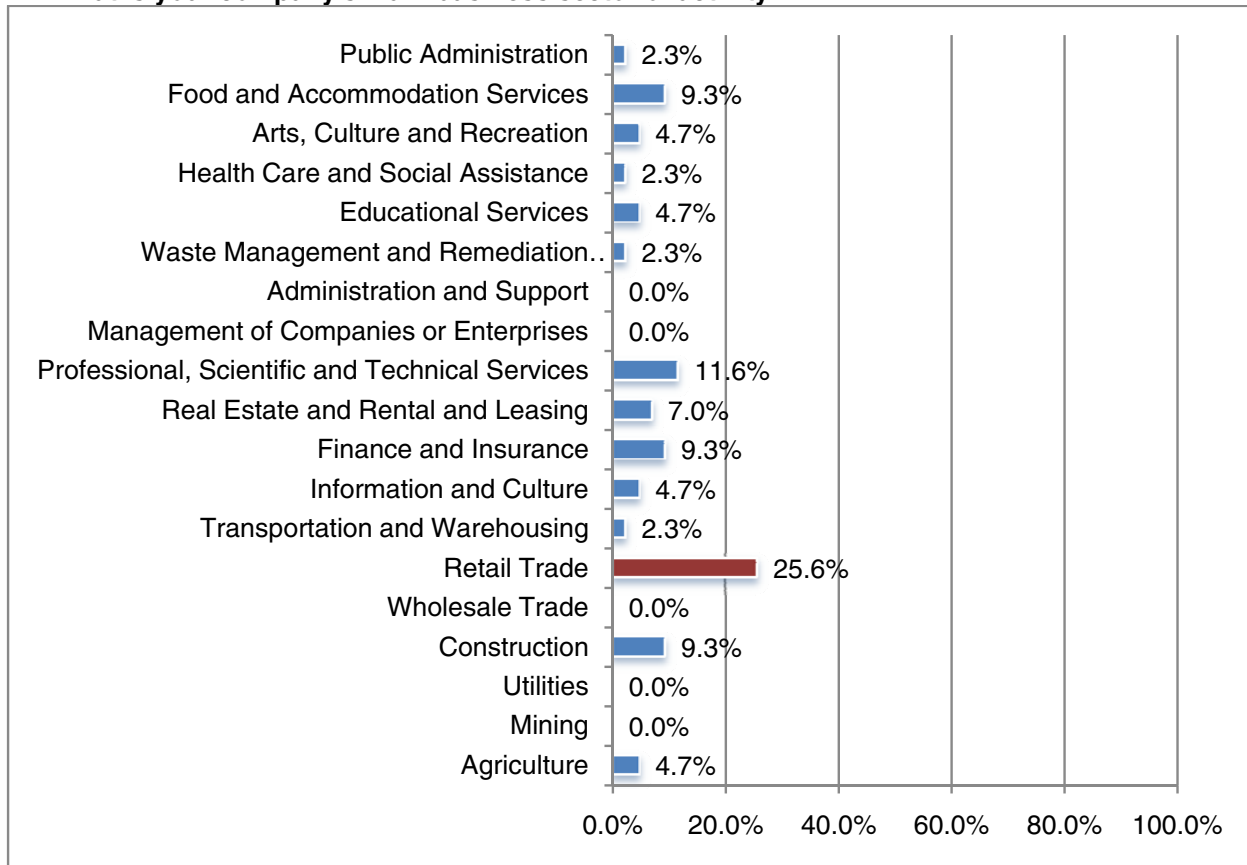
Number of Responses (02/16/10): 61

Company Profile

1. What municipality do you operate your business from?

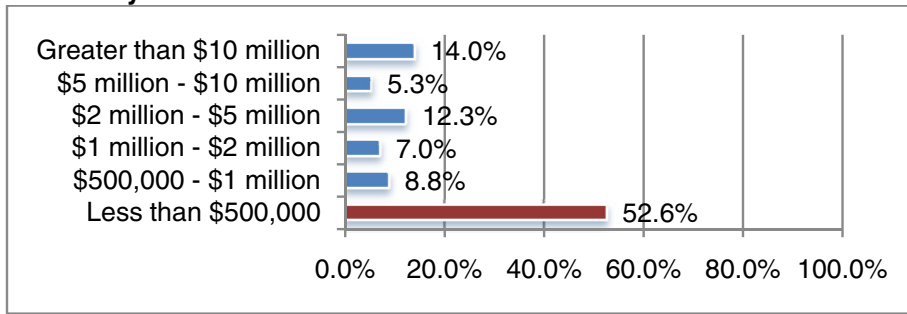


2. What is your company's main business sector of activity?

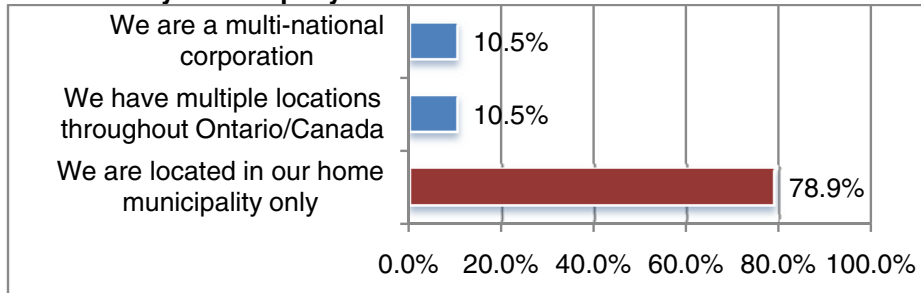


Other: Tourism, consulting, various manufacturing/automotive, HVAC, recycling, funeral home

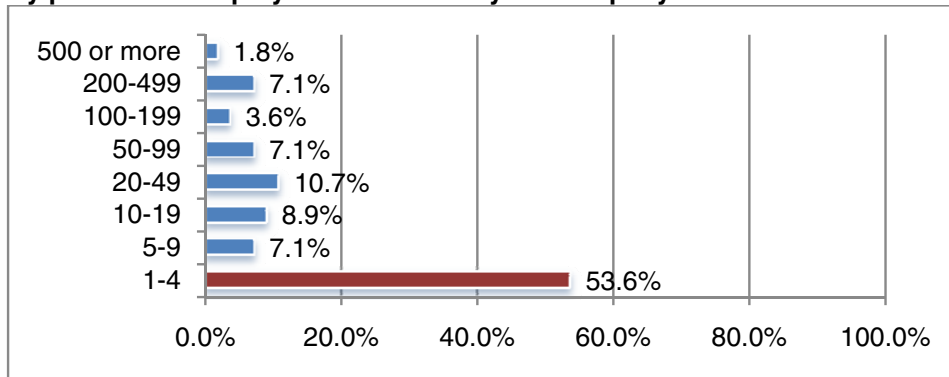
3. What were the approximate revenues for your company (specific to your local operation) in the previous fiscal year?



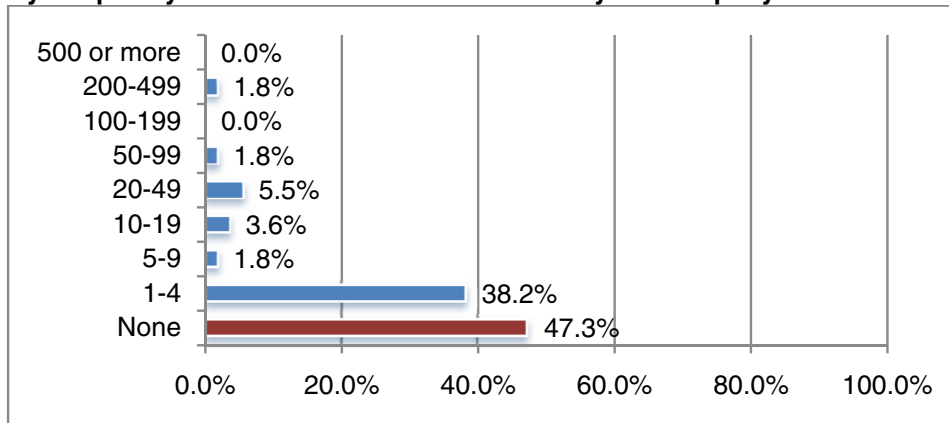
4. What best describes your company?



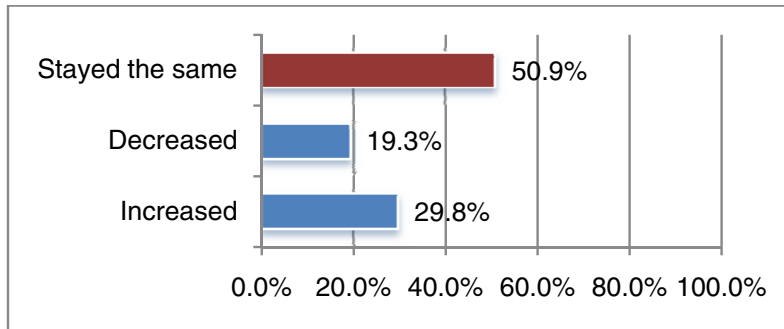
5. How many permanent employees are there at your company?



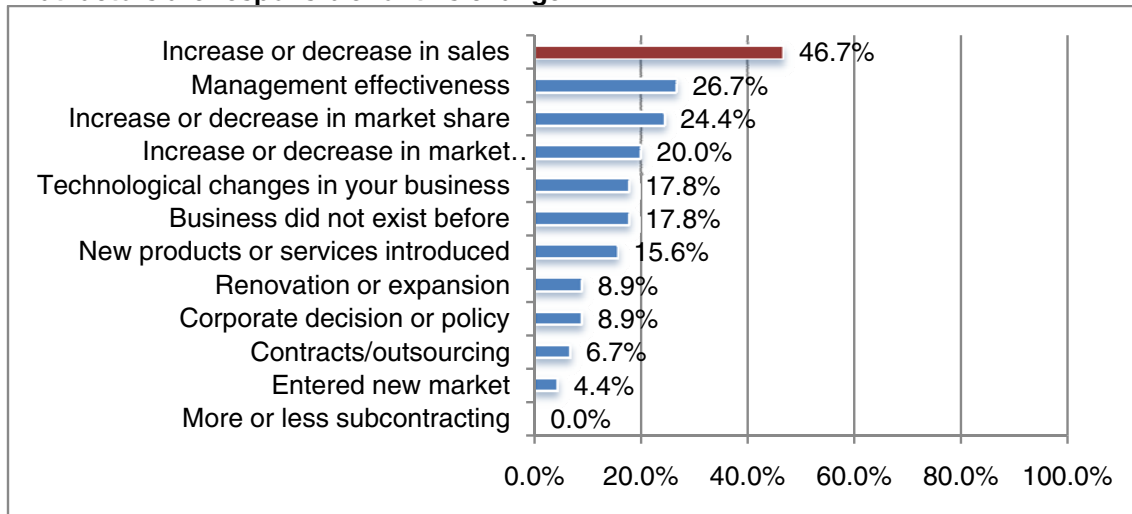
6. How many temporary or contract workers are there at your company?



7. During the past 3 years, has the number of employees in your business increased, decreased or stayed the same?

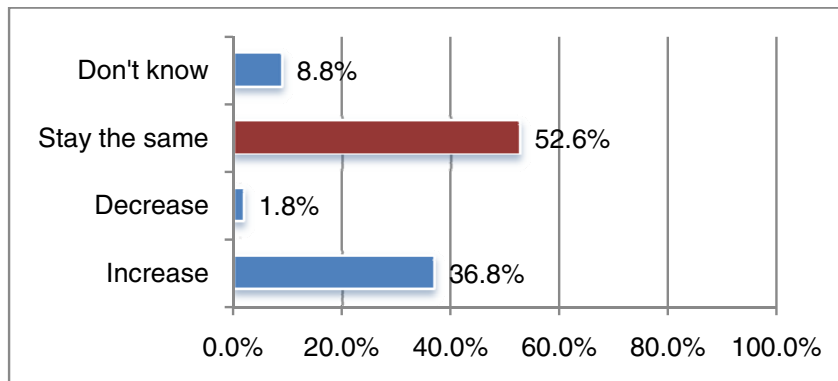


8. What factors are responsible for this change?



Other: Reduced overhead; weak economic conditions and clients leaving Stratford
Social media and website development

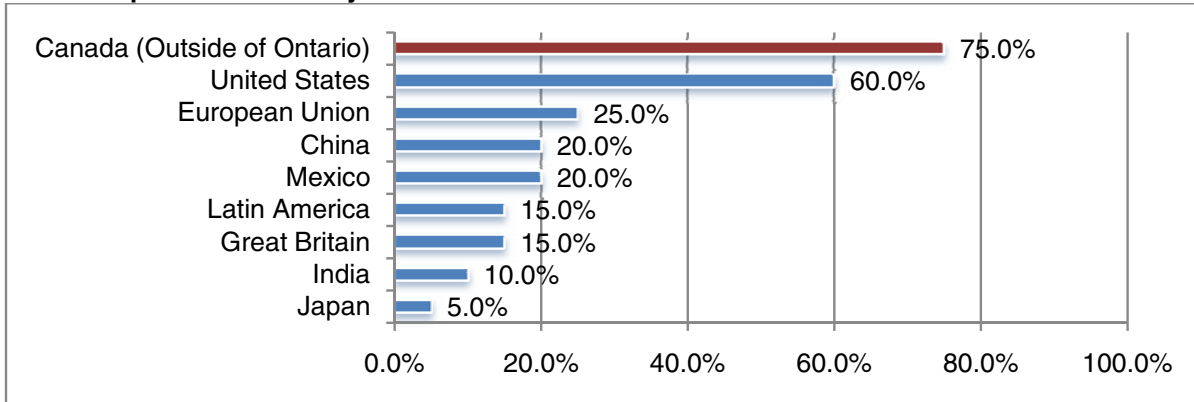
9. During the next 3 years, do you anticipate the number of employees in this business to increase, decrease or stay the same? Please indicate a number of expected increase or decrease?



Other: Most expected increase/decreases are only 1-3 employees; others report 50% change due to shift in operations

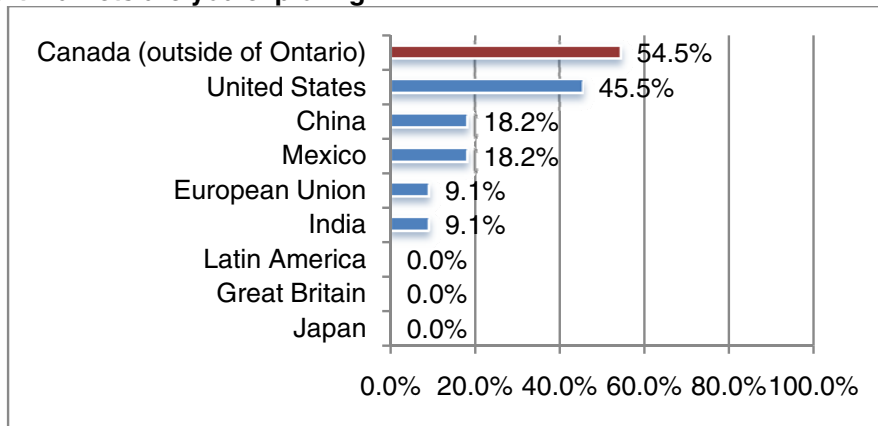
Business Expansion

10. What export markets are you in?



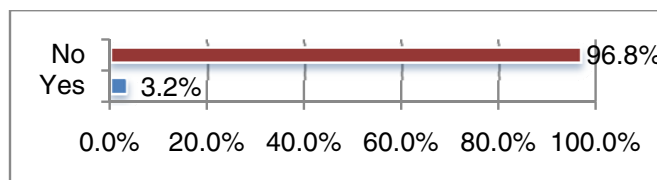
Other: Southeast Asia; Korea; none – locally consumed service

11. What export markets are you exploring?

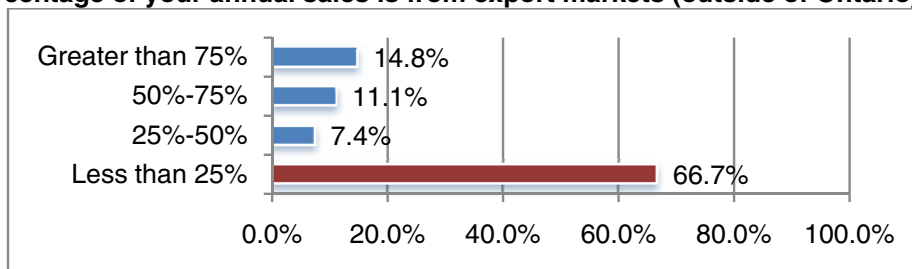


Other: Korea; local consumption; depends on opportunities

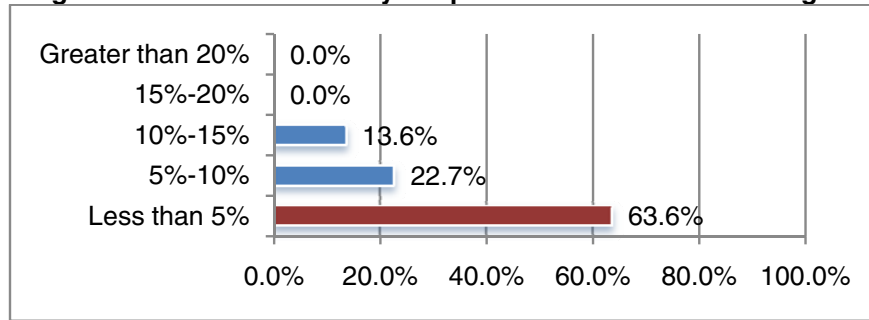
12. Do you require support to further investigate this exporting opportunity?



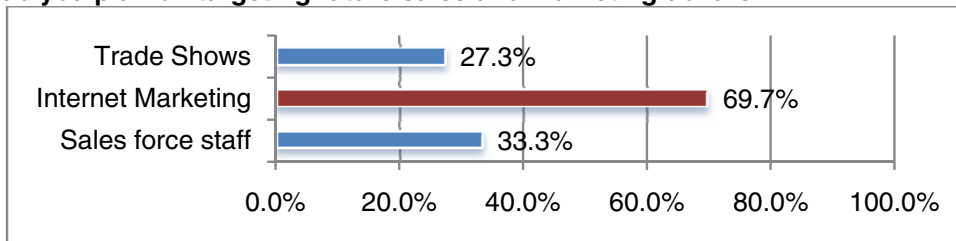
13. What percentage of your annual sales is from export markets (outside of Ontario)?



14. What percentage of annual revenues do you spend on sales and marketing?

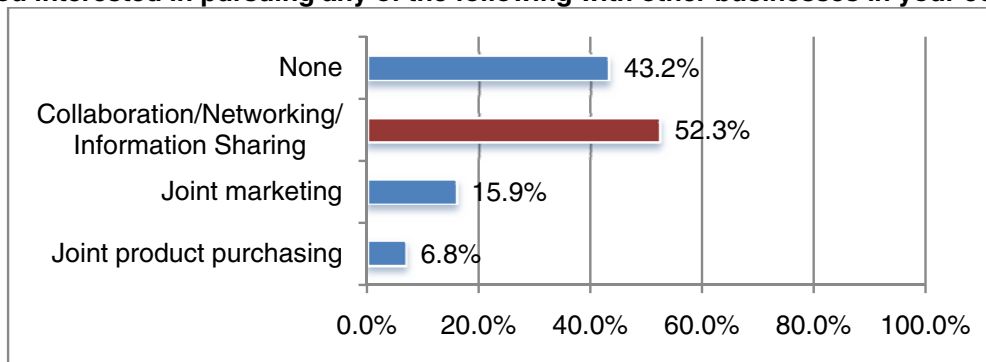


15. Where do you plan on targeting future sales and marketing dollars?

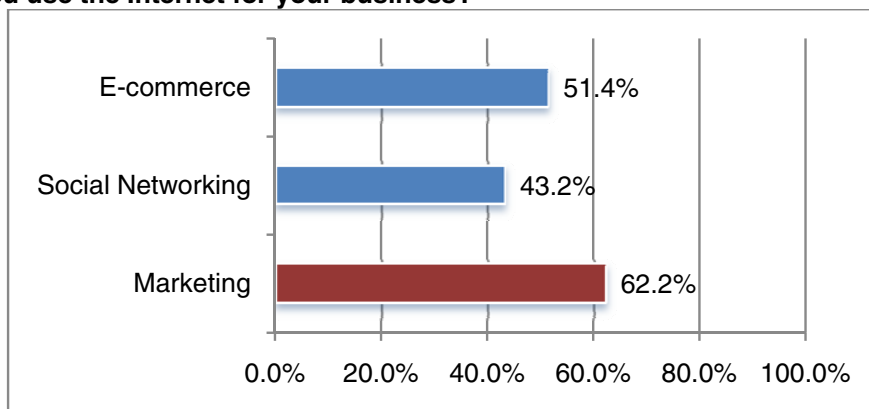


Other: Local advertising; direct mail; print/brochure/trade and tourism publications; word of mouth

16. Are you interested in pursuing any of the following with other businesses in your community?

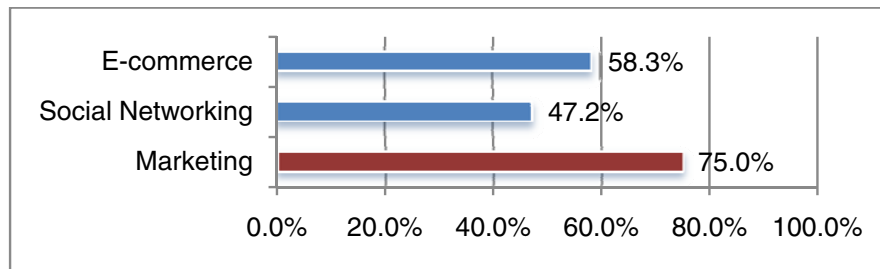


17. How do you use the Internet for your business?



Other: Web-based business software; communication; product orders; research

18. How do you plan on using the Internet for your business in the future?



Other: Communication; research; advertising; blogging

19. Please describe how local business associations and/or economic development offices could assist your business sector?



Other: Bring in more local manufacturing; finding client companies and referrals; connecting with local (regional) plants on product/service requirements

Business Investment and Environment

20. What are St. Marys, Stratford and Perth County's three best opportunities for growth in the next five years? (ordered by frequency of response)

- Technology, digital media, high tech, IT and other knowledge/information sectors
- Tourism, local attractions and “staycations”
- Green initiatives, renewable energy and recycling
- Post-secondary education; U of Guelph, UW, U of Toronto
- Manufacturing, automotive/parts
- Food production, agriculture and rural investment
- High-end/specialty retail and services

21. What are St. Marys, Stratford and Perth County's three advantages as a place to do business?

Quality of Life: Small town atmosphere, lifestyle, service; community involvement; information sharing; safe and pleasant environment; adequate amenities; heritage ambience; quality Infrastructure

Locational Advantages: Proximity to diverse businesses and clients in major centres (Toronto, Kitchener and London); close to GTA but not the GTA; proximity to education/innovation in KW and London; proximity to freeway

Business Environment: Available industrial-commercial land space; good farmland and large inventory of customers; intelligent, hard-working, non-union labour force; local suppliers; excellent customer service; lower development costs re: land rates, permit fees etc.

Local Government: Support of municipal leadership in business restructuring and location; large variety of services offered

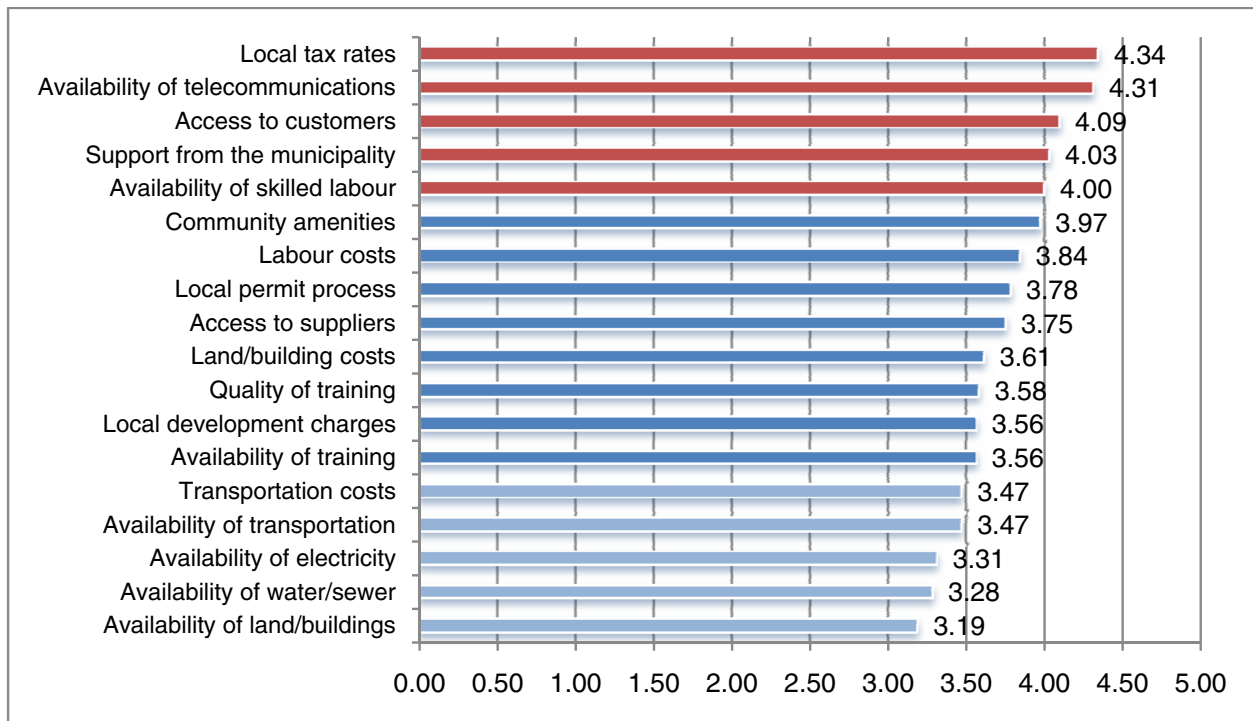
22. What are St. Marys, Stratford and Perth County's three disadvantages as a place to do business?

Location: Not a regional centre, and distant from major centres; travel and public transportation to clients; majority of skilled workforce has to travel from KW/London; not near major highways (only 2 lane); located in snowbelt (weather)

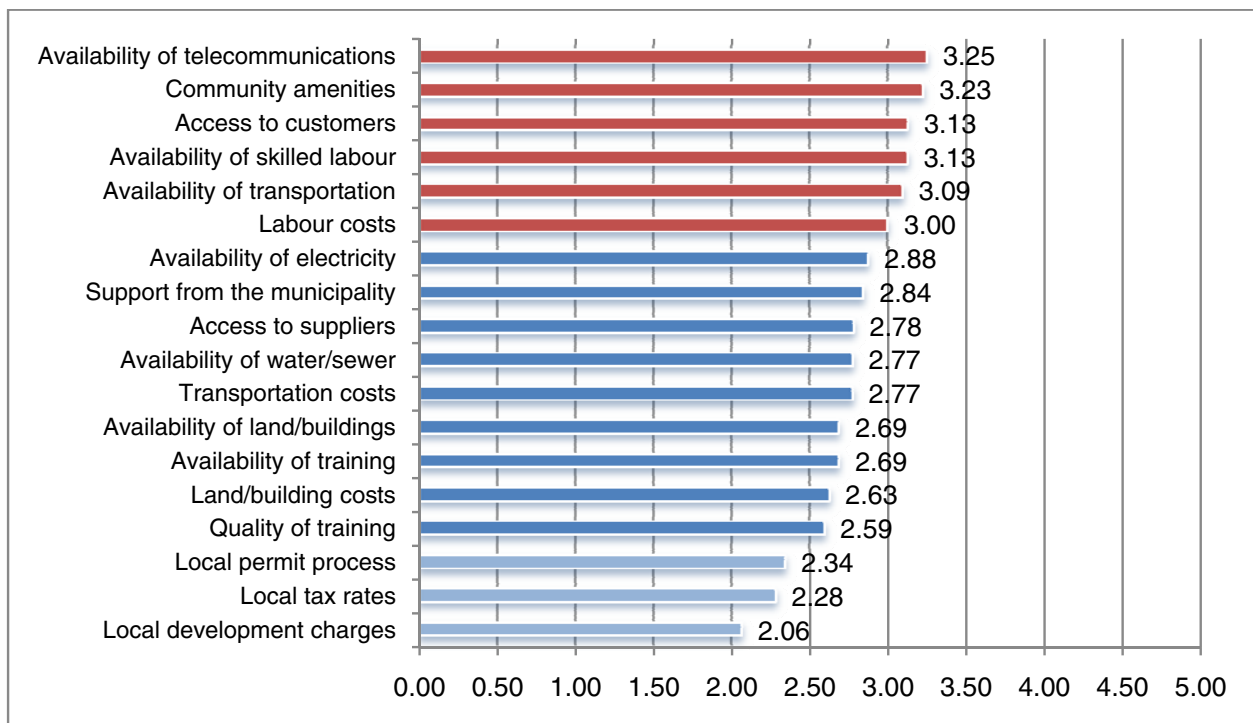
Business Environment: High price; rest of county not targeted for investment outside Stratford; lack of technology workers and skills; property taxes too high; lack of training in emerging industries; professional associations for networking are not local; lack of business support services expertise, and suppliers (e.g. Home Depot); lack of compensation

Local Government: Red tape; difficult to obtain municipal approvals; lack of member organizations; high license fees; lack of initiative; lack of collaboration and partnership across the County's governmental levels to sell region as a whole

23. Using a scale of 1 to 5 where 1 is “not at all important” and 5 is “very important”, please rate the following criteria to indicate the level of IMPORTANCE each one has in ensuring the growth of your business.



24. Using a scale for 1 to 5 where 1 is “not at all satisfied” and 5 is “very satisfied”, please rate the following criteria to indicate your level of SATISFACTION with each.

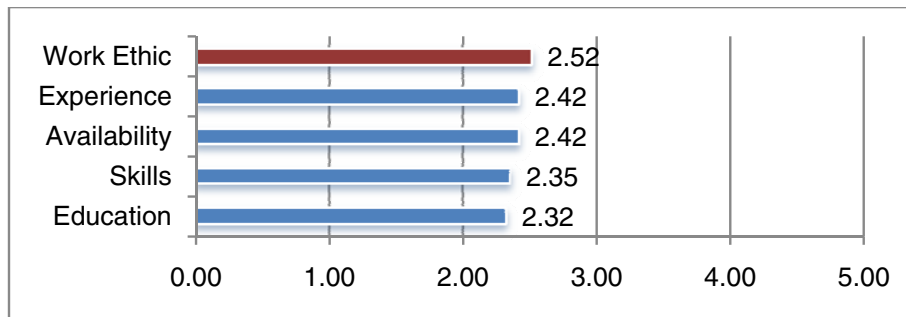


25. If you ranked your **SATISFACTION** of any of the above criteria as 1 or 2 please make specific comments on how to improve this ranking below. Indicate which asset you are commenting on and your specific comments (e.g. A. Labour Costs - Labour costs are too high...)

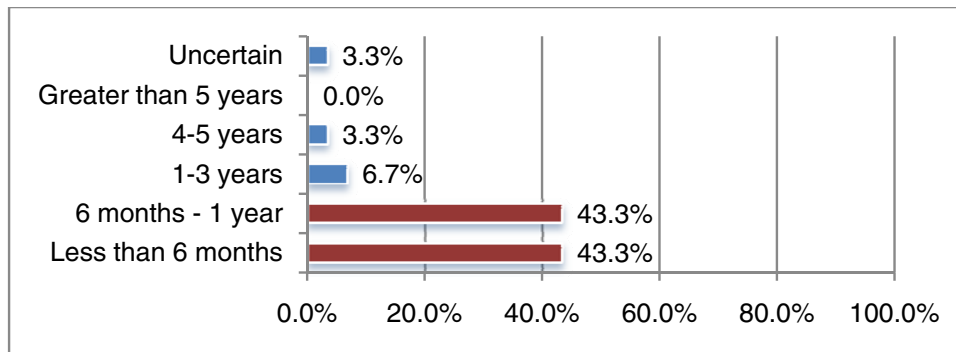
- Tax rates and permit fees are too high for the services and location businesses get
- Lack of labour skills, especially in high tech, and not enough funding or programs for local training specific to labour needs
- More municipal support to be seen as business friendly, and needs to promote its services more
- Transportation costs and access from major centres hurt; affects access to customers and suppliers
- Rates and availability of electricity and telecommunications are quite high

Current Labour Force Profile

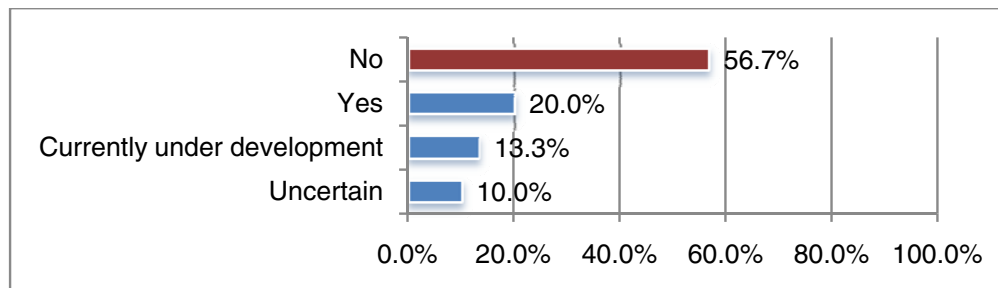
26. Please rate the regional workforce in terms of:



27. How far in advance can you typically predict your workforce needs?

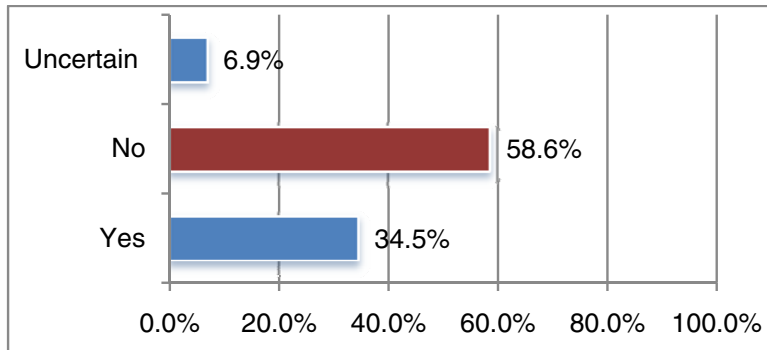


28. Does your company have a formal retention program for experienced employees?



Current Training Profile

29. Does your company have a formal training program?



Yes: An in-house program and community colleges; contract out to consultants; apprenticeship

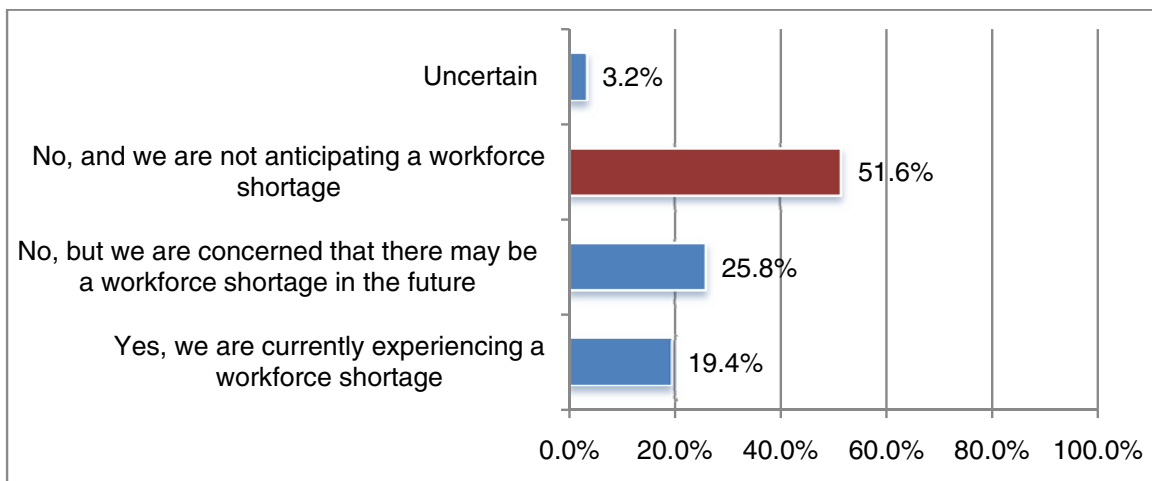
No: Company is evolving and jobs shifting

30. What types of training programs are required by your company?

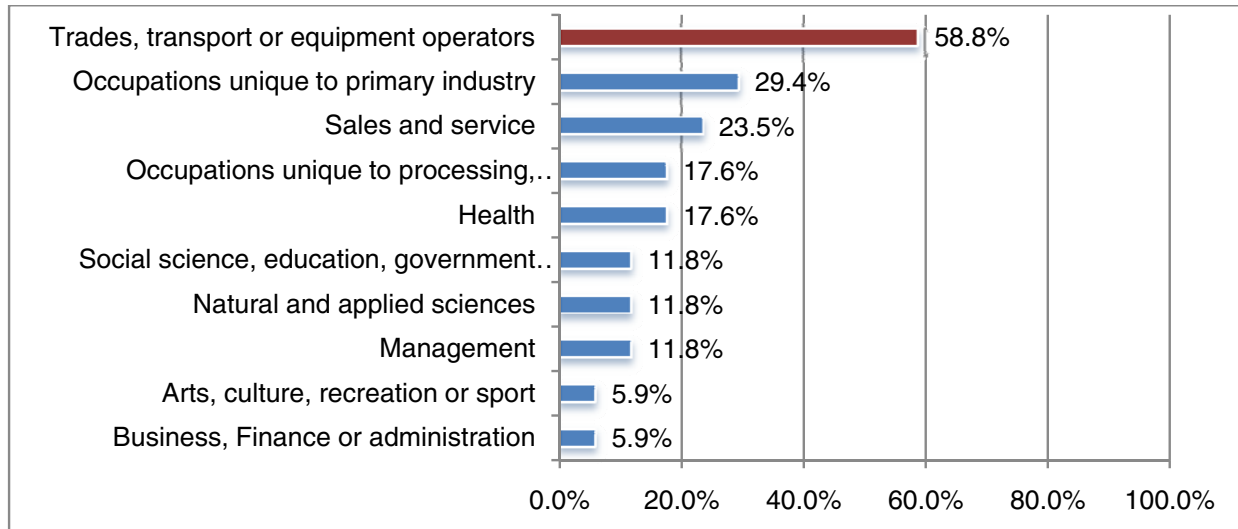
- First aid/CPR/EMS; WHIMIS; skilled trades, equipment operation, carpentry and masonry; social media; customer service and people skills; technical training; local building codes and requirements; proposal and RFP writing

Workforce Needs

31. Is your company currently experiencing or do you anticipate experiencing a workforce shortage?



32. In which of the following National Occupation Categories are you currently or anticipating experiencing a workforce shortage?



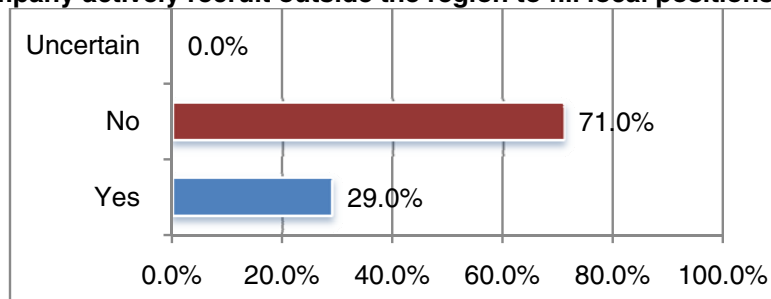
Other: Small engine mechanics; carpentry and masonry; networking/fibre optics/telecommunications; electrical engineers; research and development; skilled trades; truck drivers; plant operators

33. What types of skills or occupations will your company require in the future? Please be specific in your response. (e.g. chemical engineers rather than engineers.)

- Sales and service; mechanics, licensed and skilled trades (tool and die, welders, machinists); electrical, chemical, network and mechanical engineers; accounting, internal audit and funding consultants; computer technicians; waste management experts; carpenters and masons; IT and network support; international development experts

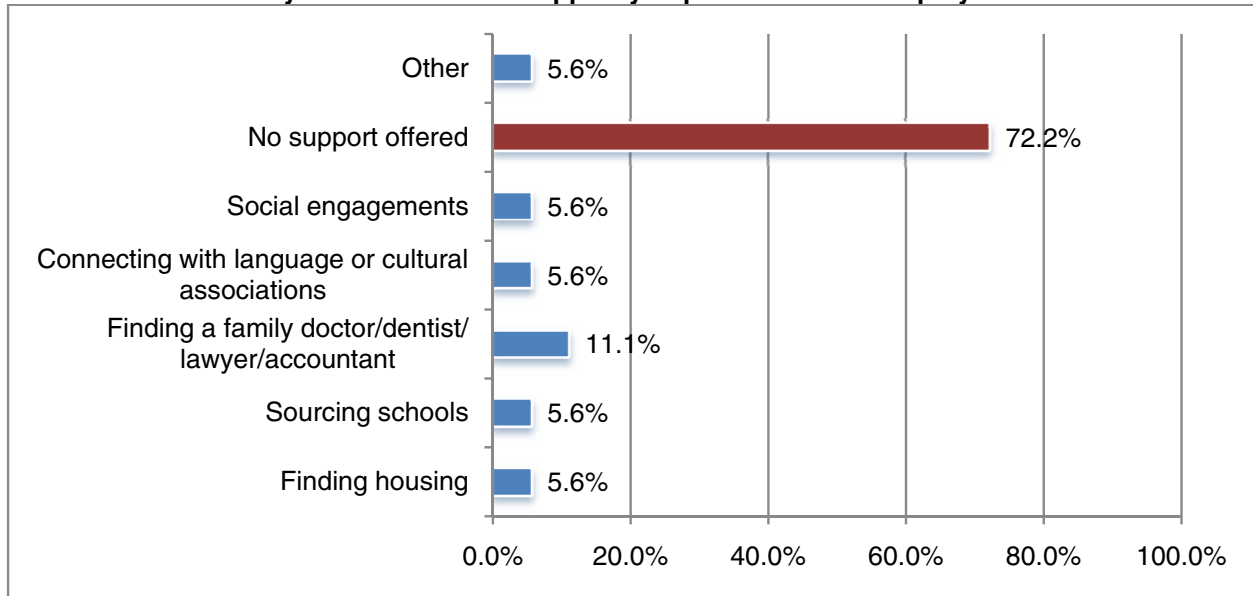
Employee Retention and Attraction

34. Does your company actively recruit outside the region to fill local positions?



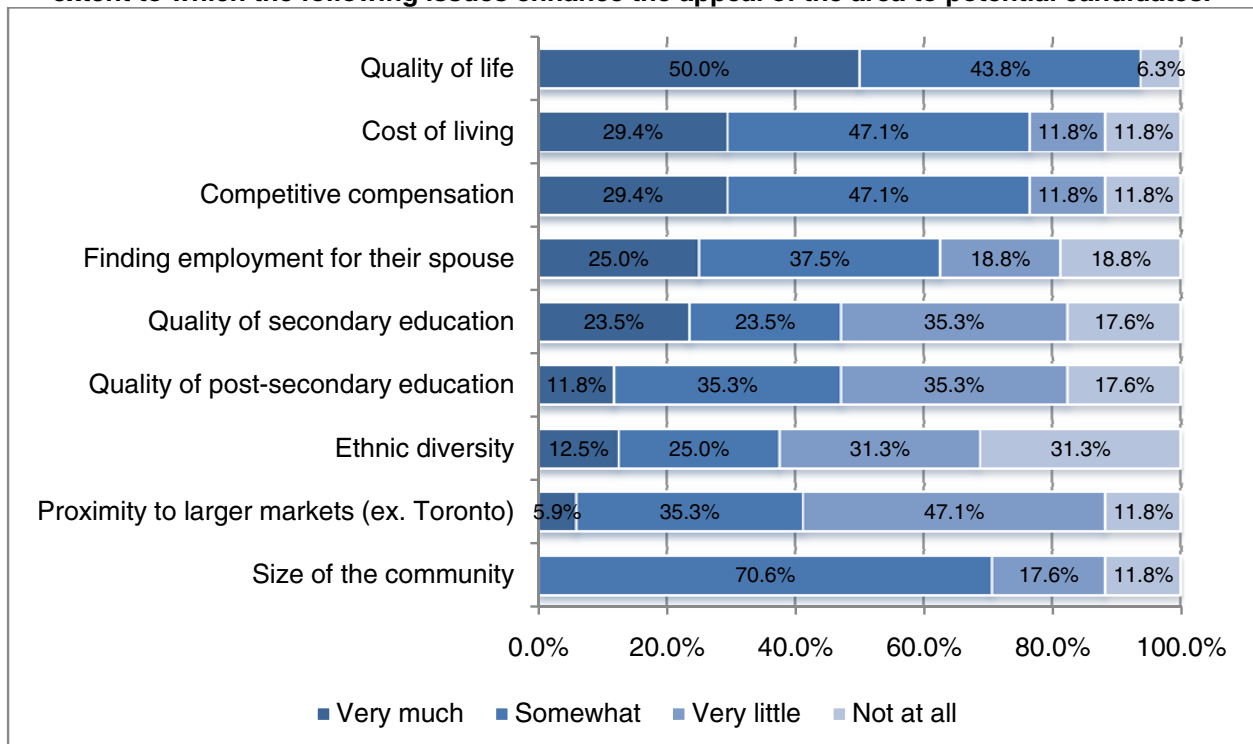
Locations: Kitchener, London

35. Please indicate any formal non-work support you provide to new employees and their families.



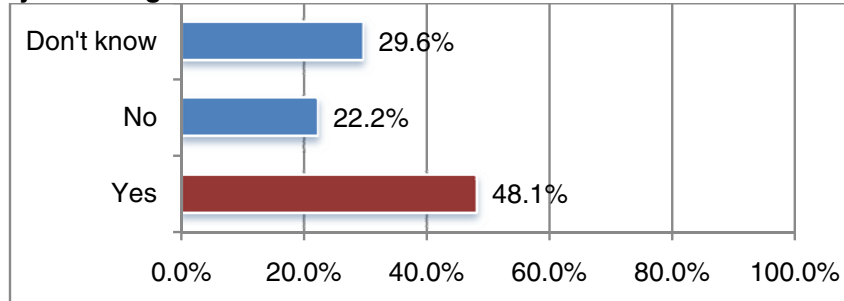
Other: Support is informal, but in all categories; would provide supports if needed

36. From your experience dealing with employees recruited outside of the region, please rate the extent to which the following issues enhance the appeal of the area to potential candidates.

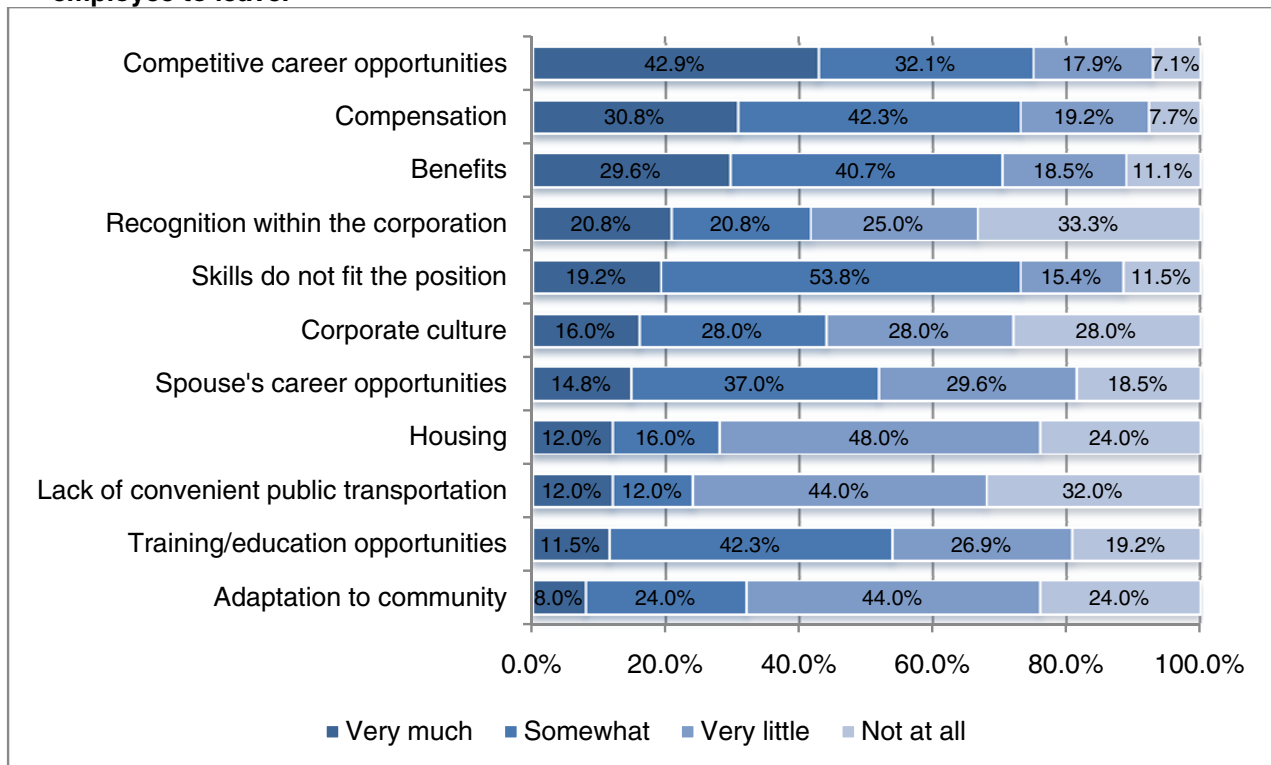


Other: Housing market costs; private schooling and continuing education; associations and volunteer opportunities; use of technology and telecommunications

37. To the best of your knowledge do the skilled or experienced employees who leave your company stay in the region?



38. Please rate the extent to which the following factors may encourage a skilled or experienced employee to leave.



Additional Comments

39. Place your additional comments here.

- Smaller communities need to be more aggressive in business attraction – can't all go to Stratford
- Inadequate reliability among skilled trades in Stratford
- Lots of potential for business attraction in the region due to quality of life factors, but lack of communication and power struggle for dollars and support within region
- Need infrastructure/Industrial Park to attract bigger businesses – currently have to go outside to KW, London, Guelph etc. to get things done

Appendix III

One-on-One Stakeholder Interviews Summary

Introduction

In order to understand the perspective of local business and community leaders in the Perth County region (which includes St. Marys and Stratford), the project team conducted a series of one-on-one in-person interviews with key stakeholders.¹⁶ These stakeholders were prominent business and community leaders, identified by the Project Steering Committee members for their expert knowledge of the local economy and community. In all, 28 people were consulted through this process. The stakeholders interviewed included:

1. Cathy Bieman, General Manager, Perth County Visitors Association
2. Bill Heuther, President, Listowel Retail Merchants
3. Charlie Hammond, President, St. Marys BIA
4. Dan Mathieson, Mayor, City of Stratford
5. Dave Shearer, CFDC Board Member, Perth CFDC
6. Gwen Kirkpatrick, Executive Director, Huron-Perth Association of Realtors
7. Garry Lobsinger, General Manager, Stratford & District Chamber of Commerce
8. Jasmin Hofer, President, Energrow
9. Ken Bailey, Teacher, Listowel District Secondary School
10. Kent & Dianne Chisholm, Owners, Chisholm B&B
11. Michael Brightling, Lawyer, TarBush, Giller & Associates
12. Marty Rops, Libro Credit Union
13. Paul Nairn, Member Service Rep., Ontario Federation of Agriculture
14. Tami Chauvin, General Manager, North Perth Chamber of Commerce
15. Tabatha Morrison, Owner, TabWorks Documentation Services
16. Sandra Huntley, Perth County Information Network
17. Charlene Gordon, Edmonds and Gordon Inc.
18. Tom Orr, Account Executive, Orr Insurance
19. Sam Coghlan, CEO, Stratford Public Library
20. Rita Schneuker, President, Milverton Business Association
21. Gary O'Connell, President, Stratford City Centre Committee
22. Ellen Balmain, Executive Director, United Way of Perth County
23. Shawna Stonehouse, Economic Development Consultant, Huron-Perth-Oxford, OMAFRA
24. Jamie Hahn, Mayor, Town of St. Marys
25. Eugene Zakreski, Executive Director, Stratford Tourism Alliance
26. Andrew Williams, CEO, Huron Perth Healthcare Alliance
27. Susan Young, Co-op Teacher, Mitchell District Secondary School

The following provides a summary of the responses received. All responses have been aggregated to preserve the anonymity of individual respondents.

1. In general terms, can you describe any reasons why this area might be a successful place for a business to operate from?

The Perth County region is a successful place for a business to operate from because there is an available skilled labour force, larger markets are accessible, technology infrastructure is largely in place and there is an unmatched quality of life that the region provides its residents.

A skilled labour force is available in the region. A segment of the labour force has become available because of local plant closures; however, the manufacturing industry has maintained much of its labour

¹⁶ Two telephone interviews were conducted with individuals who could not meet with the consulting team in-person.

force. More importantly, the boards of education and training bodies have been involved in upgrading and retraining the labour force that have lost their employment.

The region has the benefit of being accessible to larger markets such as Kitchener-Waterloo and London.

High technology infrastructure is in place for the region. The advancement of a digital economy and the UW Digital media centre holds significant potential to draw further business investment to the region.

The region's quality of life benefits are the Stratford Theatre, Stratford's network of parks and no traffic congestion.

2. More specifically, what are the area's advantages or disadvantages for promoting economic growth and business development in the following?

a. Transportation links

The transportation links are a disadvantage for promoting economic growth and business development for the Perth County region. Highway 401 is located to the south of the County and highway access is limited to two lanes.

Public transit is a disadvantage for this area. Local bus service is limited in the city and regional bus service is infrequent. Passenger rail service is also limited to St. Marys and Stratford.

b. Location

The Perth County region is located in proximity to the larger markets of Kitchener-Waterloo, London and the Greater Toronto Area.

c. Local taxes and regulations

Taxes are higher in Stratford than the rest of the region; however, Stratford provides municipal services that are not available in all other communities in the region. Regulations are restricting development from occurring. The number of people involved in obtaining development approvals is cumbersome for business owners; however, it was stated that compared to cities like Kitchener or Waterloo the regulations aren't too bad.

d. Sewer, water, electricity – costs and reliability

For the most part the costs for sewer, water and electricity were reasonable.

e. Support from municipality

The City of Stratford, and to a lesser extent the Town of St. Marys, has been very progressive in attracting investment and jobs. The Stratford mayor is a key driver to attracting investment to the city. Recent successes include the UW Stratford Institute and the RBC data centre. The County of Perth staff have good intentions for attracting investment, but council decisions reveal divisions between municipalities, the Town of St. Marys and City of Stratford.

f. Availability of land or buildings

There is available land or buildings in the Perth County region. There are many examples of vacant store fronts in Stratford, St. Marys and small towns in Perth County. The Town of St. Marys has limited employment land development opportunities.

g. Availability of skilled/unskilled labour

Skilled and unskilled labour is available in the region. Many of the people who have lost their jobs in manufacturing need to be retrained for different jobs. The skill sets of the people who have lost manufacturing jobs are not necessarily transferable for new jobs.

There is a need for people who can multi-task and sell a company's product/service effectively.

h. Access to training

There is a need to provide more training within the Perth County boundaries. Much of the training is only available in cities such as London, Kitchener-Waterloo or Guelph. People have to travel to these cities for training and this becomes an issue if people do not have access to a car.

The Perth CFDC provides workshops for business owners and entrepreneurs.

3. What major barriers or obstacles to future economic growth exist in the area (and how could the municipal leaders address them?)

The major barriers to future economic growth are:

- Municipal - a desire to stay small or not seeing beyond municipal boundaries for the economic benefit of the region. Municipal staff, councils and business owners must realize that business investment or job growth that occurs in Stratford is beneficial for St. Marys and Perth County. The reverse is also true.
- Business community – there is a lack of readiness of learning new ways to do business.
- Labour- Those people who have been laid off need to develop new skills and earn credentials for new jobs.

4. What industry sector (i.e. manufacturing, arts/culture, agriculture, tourism, entrepreneurship, etc.) should the area focus on to attract new economic growth?

- Agriculture/agri-food sector – add further value of the agricultural products being grown within the municipal boundaries. This may require a tax support system that creates an incentive for agricultural producers to add further value to their products.
- Advanced manufacturing sector- target economic growth in new and emerging markets (i.e. green energy technologies)
- Arts, culture and tourism sector- diversify the tourism product offerings beyond the Stratford Festival. The Perth County region needs to develop into a four season tourist destination. Currently, this sector is active from April to October. The culinary tourism initiatives are a good start for product development.
- Education sector– the University of Waterloo Stratford Institute for Digital Media has potential to attract new economic growth and spin off businesses.
- Construction sector– new housing construction will occur in Stratford. There is economic spin off benefit for companies that support the construction industry (ex. Landscaping services).

5. What do you hope will be different about the area in the next 10 years?

Stakeholders have many hopes for the area in the next 10 years. Most stakeholders recognize the economic importance of the UW Stratford Institute for Digital Media. These stakeholders hope that the area will take full advantage of the Institute and the economic potential of what it can become.

What do you hope will stay the same?

The community does not want to lose its small town charm, access to health care services and viable agricultural economy.

6. Is the area an entrepreneurial community? Are there many successful business people?

Yes, the area is an entrepreneurial community, especially the agricultural community. The people that have stood out as entrepreneurs have been the ones with specialized services/skills. Perth Community Futures works with many entrepreneurs. The business community needs to step up its involvement with

entrepreneurs by developing business incubation and mentoring programs. Many small business owners need basic help in business budgeting.

7. What do you think is very unique about the area?

The area is a unique mix of agriculture, manufacturing and tourism/cultural activity. Stratford has the manufacturing base, mixed with one of the most popular tourism destinations in Ontario and surrounded by an agriculture community. The area can maintain this unique balance by continuing to provide employment opportunities that provide a reasonable income.

8. What is your vision for the area – what is it you want the area to be known for?

The vision for the Perth County, St. Marys and Stratford is to become a community with a strong economic mix of agriculture, manufacturing, culture/tourism and educational businesses. The area will be known for a progressive outlook, its economic integration, a willingness to embrace change and an entrepreneurial forward thinking mind set.

Conclusions

The consultation process represented an excellent cross section of business and community stakeholders. People that were included in the process represented business, municipal governments and the non-profit sector.

The region has economic successes. Examples of the successes include a viable agricultural industry that is largely entrepreneurial, a manufacturing base that has “held its own” despite the economic recession and industry restructuring and a Stratford Festival tourism attraction that is one of the largest draws in Ontario.

Stratford is driving future population and economic growth to the region. There is a need to recognize the importance of economic integration between Stratford and the rest of the County. Investment that occurs in any community within the region is good for the entire region. A barrier to growth will be the mindset of municipal decision makers not seeing the benefit of business investment past municipal boundaries. In addition, business owners and the labour force will need to embrace change for growth to occur in the region.

Appendix IV

Institutional Stakeholders Summary

Introduction

Part of the labour market analysis and economic diversification plan project was to interview institutional stakeholders who play a central role in preparing the future labour force. The project team conducted a series of telephone interviews with these key stakeholders. In all, ten people were consulted through this process. The stakeholders interviewed include:

1. Mr. Chuck Reid, Director of Education, Avon Maitland District School Board
2. Ms. Tobi Day-Hamilton, Director of Advancement, University of Waterloo, Stratford Institute
3. Ms. Gemma Mendez-Smith, Executive Director, Four Counties Labour Market Planning Board
4. Ms. Virginia Lambdin, TTG Coordinator, Technical Training Group
5. Mr. Mark Roth, Welding Coordinator, Technical Training Group
6. Ms. Deb Hotchkiss, Manager, Partners in Employment
7. Mr. Serge Lavoie, President, Southwest Economic Alliance
8. Ms. Tine Buecher, President, Business Growth Training
9. Mr. William Tigert, Director of Social Services, City of Stratford
10. Ms. Elizabeth Hachbourn, Executive Director, Stratford & Perth Community Foundation

The following provides a summary of the responses received from stakeholders. All responses have been consolidated to preserve anonymity of individual responses.

Labour Force Characteristics & Issues

1. Can you describe your role in developing the future labour force for the region (region defined as Perth County, St. Marys and Stratford)?

The role of stakeholders in developing the future labour force for the region varied from serving as providers of labour market information to providing employment finding skills to coordinating co-operative education opportunities for high school students.

The school boards play a significant role in working with existing employers to train/provide experiential learning to students. These learning programs include co-operative education, registered apprentices through the Ontario Youth Apprenticeship Programs and Specialist High School Majors. The Schools to Work programs include apprenticeships that provide direct entry to the labour force. The Schools to College/University to Work programs utilize co-operative education which provides exposure for students as future employees. Students learn of opportunities for them within their own communities upon post-secondary graduation. The specialist high school majors courses strongly relate to community interest. Essentially, the school boards provide students with the opportunity to develop the essential skills necessary to be successful in life-long learning, post secondary education and functioning successfully as productive members of the community. For adults, school boards provide the opportunity to acquire or enhance essential skills that will increase their success in life-long learning, personal development and maximizing their potential in the labour market.

2. What are the advantages of the labour force in the region?

The advantages of the labour force in the region are the availability of highly skilled and experienced labour, diversity of skills, high school involvement in developing skills, the creative cultural base in Stratford and the development of the digital media program at the University of Waterloo – Stratford Institute.

There are a lot of older workers that are out of work because of labour force downsizing in the manufacturing industry. The region has a higher proportion of its labour force with trades and/or college certificates than the Province of Ontario.

Many high schools provide specialist programs in an effort to reach out to the youth population. The two school boards provide specialist programs in construction, hospitality and tourism, arts and culture, information and communications technology, manufacturing and transportation.

The creative cultural base in Stratford is unique in a community with a large agricultural and manufacturing industry base. There are untapped opportunities to create synergies with Stratford's arts/cultural base and other industries.

The new digital media program at the University of Waterloo's Stratford Institute will draw creative and technologically savvy people to the area.

3. What labour force issues require more attention from government institutions and training bodies for the community to remain successful into the future?

The labour force issues that require more attention from government institutions and training bodies are:

- addressing the people out of work because of manufacturing industry downsizing
- lack of local training programs
- youth out-migration and the transient workforce
- developing a home grown cultural industry.

The region has been affected by downsizing through manufacturing plant layoffs and closures. There are approximately 5,000 people who do not have any education or training (or even a high-school diploma). These people are generally the older segment of the labour force and they are seeking employment. It is difficult to retrain and engage this segment in a "classroom" environment. Programming could be developed to enhance literacy and numeracy skills for these adults.

Another labour force issue stated by stakeholders was the need to provide more local training. There is a greater need for post secondary training facilities within the area to enhance the labour force's skills base.

Stakeholders stated a labour force issue that requires more attention is addressing the fact that there is a small proportion of the labour force that is "young". Much of the youth that are raised in the region leave to pursue a post-secondary education and do not come back for employment, commonly referred to as youth out-migration.

Stratford's cultural industry is not home grown. A challenge the region must address is to create local arts and culture opportunities. This local industry has a transient workforce. The people who are trained at Stratford's chef school move out of the area. In addition, many people working in local restaurants also move out of the area after the peak season.

4. What major barriers to future labour force growth exist in the region?

The major barriers for future labour growth are the lack of services for newcomers, specifically settlement and support services or English as a Second Language (ESL) courses, aging workforce, lack of local access to education programs and lack of new local business ventures.

Many new Canadians who first settle in Perth County will eventually move to Kitchener-Waterloo or London because of the available support services. It was stated that new Canadians also move out the region because it has not been welcoming to immigrants.

The aging workforce in the region is a barrier to future labour force growth. Much of the youth that were raised in the region have left to pursue career opportunities in Kitchener-Waterloo, London and the Greater Toronto area. The workforce has aged because of too few local youth remaining in the area.

There is a lack of access to local education, training and apprenticeship programs. Many people who want to improve their skills sets have to access training programs in London or Kitchener-Waterloo because these programs are not available locally.

Stakeholders stated that the area has lacked new local business ventures with innovative products or services. Similar to this thought was the lack of business incentives that attract new emerging industries to the area.

5. What gaps exist in the labour force? How are you addressing these gaps?

The two main gaps that exist in the labour force are the lack of youth in the labour force and the local access to technical training across industries.

A solution to addressing the lack of youth is the high school specialist major program. It helps engage youth in being active in the local business community and may keep them in the area after they graduate.

There is not a facility in the region that can “train up” the skills of people who lost their jobs in manufacturing industries. Many of the people that are out of work have a lot of skills and experiences that are transferable to other industries.

The school boards are addressing these gaps by enhancing programming for youth who will enter the labour market directly from secondary school.

6. Are workers leaving the region? What factors are drawing them out?

Yes, workers are leaving the region. They are pursuing employment opportunities in Kitchener-Waterloo, London and the Greater Toronto area. The primary age group is the 18-24 year olds as many of these people are leaving to attend post secondary institutions. Many of these people do not return to Perth County to pursue career opportunities.

Workers are considering commuting greater distances to work in cities such as London, Woodstock or Kitchener-Waterloo. The workers that are being drawn out of the region are those attracted to jobs earning a higher salary/wage than can be offered locally.

Workers are leaving because they want appropriate career opportunities for both wage earners in a household.

A factor that is drawing some people out of the area is the centralization of health-care and education as a result of population decline. The cost of service delivery has caused many smaller communities to become unattractive to young parents/families.

Training

7. What training programs are receiving a higher rate of uptake?

The training programs that are receiving a higher rate of uptake are training in personal support work, technical trades, HVAC installation, office administration, AZ truck driving and heavy equipment operating. A common response among stakeholders was that local people have to drive to London or Kitchener-Waterloo for training.

Dual credit opportunities for secondary school students are expanding rapidly. School board administrators need to create the dual credit opportunities that will lead to careers within the region, i.e. health care and trades jobs.

There is also a large local interest in the UW Stratford Institute Centre for Digital media.

8. What kinds of changes would you like to see in the training programs offered to meet labour force demands?

The kinds of changes that stakeholders would like to see in the training programs are:

- more local training opportunities
- training for new digital economy jobs
- training in the sectors that are regional economic drivers (i.e. agriculture, manufacturing, culture) and
- pre-employment training designed to increase new hire success and reduce turnover.

9. What labour force training opportunities or trends is the region missing out on?

The labour force training opportunities or trends that the region is missing out on are skilled trades, high technical computer skills, opportunities in information technology industries, agri-food and agri-business and tying advanced automotive manufacturing with new energy opportunities (i.e. solar panels, wind, biofuels). This region project will need to target the expansion and attraction of value added agriculture and green industries.

Local Employers

10. Are local employers recruiting from outside the area?

- **If yes, what factors are serving as positive influences for workers moving to the area?**

Responses were mixed when stakeholders responded to this question. A few stakeholders stated that the labour market is not strong enough that employers need to recruit from outside the area. Others had stated that they have seen Stratford jobs posted in the neighbouring cities of Kitchener-Waterloo and London.

11. Do you think local employers are having any difficulty finding appropriately skilled labour?

Yes, employers are having difficulty in finding appropriately skilled labour.

- **If yes, how could government institutions or training bodies address these issues?**

The challenge that government institutions or training bodies need to address is the retraining of older workers with no education and strong roots in the area. Government institutions will need to promote the region's quality of life attributes. In addition, the government institutions will need to influence the ratio of employers to apprentices. The current 3:1 ratio is ineffective and unrealistic.

The availability of post secondary education is a must to encourage people to stay or to come to the region.

New industrial/agricultural opportunities need to be investigated, sponsored through start-up incentives and supported locally with appropriate education and training to make these opportunities a success over the long-term.

- **If yes, how could local government address these issues?**

Local government can address the issue by providing a retraining facility. This facility would provide the space for local training bodies. Training will need to fill the immediate need for employer job requirements.

Conclusion

12. Is there potential for industry leaders to partner and collaborate on building, developing or attracting common skilled labour?

Yes there is potential for industry leaders to partner and collaborate on building, developing or attracting common skilled labour. There is a need for a unified effort among businesses, school boards and associations who realize the benefit to the community. Small business owners will need to cooperate with

each other to meet the 3:1 trade ratio. There is an opportunity to initiate a workforce sharing arrangement between business owners and apprentices. Local school boards want to enhance opportunities for in-school youth to obtain on the job experience and training that prepares them for an occupation after graduation.

Examples of partnerships and collaborations to develop include the Perth County Manufacturers Association, Perth County HR Association. An partnership model outside the region that could be developed locally is the Kitchener-Waterloo Manufacturers Innovation Network, a virtual manufacturing association.

Local small and medium businesses have a stake in the region. These business owners are willing to do on the job training. Employment growth can occur among these businesses, but growth will be incremental.

Appendix V

Social Media Strategy in Economic Development

Social Media Strategy in Economic Development



Introduction to Social Media

Social media has forever changed the way that people communicate, and has become a very popular method of reaching out to the public for economic development agencies. Social media is an internet and web-based technology that changes broadcast media monologues (one to many) into social media dialogues (many to many). People are now able to produce content on the internet, instead of just accessing content. It is believed by many that due to the increase in social media popularity, this period in time will become known as the 'Attention Age'.¹⁷

The popularity of social media has been soaring, so much that Facebook alone has exceeded the use of 'Google', as shown in Figure 1. But with all this hype about social media, one must wonder if it is a fad, or if it is here to stay?

Source: www.jacobytyler.com

Economic development organizations may find themselves putting in countless hours on social media sites, with a fear that in coming days, months or years, it will be a thing of the past, as users go on to the newest trend. However, given the current popularity in social media, statistics indicate that it will not be going anywhere. While the platform being used may become obsolete or be replaced, social media as a whole will continue to play a major role in advancing economic development opportunities. According to Econsultancy.com¹⁸, social media is here to stay.

- Social networks and blogs are the 4th most popular online activities, exceeding personal email. 67% of global users visit member communities and 10% of all time spent on the internet is on social media sites.
- If Facebook were a country, it would be the fourth most populated place in the world. This means it easily beats the likes of Brazil, Russia and Japan in terms of size.
- 80% of companies use (or are planning to use) LinkedIn as their primary tool to find employees during the course of this year. The site has just celebrated reaching its 45-millionth membership.
- It took radio 38 years to reach 50 million listeners. Terrestrial TV took 13 years to reach 50 million users. The internet took four years to reach 50 million people. In less than nine months, Facebook added 100 million users.
- Wikipedia currently has more than 13 million articles in more than 260 different languages. The site attracts over 60 million unique users a month and it is often hotly debated that the information it contains is more reliable than any printed encyclopedia.
- It's been suggested that YouTube is likely to serve over 75 billion video streams to around 375 million unique visitors during this year.

¹⁷ Schefren, R. (2007). *The attention age doctrine, part 2*. Retrieved March 15, 2010 from http://www.prweb.com/releases/online_marketing/entrepreneurs/prweb573273.htm

¹⁸ Econsultancy.com (2009). *20 + More Mind Blowing Social Media Statistics*. Retrieved from <http://econsultancy.com/blog/4402-20+-more-mind-blowing-social-media-statistics>

- According to Socialnomics¹⁹, if you were paid \$1 for every time an article was posted on Wikipedia, you would earn \$156.23 per hour.
- The online bookmarking service, Delicious, has more than five million users and over 150 million unique bookmarked URLs.
- Since April this year, Twitter has been receiving around 20 million unique visitors to the site each month, according to some analytical sources.
- Formed in 2004, Flickr now hosts more than 3.6 billion user images.

Lessons learned in platforms that exist today will be relevant for those that are invented tomorrow.

The Figure 1 is an example of the growing use of social media. In March, 2010 Facebook usage surpassed that of Google-the world's most popular search engine.

Figure 1 - Weekly Market Share Visits to Facebook.com & Google.com

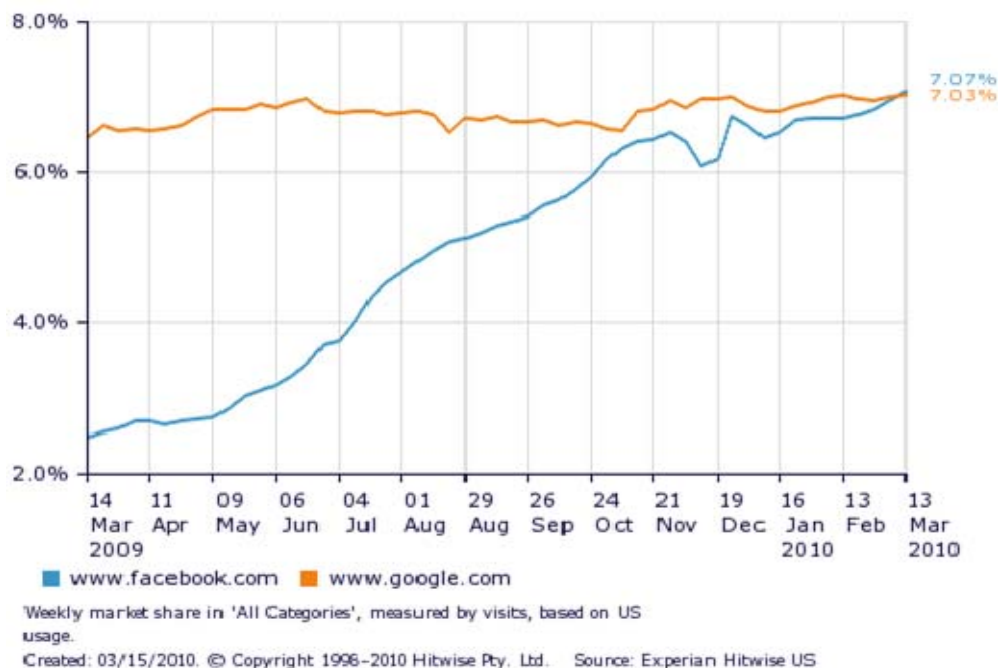


Figure 2 displays the level of interaction that organizations/users can have when utilizing social media tools, while Figure 3 characterizes social media users.

These tools allow economic development organizations an opportunity to reach out to their community base through the internet. They are able to reach out to new groups of people (e.g. tourists who are currently visiting the community) as well as rebuild relationships with groups they may have lost touch with (e.g. former residents who have moved away from the community). Social media has become a very popular tool for effective marketing and sales, as many of the platforms that it operates on are available across the globe, in many different languages.

¹⁹ Socialnomics. (2010). *Facebook Surpasses Google*. Retrieved from www.socialnomics.com.

Figure 2: Types of Social Media Users and Applications

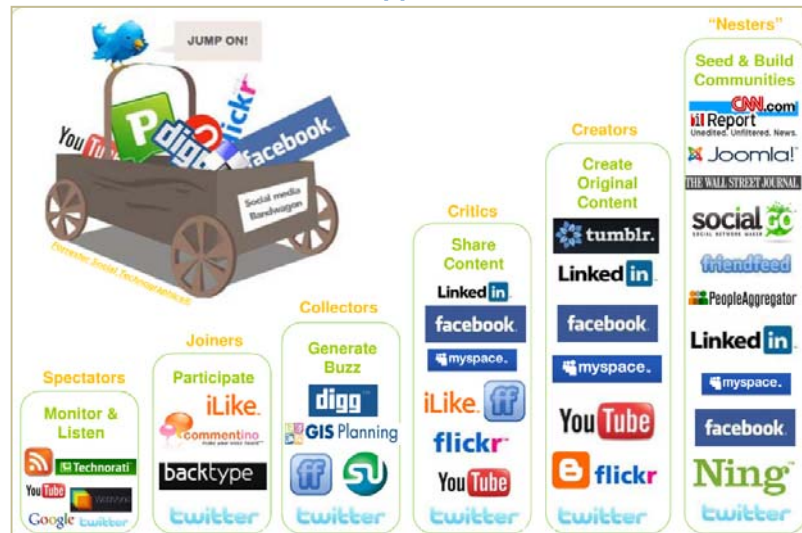


Figure 3: Characteristics of Social Media Users

Social Media Type	Characterization	Example Behaviours
Spectators	Consume social content including blogs, user generated video, podcasts, forums, or reviews.	Read blogs, watch videos from other users, listen to podcasts, read online forums, read customer ratings/reviews.
Joiners	Connect in social networks like MySpace and Facebook	Maintain profile on a social networking site, visit social networking sites.
Collectors	Organize content for themselves or others using RSS feeds, tags, and voting sites like Digg.com.	Use RSS feeds, add 'tags' to web pages or photos, "vote" for web sites online.
Critics	Respond to content from others. They post reviews, comment on blogs, participate in forums, and edit wiki articles.	Post ratings/reviews of products/services, comment on someone else's blog, contribute to online forums, contribute to/edit articles in a wiki.
Creators	Make social content go. They write blogs or upload video, music, or text.	Publish a blog, publish own web page, upload video personally created, upload music personally created, write articles or stories and post them.
Nesters	Start, and build online social communities.	Develop social media programs and actively promote them.

Adapted from : Forrester Research Inc. (2008). Retrieved from www.slideshare.net/jberoff/social-technographics-explained.

According to Harvard Business School²⁰, "To be successful, you need to shift your mindset from social media to social strategy. A good social strategy essentially uses the same principles that made online social networks attractive in the first place – by solving social failures in the offline world". Economic

²⁰ Harvard Business School. (2009). *Understanding users of social networks*. Retrieved from <http://hbswk.hbs.edu/item/6156.html>.

development organizations should begin to do the same to fulfill their social needs online. Effective social media strategy organizations keep a few things in mind:

- **Everyone must work together.** Collaboration must be encouraged in order to succeed in integrating social media tools into the marketing mix, no matter what agency or consultant they hire. For example, if a regional economic development agency would like to introduce social media, they need to be sure that the groups they represent are supportive of these efforts.
- **Top management must be on board.** Management has to first buy into the idea of integrating social media and pass along a willingness to change throughout all levels of the organization. Any organization that is not willing to listen to their customers (citizens, prospective investors, current businesses) and be nimble and quick enough to respond, and change when needed, will see themselves unable to compete with communities that have embraced change, such as communities listening to what their citizens envision for the future.
- **Don't expect overnight success.** Once the social media tools are developed, they need to fit into the organizations overall strategy to help reach its long term goals.

How Can Social Media Be Used in Economic Development?

Taking the step to incorporate social media into an organization is definitely a big undertaking, but one that can create huge success. It should be viewed as a long-term commitment, and therefore needs to start off with clear, measureable goals.

When an organization is new to social media tools, Mashable.com, The Social Media Guide, suggests that an organization should pick a small number of social media goals for the coming year, such as:

- Turn an organization's newsletter into an internal blog and give all employees the ability to contribute
- Establish a social media policy for employee participation in social media on company time and beyond
- Let employees vote on the best ideas suggested by other employees
- Resolve to respond to customer service issues within three hours, via social media, such as 'tweeting' on Twitter that the office will be open for event registration on a specified day (See 'Twitter' description below).

Figure 4: The Benefits of Social Media Marketing



Some Popular Social Media Tools



Twitter is a communication platform that helps businesses and individuals stay connected. Economic development organization can create short news updates that broadcast to anyone who has registered their site as a 'follower'. It has become very popular in economic development, as it basically offers live 24-7 updates to groups of people who have similar interests. Updates can be used for upcoming events, where to register for training, who to contact regarding economic develop, and much more.



Is another social networking giant that acts as a powerful tool for communities and individuals looking to build relationships, raise visibility for the community and target a customer niche. It allows you to connect directly to the potential customers or clients who might want to know about you in a relatively low-cost advertising platform. Many municipalities have integrated this tool into their social media plan as it helps them to offer 2-way communication with users, and is a powerful tool to disseminate information. An innovation of the service is to sign up visitors when they arrive at a local tourist information office which will make them eligible for 'instant offers' that tourism partners provide (e.g. "first one to show up at Sandra's Ice Cream Parlour with a Canadian flag receives a free sundae", "Jim's Fishing Charter is leaving in 30 minutes and has four spots left – hurry to get 30% off", "two rooms still available at Holiday B&B"). This type of interaction with visitors was never available before and will make the community a more interesting and fun place to visit.



While most people know the common video viewing application of You Tube, many have not considered how it could help their organization/community to grow by creating a viral video strategy in their marketing strategy. This can help to attract new interest, build community culture, turn inquiries into sales and help the community solidify their brand.



This service monitors Twitter mentions in real-time in a multi-column interface. The user simply has to input a search term into a column, add or remove columns as desired, and get an automatically-refreshing picture of what people are saying about the organization's brand or competing brands on the world wide web. This tool could help economic development professional gauge the public interest in specific social media programs they have undertaken.



This program is very useful in economic development as it allows users to connect with past and present colleagues, discover connections when looking for a new development opportunity, or consult your network with questions or share advice.



UserVoice helps small businesses to juggle their social media. It can create bug reports to feature requests, and help track and manage the feedback of your users and customers. It helps to assure your user base that you care about what they have to say and allows the organization the benefit of receiving suggestions from people who are actually using the tool or service. Users are able to vote on the ideas of other users, which allows the organization a chance to understand the most-requested features and fixes for the application or service.



MailChimp is a mailing list manager and offers list management, tracking, analysis and custom HTML templates for up to 500 subscribers and 3,000 emails a month for free. This program allows you to integrate service with your own existing applications, tools, content management system or CRM solution. The program can be useful in helping economic development organizations keep track of their many contacts, while saving time.



Google Earth is an online program which allows users to view satellite images, maps, terrain, 3D buildings from anywhere on earth. Users are able to see seemingly endless amounts of geographical content, save toured places and share information with others. Features of Google Earth include: historical imagery from around the globe (i.e. see how areas have changed over time due to recent trends like suburban sprawl or global warming); ocean floor and surface data from marine experts; and simplified touring with audio and voice recording. Google also has a unique mapping feature which will allow communities or business owners to put their business on the map, literally. Business owners are able to customize how their business is able to track follow their customer/prospect trends, to see who is searching their business, where they are located and what in particular they are looking for.



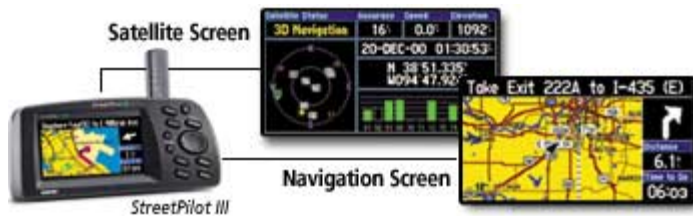
RSS Feeds (most commonly expanded as "Really Simple Syndication") is a family of web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio and video – in a standardized format. An RSS document (which is called a "feed", "web feed" or "channel") includes full or summarized text, plus metadata such as publishing dates and authorship. Web feeds benefit publishers by letting them group content automatically. They benefit economic development organizations that want to subscribe to timely updates from favoured websites or to aggregate feeds from many sites into one place. RSS feeds can be read using software called an "RSS reader", "feed reader", or "aggregator", which can be web-based, desktop-based, or mobile-device-based.

What is GPS and how is it useful in Economic Development?

The Global Positioning System (GPS) is a satellite-based navigation system made up of a network of 24 satellites placed into orbit by the U.S. Department of Defense. GPS was originally intended for military applications, but in the 1980s, the government made the system available for civilian use. GPS works in

any weather conditions, anywhere in the world, 24 hours a day. There are no subscription fees or setup charges to use GPS.

GPS satellites circle the earth twice a day in a very precise orbit and transmit signal information to earth. GPS receivers take this information and use triangulation to calculate the user's exact location. Essentially, the GPS receiver compares the time a signal was transmitted by a satellite with the time it was received. The time difference tells the GPS receiver how far away the satellite is. Now, with distance measurements from a few more satellites, the receiver can determine the user's exact position and display it on the unit's electronic map.

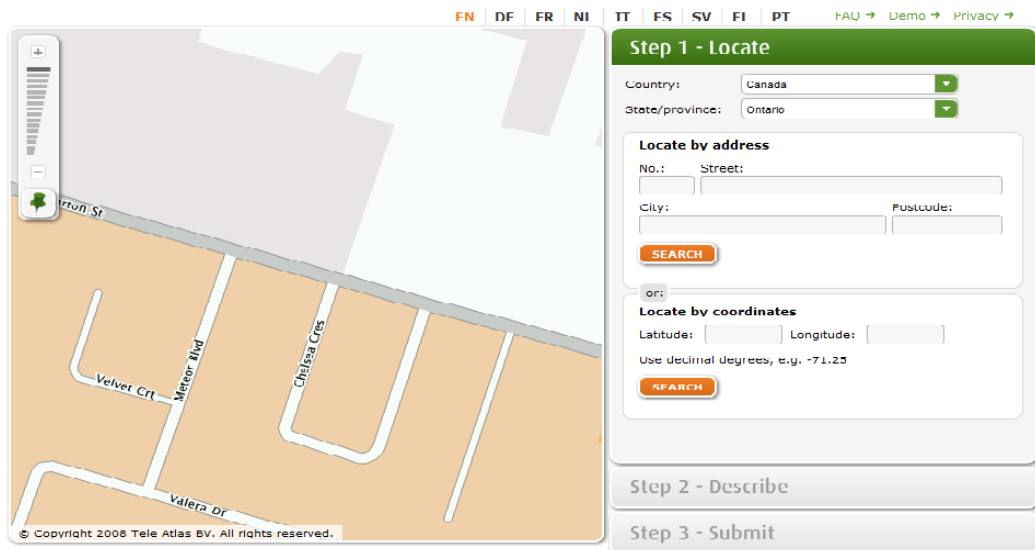


A GPS receiver is able to find the addresses that you put into the unit and business owners are now able to add their business as a 'Point of Interest' on two internationally recognized companies that supply the data to almost all GPS maps as well as Google Maps. These companies are Navteq and Teleatlas.

To get a community's businesses on GPS maps so people can find them follow these two steps:

1. Go to <http://www.navteq.com> - click on Map Reporter and fill out the form
2. Go to <http://mapinsight.teleatlas.com/mapfeedback/index.php> and follow the directions.

Figure 5: Teleatlas Website Page to Add a GPS Point



Source: Teleatlas. (2010). Retrieved March 14, 2010 from <http://mapinsight.teleatlas.com/mapfeedback/index.php>

Social Media and Website Best Practices

A website has become the number one way for a community to connect with a wider range of people and also to employ social media tools. Today the World Wide Web is seen as the first place to check when looking for information about a particular area or business. Investors use community websites as a first source in identifying communities who are candidates for site selection projects.

Can a community/region be overlooked by potential investors because of the quality of their website? The answer is a definitive “yes”.

So what makes a good website for an economic development organization, whose main objective is usually promoting the area? Best practices are emerging as communities are developing better websites and competing with each other to command the highest number of 'web hits' by their target market. According to Josh Gordon (Social Media Today, 2009), this means a big change for communities because it changes how a community's product and services are sold. Below are some best practices in economic development websites as recommended by YFactor, a leading economic development website developer²¹.

1. Ease of Use

Visitors to your community's webpage should find it easy to use and find the information that they are looking for. Research has shown that if a user has to click too many times to find the information they are looking for, they will give up and try a new webpage. This means that website designers must find the best method possible to maximize the visitor experience while locating information in a space that requires less than five mouse clicks.

2. Content Completeness

The community's webpage must offer access to information and data that would be needed by an investor looking to locate their business in the municipality. Any information that would be relevant to an investor such as primary industry sectors, workforce availability, cost of doing business, proximity to highways and border crossings, etc. should be readily available on the economic developer's site.

3. First Impression

Your website can serve as the first impression of your organization and the community. Therefore, it is very important that the first impression is a very positive one. If it is not a compelling enough message it is very possible that the site selector, potential investor or potential visitor will be quickly moving on to evaluate another municipality. The site must be done professionally, using maps, pictures and graphical images that are high quality and visually appealing.

4. Measure Results

A strong community website should have strong performance objectives. A plan should be made to track the number of site visitors and behaviour patterns as compared to the pre-established goals or key performance indicators. A set of benchmarks should be established and a comparison between other community websites should be made to ensure they measure up.

5. Two-Way Communication

It must be remembered that a modern economic development website is not simply an electronic brochure. Incorporation of interactive features such as blogs, cost calculators, land and space databases,

²¹ YFactor. (2010). *Economic development website best practices*. Retrieved March 10, 2010 from <http://www.yfactor.com/Public/Default.aspx?l=705&n=Website+Best+Practices>

polls and surveys all encourage visitor participation. Interactive maps are more engaging because they allow the user to navigate around the map and zooming in allows more detailed information to be displayed. These two-way communication tools should be given at least as high a priority as the textual presentation of facts and data.

Case Studies: Communities on the Right Track

In identifying community websites that were on the right track in terms of social media practices, the following list was used as general guideline for what a good case study should include.

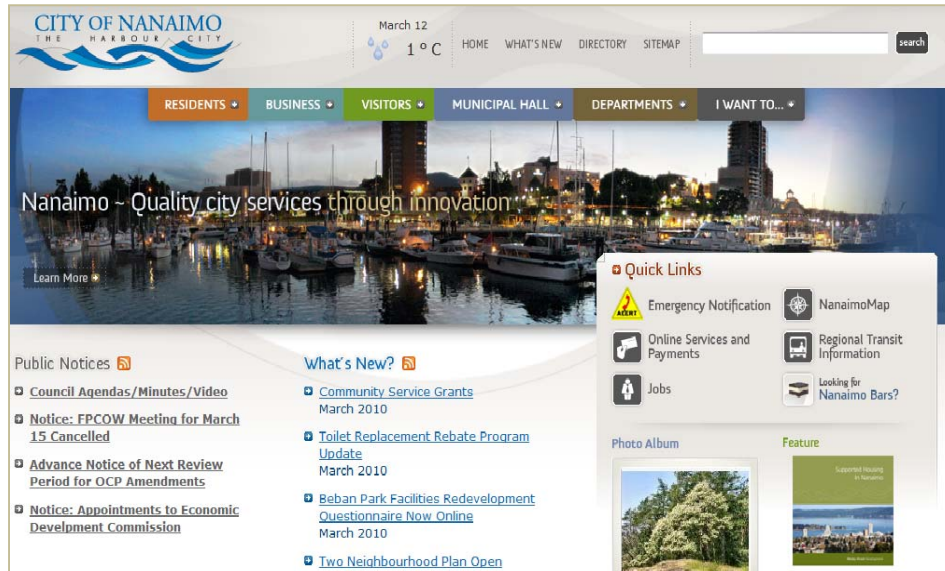
- Home page including link for site selection section
- Contact person name for site selection inquiry
- Blogs
- Linked to Facebook
- Linked to Twitter
- Linked to LinkedIn
- Linked to other sharing platforms (i.e. YouTube, Flickr, Digg, StumbleUpon)
- Podcasts (Audio or Video)
- RSS Feeds
- Newsletters
- News Alerts
- Forums
- Multi-language functionality

Nanaimo, British Columbia

The City of Nanaimo's key marketing message is that it is "One of the most desirable, liveable small cities in North America". This phrase is evident throughout all of their promotional tools, including their website. The City of Nanaimo is the second largest urban centre on Vancouver Island and seems to have developed social media strategy that is quite effective.

The City of Nanaimo website (www.nanaimo.ca) integrates several key features that help stimulate better participation in government. Simple features that help make the process less bureaucratic and time consuming like RSS feeds for public hearing notices and the ability to switch the website to a format designed for mobile devices. There is a lot of content available, but it is designed in a way that is neatly organized, such as by using a 'Quick Links' tab on the home page to access emergency notification, online payments and regional transit information (See Figure 6).

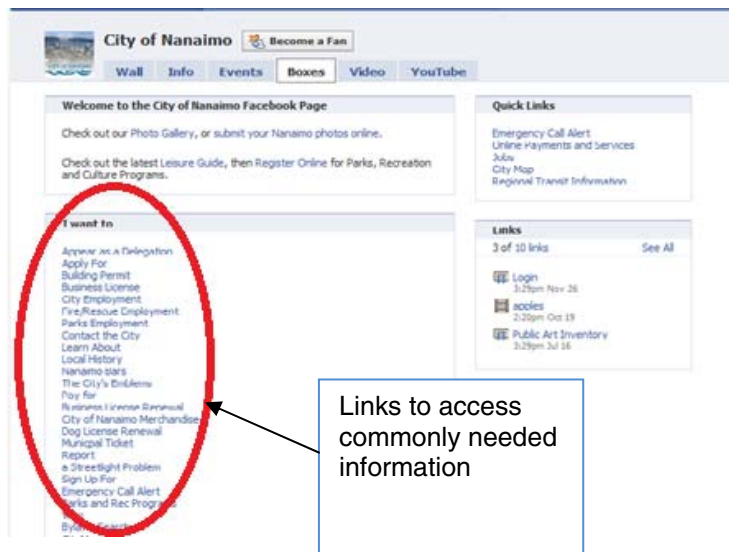
Figure 6: City of Nanaimo Website



Alongside this, the website makes use of other social media tools, such as the very popular Facebook, Twitter, Delicious, StumbleUpon, and many others using an 'Add This' toolbar. Upon entering their Facebook page, for example, it becomes apparent that a high number of people are fans of the page.

Nanaimo's Facebook site offers the user a very interactive experience, as a user can access links for reports, upcoming events, public transit, etc. The 'Boxes' tab welcomes users and has links to view photos, upload photos, register online for events, as well as other important city resources. A 'Video' tab is present, and allows the user to access a large library of videos about Nanaimo. This Facebook page is very well organized, and seems to be updated very regularly so information is current and relevant for the user.

Figure 7: City of Nanaimo Facebook Page



The City of Nanaimo also has a very active Twitter account. As is seen below, they frequently use Twitter as a way to get messages out to their community, such as giving the user a registration code to view their new online activity guide. The example above shows that many of their posts (also called 'Tweets') are centered around brief but frequent reminders about important dates and upcoming events. Utilizing this program is very beneficial for the City of Nanaimo, as it cuts down on the cost of mail-outs, print/radio advertising, and can be done in seconds. This tool allows Nanaimo a cost savings in their marketing budget, and allows for more funding to be spent on other initiatives.

Figure 8: City of Nanaimo Twitter Page



Prince Edward County



Prince Edward County (PEC) is an “island” located in Lake Ontario 1.5 hours east of the Greater Toronto Area and has a population of just over 25,000 people.

Upon entering the Prince Edward County’s economic development website (www.buildanewlife.ca), which is separate from the County’s municipal site (www.pec.on.ca) users are pleasantly welcomed by bright and colourful interactive graphics, offering a very positive first impression. Use of colour and unique pictures of real people and places in Prince Edward County make the

website stand out. This website has emerged as a leader in creativity as it allows for the user to become engaged as soon as they visit the site due to the high quality images and relevant information. As seen below, the website is very well organized and does not appear cluttered or overrun with information. Users are able to easily find what they are looking for, as they can 'click' to view information from different industry sectors.

Figure 9: Prince Edward County Webpage



A number of social media tools are available on this site, creating a very strong, interactive, two-way form of communication. Users are able to join PEC on Facebook, Spurr, Yahoo, Delicious, and Digg. They are also able to sign up to receive RSS Feeds, or share the website with a friend. To access these social media forms, the user visits the "Collaboration Centre" of the website, which is described as an online place where researchers, developers and community members from anywhere in the world can meet to exchange ideas about creative rural economies.

Without a post-secondary institution, PEC's Collaboration Centre on Facebook is an experiment to strengthening the Creative Rural Economy. PEC is creating a "mass collaboration space" to include many forms of education, research, and information sharing that will lead to stronger relationships with community groups, not for profits, libraries, local schools and students, citizens and the private sector.

Also listed on the PEC Facebook page is that: "Part of the goal is to build capacity. We see opportunities for students' world wide working in various fields such as agriculture, tourism, creative industries, etc...to come here on co-op or apprenticeship / internship placements to get first hand training in our market place and assist our businesses". This idea is one that is very forward thinking, and creative, and is becoming a way of life for Prince Edward County. Figure 10 displays a snapshot of PEC's Facebook page.

In the end, all of these tools help to position the community as one that is open to new ideas and inclusive of different ways of living, which is an appealing message to their target market, Toronto's creative class. This is an excellent "pull marketing" tactic because they are using everyone's voice, but their own (in large part) to sell the community. "It's always better for someone else to say it for you than to say it for yourself!"

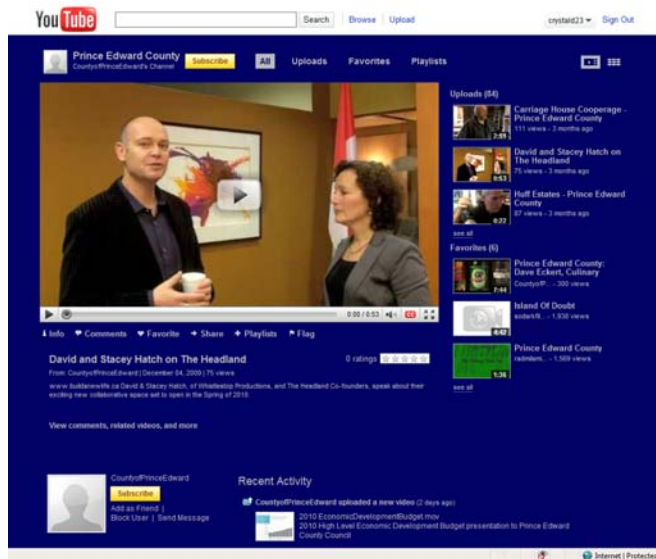
Figure 10: Prince Edward County Facebook Page



As seen above, the PEC Facebook page offers links to view economic development websites, events, information, questions, favourite pages, and includes a link to "Create a page for my business". Their information tab shares contact information as well as a map to locate the County. The photo's tab includes some local pictures, as well as allows users to upload their own pictures. A 'Boxes' tab is used, and includes two discussion tabs, as well as links to several You Tube videos and reviews. A 'Restaurants' tab is on the site, but information has not yet been inputted. The group is growing, and has a fan base of nearly 2,000 people. Including all of this information is important in economic development, as it gives interested parties a common space to access important information.

Another task that PEC has done very well has been incorporating videos to their website. In the "Collaboration" section of their website there is a link to You Tube. Upon clicking this link, a customized PEC You Tube page appears. This allows users to view/upload videos about PEC, view subscription information, list favourites, and create playlists. What is important to note is that it is only PEC material. Figure 11 displays the PEC YouTube page.

Figure 11: PEC YouTube Page



PEC believes that through social networking & media and real human interaction they can strengthen skills training and their labour force for emerging economic opportunities in the community. Through research and academic work, they are able to identify new emerging rural economic opportunities and assist their businesses to capitalize on them. Ultimately, they are creating a space first "virtually" but very real and perhaps one day via "bricks and mortar" to build knowledge, develop skills, engage the community, enhance their labour force and assist their businesses to grow.

Ely, Minnesota



Ely is a small community with a population of 3,427 people located in northern Minnesota. It boasts being an attractive destination for outdoors enthusiasts to go to find 'true wilderness adventure'. It is a remote place that has a lot of reasons to NOT exist.

Figure 12: Ely’s Nearest Urban Centres:

Urban Centre	Population	Driving Distance to Ely
Duluth, Minnesota	185,000	2.5 hours
Twin Cities, Minnesota	3,500,000	4.5 hours
Thunder Bay, Ontario	130,000	5 hours

Ely once relied on the iron mining industry for its survival but had to reinvent itself when the deposits were all but removed. The town is an excellent example of a community that has capitalized upon tourism and entrepreneurship in order to hold and grow its population and establish tremendous local pride in the place. Ely has long been known as a place that harbours people of independent thinking and spirit. It’s often called the “town at the end of the road,” sitting as it does on the edge of the Boundary Waters Canoe Area Wilderness.

While their community website does not seem to stand out amongst the rest, it is their unique marketing strategy that will be outlined in this case study.

In 2009, Ely kicked off their campaign to host the 2016 Summer Games (see www.ely2016.com). This unique marketing ploy was not so much a bid for the games, but capitalize on the interest that was being generated in the Midwest because the region's largest city, Chicago, had put in a serious bid for the Games. One Minnesota online newspaper reported: "ELY, Minn. (AP) — This year's April Fool's hoax from the small northern Minnesota town of Ely is a bid to host the 2016 summer Olympics, including a plan to drain a lake for an in-ground stadium". The announcement was made on April Fool's Day, and followed up many other previous hoaxes such as a campaign that Canada was trying to buy Ely and move it north.

Knowing their target market for visitors and investors is the main population centres of the Midwest such as Minneapolis-St. Paul, Ely launched a series of radio spots on the Olympics bid on the Twin City's stations, and included social media tools such as Facebook, Twitter and YouTube. A website was created specifically for the 'Ely 2016' campaign, and users were able to access news reports, videos, links and give their support. The campaign featured a series of 'press conferences' that are available on their website, as well as on YouTube, which yielded more than 30,000 views.

Figure 13: Ely 2016 Website



The Ely Facebook page currently has over 4,000 members, and allows fans to view/submit pictures of Ely and access links for upcoming events, news and information. Daily, fans continue to share their love for Ely on Facebook and Twitter which is encouraged through smaller campaigns like "in six words or less tell us what you love about Ely".

Figure 14: Ely Facebook Page

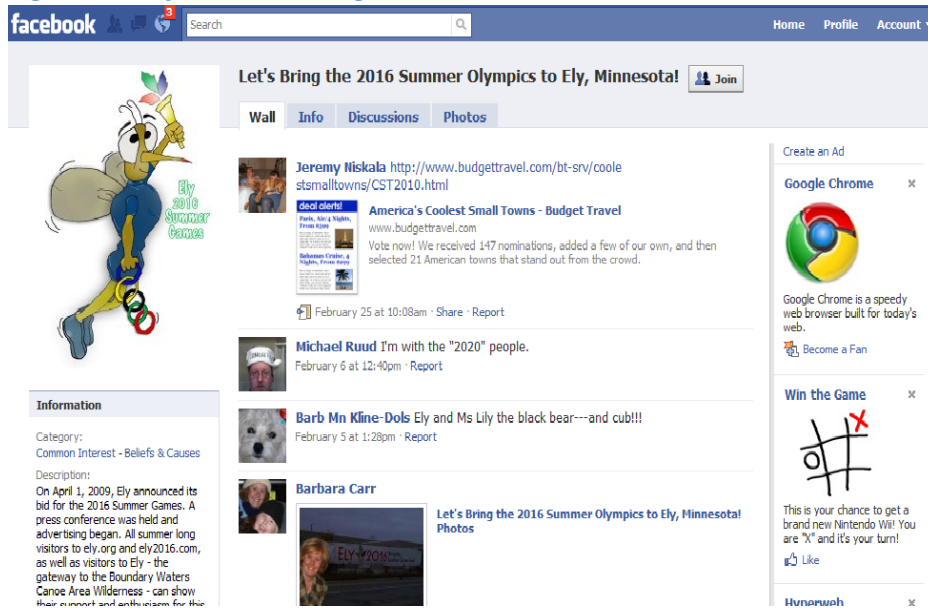


Figure 15: Ely Twitter Post



Another creative campaign, that was again used as an April Fool's hoax was the 'Ely Leaf Coloring Project'. As is shown below, Ely posted a fictitious advertisement asking users: " Do you have what it takes to be a leaf colorist? Watch the WBBS-TV special report on the Zuenik family. Fill out a Leaf Colorist application online. And take a simple coloring test". The webpage is linked to a You Tube video which creates a ton of laughter, but most importantly creates recognition in the minds of potential tourists to Ely, and potential investors. It also seemed to instil an increased sense of pride amongst the local population, which is always beneficial when trying to promote economic development.

Figure 16: Ely Leaf Coloring Project



These quirky, yet effective campaigns have been very successful for Ely, as they have been the recipient of two Minnesota State Tourism awards, and the media coverage has continued. Ely attracted significant interest in new media outlets, including over 24,000 views on YouTube, more than 4,000 fans on Facebook and 500 followers on Twitter. This example shows that social media can be a very effective tool in helping small communities become known to potential investors and tourists.

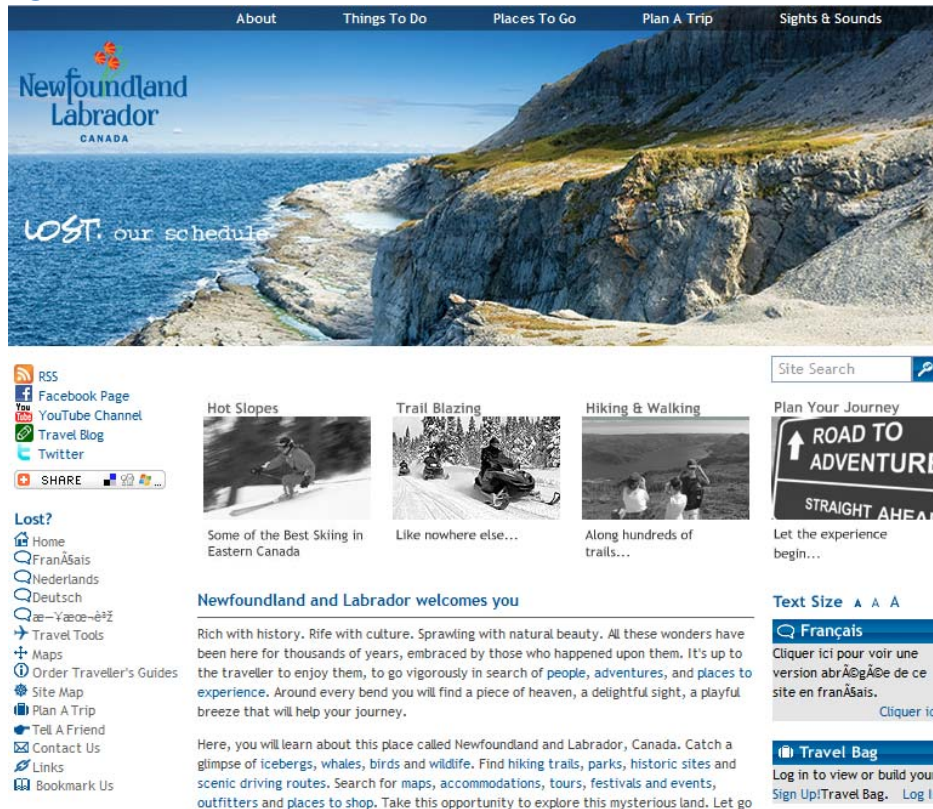
Source: www.ely2016.com

Newfoundland & Labrador

The website for Newfoundland and Labrador is one that gives an excellent first impression. The homepage is neatly organized and offers visual images that are very appealing. The user is able to access a number of links, without being overwhelmed.

The Newfoundland and Labrador webpage offers a variety of social media tools. Users are able to utilize two-way communication by a number of methods. The site includes tools such as Facebook, RSS Feeds, YouTube, a Travel Blog, Twitter and other popular platforms. The site is very easy to use and is available in English, French, German, and Japanese. Newfoundland & Labrador's tourism partnership has realized the potential for working together to capture interests of international visitors. A series of interactive maps are available on the website, and are very user friendly. Visitors are also able to utilize a trip planner. Any information that is needed to travel to the area is virtually available at the tip of your fingertips. Users can even check and book flights through the site, which eventually links to Air Canada.

Figure 17: Newfoundland & Labrador Website

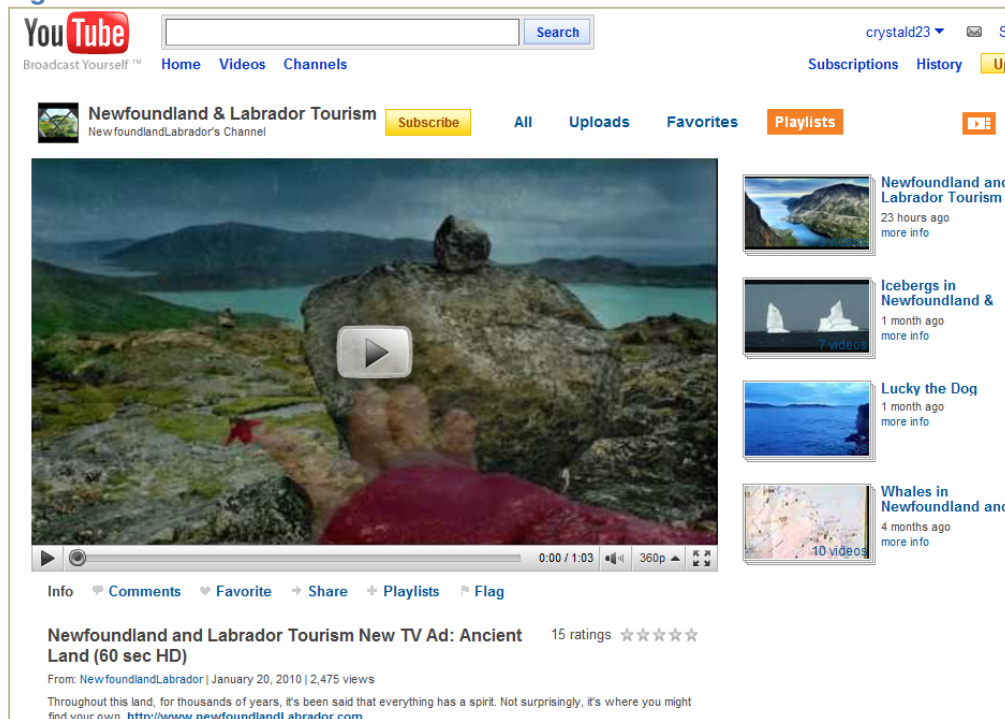


This site is excellent as it provides access to almost every link from the homepage. The site allows users to view an E-newsletter, which appears to be available monthly. According to Ezine.com one of the best ways to communicate news and information to your prospects and customers is with a newsletter. Newsletters improve awareness of an economic development organization's initiatives to a target market and help build a relationship with those who read it. It gives the organization a competitive advantage, which makes it more likely that readers will be interested in the community²². This is especially important in Economic Development and Tourism, as communities today are fiercely competing for a fixed number of potential visitors.

As is shown, Newfoundland & Labrador has built an extensive collection of videos on the popular site, YouTube. The customized pages allow users to view videos about Newfoundland & Labrador, upload their own videos and subscribe to RSS Feeds. The videos, like the one below are largely centered on promoting the tourism opportunities, which have been also featured on radio and television quite frequently.

²² Love, J. (2006, February 21). *How To Use Newsletters To Build Customer Relationships*. Retrieved March 15, 2010, from <http://ezinearticles.com/?How-To-Use-Newsletters-To-Build-Customer-Relationships&id=149759>

Figure 18: Newfoundland & Labrador Tourism YouTube Centre



The overall social media strategy of Newfoundland & Labrador is a good example of one where all players have worked together such as industry (mainly economic development and tourism) to produce an image that is clear and consistent. This is very important to capture and retain the eyes of potential tourists and investors.

So What Does it All Mean?

The case studies discussed above are prime examples of communities that have really developed their social media strategy and the value of it is very obvious to the user. These sites make use of social media tools on an everyday basis. Social media is not just a fad, or 'new toy to use', it has become a way of life, and an important tool in promoting the economic/tourism development potential for a community/region.

Error! Reference source not found. Figure 19 presents the top early adopters of Web 2.0 applications integrated in their branding strategy and ranked in order on a scale from 0 to 13:

Figure 19: Top Early Adopters of Web 2.0 Applications

City	Agency	Website	Score
London	London Economic Development Corporation	www.ledc.com	10/13
Halifax	Greater Halifax Partnership	www.greaterhalifax.com	10/13
Ottawa	Ottawa Centre for Research & Innovation	www.ocri.ca	9/13
Hamilton	Hamilton Economic Development	www.investinhamilton.ca	8/13

Source: EBA Data. (2009). *Web 2.0 and business attraction: Canadian cities online marketing index*. Retrieved March 12, 2010 from <http://www.ebadata.com>.

The companies listed above have incorporated social media into their overall economic development strategy. They were quick to realize the potential of social media and are now leading the way for other organizations to explore the benefits that they have experienced. For a more detailed list of communities/organizations utilizing social media, see below.

Community Websites Using Social Media Well

Community/ Region	Website Address	Social Media Used
Prince Edward County	www.buildanewlife.ca	Facebook, Spurl, Yahoo, Reddit, Delicious, RSS Feeds, You Tube, Pod Casts, 'Share with a Friend' Link
Leduc Nisku Economic Development Authority	www.internationalregion.com	Virtual Tradeshow, RSS Feed
Niagara Region	www.niagararegion.ca	Facebook, Twitter, You Tube, E-Newsletter Signup
City of Vancouver	www.vancouver.ca	RSS Feeds, Facebook, Twitter, You Tube
Spokane, Washington	www.visitspokane.com	Video's, travel planner, podcasts, blog, multiple languages.
Metro Denver	www.metrodenver.org	Blog, Twitter, LinkedIn, Flickr
City of London	www.london.ca	Facebook, Twitter
Rainbow Country	www.rainbowcountry.com	Facebook, Twitter
Newfoundland Labrador Canada	www.newfoundlandlabrador.com	Facebook, RSS Feeds, You Tube, Travel Blog, Twitter, MySpace, Digg, Delicious, Google, Live, Stumble Upon, (Add This Toolbar)
Town of Grande Cache	www.grandecache.ca	Videos, Weather RSS, You Tube, Blogger,
Drumheller	www.dinosaurvalley.com	Facebook, Twitter, (Add This Toolbar)
Greater Spokane Incorporated	www.greaterspokane.org	You Tube, Twitter, LinekdIn, Blogger,

City of Oshawa	www.city.oshawa.on.ca	Video Tour Book, eNews, Twitter, RSS Feeds, WCAG 2.0
City of North Bay	www.cityofnorthbay.ca	Weather, webcam, solar generation, Twitter,
Township of Nipigon	www.nipigon.net	Twitter, Facebook, Google Maps, Weather, You Tube
City of Nanaimo	www.nanaimo.ca	Emergency notification, Google Maps, Facebook, Twitter, (Add This Toolbar), Weather
Ely, Minnesota	www.ely2016.com	Facebook, Twitter, You Tube
Greater Halifax Partnership	www.greaterhalifax.com	LinkedIn, Facebook, Twitter, Blog, Flickr, You Tube
Hamilton Economic Development Office	www.investinhamilton.ca	Facebook, LinkedIn, YouTube, Twitter, Flickr,
Ottawa Centre for Research and Innovation	www.ocri.ca	Facebook, Twitter, Blog, Podcast, RSS Feed
Calgary Economic Development	www.calgaryeconomicdevelopment.com	'Calgarypedia'

Appendix VI

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