

Orangeville Economic Development Strategy Update

January 2018



Prepared by

**GLOBAL
INVESTMENT ATTRACTION
GROUP**

Orangeville Economic Development Strategy Update

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Orangeville Economic Development Strategy Update

EXECUTIVE SUMMARY

Economic Development Vision

Orangeville will sustain and enhance its strong economic, community, cultural and environmental well-being by focusing on the following key areas of importance:

- Maintenance and enhancement of Orangeville’s overall quality of life and small town appeal;
- Protection of Orangeville’s heritage, cultural and natural environments;
- Balanced growth management for residential and employment uses while maintaining the community’s natural and historical character;
- Providing an economic development strategy that supports the retention and expansion of local businesses, and seeks new opportunities; and
- Development of an equitable, efficient and accountable municipal service delivery system, that allows for regular public consultation.

A. Introduction

Orangeville’s 2017 Corporate Strategic Action Plan, “Orangeville Forward,” approved by the Town Council in July 2017, identifies economic vitality as one of five key priorities for direct action.

This Economic Development Strategy Update provides an economic development vision and proposes goals, objectives and actions to:

- create a positive framework for economic development;
- attract, retain and expand businesses;
- foster entrepreneurship;
- stimulate tourism and cultural development;
- further workforce development; and
- market Orangeville.

The sectors of focus that this Strategy Update identifies are:

- tourism;
- creative industries;
- manufacturing; and
- professional, engineering, information technology, and financial services.

Economic development programs seek to improve a community's economic well-being by fostering sustainable growth and economic diversity. More than just growth, a qualitative balance is sought.

The scope of the interrelated responsibilities of Orangeville's Economic Development team is notably broader than that of many municipalities, encompassing both tourism and culture. In addition, the officers operate the Orangeville and Area Small Business Enterprise Centre and advise Town Councillors as Board members of the Orangeville Brampton Railway.

Over the last five years, Orangeville Economic Development has systematically collected extensive data on its operations, much of which has been provided publicly through reports, releases and newsletters, including its annual Economic Development Report. It now has a substantial database on which to analyze trends and outcomes and assess performance.

The Orangeville Economic Development team engages its stakeholders regularly through outreach to the business, manufacturing, tourism, and arts and culture communities. This has occurred through structured arrangements, such as advisory committees, the recent manufacturing Business Retention and Expansion (BR+E) survey, and one-on-one meetings. The Town's Economic Development Committee and Arts and Culture Committee, which meet regularly, include a cross-section of community representatives. In addition, in a community the size of Orangeville, there are frequent opportunities for interaction, including through events organized by groups such as the Dufferin Board of Trade (DBOT), the Business Improvement Area (BIA), Headwaters Tourism, and the Dufferin Arts Council.

B. Orangeville – A Brief Profile

Located on the northwest border of the Greater Toronto Area (GTA), Orangeville is part of the wider Greater Golden Horseshoe (GGH) which, according to the 2016 Census, had a population of 9.4 million, a quarter of Canada's population and an even larger share of the national Gross Domestic Product (GDP).

Orangeville serves as the gateway and major business hub for Dufferin County. Its population of 28,900 in 2016 represents nearly half of the total for the County. The rate of growth in Orangeville's population slowed over the past fifteen years to 3.3% from 2011 to 2016. However, the County's increase was a robust 8.5% from 2011 to 2016, led by Shelburne and Mono. The average age of the Orangeville population was 38.7 years, younger than Ontario's (41.0 years) and Dufferin County's (39.6 years).

Job growth in Orangeville from 2011 to 2016 was 7.9%, a rate higher than in Ontario and more than double the Town's population increase. Orangeville had sizable shares of the County jobs in information and cultural industries, manufacturing, finance and insurance, and professional, scientific and technical services. As the County's major business and services hub, jobs in retail, utilities, health care, accommodation and food services, and education are also concentrated in Orangeville.

C. Orangeville’s Opportunities and Challenges – Growth and Change

Growth and change will continue to present Orangeville with both opportunities and challenges that need to be managed to bring maximum benefit. Orangeville is set in one of Ontario’s most scenic regions and offers a small town lifestyle, active arts and culture scene, and unique housing opportunities that can appeal – among others – to professionals, entrepreneurially-oriented individuals and business proprietors. Though relatively lower as compared to the Greater Toronto Area (GTA), Orangeville housing costs are escalating; regional infrastructure is stressed; and societal adaptation accompanies population growth.

Availability of Industrial and Commercial Land and Buildings: A major challenge for Orangeville is that, as of mid-2017, there was virtually no vacant serviced industrial land available for sale. Moreover, there were no publicly known plans to deliver additional serviced industrial land, although the 2016 land needs assessment for the Town indicated that there were sufficient amounts of land designated for employment purposes. The land needs assessment did not consider whether or when land zoned for industrial and commercial uses will come to market.

In the absence of definite plans by owners of employment lands, the Town’s ownership of the 29.7 acre Humber Lands parcel offers possibilities for redesignation and rezoning from institutional to employment and/or mixed uses. There were also only a very limited number of industrial buildings on the market for sale or lease. By contrast with the immediate industrial land situation, there was a good supply of commercial office space according to real estate listings.

Competitiveness of Taxes, Charges, and Policies: Orangeville’s Development Charge exemption for most industrial facilities makes the effective development charges in Orangeville the lowest of similarly-sized and neighbouring jurisdictions, as only County Development Charges apply. On a comparative basis, Orangeville property taxes for commercial office, standard industrial and large industrial are in the low range among communities that are nearby or of comparable size.

The Orangeville Business Improvement Area (BIA) is well financed, based on a special tax on commercial properties that is enhanced by a trend-setting arrangement with Walmart that it become a BIA member. The Downtown Heritage District Façade Assistance Program has levered significant private investment to maintain, restore and construct façades that add to the downtown’s character and attractiveness. The Town’s branding and welcome to visitors has also been enhanced with way-finding signage.

The value of building permits issued is an indicator of local development. Over the five year period from 2012 to 2016, almost all of the industrial construction involved additions. This could be a consequence of the limited amount of vacant employment land available for new construction. The more significant growth in commercial construction may reflect the general shift in the economy toward service employment.

A forthcoming approach to dealing with businesses and developers is evident in the Town’s valuable and user-friendly overview of its site plan approval procedures and delegated Director-level approval authority.

Availability of Affordable High-Speed Broadband Infrastructure: Affordable high-speed fibre optic broadband is accepted as essential community infrastructure today. The capacity and speed needs of businesses continue to grow rapidly. Orangeville is hampered by gaps in coverage, high up-front costs for fibre optic connections, and other inadequacies. The ability to attract new investment and support the expansion of existing facilities is limited by the current situation, as is talent attraction. The three to six points of presence (POPs)¹ that the new SouthWestern Integrated Fibre Technology (SWIFT) project are expected to deliver in Dufferin County by 2021 will not be sufficient to address all needs and are several years from full realization.

Connectivity – Transportation Infrastructure: Continued growth calls attention to the Orangeville and area transportation infrastructure needs. Though Highway 10 to 410 was upgraded and the Orangeville By-Pass completed in the 2005-2010 time span, the future need for direct access in Orangeville to Ontario's 400-series highways will be more and more evident, along with upgrades to Highway 10 to Shelburne and Highway 89 east to Alliston.

The Town-owned Orangeville Brampton Railway (OBRY) not only provides twice-weekly freight service that is critical to certain manufacturers, but also makes possible the Credit Valley Explorer scenic train that has become a major tourism draw. Steps that will ensure the longer-term viability of the Railway need to remain a preoccupation of the Town to ensure the continuity of this railway asset.

GO Transit buses provide service from Orangeville to and from the Brampton GO hub, mainly during rush hours. More frequent all-day two-way service into the GTA and links to Orangeville from other points in the area will assist employees get to Orangeville workplaces and increase access for business to the GTA. The proposal by the Greater Toronto Airport Authority for a major regional multi-modal Pearson hub should be monitored and advocacy for robust Orangeville connections initiated as plans take shape. Public transit service in Orangeville that will better serve the Business Park as well as the growing residential areas also needs consideration.

Post-Secondary Educational Partners: Orangeville is host to two college campuses – Georgian and Humber. Post-secondary institutions are catalysts in economic development and community building. With the tight restrictions now applied by the Ontario government to the approval of new campus locations, Orangeville appears to be in an advantageous position to work with Humber and Georgian to focus on growth of the offerings and footprints in Orangeville to serve the growing population in the Town and the surrounding region.

Sustainability: Orangeville's commitment to sustainable development is reflected in its Official Plan, in the creation in 2007 of the Sustainability Action Team (a committee of council), in selected incentives favouring environmental features in infill building, and in the 2015 conversion to LED lighting. The Town envisages developing a sustainable development plan to ensure a comprehensive approach to guide the efforts of the Town and to maintain the momentum established.

The Impact of External Developments and Trends: Substantial and consequential changes have occurred externally since the preparation of the 2007 Orangeville Economic Development Strategy. These include major shifts in the economy and economic drivers, the rise of advanced digitally-based cross-cutting technologies, and the rapid and disruptive pace of technological change. The impact of

¹ Points of presence (POPs) are fibre optic network nodes located to provide connections to local (so called "last mile") service providers or users with their own "last mile" infrastructure.

the 2008-2009 global recession was profound, leading to slower more tentative and uncertain growth. Protectionist and nationalist tenancies raise threats and uncertainties, including Canada's involvement with and dependence on North American supply chains. Greenfield foreign direct investment (FDI) flows are tentative and have yet to recover to pre-recession levels. Strategic expansions in Ontario by existing foreign investors appear to have been the most notable sources of increased FDI, underlining the importance of business retention and expansion activities.

Dufferin County Role in Economic Development: In July 2017, the Dufferin County Council accepted the County Economic Development Strategic Plan and endorsed the hiring of an economic development officer. This will contribute additional resources and heighten economic development coordination that will encourage greater local engagement with Federal and Ontario partners and the entities and programs that they fund. In addition, increased County financial support and involvement will encourage the expansion of the reach and presence of the Orangeville and Area Small Business Enterprise Centre (SBEC). A collaborative County-wide approach to attracting external investment through a County economic development coordinating committee will also focus and add resources for mutual benefit.

D. Principal Economic Development Roles

1. Economic Development Framework Issues

A foundational goal in economic development is to be an attractive and competitive location that is responsive to the requirements of prospective new investors and local businesses that wish to expand.

Currently, Orangeville's two most pressing economic development challenges are:

- To explore options and define how to ensure that urgently needed serviced industrial land parcels of varied sizes can be brought to market in the shortest time possible; and
- To formulate a high-speed broadband strategy that will identify, bring together and capitalize on contributions from community partners to address deficits in affordable and available access to high-speed fibre optic broadband service.

In addition, major infrastructure investments will be necessary in the future to support Orangeville's economic development. Compelling, timely and well-coordinated advocacy is required, given long lead times. The future needs, which need to be researched and documented, include:

- Extension of Highway 410 to Orangeville and upgrading of key Dufferin County arteries leading to Orangeville;
- More frequent two-way all-day GO Transit bus connections from Orangeville to the Brampton hub and nearby post-secondary institutions, with the inauguration of feeder routes into Orangeville from points in the County;
- Improved public transit in Orangeville and through connections to neighbouring communities that will get the workforce to and from their places of employment in Orangeville; and

- Planning to ensure robust connections from Orangeville to the proposed mega Pearson transportation hub at Toronto Pearson International Airport.²

A major priority for the Town is to sustain efforts to ensure the viability of the Orangeville Brampton Railway (OBRY), which is vital to several important manufacturers and provides the scenic route for the Credit Valley Explorer (CVE) excursion train.

A fresh assessment of the benefits that could flow from more notable Orangeville presences by either or both of the Colleges would be timely. The Ontario government has tightly controlled approvals of new satellite campus locations, a situation which should favour those, like Orangeville, that already have satellite campuses.

GOAL: Be an attractive location that is competitive and responsive to job-generating growth opportunities

Key Recommendations

- Evaluate options to ensure that vacant serviced industrial land will be brought to market in Orangeville at the earliest possible time;
- Ensure the protection and designation of the remaining readily serviceable employment lands with good access to major transportation infrastructure in order to achieve a more complete community in Orangeville;
- Undertake an inventory and analysis of all existing Orangeville industrial buildings to establish whether a program of incentives for adaptive reuse is merited;
- Monitor the competitiveness of Orangeville industrial and commercial development charges, property taxes and incentive programs, and recommend changes that may be advised;
- Participate in the development of an Orangeville broadband strategy that will support actions to ensure near-term availability of the reliable and affordable high-speed broadband coverage needed by businesses and expected by the public;
- Participate in the creation of a sustainable development plan for Orangeville;
- Continue to explore and act upon options that will enhance the viability and ensure the continued operation of the Orangeville Brampton Railway;
- Support research-based advocacy for the extension of Highway 410 and upgrades to other highways in the County; and
- Support research-based advocacy for greater frequency of GO Transit bus service to the Brampton hub and nearby post-secondary campuses; and for all-day, two-way links with the proposed Pearson Hub.

2. Business Retention and Expansion

The retention and expansion of existing businesses are a primary economic development objective, with local firms almost certain to be the most significant source of job growth. In addition, the views of local business are important to the formulation of Town policies and the development of programs that respond meaningfully to their

GOAL: Encourage the retention and expansion of existing Orangeville businesses

² See

[tps://torontopearson.com/uploadedFiles/Pearson/Content/About_Pearson/Economic_Impact/Regional_Growth/GTAA_GrowthCanadaWithAMegaHubAirport.pdf](https://torontopearson.com/uploadedFiles/Pearson/Content/About_Pearson/Economic_Impact/Regional_Growth/GTAA_GrowthCanadaWithAMegaHubAirport.pdf). Accessed on August 30, 2017.

needs. Close relationships with local companies provide valuable insights, information, and allies related to investment attraction activities. During 2015/2016, Orangeville Economic Development initiated a structured Business Retention and Expansion (BR+E) calling program involving 36 manufacturers, with the responses being analyzed and reported on.

Key Recommendations

- Undertake further BR+E calling programs, ideally in parallel with colleagues in the County and other municipalities, to remain informed of Orangeville firms' needs, preoccupations and intentions; and
- Offer, support and promote programs in collaboration with Federal, Ontario and other partners that will assist Orangeville businesses to sustain their competitiveness, find markets and grow.

3. Innovation and Entrepreneurship

Business creation, growth, innovation and the encouragement of entrepreneurship are at the centre of healthy and vibrant local economies today. Established businesses also need to embrace innovation and change if they are survive a rapidly changing world.

The Orangeville and Area Small Business Enterprise Centre (SBEC) has been run by Orangeville Economic Development for the benefit of the entire County. The County has increased its financial contribution for the SBEC and will be interested to support expansion of its activities and its presence beyond Orangeville.

GOAL: Encourage and support a climate for entrepreneurship and innovation

Enhanced collaboration with Provincial and Federal partners, establishment of links with post-secondary entrepreneurship and innovation centres, and encouragement of involvement by Innovation Guelph, the Ontario Regional Innovation Centre (RIC) with responsibility for the local region, will bring additional innovation-oriented resources to Orangeville Economic Development's clients and further support entrepreneurs.

Key Recommendations

- Grow and evolve the Orangeville and Area Small Business Enterprise Centre (SBEC) and its role, including capitalizing on greater Dufferin County collaboration and funding;
- Increase engagement with Federal and Provincial officials and programs, as part of County-wide coordination, in order to bring greater benefits to the Orangeville community;
- Build a relationship with Innovation Guelph, jointly with County partners, to bring its capabilities to Orangeville enterprises focused on innovation and scaling;
- In conjunction with Orangeville businesses, explore research, testing, prototyping, and talent linkages with local and nearby colleges and universities; and
- Encourage development of a Town procurement initiative to make the Town a first or early public sector client for emerging technologies.

4. Attracting New Investment

New external investment attraction is exceptionally competitive. As such, there is a requirement for thorough preparation, in-depth research, careful targeting of companies, compelling value propositions, engagement with prospects, and sustained efforts. In two tier municipalities, the adoption of a collaborative approach to external investment attraction is invariably the norm. As part of Dufferin County’s decision to become directly involved in economic development, an economic development coordinating committee, of which Orangeville will be a member, will be established. Orangeville, as the principal business hub, has the experience to make an important contribution and benefit from a collaborative effort.

GOAL: Attract new investment to Orangeville

Key Recommendations

- Identify, pursue and attract external investment prospects;
- Contribute to the creation and development of a County-wide external investment attraction program that will align with Orangeville’s priorities and strengths;
- Ensure County economic development colleagues are familiar with the assets and value propositions for external investment in Orangeville; and
- Participate in collaborative investment attraction initiatives and pursue leads where Orangeville can match prospects’ requirements.

5. Talent and Workforce Development

Highly qualified personnel are the assets that globally competitive firms principally seek and want access to when choosing where to expand or undertake new investments in advanced economies such as Canada’s. Companies looking to invest or expand want verifiable information on workforce availability. They will also favourably consider locations where there is access to post-secondary institutions and programs that provide further training, reskilling and lifelong learning.

The new Dufferin County Workforce Development Committee, convened by the Workforce Planning Board of Waterloo, Wellington and Dufferin (WPBWWD), has been established to engage community partners in labour market research and planning processes to find local solutions to local issues. The recent Orangeville BR+E project that focused on the manufacturing sector helped define issues and needs. Full analyses of commuting flows, based on 2016 Census data released in December 2017, are vital to establish where local jobs might be created to attract local residents now holding jobs elsewhere. Programs to keep and attract talent, including immigrants, are an important dimension.

GOAL: Have the talents and skills available that match the needs of growing and competitive businesses, and attract investment that will employ available talent

Key Recommendations

- Ensure the Dufferin County Workforce Development Committee addresses issues of importance to Orangeville interests, and participate in the funding of research and projects that respond to Orangeville economic development priorities, including for example in-depth analysis of commuting data from the 2016 Census;

- Arrange and/or participate in well researched workforce-workplace matching initiatives, such as job fairs and programs to introduce commuters to job opportunities closer to home;
- Contribute to the development and execution of strategies and programs to attract and retain talent, including immigrants; and
- Encourage and support public transit solutions that facilitate GTA travel connections for businesses, travel to and from Orangeville workplaces, and trips to and from post-secondary campuses.

6. Marketing Orangeville to Attract Investors, Tourists and Talent

The key marketing challenge in economic development is to develop branding and messaging that differentiates a community's offering to investors, talent and tourists. Orangeville's lifestyle and quality of life are at the centre of the community's self-image and branding. It aligns with the Headwaters regional brand as well.

A consistent, focused and authentic brand will enhance Orangeville's profile as a place for business, manufacturing, tourism and arts and culture. A re-evaluation of Orangeville's economic development and tourism branding, last undertaken in 2009, would be timely and might be coupled with the development of a new tourism strategy commencing in 2020.

GOAL: Brand and market Orangeville

Key Recommendations

- Develop in-depth value propositions for selected sub-sectors, to be available when suitable sites and broadband access are available;
- Undertake an Orangeville economic development and tourism branding review; and
- Renew and update websites, including strengthening content.

E. Sectors of Focus

Economic development programs focus on tradeable sectors – those whose products and services are sold to external markets or to visiting tourists, thereby providing incremental revenue to the community. Non-tradeable sectors, by contrast, tend to be driven by local demand.

The Orangeville Economic Development program needs to judiciously focus efforts on a limited number of sectors where the Town can present demonstrable advantages that differentiate it from others' offerings. Well-targeted and thoroughly researched initiatives are required to reach prospects, generate interest and make the case for Orangeville. In-depth value propositions are required.

The emergence of digitally-based technologies are blurring many traditional sector boundaries. Technologies are also converging and being applied across many product and service sectors. These shifts increasingly mean that priorities also need to take account of the technology platforms that are at the forefront of change and growth and that are applicable to many areas. These platforms include Artificial Intelligence, the Internet of Things, Big Data Analytics, Virtual Reality and 3D printing, among others.

Additional factors that are challenging traditional sector-oriented thinking are government public policy thrusts that apply to many areas. Ontario’s Climate Change Action Plan and the priority that governments attach to innovation and to infrastructure are examples. The creative component is also a needed dimension in many different fields and situations that are important to economic development.

Given accelerating change, economic development strategies and plans must acknowledge the need for flexibility and more frequent reviews of priorities.

Orangeville Sectors of Focus			
SECTOR of FOCUS	RETAIN Existing Firms	NURTURE Existing Capabilities	ATTRACT Additional Investment
Tourism	A	A	B
Creative Industries	A	A	B
Manufacturing	A	A	B
Professional, Engineering, Information Technology and Financial Services	A	A	C
Explanation of Priorities: A = Good prospects are evident that merit well-targeted proactive investment of effort in the near term B = Potential is evident that justifies close attention, opportunistic initiatives and regular review to determine if prospects merit higher or lower priority C = Prospects currently do not justify proactive efforts – only responsive –but may become a B or A priority in time based on further developments and/or evaluation			

1. Tourism

A significant part of Orangeville’s economic development mandate, tourism is one of the fastest growing economic sectors. Tourism has grown in importance as Orangeville’s festival, arts and culture, recreational, and culinary scenes grow and reach a critical mass that gains wider notice within the Greater Golden Horseshoe (GGH).

Headwaters Tourism, the destination marketing partner, has successfully presented the region and generated traffic through its award-winning “Where Ontario Gets Real” campaign. As part of the partnership, an Orangeville Economic Development staff member is an ex-officio member of the Board.

OBJECTIVE: Encourage expanded and enhanced tourism offerings and capacity, and delivery of memorable experiences to increased numbers of visitors to Orangeville

Key tourism roles for Orangeville focus on visitor servicing, publications and information; identifying, inventorying, engaging and building local tourism assets, including arts, culture and culinary aspects; working with the Business Improvement Area (BIA) and others on festivals, streetscapes, way-finding signage, façades, parking and other infrastructure; managing the Credit Valley Explorer excursion train; and attracting tourism-related investment, including accommodations.

Key Recommendations

- Build on the strong marketing partnership with Headwaters Tourism, ensuring that Orangeville tourism partners, assets, initiatives and events are featured and involved;
- Engage expert advice to evaluate and develop a business plan for the Credit Valley Explorer with a view to strengthening its viability and enhancing its offering, including learnings from other comparable operations;
- Continue to expand way-finding signage;
- Expand information available to visitors, especially electronically and to cross-promote attractions;
- Coordinate increased focus on attracting bus tours, especially centred on the Credit Valley Explorer and Theatre Orangeville;
- Review Visitor Information Centre operations and opportunities for collaboration with other municipalities as appropriate;
- Support training for the hospitality workforce and operators to enhance the Orangeville visitor experience;
- Support development of a hotel or motel on the designed and zoned site which has been purchased;
- Continue to target sports tourism that aligns with availability of accommodation in Orangeville;
- Continue to seek and evaluate opportunities to build new and expanded assets that strengthen cultural tourism; and
- Develop a new multi-year Orangeville tourism strategy to be launched in 2020.

2. Creative Industries

The creative sector is a significant part of Orangeville’s identity and appeal, with offerings intertwined with tourism. The arts and culture scene is a key factor in retaining and attracting talent, including youth. The Town provides direct financial support to Theatre Orangeville, Rotary Ribfest, and the Dufferin Cultural Resource Circle. Job growth in the creative sector is evident from 2011 to 2016. The Municipal Culture Plan, “Orangeville’s Cultural Advantage,” completed in 2014, is driving a host of initiatives that respond to the Plan’s recommendations.

OBJECTIVE: Support growth, greater recognition, and external audience attraction for Orangeville’s arts and culture

Key Recommendations

- Continue to pursue recommendations in the 2014 Municipal Culture Plan and consider the benefits of a five-year update or renewal in 2019 to sustain momentum;
- Celebrate successes with the Orangeville community and draw external attention to the growing critical mass and excellence of Orangeville’s arts and entertainment sector;
- Benchmark Orangeville’s creative sector offerings and evolution against other similar communities, whether through visits or membership in an entity such as the Creative City Network of Canada;
- Establish a film and video attraction program and policies designed to encourage filming and productions in Orangeville and the surrounding region;
- Promote linkages among the arts and culture, tourism, and food and culinary sectors; and

- Explore possible post-secondary linkages, such as with Humber College’s School of Creative and Performing Arts.

3. Manufacturing

Orangeville’s manufacturing sector is the third largest employment generator in Orangeville, after retail and health care. The jobs in Orangeville account for three-quarters of the County’s manufacturing employment. The increase in the number of jobs has significantly outpaced the Ontario average from 2011 to 2016, growing by nearly 19% compared to just under 1% provincially. Notable sub-sectors are plastics, dairy products, and machinery manufacturing. A Business Retention and Expansion (BR+E) calling program for the manufacturing sector during 2015 and 2016 indicated significant numbers of firms had made major investments, increased productivity, and planned to modernize their facilities or equipment. Central concerns revealed the need for workforce training and attraction, as well as internet access, speed and affordability. The scope to attract new investment is also limited by the lack of vacant, serviced, appropriately designed and zoned industrial land and industrial buildings and space for sale or lease.

OBJECTIVE: Support business retention, growth and new investment attraction in Orangeville’s manufacturing sector

Key Recommendations

- Pursue the action plan developed subsequent to the 2015-2016 manufacturing sector BR+E program, including the convening of a manufacturing summit, addressing workforce shortages, and support for programs that respond to identified interests and needs of manufacturers;
- Evaluate the feasibility of partnerships with Toronto food and beverage incubators and the development of a shared food and beverage acceleration space in Orangeville to which some of the start-ups could graduate or locate;
- Support further events centred on food and beverage sector entrepreneurship, innovation, start-ups, and scaling, based on County-wide collaboration that includes the agriculture sector’s supply capabilities;
- Assist manufacturers to access research and innovation resources, including at nearby post-secondary institutions; and
- Evaluate participation in the Economic Developers Council of Ontario’s Advanced Manufacturing Network.

4. Professional, Engineering, Information Technology and Financial Services

The shift from manufacturing to services jobs puts a focus on Orangeville’s potential for professional services businesses, such as engineering, environmental, design, computer services and information technology, accounting, finance, and technical and scientific services. The current concentration of employment in professional services in Orangeville is in engineering, computer systems design, and data processing and hosting. A very significant near-term constraint facing any proactive efforts to attract professional services firms is the limited availability and high cost of access to ultra-high-speed broadband.

OBJECTIVE: Retain, grow and attract professional, engineering, information technology, business support, and financial services operations to Orangeville

Key Recommendations

- Reach out through individual calls to the larger local professional and business services firms to understand their needs, challenges, opportunities, and the support required to encourage expansion;
- Assess the near-term opportunities for business attraction and expansion in Orangeville related to Ontario's Climate Change Action Plan, including possible post-secondary linkages;
- As part of a broadband strategy, identify existing and prospective commercial office space and developments where suitably robust and affordable broadband is and will be available, as an input for development of a business attraction plan for the professional and business services sector; and
- Determine which sub-sectors in professional and business services have the talent base available to merit business attraction activity, examining particularly commuting patterns and the skill sets of those commuting to jobs outside of Orangeville.

F. Resource Implications

Notable changes in resource requirements for Orangeville's Economic Development program are outlined for the goals in each of the principal economic development roles in Section D and for the objectives for each sector of focus in Section E.

The major framework initiatives identified in the Economic Development Strategy Update – ensuring that serviced industrial land is brought to market, and participating in the development of a strategic plan for high-speed broadband – will initially require the investment of time by staff, possibly to the exclusion of some other priorities. The first objective in developing a high-speed broadband strategy will be to identify various investments and contributions from partners that can be marshalled or leveraged. In the case of industrial properties, a less pressing but still important initiative is the proposed analysis of all larger older industrial buildings to determine the need to incent the adaptive reuse that will ensure they are suited to changing requirements. This could be contracted out.

Dufferin County has decided to take a direct role in economic development and tourism and hire an economic development officer, increasing the overall level of economic development resources available to benefit of the Town of Orangeville. Increased financial support for the Orangeville and Area Small Business Enterprise Centre (SBEC) by the County should limit future increases in Orangeville's contribution while allowing some expansion in the SBEC's reach and activities. The County's economic development involvement will also potentially bring a greater degree of burden sharing, while a collaborative County-wide approach will heighten the local involvement and exposure for Federal and Provincial representatives and their programs of assistance, along with other partners such as post-secondary institutions.

Incremental funding will be required for several major projects such as a new tourism strategy, a branding review, website and social media updates (including video), and an evaluation and business plan for the Credit Valley Explorer. Budget resources will also be required to share costs of projects emanating from the Dufferin County Workforce Development Committee. Continued funding will be required for way-finding signage. Modest funding is recommended for Orangeville to benchmark other communities' creative sector successes.

Timing for investments in the development of some of the in-depth value propositions for selected sub-sectors will depend on whether industrial land and broadband access are available.

G. Implementation Priorities and Phasing

In the Economic Development Strategy Update, priorities and timing are indicated for each action associated with the principal economic development roles in Section D and the sectors of focus in Section E.

In terms of overall priorities and phasing, the most immediate economic development issues are the lack of industrial land and buildings and the gaps and high costs associated with high-speed broadband as these challenges limit the ability to attract new job-generating investment. Ensuring the viability of the Orangeville Brampton Railway is a priority but involves longer timelines and ongoing efforts.

During 2018, time will be devoted to defining the County-wide economic development roles, programs and priorities, and the establishment of an effective working level coordinating committee. The Dufferin County Workforce Development Committee will also become more fully operational during this period. It may be possible to initiate discussions with Innovation Guelph during 2018 about how to support its involvement with clients in Orangeville.

The constraints imposed by a lack of industrial land and by high-speed broadband availability and cost will not unduly impeded the planned actions for the tourism and creative sectors. Business retention and expansion activities can also proceed. On the other hand, any proactive investment attraction plans for manufacturing or professional and business services will be largely deferred until the issues are addressed.

Advocacy for transport-related issues require research which will better document the justification and timing for the respective priority projects.

Orangeville Economic Development Strategy Update

Economic Development Vision

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- Protection of Orangeville’s heritage, cultural and natural environments;
- Balanced growth management for residential and employment uses while maintaining the community’s natural and historical character;
- Providing an economic development strategy that supports the retention and expansion of local businesses, and seeks new opportunities; and
- Development of an equitable, efficient and accountable municipal service delivery system, that allows for regular public consultation.

A. Introduction

This update of the Town of Orangeville’s 2007 Economic Development Strategy occurs in an environment that has changed significantly over the past decade – one that offers both opportunities and challenges going forward. The Strategy Update’s goals and objectives focus on the next five years but have been developed with a ten-year time horizon. The proposed actions and associated performance indicators target the first three years.

This Economic Development Strategy Update aligns with the new corporate Town of Orangeville Strategic Action Plan, “Orangeville Forward,” adopted by Council in July 2017.³ “Orangeville Forward” identifies economic vitality as one of five key priorities needed to fulfill the overall vision:

“Orangeville is an inclusive community that respects its heritage, natural environment and small town appeal while embracing the future with a progressive and innovative spirit.”

³ Town of Orangeville, “Orangeville Forward: A Strategic Action Plan for the Town of Orangeville,” 2017.

Economic vitality, the Plan indicates, involves the attraction, retention and expansion of business; fostering entrepreneurship; stimulating tourism and cultural development; and furthering workforce development. These aspects are addressed at greater length in this Strategy Update.

In addition, the Economic Development Strategy Update builds on the policies and strategic directions for economic growth included in the Orangeville Official Plan.⁴

The Economic Development Strategy Update has been undertaken in parallel with the development of the Dufferin County Economic Development Strategic Plan which was accepted by County Council in July 2017 and which provides the basis for the definition of an inaugural County economic development role.

Since 2007, the Town has also developed several other strategies and plans related to economic development:

- A 2010 Tourism Development and Marketing Plan;⁵
- A 2014 Municipal Cultural Plan – Orangeville’s Cultural Advantage;⁶ and
- The Town’s 2014 Directional Way-finding Master Plan.

A Lands Needs Assessment Study⁷ and a Land Needs Assessment and Commercial Market Analysis⁸ were also done for the Town in March 2016.

A comprehensive progress report on the 2007 Strategy was provided to Council by Orangeville Economic Development staff on March 30, 2015, indicating that progress had been achieved in all priority areas established by the 2007 Strategy. The report also presented 2015-2016 initiatives in areas such as business retention and expansion, way-finding installations, sports tourism, community and sector profiles, the Credit Valley Explorer, and arts and culture. Regular updates on the Cultural Plan are prepared by the Economic Development Staff.

The Town of Orangeville recognizes the importance and value of public consultation and engagement. To achieve this without undue duplication with other initiatives, the development of the Economic Development Strategy Update drew on a number of sources:

- The feedback from Orangeville manufacturers obtained during the Business Retention and Expansion (BR+E) survey conducted in 2015 and 2016;
- Interviews by the consultants with selected stakeholders;
- Responses from people who operate or work at an Orangeville business or organization to the public survey undertaken as part of the outreach for the concurrent Dufferin County Economic Development Strategic Plan⁹;

⁴ Town of Orangeville, “Official Plan,” Office Consolidation, September 24, 2013, Section D1.

⁵ Mitchell Westlake, “Tourism Development and Marketing Plan,” January 2010, Prepared by Erin Mitchell.

⁶ Culture Capital in association with Nordicity and GeoProxis, “Orangeville’s Culture Advantage: Municipal Cultural Plan with Appendices,” March 2014.

⁷ MacNaughton Hermsen Britton Clark Planning Limited (MHBC), “Town of Orangeville Land Needs Assessment,” March 14, 2016.

⁸ urbanMetrics inc., “Orangeville Land Needs Assessment and Commercial Market Analysis,” March 2, 2016.

⁹ A public survey using Survey Monkey was undertaken covering the area between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

- Orangeville-relevant input provided during the stakeholder consultations held in Dufferin County at the beginning of April in 2017¹⁰; and
- Economic development relevant views offered as part of the late 2016 consultations associated with the development of the Town of Orangeville corporate Strategic Action Plan.

The Orangeville-related feedback from the public survey is in Appendix A.

This Economic Development Strategy Update outlines an economic development vision, along with goals, objectives and action items. These are directed but not limited to achieving an environment that will be conducive to attracting and retaining investment that supports jobs and job growth; diversifying the tax base; and generating wealth and opportunity, while maintaining a high quality of life. The Strategy Update identifies Orangeville’s competitive advantages, the principal areas of opportunity, and the priorities on which to focus to ensure value for money.

An Overview of Orangeville’s Economic Development Program

The principal goal of an economic development program is to improve the economic well-being of a community by fostering sustainable growth and economic diversity through policies and initiatives that will maintain and grow the tax base through the retention, expansion and attraction of investment and talent. Economic development is not just about growth. Rather, it seeks to enhance the overall quality of life and strike a qualitative balance that recognizes community goals.

The Town of Orangeville Economic Development team is responsible for an array of interrelated activities that exceeds the typical portfolio of many municipal economic development organizations. For example, the scope encompasses both tourism and culture which are a good match and which are important dimensions of economic development that will grow in relative importance. Orangeville Economic Development also provides support to the Orangeville Railway Development Corporation (ORDC) which oversees the delivery of freight and tourism passenger services along the Orangeville Brampton Railway (OBRY). The railway provides services to several manufacturing operations and provides – through its Credit Valley Explorer (CVE) model – a major tourism attraction. Furthermore, the Economic Development team operates the Orangeville and Area Small Business Enterprise Centre for the benefit of the entire County, as an integral part of its activities.

The Orangeville Economic Development team reports regularly and comprehensively on its activities based on the extensive data it has gathered on its operations and programs over the last five years. This includes information from the Orangeville and Area Small Business Enterprise Centre (SBEC), the Visitor Information Centre, the Credit Valley Explorer, and events and organizations that it supports financially. The information and metrics are reported extensively, including in its annual Economic Development Report, the Business Connections Newsletter, and media releases. With five years of data available, reviews can identify trends and contribute to informed judgements about performance, priorities and programs.

The Economic Development team has valuable and extensive interaction with its community and client base. Two Town committees – the Economic Development Committee and the Arts and Culture

¹⁰ Economic development stakeholder consultations were held on April 4 and 5 in Shelburne, Mono and Grand Valley in connection with the development of the Orangeville Economic Development Strategy Update and the Dufferin County Economic Development Strategic Plan.

Committee – include representative members of the community. Structured outreach includes Business Retention and Expansion (BR+E) calling programs, and individual outreach to companies and organizations. Attendance at a range of community events, including those organized by groups such as the Dufferin Board of Trade (DBOT), Business Improvement Area (BIA), Headwaters Tourism and the Dufferin Arts Council, ensure regular contact with a broad spectrum of the community. These mechanisms, events and outreach afford ample opportunities for staff to benefit from feedback and remain in touch with community views.

Orangeville Economic Development programming recognizes the value that can be gained from contracting out certain functions, such as the operation of the Visitor Centre (to Theatre Orangeville), the Orangeville Brampton Railway and the Opera House. The Town’s active support of community initiatives extends to meaningful backing of signature events in tourism and partnerships with community organizations where interests coincide.

B. Orangeville – A Brief Profile

Orangeville borders directly on the northwest edge of the Greater Toronto Area (GTA), just 80 kilometers from Toronto, and is part of the wider Greater Golden Horseshoe (GGH).¹¹

Orangeville benefits from and its potential is driven by the huge market of which it is part and the higher levels of economic growth that are generated by the GTA and the GGH relative to the rest of Ontario and the country. Future growth in Orangeville is likely to be fueled by the positive outlook for the GGH mega-region which had a population of 9.4 million people in the 2016 Census,¹² ranking it fifth among major US and Canadian metropolitan agglomerations.¹³ The region contains over one-quarter of Canada’s population and attracts one in three new immigrants to Canada. As one of North America’s fastest growing regions, the GGH is forecast to have a population of 13.5 million by 2041.¹⁴

Exhibit 1 Forecast for Real GDP Growth			
	2016	Forecast 2017	Forecast 2018-2021
Toronto	4.1%	2.9%	2.4%
Ontario	3.1%	2.4%	2.0%
Canada	1.3%	2.0%	1.8%

Source: Conference Board of Canada, Metropolitan Outlook 2, Winter 2017

Real GDP growth of 2.9% is forecast for the Toronto area for 2017 by the Conference Board of Canada, following 2016’s 4.1% increase. For both years, Toronto ranks ahead of other Canadian CMAs. From 2018 to 2021, annual growth in the 2.4% range is expected, second nationally just below Vancouver. The Toronto estimates are above anticipated GDP growth for Ontario and for Canada (Exhibit 1).

Orangeville’s Role in Dufferin County: Orangeville is the gateway community and major business and urban hub in Dufferin County. With a population of 28,900 in the 2016 Census, the rate of growth in

¹¹ The Greater Golden Horseshoe, as defined in Regulation 416.05 under the Ontario Places to Grow Act, 2005, includes Brant, Dufferin, Durham, Haldimand, Halton, Hamilton, Kawartha Lakes, Niagara, Northumberland, Peel, Peterborough, Simcoe, Toronto, Waterloo, Wellington and York.

¹² Canadian Census 2016.

¹³ Based on a comparison with US “Combined Statistical Areas” in 2015 US Census. New York-Newark NY-NJ-CT-PA, Los Angeles-Long Beach CA, Chicago-Naperville IL-IN-WI, and Washington-Baltimore-Arlington DC-MD-VA-WV-PA are the four ahead, while San Jose-San Francisco-Oakland CA, Boston-Worchester-Providence MA-RI-NH-CT, Dallas-Fort Worth TX-OK and Philadelphia-Reading-Camden PA-NJ-DE-MD follow.

¹⁴ Ontario Ministry of Municipal Affairs (<http://www.mah.gov.on.ca/AssetFactory.aspx?did=10852>). Accessed on March 10, 2017.

Orangeville’s population has slowed over the past fifteen years, from 6.6% between 2001 and 2006, to 3.9% between 2006 and 2011, and to 3.3% (925 persons) from 2011 to 2016. Nonetheless, Orangeville accounts for nearly half of Dufferin County’s population. Orangeville’s relative share is declining, however, as Dufferin County as a whole grows more quickly (by 8.5% between 2011 and 2016), led by Shelburne (39.0%) and Mono (14.1%), due partly to a larger vacant residential land supply.

Exhibit 2 Population Growth for Dufferin County and Orangeville 1991 to 2016 Censuses				
Census	Dufferin County		Orangeville	
	Population	% Increase Over Previous Census	Population	% Increase Over Previous Census
1991	39,897	22.2%	17,921	24.0%
1996	45,657	14.4%	21,498	20.0%
2001	51,003	11.7%	25,248	17.4%
2006	54,436	6.7%	26,925	6.6%
2011	56,881	4.5%	27,975	3.9%
2016	61,735	8.5%	28,900	3.3%

Source: Statistics Canada, Census Data

Age Distribution: The average age of Orangeville residents in the 2016 Census was 38.7 years which was younger than the County’s average of 39.6 years and Ontario’s 41.0 years. The age distribution of Orangeville’s population showed that it had a higher proportion of its residents in the 0 to 19 years and the 30 to 54 years brackets than the provincial averages. Otherwise, in the 20 to 29 years and 55 years and over age ranges, Orangeville’s share was below Ontario’s. This suggests that Orangeville tends to lose some of its youth who go on to post-secondary studies or early employment elsewhere, but that talent is attracted to the Town during the principal income producing years from 30 to 54. The age distribution did not show either Orangeville or the County to have elevated levels in any of the age ranges of 55 years and over.

By comparison with its 47% overall share of the Dufferin County population, Orangeville’s population profile by age cohort shows it had a higher portion in the working age cohorts from 25 to 44 years.

Exhibit 3 Age Distribution of the Population of Orangeville With Dufferin County and Ontario Comparisons - 2016 Census					
Age Cohort	Orangeville			Dufferin County	Ontario
	Population by Age Cohort	% of Dufferin County	% by Age Cohort	% by Age Cohort	% by Age Cohort
0 to 4 years	1,770	49.5%	6.1%	5.8%	5.2%
5 to 9 years	1,910	49.0%	6.6%	6.3%	5.6%
10 to 14 years	1,815	45.7%	6.3%	6.4%	5.6%
15 to 19 years	2,040	47.7%	7.1%	6.9%	6.0%
20 to 24 years	1,790	46.3%	6.2%	6.3%	6.7%
25 to 29 years	1,810	52.8%	6.3%	5.5%	6.5%
30 to 34 years	1,900	53.0%	6.6%	5.8%	6.4%
35 to 39 years	1,940	51.5%	6.7%	6.1%	6.3%
40 to 44 years	2,070	49.5%	7.2%	6.8%	6.5%
45 to 49 years	2,220	47.1%	7.7%	7.6%	7.0%
50 to 54 years	2,345	43.6%	8.1%	8.7%	7.9%
55 to 59 years	1,795	40.1%	6.2%	7.3%	7.4%
60 to 64 years	1,450	40.6%	5.0%	5.8%	6.3%
65 to 69 years	1,275	40.6%	4.4%	5.1%	5.5%
70 to 74 years	965	43.0%	3.3%	3.6%	3.9%
75 to 79 years	675	45.2%	2.3%	2.4%	2.9%
80 to 84 years	540	50.2%	1.9%	1.7%	2.2%
85 years and over	595	54.1%	2.1%	1.8%	2.2%
TOTAL	28,900	46.8%	100.0%	100.0%	100.0%

Source: Statistics Canada, 2016 Census

Employment by Sectors: The number of jobs in Orangeville increased from 14,952 to 16,127 between 2011 and 2016, which is an increase of 1,175 jobs or 7.9%; this is slightly higher than the job growth in Ontario over that period (6.6%) and well over double the rate of population growth in Orangeville in the same period. This suggests that Orangeville is increasing the job opportunities in the Town that could reduce the proportion of its residents who commute elsewhere to find work.

Orangeville’s 16,127 jobs represent around 66% of the total number of jobs in the County. Its share of jobs is significantly higher than its share of population (47%) which also points to its role as a service centre in the region.

Orangeville has high concentrations of the County’s jobs in information and cultural industries (95%) manufacturing (76%), finance and insurance (70%), and the professional, scientific and technical services (63%). As the major centre servicing the region, Orangeville also has a high proportion of the County jobs in retail (78%), utilities (78%), health care and social assistance (75%), accommodation and food services (71%), and education (62%). (See Appendix B, Exhibit 1.)

Among the sectors with significant employment levels, Orangeville had particularly strong job growth in the last few years in accommodation and food services, and in manufacturing sector jobs (Exhibit 4). Relative to the Provincial averages, the rate of job growth in manufacturing stands out – 18.8%

compared to a 0.9% increase in Ontario between 2011 and 2016. Though the total number of jobs is more limited, the rate of growth in employment in information and cultural industries is noteworthy. The principal segment contributing to growth was data processing, hosting and related services.

Exhibit 4 Selected Major Orangeville Sectors by Employment – 2016				
NAICS Code	Sector Description	2016 Jobs	% Change 2011-2016	Ontario % Change 2011-2016
44-45	Retail Trade	2,690	5.6%	6.9%
62	Health care & social assistance	2,338	2.4%	9.5%
31-33	Manufacturing	1,906	18.8%	0.9%
72	Accommodation & food services	1,526	21.6%	16.1%
23	Construction	989	15.9%	11.2%
61	Educational services	968	16.6%	8.8%
54	Profession, scientific & technical services	753	1.8%	10.4%
56	Administrative & support, waste management & remediation services	699	-16.7%	6.0%
91	Public administration	572	4.0%	-2.4%
51	Information & cultural industries	458	60.7%	7.5%

Source: EMSI Q3 2016 Data Set (Version 2016.3)
Note: See Appendix A, Exhibit 2, for the full chart.

Location Quotients: Several Orangeville sectors have job concentrations – or location quotients¹⁵ – higher than provincial averages (Exhibit 5). Sectors with high location quotients tend to have achieved a critical mass which can spur further sector growth. These include: utilities, manufacturing, retail trade, information and cultural industries, health care and social assistance, and accommodation and food services. Information and cultural industries and accommodation and food services also showed higher job growth levels between 2011 and 2016 than the averages for Ontario.

Exhibit 5 Selected Sector Location Quotients for Orangeville – 2011 and 2016			
NAICS Code	Sector Description	2011 Location Quotient	2016 Location Quotient
22	Utilities	1.58	1.53
51	Information and Cultural Industries	0.94	1.49
44-45	Retail trade	1.49	1.48
31-33	Manufacturing	1.22	1.41
72	Accommodation and food services	1.34	1.40
62	Health care and social assistance	1.42	1.29

Source: EMSI Q3 2016 Data Set (Version 2016.3)
Note: See Appendix A, Exhibit 2, for the full chart.

¹⁵ Location quotient analysis compares the relative concentration of each sector in a community to a reference area (in this case Ontario). The comparison uses a ratio of sector employment to total employment. The provincial average for each sector has a location quotient of 1. A location quotient higher than 1 indicates a higher employment concentration in that sector. Greater location quotient variances mean higher or lower employment concentrations than provincial averages. In essence, location quotients assist in identifying which sectors are over- or under-represented relative to the province as a whole. The higher the location quotient is, the greater the level of concentration and attractiveness of the community for that sector.

Labour Mobility and Commuting: According to the latest data available from the 2016 Census, Orangeville had enough jobs in 2016 on a net basis for almost all (96%) of its total labour force which consisted of 16,760 people (including those unemployed in 2016). This is based on the number of jobs reported for 2016 by EMSI (16,127). When just the 2016 employed labour force is considered (15,745), Orangeville had more than enough jobs for all of its employed resident labour force on a net basis. This is a significant improvement from 2011 when Orangeville had only about four jobs for every five employed residents on a net basis.

There is extensive commuting both to and from Orangeville, with the most significant flows being with the rest of Dufferin County and with Peel Region. (This is discussed more extensively in the section on Talent and Workforce Development, Section D.5.)

C. Orangeville's Opportunities and Challenges – Growth and Change

As Orangeville looks to the future, it faces the pressures of both growth and change – opportunities and threats that must be managed to bring maximum benefit.

The Ontario government's 2006 Places to Grow plan designates the Town of Orangeville, along with Shelburne and Grand Valley, as a fully-serviced settlement area that will be a focal point for growth within Dufferin County. Under the Ontario Greenbelt Plan, the Town of Orangeville is considered to be a Town within the protected countryside. Land designated as greenbelt surrounds the Town. This tends to heighten the community's interest in sustainable development within the Town to parallel the surrounding environment.

Interest in Orangeville's relatively more affordable residential properties continued to accelerate into 2017 as housing prices in the GTA climbed and choices there narrowed. Orangeville faces longer-term constraints on its growth, imposed particularly by expected limits on waste water capacity and the fact that the protected Greenbelt surrounds the Town. The current expansion of waste water capacity, to be completed in 2018, is projected to meet needs to the projected build-out in 2036 for a population of 36,490.

Orangeville attracts interest because of its location just outside of the Greater Toronto Area (GTA) and the small town lifestyle and arts and culture scene that it offers in one of Ontario's most scenic regions. Its appeal can attract varied talent, including professionals, entrepreneurs and business proprietors. Businesses recognize that an Orangeville location provides access to the huge Greater Golden Horseshoe market and the US. Being close to Toronto Pearson International Airport is advantageous to those who conduct business nationally and internationally.

Population and economic growth also present challenges. Housing prices escalate; infrastructure investment lags growing needs; and newcomers must adapt to their new environment and consider whether jobs closer to their new homes meet their skills and expectations. Attracting and growing businesses that align with the growing but changing workforce is a key economic development role. The shift towards more rapid growth in service rather than manufacturing jobs globally, nationally and provincially presents opportunities for Orangeville to grow as a business services hub regionally and beyond.

Residential Housing

Housing Costs: The cost of housing in Orangeville increased rapidly during 2015, 2016 and 2017 in line with the overall trend in the GTA. Orangeville is part of the Toronto Real Estate Board (TREB) territory, as are other areas in the GTA proper and some southern Simcoe County municipalities (Adjala-Tosorontio, Bradford West, Essa, Innisfil and New Tecumseth). By comparison with the other 29 lower-tier municipalities in the TREB coverage area, Orangeville has among the lowest benchmark prices for single-family residences. The only municipalities that had lower benchmark costs for single-family detached homes in the TREB coverage area in June 2017 were Oshawa, Clarington, Brock, Essa, Innisfil and New Tecumseth. As shown in Exhibit 6, Orangeville’s benchmark prices are notably lower than Brampton’s, Caledon’s and Newmarket’s.

Exhibit 6 Comparative MLS Home Price Indexes for Orangeville, Brampton, Caledon and Newmarket June 2017				
Community	Single-Family Detached		Single-Family Attached	
	Benchmark	Year-Over-Year % Change	Benchmark	Year-Over-Year % Change
Brampton	\$731,300	24.9%	\$599,500	24.3%
Caledon	\$889,500	28.8%	\$647,200	27.6%
Newmarket	\$955,900	24.4%	\$659,700	20.9%
Orangeville	\$615,800	31.0%	\$473,300	32.5%

Source: Toronto Real Estate Board, Market Watch, June 2017

The rapid rises in benchmark prices in Orangeville and the three reference communities have become evident only in the two most recent years. The increase for a single-family detached home from June 2016 to June 2017 is shown in Exhibit 6. For the previous year (June 2015 to June 2016), the year-over-year percentage change in Orangeville was 20.8%. By comparison, it had been 7.0% in June 2015 over June 2014, 6.4% in June 2014 over the prior year, and 2.3% from June 2012 to June 2013.

Residential Property Taxes: In terms of housing costs, consideration must also be given to the influence of municipal property taxes. Development charges which contribute to the cost of new housing are markedly lower in Orangeville compared to the other three communities (Exhibit 7). On the other hand, annual municipal property taxes are somewhat higher in Orangeville than the other three (Exhibit 8).

Exhibit 7 Comparison of Relative Taxes Development Charges	
Total Development Charges for Single Detached Dwellings Per Unit	
Community	
Brampton	\$82,332
Caledon	\$77,482
Newmarket	\$67,688
Orangeville	\$26,997

Source: Municipal Study, 2016, BMA Management Consulting Inc.

Exhibit 8 Comparison of Relative Taxes Annual Total Municipal Property Taxes	
Residential Comparison for a Residential Detached Bungalow	
Community	
Brampton	\$3,890
Caledon	\$3,507
Newmarket	\$3,643
Orangeville	\$4,175

Source: Municipal Study, 2016, BMA Management Consulting Inc.

Rental Accommodation: The availability of rental accommodation is an important factor in the attraction of talent to a community, as people moving to take a new job often prefer to rent initially or may still be saving for a down payment. The market for rental accommodation in Orangeville appears to be tight, in line generally with other parts of the GTA. For example, Orangeville’s 2016 vacancy rate for private row (townhouse) and apartments was 0.9%, compared to an average of 1.4% for the GTA, according to the Canada Mortgage and Housing Corporation’s rental market report.¹⁶ For the medium-term, Orangeville might consider how it can incent greater availability of rental housing for families – typically townhouses and low rise apartments – and trendy downtown locations in historic buildings.

Availability of Industrial and Commercial Land and Buildings

As of mid-2017, Orangeville had limited vacant serviced industrial land available for sale. The last Town-owned parcels of industrial land were sold in the first half of 2017. In recent years, industrial space that was freed up by departures was generally taken up relatively promptly by other companies. This indicates that Orangeville is an attractive and competitive location for manufacturing. The most recent new operations have involved firms based elsewhere in the Greater Toronto Area (GTA).

In November 2017, the vacant lands in Orangeville designated for employment purposes included 165 acres of lands, 115 acres of which were within the greenfield area and 50 acres of which were within the built boundary. These employment lands were unserviced and not on the market for sale. They are situated in the northwest and southwest areas of Town, away from the Highway 10/410 transportation corridor. The Town was addressing the future of the 29.7 acre Humber Lands parcel within this inventory. When Humber College’s proposed project did not proceed, the parcel, designated institutional and zoned as Development (D) Zone, was returned to the Town.

In the case of available industrial buildings, there were no industrial buildings of significant size on the market for sale or lease in mid-2017. Other than two offerings (one of 10,000 square feet and another with 10,000 square feet of office and 28,000 square feet of warehouse space), most industrial listings were under 2,500 square feet and had maximum ceiling heights of 16 feet, below what is often now required.

By contrast, there was a good supply of commercial space, including office space. Several vacancies on and just off Broadway could be suitable for professional services firms. Some other available commercial/retail space along with historical houses could be used for office.

Land Needs Assessments: In March 2016, a Land Needs Assessment Study¹⁷ and a Land Needs Assessment and Commercial Market Analysis¹⁸ were completed for the Town of Orangeville. The assessment concluded that a sufficient amount of industrial, commercial and institutional lands were available to meet the growth requirements of Orangeville. The assessment did indicate nonetheless that the supply of employment lands was overstated due to permitted mixed use development on a portion of the lands. The report also noted that provision of oversupply ensures flexibility in the marketplace through a greater number of development options for prospective employment uses. To

¹⁶ Canada Mortgage and Housing Corporation, “Rental Market Report: Greater Toronto Area,” 2016.

¹⁷ MacNaughton Hermesen Britton Clark Planning Limited (MHBC), “Town of Orangeville Land Needs Assessment,” March 14, 2016.

¹⁸ urbanMetrics inc., “Orangeville Land Needs Assessment and Commercial Market Analysis,” March 2, 2016.

achieve the targeted employment density of 1 job for every 2 persons, a need for prestige-type industrial uses was indicated.

Land needs assessments, such as those prepared in 2016, tend to adopt a numerical approach that looks at employment density, gross areas available and forecasts of overall demand. The analysis does not consider whether land zoned for employment uses will come to market in a timely way. The analysis touches on appropriate lot sizes, but does not examine the suitability of the inventory or lot coverage.

Protecting Designated Employment Lands: The land needs assessment report indicated that there is a need to protect existing designated lands to ensure options for employment land use over the long term. The Town’s Official Plan as well as the County of Dufferin Official Plan have policies that reflect the protection and the requirements for the conversion of employment lands.

Section E3.8 of the Town’s Official Plan states that “the conversion of employment lands to non-employment uses will be strictly controlled.” A “municipal comprehensive review” is required that must demonstrate that:

- there is a need for the conversion;
- the Town of Orangeville will meet its employment forecasts;
- the conversion will not adversely affect the overall viability of the employment area and/or achievement of the intensification target, density target, and other policies of the Plan;
- there is existing or planned infrastructure to accommodate the proposed conversion;
- the lands are not required over the long term for the employment purposes for which they are designated; and
- cross-jurisdictional issues have been considered.

The County of Dufferin Official Plan discourages the conversion of employment areas and indicates such conversion is required to be reviewed through a municipal comprehensive review.

The recent Growth Plan also highlights the requirements to identify and protect prime employment areas and protect them for appropriate employment uses over the long-term.

Outlook for Industrial Properties: Looking to the future, Orangeville has an obvious urgent and immediate requirement for serviced industrial land parcels of varied sizes. Early commitment is needed on the Town’s part to plans that can be counted upon to deliver additional serviced industrial areas in the shortest time possible.

On-going renewal of existing industrial buildings in Orangeville should also be encouraged. For example, many buildings along Centennial Road and in the Business Park are older and do not offer the configurations and ceiling heights required today or transportation radiuses required for warehousing and logistics. An inventory of all existing properties should be undertaken to understand existing uses, and impediments to upgrading or adaptive reuse. This would provide invaluable information to Planning to enable informed responses to market conditions in zoning and approvals and the possible development of incentives as part of a Community Improvement Plan.

Competitiveness of Industrial and Commercial Property Taxes, Charges and Policies

Overall, Orangeville’s development charges and the relative effective industrial and commercial property tax levels appear to be competitive with a selection of jurisdictions chosen based on proximity and population size.

Development Charges: Orangeville provides a development charges exemption for most industrial facilities, in accordance with By-law 14-069. This means that, in most cases, only the Dufferin County development charges are applicable, giving Orangeville much lower total industrial development charges than most other jurisdictions. Some other jurisdictions may, of course, have special incentive programs, such as Community Improvement Programs (CIPs), that reduce development charges or tax rates in specific circumstances. Such incentives are not factored into the rates in Exhibit 9.

Industrial and Commercial Property Tax Levels: Orangeville’s stated industrial and commercial tax rates were higher than many other benchmark communities as shown in Exhibit 9. However, the property tax comparisons that are calculated for Ontario municipalities in the widely-used annual BMA Management Consulting Municipal Study for 2016 show Orangeville’s effective tax levels to be much more competitive than most of the same selection of communities (Exhibit 10). Only one in nine of the other selected communities had a lower level than Orangeville for the large industrial property tax, four of nine for standard industrial properties, and two of nine for commercial office properties. The BMA comparisons seek to take into account the significant variances in the values of like properties; differing tax ratios in each class and the use of optional classes; variances in the tax burdens based on the level and cost of services; and the extent to which a municipality employs user fees or has access to revenues from hydro utilities and gaming and casino revenues.

Exhibit 9			
2016 Comparisons of Total Industrial & Commercial Property Tax Rates			
Dufferin County Municipalities¹	Development Charges³	Commercial Occupied Tax Rate⁵	Industrial Occupied Tax Rate⁵
Orangeville	\$0.58	2.54%	4.22%
Amaranth	\$0.58	2.09%	3.42%
East Garafraxa	\$0.58	2.03%	3.31%
Grand Valley Urban	\$10.34	2.38%	3.95%
Grand Valley Rural	\$4.24	2.38%	3.95%
Melancthon	\$0.58	1.19%	3.41%
Mono	\$0.58	1.98%	3.23%
Mulmur	\$2.20	2.09%	4.00%
Shelburne	\$9.14	2.41%	3.95%
Municipality²	Development Charges^{2 & 4}	Commercial Occupied Tax Rate⁵	Industrial Occupied Tax Rate⁵
Aurora	\$24.91	1.83%	2.14%
Barrie	\$19.91	2.81%	2.98%
Brampton	\$17.97	2.24%	2.64%
Caledon	\$16.96	1.97%	2.39%
Collingwood	\$9.14	2.50%	3.12%
Halton Hills	\$13.21	1.88%	3.07%
Newmarket	\$26.18	1.88%	2.21%
Orillia	\$0.47	3.18%	3.70%
Vaughan	\$26.10	1.71%	2.00%

¹ Source: Published municipal rates
² Source: BMA Management Consulting, "Municipal Study," 2016
³ Grand Valley, Mulmur and Shelburne have Development Charges. In the other Dufferin County municipalities, only County Development Charges apply.
⁴ Non-Residential Industrial Rate
⁵ Rounded
 NOTE: Rates and charges do not include any incentives such as CIPs.

Exhibit 10			
Commercial Office and Industrial Property Tax Comparisons for Selected Ontario Municipalities			
Total Taxes per Square Foot in Dollars - 2016			
Municipality	Commercial Office	Standard Industrial	Large Industrial
Orangeville	\$2.77	\$1.73	\$0.85
Aurora	\$3.98	\$1.93	\$1.23
Barrie	\$3.51	\$1.26	\$0.98
Brampton	\$3.11	\$2.57	\$1.31
Caledon	\$3.32	\$2.94	\$1.27
Collingwood	\$2.88	\$1.92	\$0.75
Halton Hills	\$2.42	\$1.42	\$1.55
Newmarket	\$2.81	\$1.97	\$1.40
Orillia	\$2.24	\$1.02	\$1.38
Vaughan	\$3.38	\$1.68	\$1.52

Source: BMA Management Consulting, "Municipal Study," 2016

Contribution of Commercial and Industrial Property Taxes to Orangeville’s Tax Revenue:

As commercial and industrial property tax rates are proportionally higher than residential rates, it is desirable for a municipality to seek to grow the business property tax base relative to residential. In 2017 in Orangeville, commercial property taxes contributed 19.7% of all property tax dollars collected, while 3.6% came from industrial property taxes. In both cases, the shares decreased marginally in each year since 2013, starting from 20.4% and 4.5% respectively in 2013. At least some of the industrial tax decline was attributable to lower industrial assessments in 2012 for the 2013-2016 period, even though the number of industrial properties rose between 2010 and 2014. The residential share of property tax revenue has grown correspondingly as a consequence.

Façade Improvement Projects: The Town of Orangeville’s Downtown Heritage District Façade Assistance Program is designed to encourage business owners to maintain, restore and construct building façades in the central business district. The program offers 50% of the cost up to a maximum of \$10,000 per property. Between 1999 and 2014, 66 façade improvement projects were completed with a total investment by the Town of \$456,682, leveraging private investment of \$1,616,231. The program was not offered in 2015, but when it resumed in 2016, 3 additional projects were supported.

Municipal Incentives: A significant variety of municipal tax incentives and grant programs have been adopted by Ontario municipalities to drive desired economic development or other outcomes. Among those which Orangeville has in place cover:

- Development Charge Waivers;
- Façade Improvement Programs;
- Signage Improvement Programs;
- Parking;
- Accessibility Grant Program; and
- Cash in Lieu of Parkland By-law for intensification and higher density green building initiatives.

Other examples of incentives, mentioning a few communities that are recognized for leadership, include:

- Building Code Upgrade Grant Program;
- Building Permit Grant Programs;
- Building Revitalization Loan Program (Cambridge);
- Design Guide Programs Planning and Professional Design Grants;
- Downtown Activation Grant;
- Environmental Remediation and Site Enhancement (ERASE) (Hamilton);
- Heritage Grant Programs;
- Infill Grant Program;
- Interior Renovation and Improvement Program;
- Landfill Tipping Fee Rebate Program;
- Landscape Improvement Grants;
- Last Mile/Fibre Optic Connection Grant Program (London);
- Office Tenancy Assistance Program (Hamilton);
- Remediation Programs Including Environmental Site Assessment (ESA) I & II Grants, Tax Increment Grants (TIGs), Tax Increment Financing (TIF);
- Residential and/or Commercial Conversion/Rehabilitation Grant Program;

- Start Up Landing Pad Program – Leasehold Improvements (Kitchener); and
- Tax Increment Equivalent Grants – 100% Of Assessed Value Increase Amount Paid Annually in Decreasing Amounts Up To 10 Years.

Some of these types of incentives may align with future Orangeville objectives to generate payoffs or benefits that will make them worth considering.

Orangeville Business Improvement Area (BIA): Started in 1976, the Orangeville BIA represents over 230 businesses in the Fairgrounds Shopping Centre and the downtown area. The BIA has made a major contribution to the downtown’s viability, character and signature events, something that is at the heart of the Town’s tourism offering. Financed through a special tax on commercial properties which generated \$460,000 dollars in 2017, the BIA mandate is to oversee the improvement, beautification and maintenance in the area beyond what is provided by the Town and to promote the area as a business and shopping hub. The BIA tax revenue was measurably enhanced by a trend-setting negotiated arrangement with Walmart that it become a member of the BIA. The BIA is responsible for paying down the mortgages for three parking lots, amounting to just under 30% of the budget. In 2002, Orangeville’s downtown became a Heritage Conservation District.

Development Approval Information and Processing: The Town of Orangeville Planning Department has produced a summary brochure, “Guide to Site Plan Approval,” that provides a valuable and user-friendly overview of the more detailed “Site Plan Approval Procedures and Guidelines.” Together with its invitation to a pre-consultation with Planning Department staff, this demonstrates a forthcoming approach on the Town’s part to dealing with businesses and developers. In addition, approvals can be made expeditiously as authority has been delegated to the Director by Town Council.

Building Permit Activity: Recent building permit activity in Orangeville is summarized in Exhibit 11. Five years is a short time span over which to fully assess trends. The fact that most of the industrial construction in recent years involved additions, rather than new construction, would appear to reflect the modest amount of vacant employment land available. The more significant growth in commercial construction relative to industrial likely reflects the stronger growth in employment in the service sector and Orangeville’s role as the established commercial hub for the region.

Exhibit 11									
Town of Orangeville – Building Permits – 2012 to 2016									
Year	Industrial Construction			Commercial Construction			Institutional Construction		
	Value	Permits		Value	Permits		Value	Permits	
		New	Additions		New	Additions		New	Additions
2012	\$3,250,285	0	15	\$10,577,000	2	49	\$1,886,000	0	15
2013	\$680,000	1	4	\$15,755,000	5	41	\$5,499,000	1	20
2014	\$720,000	0	1	\$6,376,000	0	44	\$1,770,000	1	8
2015	\$2,666,500	0	8	\$2,409,000	0	37	\$12,940,000	0	15
2016	\$530,000	0	3	\$7,588,000	4	29	\$11,720,000	1	8
TOTAL	\$7,846,785	1	31	\$42,705,000	11	200	\$33,765,000	3	66
TOTAL		32			211			69	

Source: Town of Orangeville

Note: The number of permits issued includes all renovations that would lead to increased business opportunities, whether or not they resulted in increased floor space. The values are related to construction value and not the value of the building permits.

In the period 2010 to 2014, Orangeville Economic Development was regularly involved with the Central Canada Chapter of the Society of Industrial and Office Realtors (SIOR), including taking sponsorships of its annual GTA seminar. The top producing industrial, commercial and investment (ICI) realtors are members of SIOR. With the recent decline in impact and value of these SIOR events, the Orangeville Economic Development team has concentrated on sustaining contact with the principal ICI realtors that are knowledgeable of and interested in the Orangeville area.

Availability of Affordable High-Speed Broadband Infrastructure

Affordable high-speed fibre optic connections are now a basic and essential part of a community's infrastructure. For Orangeville, the availability of high-speed broadband is a critical factor for citizens and businesses and in the attraction of new investment and talent. The Town's Corporate Strategic Action Plan, adopted in July 2017, mentions, as part of the priority to be placed on sustainable infrastructure, the need to "work with partners and funders to improve Internet for business, institutions and residents." The commitment to improving communications infrastructure is also stated in the Town's Official Plan: "In recognition of the importance of electronic communications, Council will support the improvement of the Town's communication infrastructure to serve the needs of the Town's residents, businesses and institutions."¹⁹

Some Orangeville businesses rank service as being adequate, but others point to gaps and inadequacies, especially as the demand for greater capacity and speed inevitably continues to grow. In the Orangeville business sub-sample of the public survey undertaken as part of the Economic Development Strategic Plan Update, high-speed internet was the third most frequently chosen weakness and challenge related to economic development.²⁰ Meanwhile, in the 2016 Business Retention and Expansion survey, over one-quarter of the manufacturers identified internet speed as a barrier to information technology use. Internet access (13%) and cost (6%) were also identified as issues. The importance of their broadband needs was reflected by the fact that more than four in five (83%) businesses rated their use of technology as moderate to very high. Some businesses that have broadband have mentioned the very high cost of getting new network connections.

Future commercial office demand in Orangeville will be heavily dependent on access to broadband. The capacity and speed requirements of professional, engineering, architectural, advertising and media, accounting and human resources firms grow at an exponential rate. Nielsen's Law of Internet Bandwidth, for example, states that a high-speed user's connection speed grows by 50% a year. This rate of growth is only slightly less than the 60% a year postulated by Moore's Law which addresses computing speed.²¹

Orangeville does not currently have a sufficiently robust case to make to attract new facilities or expansions given the existing state of broadband accessibility. When reliable ultra-high-broadband becomes available, Orangeville can anticipate higher demand for commercial offices.

¹⁹ Town of Orangeville, "Official Plan," Office Consolidation, September 23, 2013, Section D1.9.

²⁰ A public survey using Survey Monkey was undertaken covering the area between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

²¹ Nielsen Norman Group, "Nielsen's Law of Internet Bandwidth," (<https://www.nngroup.com/articles/law-of-bandwidth/>). Accessed on August 10, 2017.

Given the impediment that the lack of universally available and affordable high-speed broadband represents, the Town of Orangeville requires an aggressive high-speed broadband strategy, possibly spearheaded by a Town taskforce. The SouthWestern Integrated Fibre Technology (SWIFT) project, led by the Western Ontario Wardens' Caucus (WOWC) and financially supported by the Federal and Ontario governments, is part of the response to broadband needs in the wider region. The SWIFT Network is expected to deliver three to six points of presence (POPs)²² in Dufferin County by 2021. These points of presence are still several years from realization, however, and will not be sufficient to address County-wide needs.

Connectivity – Transportation Infrastructure

Highway Access and Capacity: In the 2005-2010 time span, the Orangeville By-Pass (County Road 109) and the extension of four lanes on Highway 10 between Caledon Village and Highway 9 were completed. With continued growth however, the limitations of the present capacity are increasingly evident. Given the long lead times for major projects, the case for the extension of Highway 410 to Orangeville to provide direct access to Ontario's 400-series highways should be explored and advocacy plans developed, based on the findings. Also apparent, in order to facilitate movement within Dufferin County, is the need for an upgrade and widening of Highway 10 north to Shelburne at least, along with improvements to Highway 89 from Shelburne eastward toward Alliston. The Province has not publicly committed to time frames for these future developments. Extended time horizons tend to be involved in provincial decision making, meaning that heightened advocacy is needed as the problem will become more and more urgent.

The considerable level of public concern over highway and rail transport appears to be reflected in the public survey undertaken in association with the preparation of the Economic Development Strategy Update. Highway transportation and rail ranked low among the area strengths (tied with two others for ninth out of fifteen). Meanwhile, public transportation ranked fourth among weakness and challenges. (See Appendix A for the survey results)

Orangeville Brampton Railway (OBRY): The Town-owned Orangeville Brampton Railway is a vital lifeline for several Orangeville manufacturers in the Town's plastics cluster. In addition, an excursion train, the Credit Valley Explorer, which operates over a scenic part of the route, has become a major tourist attraction, especially for the autumn tours and the Santa Train.

In 2000, the Town of Orangeville purchased CP Rail's 55 kilometre rail connection between Orangeville and CP Rail's Streetsville Junction in Mississauga to ensure the line's continued functioning. Twice weekly freight service to Orangeville's industrial area is maintained. The companies that use the line, mainly to bring in raw materials, are constituted as the Orangeville-Brampton Rail Access Group (OBRAG).

The Credit Valley Explorer (CVE) – which starts and ends its scenic trips in Orangeville – registered 79 trips in 2016, some under charter. The operations of the CVE are covered in greater detail in the section on Tourism (Section E.1). The freight and tourism operations on the line are contracted to CANDO Rail Services until 2022, which also operates the Barrie Collingwood Railway (BCRY) under contract and owns and operates a Manitoba short-line railway.

²² Points of presence (POPs) are fibre optic network nodes located to provide connections to local (so called "last mile") service providers or users with their own "last mile" infrastructure.

Canvassing options, both for freight and tourism, that will enhance the viability and local economic impact of the OBRY should continue to be an overriding preoccupation, including possible sources of government support. Discussions with other municipalities that are involved with comparable short-line railway operations, such as the City of Guelph, may provide insights and learnings.

GO Transit Business and Commuter Access: Orangeville is the Dufferin County originating point for GO Transit service with the GTA. The service to and from GO's Brampton hub is principally in the morning and evening rush hours. More frequent all-day service is required to facilitate access to Toronto for Orangeville-based businesses. In many parts of the Greater Golden Horseshoe, GO bus provides connections with post-secondary educational institutions. Initiation of such service to and from Orangeville would permit access to training, including in courses complementary to those offered locally, and a greater range of options, without having to give up Orangeville residency. The case for greater frequency will be strengthened if GO Transit Bus connections to Shelburne and other parts of Dufferin County can be part of the equation.

Looking to the future, the proposal from the Greater Toronto Airports Authority (GTAA) for a new regional multi-modal Pearson Hub²³ presents an appealing concept that, with suitable connections from Orangeville via GO Transit, could represent an efficient and highly advantageous connection for Orangeville businesses. The proposed Pearson Hub would be comparable in scale to Union Station and would bring together national, commuter and airport express trains, buses, subway and light rail lines in the same western GTA area where five 400-series highways converge.

Orangeville, in company with the County and other municipalities, should advocate for the incremental Federal and Ontario investment in public transit from Orangeville and Dufferin County that will provide frequent all-day two-way connections to Brampton and ultimately the Pearson Hub. A heightened level of connectivity will make Orangeville a more attractive base of operations for business (including for firms with national and international travel needs), and facilitate growth in tourism. Orangeville's geographic position changes positively if viewed as a location that can be easily reached from a multi-modal western GTA public transport hub.

Orangeville Bus Service: Public transit within Orangeville that accommodates industrial and distribution jobs that generally start early in the day is needed. Orangeville Transit introduced earlier morning weekday service commencing at 7:15 am that attracted a fairly high ridership. The April 2016 Transit Optimization Study saw potential to start the service earlier, targeting specific industrial situations.²⁴ Orangeville Economic Development can be a catalyst in encouraging further dialogue and study to realize more effective scheduling in terms of business needs. The Dufferin County Workforce Development Committee may be able to contribute.

²³ See

[tps://torontopearson.com/uploadedFiles/Pearson/Content/About_Pearson/Economic_Impact/Regional_Growth/GTAA_GrowingCanadaWithAMegaHubAirport.pdf](https://torontopearson.com/uploadedFiles/Pearson/Content/About_Pearson/Economic_Impact/Regional_Growth/GTAA_GrowingCanadaWithAMegaHubAirport.pdf). Accessed on August 30, 2017.

²⁴ Dillon Consulting, "Transit Optimization Study – Final Report," April 2016.

Post-Secondary Educational Partners

Orangeville is fortunate to host two college campuses – Georgian College and Humber College.

The presence of post-secondary educational institutions in communities is an important catalyst in economic development and community building. Post-secondary institutions retain and attract youth, produce the talent needed for the local economy, provide life-long learning and reskilling, and are sources of innovation and research collaboration. All of this is needed fuel for today’s knowledge- and talent-centred economic development. Over the last three decades, North American communities that are centred around a notable local post-secondary presence and that are on the periphery of a large metropolitan economy have been among the most successful small and mid-sized economies.

Georgian College, with Orangeville roots dating from 1972, has occupied its present stand-alone location since 2007. Humber College developed a plan in 2007 for a sizable campus for which the Town designated land, but, when the plans were not realized, the land was returned to the Town in 2014. Humber is located in the Alder Street Recreational Complex.

The Town of Orangeville’s future interests lie in fostering the growth of richer, more relevant linkages with Humber and Georgian, including access and links to some their research, entrepreneurship and innovation programs and centres.

Sustainability

As a community within the Provincial Greenbelt Plan, the Town of Orangeville has a strong focus on sustainability. Orangeville’s Official Plan indicates that Council will strive to conserve, protect and enhance the natural environment by promoting best practices in sustainable development, including the use of green development standards, energy efficient systems and by living within the carrying capacity of the town’s supporting ecosystems.

A notable innovation in Orangeville was the creation of a Sustainability Action Team in 2007, a committee of Council, comprised of community political leaders, Town staff, interested citizens and business personnel. Actions include tree plantings, a community garden, an on-line stewardship guidebook, stewardship awards, and earth day recognition and festivities.

Sustainable development is “development which meets the needs of current generations without compromising the ability of future generations to meet their own needs”

Report of the World Commission on Environment and Development (Brundtland Commission), 1987

Orangeville has a cash in lieu by-law which provides development incentives to developers for intensification and higher density projects within the built boundary that accommodate green building initiatives. The incentives are in the form of reduced cash in lieu requirements for development projects that provide green features such as geothermal energy systems, greywater use, green roofs, naturalized landscaping, LEED standard constructions.²⁵ In 2015, Orangeville converted to LED lighting throughout the Town to save energy and achieve maintenance cost savings.

²⁵ Town of Orangeville By-law 47-2012, “A By-law to require land or the payment in lieu thereof, as a condition of development or redevelopment, to be conveyed to the Town for Park or other public recreation purposes.”

Orangeville fits with the sustainability image that potential travellers and residents have of the Town and the wider Headwaters region. Orangeville will benefit from developing a comprehensive approach and longer-term sustainable development planning, through the preparation of a future sustainability plan and from sharing its sustainability successes with external audiences. By making its initiatives and successes better known, it can reinforce its attractiveness to this important constituency.

The Impact of External Developments and Trends

Externally, consequential changes have occurred since the preparation of Orangeville's 2007 Economic Development Strategy. The financial crisis that triggered the 2008-2009 recession impacted the global economy and levels of employment significantly. Digitally-based technologies are stimulating innovation and driving ever more rapid change. Many consequential new companies, product and service offerings, and business models have risen to prominence in just the past decade – Google, Amazon, Facebook, and Twitter are examples.

Technology Change and Transformation: The pace of technology change has accelerated remarkably over the past decade. Change that was once occurring at linear rates has become exponential. Increasingly, established businesses are being upended or radically changed by disruptive technologies. In the face of such transformative changes, governments have recognized that giving high policy priority to stimulating innovation and entrepreneurship and to addressing workforce impacts are imperatives. Economic development agencies have moved to focus additional resources on creating innovation ecosystems that encourage entrepreneurship and nurture young ventures. Opportunities are also being driven by major new policy initiatives at the Federal and Ontario levels that cut across many sectors, including actions to mitigate climate change and to increase infrastructure investments, such as public transit.

Global Economic and Policy Trends: The global financial crisis in 2008 and 2009 impacted the world economy markedly, resulting in dislocation and significant business and job losses. Subsequently, the world economy has shifted to a lower and often more tentative growth trajectory. The outlook is unsettled in the face of the protectionist and nationalist tendencies, workforce dislocation, and the trade and economic policy uncertainties that have emerged. Faced with such circumstances, business tends to delay or proceed cautiously with possible expansions or new investments. Expansions may be viewed as lower risk than launching entirely new projects.

Going forward, the policies to be adopted by the US Administration and Congress will be consequential. The probable impacts will be to stimulate US economic growth and make the US relatively more competitive on one hand, while implicitly or explicitly inhibiting cross-border movement of goods and people on the other. Given the extensive economic ties, Canada may gain from higher US growth. However, a more competitive and inward US poses major threats and uncertainties that will require policy responses and economic development initiatives to support companies to adjust. Export diversification to reduce dependence on the US market is one example.

Internationally, Canada's policy stances have diverged to a considerable extent from those in the US and Europe. Canada secured the Comprehensive Economic and Trade Agreement (CETA) with the European Union and has pursued access-creating trade and economic agreements with Asia Pacific countries, such as the November 2017 agreement on core principles for a Trans-Pacific Partnership without the US. One area of vulnerability is increased imports of dairy products. Larger cheese quotas were granted under CETA, though the Canadian government announced in August 2017 that some of the quota was to be

allocated to existing Canadian cheese processors and that Canadian cheesemakers and dairy farmers will be eligible for \$350 million in funding under two programs designed to improve productivity.

Canada's more open immigration stance is also likely to attract talented newcomers who are selected because of the economic benefits they bring. This is a source of talent that Orangeville should target in its collaborative workforce attraction efforts.

Global Foreign Direct Investment (FDI) Trends: International greenfield foreign direct investment (FDI)²⁶ flows – though immense in absolute terms – remain uneven and have yet to recover to levels that prevailed prior to the 2008-2009 recession. On the other hand, global merger and acquisition activity grew notably in 2014 and 2015 and to a lesser extent in 2016, with tax inversions²⁷ by US acquirers being a major contributing factor.

The United States has traditionally been the largest source globally of foreign direct investment (FDI). China's outward FDI has increased significantly, however. In 2016, China ranked second in outflows of FDI after the US, ahead of The Netherlands, Japan and Canada.²⁸ Initially, Chinese FDI concentrated on foreign acquisitions, especially those that secure needed resources and agricultural commodities. Chinese investment in North American manufacturing and in the technology sector has emerged as a growing segment, however, with an increasing number of greenfield investments.

FDI in Canada: Canada's total stock of inward FDI at the end of 2016 was \$Cdn 826 billion, representing an increase of 37% since 2011. The principal source country for FDI in Canada continues to be the US, though its share declined from 51% in 2011 to 47% in 2016. Europe's proportion of the Canadian FDI stock rose to 37%, compared to 33% in 2011.

Immediately after the 2008-2009 recession, growth in FDI was strongest in the Canadian resource sector. Since 2011, the rate of growth of FDI in manufacturing (9%) has been about one-quarter of the pace of growth in the overall FDI stock. One of the most robust rates of FDI growth in Canada was in food manufacturing – rising by 85% from 2011 to 2016 to account for about 13% of all FDI in manufacturing. Europe had the largest share of the stock of FDI in food manufacturing at the end of 2016 – double the US share. FDI in professional, scientific and technical services showed remarkable growth too as the stock of FDI increased by 186% from 2011 to 2016. The stock of FDI in Canada in transportation equipment manufacturing – a category dominated by the auto sector – showed increases for the US in 2015 and 2016 after having been essentially level between 2010 and 2014.

Expansion by Existing Foreign-Owned Firms: Though reliable statistics are not available, strategic expansions in Canada by existing foreign investors appear to have been the most notable source of increased FDI since the recession, in manufacturing especially. Foreign investors already in Canada know their own milieus well and possess the strong relationships that allow them to move quickly and confidently to scale-up existing operations, including being well positioned to hire highly qualified people and to take advantage of tax rates, incentives and arrangements that support innovation. This underlines the importance to the Orangeville Economic Development team of business retention and expansion activities with local foreign-controlled firms.

²⁶ "Greenfield" investment projects involve investment at entirely new locations or involve an expansion of an existing investment. Greenfield investment does not include mergers and acquisitions (M&A).

²⁷ Tax inversion is the practice of relocating a corporation's legal domicile to a lower tax jurisdiction, through a merger or acquisition of a firm headquartered there, while maintaining its material operations in its higher tax country of origin.

²⁸ United Nations Conference on Trade and Development (UNCTAD), "World Investment Report 2017," June 7, 2017.

Federal, Ontario, GTA and County Investment Attraction Initiatives: Currently, both the Federal and Ontario governments are each independently strengthening their respective FDI attraction efforts by realigning and increasing resources around single-window models designed to offer concierge service to prospects. As well, in the Greater Toronto Area (GTA), a new GTA-wide FDI attraction agency – Toronto Global – was officially launched in early 2017, supported by significant Federal and Ontario financial contributions that complement the support from municipal partners in GTA, including in neighbouring York and Peel Regions.

Dufferin County Role in Economic Development: At the County level, Dufferin initiated an evaluation in 2016 of the County-wide economic development roles it might beneficially pursue through the development of a County Economic Development Strategic Plan.

In the past, in the economic development arena, the County has provided funding to the Orangeville and Area Small Business Enterprise Centre (SBEC) (which serves clients throughout the County); Headwaters Tourism; the Dufferin Board of Trade; and the dufferin.biz website.

In July 2017, the County Council accepted the County Economic Development Strategic Plan and authorized the hiring of an economic development officer. Among the benefits to Orangeville will be:

- Heightened economic development coordination that will invite greater local engagement by Federal and Ontario partners and entities and programs which they fund;
- A coordinated County-wide investment attraction program that will create a prime point of contact and develop a strengthened joint investment attraction program;
- Increased financial contributions from the County for the Orangeville and Area Small Business Enterprise Centre and support to extend SBEC programming and its reach and presence;
- Support to develop meaningful involvement in Orangeville and the County by Innovation Guelph, the Regional Innovation Centre (RIC) responsible for Dufferin County; and
- County involvement in tourism that will support Orangeville’s activities and leadership at the local level (in collaboration with Headwaters Tourism, the regional destination marketing organization).

None of these activities will measurably lessen the Orangeville Economic Development team’s workload, though it will bring more resources to the table and limit increases in Orangeville budgets, such as for the SBEC. Until very recently, Orangeville has been the only municipality with full-time economic development staff. This has meant that Orangeville has tended to be left with a de facto responsive role of looking out for the other seven municipalities.

Orangeville’s Strengths, Weaknesses, Opportunities and Threats (SWOT)

The following inventory of the perceived strengths, weaknesses, opportunities and threats has been compiled based on the many inputs which have been part of the development of the Strategy Update, including the recent Orangeville manufacturing Business Retention and Expansion (BR+E) survey, the

public survey²⁹ and stakeholder consultations³⁰, interviews by the consultants, and economic development-related perspectives offered in consultations leading up the Town of Orangeville Strategic Action Plan.

Strengths

- The Town of Orangeville’s Economic Development team is engaged across a wide and interrelated portfolio of economic development activities that includes tourism and culture.
- Orangeville’s Economic Development team has a reputation among developers and realtors as being business-oriented and helpful.
- The Dufferin County Economic Development Strategy which was presented to and approved by County Council in July 2017 envisages a direct County role in economic development and the hiring of a full-time economic development officer, providing incremental resources and enhanced County-wide collaboration.
- Orangeville is a gateway community and a primary business and service centre in Dufferin County and northern Caledon.
- Orangeville benefits from proximity to larger communities in the Greater Toronto Area (GTA), particularly Brampton, Mississauga and Toronto, which makes Orangeville attractive to people who want to live in a smaller community while also having access to jobs, shopping and amenities of larger centres.
- Proximity to a large potential customer base in the Greater Golden Horseshoe (GGH) is a benefit for existing and future businesses in Orangeville.
- Ready access to Toronto Pearson International Airport, 60 kilometers away, is afforded via Highway 10 and Highway 410. In moderate traffic, it is an approximate 48 minute drive at posted speed limits.
- The local highway infrastructure was strengthened in the 2005-2010 period with the construction of the Orangeville Bypass and extension of four lanes on Highway 10 between Caledon Village and Highway 9, providing access to Ontario’s 400-series highway network, Canada-US border crossings, and the US Interstate Highway system.
- The 55-kilometer Orangeville-Brampton Railway, owned by the Town of Orangeville, provides twice-weekly freight connections to and from the CP Rail mainline, and is an asset which is critical to manufacturers that use it.
- The Town-owned utility, Orangeville Hydro, has lower delivery fees than Ontario Hydro, creating a competitive advantage.
- Orangeville has GO Transit Bus connections with the Brampton hub.
- Orangeville enjoys easy access to rural areas, natural settings and amenities in Dufferin County, including conservation areas, lakes, rivers, the Bruce Trail, other hiking, horse riding and cycling trails, and forests.
- Orangeville’s strong, vibrant and growing arts, culture and creative sector centres on the Opera House, Theatre Orangeville and notable festivals such as the Orangeville Blues and Jazz Festival.

²⁹ A public survey using Survey Monkey was undertaken covering the area between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

³⁰ Economic development stakeholder consultations were held on April 4 and 5 in Shelburne, Mono and Grand Valley in connection with the development of the Orangeville Economic Development Strategy Update and the Dufferin County Economic Development Strategic Plan.

- Orangeville represents a large portion of the population and economic activity in Dufferin County – accounting for nearly half of the population and two-thirds of the jobs in the County.
- Orangeville accounts for more than 75% of jobs in Dufferin County in individual sectors that provide significant employment, such as manufacturing, retail trade, and health care and social assistance.
- The Orangeville manufacturing sector registered significant job growth between 2011 and 2016, with an increase in employment of 18.8% compared to a 0.9% growth in Ontario.
- Orangeville has greater than average concentrations of employment, as shown by higher location quotients, in several important sectors: utilities, manufacturing, retail trade, information and cultural industries, health care and social assistance, and accommodation and food services. Manufacturing sub-sectors having high location quotients include plastic products, dairy products, machinery manufacturing, and chemical products.
- High job growth was registered in two segments of the professional, scientific and technical services sector from 2011 to 2016 – architectural, engineering and related services; and computer systems, design and related services.
- Businesses based in Orangeville have access to the large regional labour force in Dufferin County – about 36,000 persons in 2011 – as well as easy access to labour in communities to the south, particularly Mississauga, Brampton, and Caledon.
- Orangeville’s population between 25 and 64 years has a higher rate of apprenticeships and college completion than the provincial averages.
- Orangeville has a younger population compared to the County and Province – the average age of the residents in Orangeville in 2016 was 38.7 years compared to 39.6 years in Dufferin County and 41.0 years in Ontario.
- The high level of resident labour outflow from Orangeville could potentially be enticed to work at local jobs if such jobs were available (only about 43% of the Orangeville resident labour force that worked at usual places of employment worked in the community in 2011).
- Residential, industrial, and commercial development in Orangeville is relatively more affordable compared to more central locations in the Greater Toronto Area (GTA).
- An adequate range of commercial office space to lease was available on the market in mid-2017.
- Though there was a lack of immediate availability of industrial land and buildings in mid-2017, Orangeville has an adequate amount of land zoned for employment use to meet foreseeable demand. The Town also controls the available 29.5 acre Humber Lands parcel that is zoned institutional.
- Orangeville does not impose Development Charges for most industrial projects. Only Dufferin County Development Charges are applicable, giving Orangeville much lower total industrial development charges than most other jurisdictions.
- The effective industrial and commercial property taxes in Orangeville are generally competitive with communities that are nearby and of comparable size.
- The Orangeville Economic Development website has a comprehensive and user-friendly on-line database of available industrial and commercial buildings and land for sale and lease.
- Orangeville is set in a very scenic region, providing an attractive quality of place for residents, visitors and businesses.
- Orangeville’s historic downtown is attractive and has a range of amenities including high quality restaurants and speciality stores.
- The Orangeville Business Improvement Area (BIA) benefits from significant funding and membership, in part as a result of a trend-setting negotiated agreement with Walmart.

- Two post-secondary educational institutions – Georgian and Humber Colleges – have satellite campuses in Orangeville.
- The Orangeville and Area Small Business Enterprise Centre’s programs support entrepreneurs and emerging local businesses and enterprises.
- The Economic Development team initiated and reported on a structured Business Retention and Expansion (BR+E) Program in 2015 and 2016 focused on the manufacturing sector.
- In the 2016 BR+E survey of local manufacturers, more than 2 in 3 employers rated their ability to retain new employees as good or excellent.
- Orangeville benefits from a successful and productive partnership with Headwaters Tourism, an award-winning destination marketing organization, including having a staff member serve in an ex-officio role on the Board.
- Destination tourism attractions, such as the Credit Valley Explorer (CVE) Scenic Tour Train, Theatre Orangeville, Art Walk of Tree Sculptures and festivals, anchor Orangeville’s offerings.
- As a community within the Ontario Greenbelt Plan, the Town of Orangeville adopts a strong focus on sustainability in line with its Official Plan, led in part since 2007 by a Sustainability Action Team.

Weaknesses

- In an increasingly digitized world, the affordability of high-speed broadband, particularly high costs for initial connections, and gaps in connectivity in Orangeville hinder business and talent attraction and expansion efforts.
- Orangeville has virtually no vacant serviced industrial land available for sale in mid-2017 and no publicly known commitments to bring further serviced industrial land to market.
- Some owners of vacant parcels of land zoned as industrial do not appear to be active sellers as they are seeking employment land conversion.
- No industrial buildings of significant size were available on the market for purchase or lease in mid-2017.
- Many older industrial buildings in the Orangeville business park, if they come on the market in the future, are not likely to cater to the configurations and ceiling heights required today and will therefore require adaptation.
- Water capacity will be a constraint on longer term industrial growth.
- Educational attainment in Orangeville is lower compared to provincial average – only 57% of the population aged 25 to 64 in 2011 had attained a post-secondary certificate, diploma or degree compared to 65% of Ontario population.
- In the 2016 Business Retention and Expansion (BR+E) survey of local manufacturers, four out of five employers rated the availability of qualified workers as poor or fair.
- While there was significant growth in manufacturing employment between 2011 and 2016, the 2016 job level (1,906) in manufacturing was lower than the 2006 level (2,399) and significantly lower than the 2001 level (3,951).
- The viability of the Orangeville Brampton Railway is important.
- Orangeville does not have immediate direct access to a Highway 400 series standard highway.
- The limited number of motel and hotel rooms impacts overnight tourism potential, including sports tourism.
- The absence of basic skills training at local college campuses for manufacturing jobs does not appear to cater to an apparent need.

Opportunities

- Orangeville’s geographic position, bordering on the Greater Toronto Area (GTA) and being part of the Greater Golden Horseshoe (GGH), offers spinoff growth opportunities.
- The Town of Orangeville can adopt initiatives to ensure that lands that are (or could be) zoned as industrial and commercial are serviced and brought to market as expeditiously as possible.
- Young adults (25 to 40 years) who were raised in Orangeville or in Dufferin County and moved elsewhere could be attracted back to the area by family ties, lower cost of living, access to the GTA and lifestyle opportunities.
- Orangeville has the potential to attract professionals, lone eagles and members of the creative and artistic class that desire to live in a smaller town environment and can work from home if adequate access to affordable high-speed broadband is assured.
- The concentration of firms in the plastics and rubber sector may offer supply chain investment opportunities.
- The Federal and Ontario governments have accorded high priority to innovation and entrepreneurship and are supporting local initiatives, organizations and ventures.
- Federal and Ontario Climate Change initiatives include significant financial support for the development of clean technologies.
- Orangeville and Dufferin County are home to retired and semi-retired business executives who can be recruited to work as mentors for entrepreneurs and early-stage companies.
- The agricultural base in the area is well positioned to respond to the preference for fresh local produce, while also offering opportunities for specialty food manufacturing in Orangeville, including for products that will attract and appeal to tourists.
- The lower Canadian dollar exchange rate vis a vis the US dollar enhances the export competitiveness of Orangeville firms in the US, including manufacturers. The exchange rate also encourages Canadian travellers to vacation in Canada, including Ontario, rather than the US.
- Orangeville is ideally located to become the acknowledged base for tourists to explore the Headwaters region, including for shopping and extended stays.
- The Town of Orangeville can collaborate with Humber and Georgian Colleges to develop courses and programming that responds to local talent, skills, training and research needs, including those in manufacturing.
- Dufferin County’s decision to take a more direct role in economic development opens the way to collaboration with the County and communities within the County on initiatives that will result in regional economic benefits including significant spinoffs for Orangeville as the largest community in the County.
- Orangeville’s sustainability initiatives can be capitalized upon to further brand the community as a centre for the Headwaters region.
- In sub-sectors where sites and broadband are available, Orangeville is well positioned to target specific Greater Toronto Area (GTA) businesses for expansion or relocation.
- Targeted sub-sector value propositions should be developed to attract new investment in sectors where there is availability of suitable sites and affordable and adequate high-speed broadband.

Threats

- Orangeville faces continued competition for business and talent attraction from other communities such as Caledon that offer similar quality of life attributes to attract new residents.
- Big box stores in Brampton and Mississauga compete with Orangeville for retail spending.
- Other communities close to the edge or bordering the Greater Toronto Area (GTA) may be more attractive for businesses given their larger employment lands supply and variety.
- Employment lands offerings in other municipalities in Dufferin County may impact the attractiveness and marketability of Orangeville lands.
- In spite of the Growth Plan, County Official Plan and Orangeville Official Plan's requirements designed to strictly control conversion of employment lands to non-employment uses, the risk remains that land zoned for employment use could be lost through its re-designation to residential.
- Technological change is accelerating rapidly and disruptive technologies are challenging existing business models.
- Protectionist and nationalist policies and tendencies may affect access to international markets, especially the US.
- The renegotiation of NAFTA poses uncertainties and risks, including possible adjustments to Canadian dairy and poultry policies.
- One consequence of the Comprehensive Economic and Trade Agreement (CETA) with the European Union will be greater competition from Europe in the specialty cheese market.
- Rapid change that is occurring particularly through digitization is challenging the competitiveness and relevance of many companies.
- Lower rates of global growth appear to be the norm subsequent to the 2008-2009 recession.

The Public Survey on Strengths, Weaknesses and Challenges: During the development of the Orangeville Economic Development Strategy Update, a public survey was conducted about the area's top three economic development strengths as well as its top three weaknesses and challenges.³¹ The full results of the survey are in Appendix A.

Among the people who said they operate or work at a business or organization Orangeville, the top four strengths that were chosen were:

1. Location;
2. Natural setting and natural amenities;
3. Lifestyle opportunities; and
4. Easy access to larger communities.

The top five weaknesses and challenges that were chosen by people who operated or worked at an Orangeville business or organization were:

1. Cost of living;
2. Labour availability;

³¹ A public survey using Survey Monkey was undertaken between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

3. High-speed internet;
4. Public transportation; and
5. Cost of new development.

Manufacturing Sector Views of the Orangeville Business Climate: Meanwhile, the 2016 Business Retention and Expansion project in the manufacturing sector solicited the views of 36 companies about their overall impression of the community as a place to conduct business. Nearly 20% said it was excellent and more than 60% thought it was good.

D. Principal Economic Development Roles

1. Economic Development Framework Issues

To create a climate that will encourage economic growth, attract new investment and support local business expansion, the Town of Orangeville needs to address constraints, ensure a competitive environment for business, and support the timely expansion of infrastructure.

Orangeville faces two immediate challenges that limit near-term economic development prospects and that should be addressed assertively and promptly.

Availability of Industrial Land and Buildings: The most pressing challenge is the absence of serviced industrial lands and industrial buildings for sale or lease. With the sale in the first half of 2017 of the last parcels of Town-owned industrial land, virtually no serviced land was available on the market, nor were there publicly known plans to delivery any.

The challenge for the Town is to define how to ensure that urgently needed serviced industrial land parcels of varying size can be brought to market in the shortest time possible. Owners of existing parcels of undeveloped land designated and zoned for employment may choose not to be active developers for the purposes of employment use or sellers of the land. They may assess whether applications for redesignation and rezoning might meet some degree of success, despite the 2010 Official Plan changes that sought to strictly control conversion of employment lands. In the absence of known plans to bringing existing privately-owned lands to market, the Town's ownership of the Humber Lands offers near-term possibilities for rezoning – in whole or in part – from institutional to employment uses. A full evaluation of options is desirable, including analyses of:

- potentially competitive fully and substantially serviced land offerings located in other municipalities in the area;
- insights, if they can be obtained, as to the objectives and intentions of owners of larger undeveloped employment lands parcels;
- the factors for and against development of a municipality-owned business park;
- costs, financing, expected revenues, and timelines for servicing and development of the Humber Lands;
- prospects for arterial road construction that may heighten investor interest (e.g. Highway 410 extension to Orangeville);
- likely demand for industrial and commercial property and the appropriate mix and size of lots;
- conditions to be placed on development that will add to the properties appeal and ensure a fit with community objectives (such as sustainability); and

- the implications of provincial Places to Grow policies, including job allocation.

Municipal ownership and development of fully serviced employment lands in the Humber Lands block would be an option that would increase the Town's ability to set the terms that ensure land comes to market in a timely way and that lands sales result in job producing development. The Town's recent experience with the previously serviced 6.2 acre parcel in the Business Park has provided experience and demonstrated that this model can deliver benefit, albeit, it may take time for this to occur. Municipally-owned business parks often set conditions on land sales that require purchasers to build the intended premises – whether for their own use or lease – within a set period of time, to counter land speculation. Rail service for newly developed industrial areas would be highly desirable – not only for the firms but for the viability of the Orangeville Brampton Railway (OBRY).

The development of options should also consider the types and quantity of commercial office space that may need to be developed and brought to market in the coming years, especially once affordable high-speed broadband connections are available. Prestige industrial lands and some mixed use development would be desirable parts of future plans. As Orangeville, Amaranth, Mono and East Garafraxa share four aquifers as sources of water, there are also possibilities for cross-boundary collaboration to deliver industrial and commercial developments that would provide employment for Orangeville residents.

In addition, a review and inventory of all existing industrial buildings should be undertaken to identify and understand opportunities and the extent of need for adaptive reuse and development. If there is evident demand for such adaptation, the Town should consider incentives for redevelopment utilizing a Community Improvement Plan (CIP) which might also address energy-saving retrofitting of buildings. This was one of the actions recently proposed resulting from the feedback obtained during the 2016 Orangeville Business Retention and Attraction survey.³²

High-Speed Broadband Availability: A high priority also needs to be accorded to ensuring that Orangeville has affordable, reliable high-speed fibre optic broadband throughout the community. High-speed broadband is now an essential part of any community's infrastructure. Gaps exist in parts of Orangeville's business park and the high costs of connections for companies are an impediment to attracting many types of investment. Lack of availability is a negative, as well, in talent retention and attraction and the ability of students to access course material. The three to six points of fibre optic presence (POPs)³³ to be delivered by the SouthWestern Integrated Fibre Technology (SWIFT) Network in Dufferin County by 2021 are still several years from completion and are not expected to meet the County's needs adequately. Orangeville's strategy should take into account the Town's own expertise and its fibre network (including in the business park along C-Line and Centennial Road); the anticipated contribution to Orangeville's capacity that may result from the SWIFT Network; Dufferin County's plans in addition to and in advance of the SWIFT Network; the further potential to develop partnerships with private sector partners; opportunities that can attract matching Federal funding under its Connect to Innovate program; Town policies to require or incent the laying of conduit for fibre when other utilities are being installed or work undertaken; right-of-way access that can be facilitated by Orangeville Hydro, the Orangeville Brampton Railway or others; and possible partnerships and collaborations with the local

³² Town of Orangeville Economic Development, "Orangeville Business Retention & Expansion Program – Manufacturing Sector – Survey Results & Action Plan," October 2016.

³³ Points of presence (POPs) are fibre optic network nodes located to provide connections to local (so called "last mile") service providers or users with their own "last mile" infrastructure.

health care and school system networks. The strategy must also consider what competing neighbouring jurisdictions have done to stimulate broadband development.

Transportation Infrastructure: There are several major infrastructure needs related to Orangeville’s medium-term economic development that have longer range planning timelines but which will only be addressed if well-researched, compelling and timely advocacy campaigns are launched and sustained in conjunction with the County and other Dufferin municipalities. These include:

- Direct access at Orangeville to Highway 410, and upgraded Dufferin County road arteries, beginning with Shelburne-Orangeville and Highway 89 eastward to Alliston;
- More frequent two-way all-day GO Transit bus connections from Orangeville to the Brampton hub and to nearby post-secondary educational institutions, and new GO Transit feeder routes into Orangeville from points in the County;
- Upgraded public transit within the Town to get the workforce to and from places of work; and
- Robust connections from Orangeville to the proposed multi-modal mega Pearson Hub at Toronto Pearson International Airport.

Also, the Town should continue efforts to ensure the viability of the Orangeville Brampton Railway (OBRY) which is vital to several key manufacturing companies and to the Credit Valley Explorer (CVE), an anchor attraction that draws tourists to the Town.

Growing the Post-Secondary Presence in Orangeville: The Town of Orangeville should sustain an active dialogue with Georgian and Humber Colleges with a view to increasing the Orangeville presence of either or both. With the Ontario government tightly controlling any further new post-secondary campus development, the current situation favours those, like Orangeville, who already have satellite campuses.

In Ontario, prior to the Ontario government’s 2011 moratorium on the creation of new post-secondary satellite campuses, a significant number of post-secondary satellite campuses were established. The communities that were involved saw the college or university presence contributing a critical stimulus to community and economic development. After imposing the freeze in 2011, the Ontario government decided to entertain three new campus bids – a York-Seneca campus authorized in Markham in 2015 and the proposals the government is studying from Ryerson and Sheridan for a Brampton campus and from Laurier and Conestoga for Milton. Except for the commitment to a new French language university in Toronto, these three additional locations are likely the last the government will consider for some time.

With Georgian and Humber already having established an Orangeville footprint, the Town of Orangeville finds itself in an advantageous position compared to other municipalities that still aspire to attract a post-secondary presence. As already established sites, Georgian and Humber are presumably not constrained from further expansion in Orangeville. Bearing in mind the rapid population growth in the local region, revisiting the potential for growth of the Georgian and Humber College presences and their focus in Orangeville seems increasingly timely.

Sustainability: The Town of Orangeville envisages creating a comprehensive sustainable development plan. This will broaden, integrate and provide additional direction and momentum to existing efforts.

Sustainable development is now a well-entrenched concept at the municipal level. It is supported by balanced economic growth and contributes to place making and the liveability of an area. Sustainable

development is inherently multifaceted, thereby demanding planning that encompasses all municipal pillars, economic development being a prominent one. As sustainability goals are often only realized over the longer term, a key objective is to achieve widespread community agreement and buy-in to a coherent set of well-aligned goals and timelines that will invite broad community involvement and build pride.

Economic development-related aspects of sustainability planning potentially encompass support for “green” business ventures, policies to incent construction of buildings to “green” certification standards, energy-efficient retrofitting of buildings, redevelopment of brownfield sites, establishing community energy systems (involving cogeneration, for example), waste recycling programs, and upgrades to municipal infrastructure that reduce financial risk in the face of more frequent and significant extreme weather occurrences. Many sustainability initiatives will also protect and enhance Orangeville’s natural environment and heritage, actions that tend to favour tourism and the creative sector development.

Businesses and developers are responsive to well-formulated programs that encourage and reward environmentally sensitive development. For example, energy efficient buildings offer cost savings over their lives. Businesses know that the employees who will contribute to their success prefer sustainable workplaces, houses and communities. Promotion of leading-edge sustainability initiatives will draw attention to Orangeville as a community in tune with its location in the Headwaters region.

The Federation of Canadian Municipalities (FCM), which administers the Federally endowed \$675 million Green Municipal Fund, can draw attention to best practices elsewhere and facilitate peer-to-peer links that will assist in the development of Orangeville’s plans. The Orangeville sustainable development plan should seek out opportunities to align local priorities and actions with the Ontario and Federal climate change plans, so as to benefit from partnership and funding opportunities. (See Sectors of Focus E.4 – Professional, Engineering, Information Technology and Financial Services) The plan’s development should consider how it can create, attract, support and grow businesses pursuing clean technologies. Initiatives can also further enhance Orangeville’s reputation and profile as a place to visit and a space that welcomes creative pursuits. The sustainability plan should also consider what roles Humber and Georgian Colleges can play, including courses, training, and accreditations that can contribute to the community sustainability priorities.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.1 ECONOMIC DEVELOPMENT FRAMEWORK INITIATIVES				
Strategy Section	Goals, Objectives & Actions	Priority¹	Timing	Lead & Partners²
D.1	<p>GOAL: Be an attractive location that is competitive and responsive to job-generating growth opportunities</p> <p>OBJECTIVE: Ensure an adequate supply of industrial/commercial land and buildings and competitive taxes, charges and incentives</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Evaluate options and define how to ensure that serviced vacant industrial land will be brought to market in the earliest possible time, along subsequently with sites for future commercial office development 2. Ensure the protection and designation of the remaining readily serviceable employment lands with good access to major transportation infrastructure in order to achieve a more complete community in Orangeville 3. Undertake an inventory and analysis of existing larger Orangeville industrial buildings to establish whether a program of incentives for adaptive reuse is merited 4. Monitor the competitiveness of Orangeville industrial and commercial development charges, property taxes and incentive programs, and recommend changes that may be advised <p>OBJECTIVE: Address broadband deficiencies</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Participate in the development of an Orangeville broadband strategy that will support actions to ensure near-term availability of the reliable and affordable high-speed broadband coverage needed by businesses and expected by the public 	<p>A</p> <p>A</p> <p>B</p> <p>B</p> <p>A</p>	<p>2018 & On-Going</p> <p>On-Going</p> <p>2018-2019</p> <p>On-Going</p> <p>2018 & On-Going</p>	<p>OED & Planning Colleagues</p> <p>OED & Planning Colleagues</p> <p>OED</p> <p>OED</p> <p>OED & Town Colleagues</p>

Strategy Section	Goals, Objectives & Actions	Priority ¹	Timing	Lead & Partners ²								
D.1 Con't	<p>OBJECTIVE: Encourage timely investment in infrastructure to support economic development</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Continue to explore and act upon options that will enhance the viability and ensure the continued operation of the Orangeville Brampton Railway 2. Support research-based advocacy, jointly with Dufferin County, for extension of Highway 410 and upgrades to other highways in the County 3. Support research-based advocacy, jointly with Dufferin County and other municipalities, for greater frequency of GO Transit bus service to the Brampton hub and nearby post-secondary campuses; for GO Transit bus service via Orangeville from other County communities; and for all-day, two-way links with the proposed Pearson Hub <p>OBJECTIVE: Promote best practices in sustainable economic development to conserve, protect and enhance Orangeville's natural environment</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Participate in the creation of a sustainable development plan for Orangeville 	A B B A	On-Going 2018 & On-Going On-Going 2018	OED OED, DCED, SED & DM8 OED, DCED, SED & DM8 OED, Town Colleagues, FCM								
<p>Funding:</p> <ul style="list-style-type: none"> • The cost for an initial internal scoping study to examine enhanced college partnerships should be relatively moderate. • The analysis and inventory of industrial buildings could be contracted out. • The high-speed broadband study will reveal whether and the extent to which municipal funding is recommended. 												
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Timely achievement of actions indicated 												
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <table border="0"> <tr> <td>DM8 = Seven Other Dufferin County Municipalities</td> <td>HC = Humber College</td> </tr> <tr> <td>DCED = Dufferin County Economic Development</td> <td>OED = Orangeville Economic Development</td> </tr> <tr> <td>GC = Georgian College</td> <td>SED = Shelburne Economic Development</td> </tr> <tr> <td>FCM = Federation of Canadian Municipalities</td> <td></td> </tr> </table>					DM8 = Seven Other Dufferin County Municipalities	HC = Humber College	DCED = Dufferin County Economic Development	OED = Orangeville Economic Development	GC = Georgian College	SED = Shelburne Economic Development	FCM = Federation of Canadian Municipalities	
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FCM = Federation of Canadian Municipalities												

2. Business Retention and Expansion

The retention and expansion of existing businesses are core economic development objectives. Accepted wisdom is that as many as 70% to 80% of new jobs are generated through expansions within the local business base. As with any company’s sales efforts, it is generally easier and less expensive to keep existing clients, as compared to the still-important task of identifying and attracting new ones.

In the case of foreign direct investment (FDI), as noted earlier, growth in manufacturing and services investment appears to be occurring mainly in existing foreign-affiliated firms rather than via large investments in entirely new prospects. Prominent foreign-affiliated firms in Orangeville include Clorox, Röchling, Novolex, PolyOne and Sanoh.

Nearly 1,000 Business Locations in Orangeville: Orangeville is host to about 49% of the nearly 2,000 Dufferin County locations of enterprises, excluding those in the Indeterminate category (Exhibit 14). Orangeville accounts for a much higher portion of Dufferin County locations of enterprises having more than 50 employees – just over three-quarters (76%). On the other hand, Orangeville has a relatively smaller portion of micro enterprise locations (1-4 employees), with the Town accounting for 43% of the County total.

The overwhelming majority of the enterprise locations in Orangeville are under 100 employees – 97.8%, comprised of 507 micro-enterprises (1-4 employees) (52.2%) and 444 small enterprises (5 to 99 employees) (45.7%).

Exhibit 14 Number of Enterprise Locations by Number of Employees, 2016			
# of Employees	Orangeville	Dufferin	Portion
1-4	507	1,168	43.4%
5-9	199	386	51.6%
10-19	129	224	57.6%
20-49	79	142	55.6%
50-99	37	51	72.5%
100-199	14	15	93.3%
200-499	6	9	66.7%
500+	1	1	100.0%
Total, excluding Indeterminate	972	1,996	48.7%
Source: EMSI Q3 2016 Data Set (Version 2016.3) Note: The indeterminate category includes locations with no employees or only contracted workers.			

Excluding the Indeterminate category, there were 972 enterprises in Orangeville in June 2016, with a net increase of seven enterprises from December 2014, with small increases or decreases in the number of locations of enterprises across most sectors. Data cannot be compared to earlier years due to significant methodology changes by Statistics Canada which have resulted in a much larger number of enterprises being counted since December 2014 compared to previous years.

Manufacturing Business Retention and Expansion (BR+E) Program: In the past, Orangeville Economic Development staff conducted a local business visitation program to about two businesses per month, in line with the 2007 Economic Development Strategy recommendations, reporting annually to Council about the common themes and issues that were identified. A more structured approach based on a

program developed by the Ontario government (through the Ontario Ministry of Agriculture, Food and Rural Affairs) was adopted for a Business Retention and Expansion (BR+E) program focused on the manufacturing sector beginning in late 2015 and running through publication of the survey results and an action plan in October 2016. The program interviewed 36 manufacturers representing about three-quarters of the eligible group. The analyses of the responses profile the sector, identify major issues, and provide insights on the business climate, business plans and intentions, and the workforce,

During the 2016 Business Retention and Expansion (BR+E) project, manufacturers expressed the highest level of interest in export development programs and services. After workforce related issues, export development ranked second in terms of types of assistance that would help support their business, just ahead of business networking sessions. Over half of the respondents (53%) indicated that their primary market was international. This is an area to continue to target, working with Ontario and Federal Government partners and the Dufferin Board of Trade. With more inward looking trade policies probable in the US and with the openings created by the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) and the anticipated Comprehensive and Progressive Trans-Pacific Partnership (CPTPP), export market diversification should be a front-of-mind issue for businesses. The BR+E survey was undertaken before the United Kingdom vote to leave the European Union and the election of President Trump, so it is probable that the interest is now greater. The Business Retention and Expansion (BR+E) survey indicated that more than half of the respondents were exporting, with 17% viewing themselves as potential exporters. Thirty-one per cent were single market exporters, likely only to the US, and therefore prime candidates. A proposed follow-through action was to establish peer-to-peer mentorship opportunities for export development.

In addition to export development, there was also moderate interest shown in the BR+E interviews in workshops on e-marketing, social media and online content; seminars on access to capital; and workshops on productivity improvement. Steps to increase awareness and uptake of Federal and Ontario programs were also proposed, through workshops, trade show events, and one-on-one meetings that Orangeville Economic Development can facilitate with Federal and Ontario officials.

The Dufferin Board of Trade (DBOT), in collaboration with the Town, is taking steps to reconstitute a manufacturing group based on the BR+E recommendations. The previous Dufferin County Manufacturers Association was valued but lost key leadership and members in the wake of the 2008-2009 recession. A new group would be a valuable partner for Orangeville Economic Development in pursuing programs and initiatives that will respond to the specific sector interests.

Further BR+E Programs: Orangeville Economic Development should consider further structured BR+E programs in 2018 and on a regular basis after. Ideally, these Orangeville BR+E initiatives might parallel Dufferin County and Shelburne programs as this would create a larger critical mass and heighten the impact of the findings. The focus could be cross-sectoral or a specific sector such as creative and cultural or professional and technical services. Tourism is also a sector of importance, though any tourism initiative should have the input and involvement of Headwaters Tourism. Provincial colleagues should be invited to participate in the calls, to bring the full range of resources and assistance to a company's attention.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES														
D.2 BUSINESS RETENTION AND EXPANSION														
Strategy Section	Goals, Objectives & Actions	Priority¹	Timing	Lead & Partners²										
D.2	<p>GOAL: Encourage the retention and expansion of existing Orangeville businesses</p> <p>OBJECTIVE: Reach out, engage, and support Orangeville businesses, and monitor their needs, preoccupations and intentions</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Conduct regular structured business retention and expansion (BR+E) calling programs, and report in the aggregate on the firms’ needs, preoccupations and intentions 2. Offer, support and promote programs that will assist local businesses to sustain their competitiveness, remove barriers, find markets and grow 3. Report to Town colleagues and Town Council on the needs, preoccupations and intentions of Orangeville businesses, and ensure that the County is informed of aspects touching its jurisdiction 	A	On-Going	OED, DCED, DM8, OMAFRA & MEDG										
		A	On-Going	OED, OASBEC, DCED, DM8, DBOT, OMAFRA, MEDG & MIT										
		A	On-Going	OED										
<p>Funding:</p> <ul style="list-style-type: none"> • Orangeville has previously used OMAFRA’s BR+E program • Some of the programs to assist local businesses will be provided by OED or OASBEC, at events where the fee will cover direct costs 														
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • The basic metrics are numbers of BR+E calls and meetings; businesses retained; expansion projects; value of investment retained; the amount invested in new projects; and jobs retained and created (in situations where OED has influenced outcomes) 														
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <table border="0"> <tr> <td>DBOT = Dufferin Board of Trade</td> <td>OASBEC = Orangeville & Area Small Business Enterprise Centre</td> </tr> <tr> <td>DM8 = Seven Other Dufferin County Municipalities</td> <td>OCE = Ontario Centres of Excellence Inc.</td> </tr> <tr> <td>DCED = Dufferin County Economic Development</td> <td>OED = Orangeville Economic Development</td> </tr> <tr> <td>MIT = Ontario Ministry of International Trade</td> <td>OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs</td> </tr> <tr> <td>MEDG = Ontario Ministry of Economic Development & Growth</td> <td>SED = Shelburne Economic Development</td> </tr> </table>					DBOT = Dufferin Board of Trade	OASBEC = Orangeville & Area Small Business Enterprise Centre	DM8 = Seven Other Dufferin County Municipalities	OCE = Ontario Centres of Excellence Inc.	DCED = Dufferin County Economic Development	OED = Orangeville Economic Development	MIT = Ontario Ministry of International Trade	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs	MEDG = Ontario Ministry of Economic Development & Growth	SED = Shelburne Economic Development
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DCED = Dufferin County Economic Development	OED = Orangeville Economic Development													
MIT = Ontario Ministry of International Trade	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs													
MEDG = Ontario Ministry of Economic Development & Growth	SED = Shelburne Economic Development													

3. Innovation and Entrepreneurship

Business creation, growth and entrepreneurship have become ever more crucial to healthy, vibrant local economies. An appetite for innovation and calculated entrepreneurial risk should also be encouraged on the part of the established companies. These are essential ingredients if businesses are to grow, earn acceptable returns and survive rapid change and disruption.

Entrepreneurship, the growth of young ventures, and innovation are interlinked, but each has distinct characteristics.

Central to entrepreneurship is the willingness to accept risk. An entrepreneur puts a job or career and financial security on the line to pursue an idea or uncertain venture. Although age is no barrier to entrepreneurship, the peak ages are people in their 30s and 40s.³⁴ Within existing businesses, entrepreneurship takes the form of intrapreneurship – referring to individuals within the corporate structure who risk the business’s resources to solve a problem, develop and introduce different products or services, or set new directions for the business.

In the case of innovation, the most widely accepted definition is that “an innovation is the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organizational method in business practices, workplace organization or external relations.”³⁵ Innovation therefore encompasses more than just novel products or processes. As well, it is found in both new and established companies – and in non-profit organizations, too. Innovation may or may not be a central characteristic of an entrepreneurial venture.

Given the challenges which emerging firms face in scaling rapidly, economic development and innovation initiatives are placing special emphasis on fostering innovation ecosystems that enable companies to scale up. Analysis indicates that young companies – generally in existence for fewer than five years – drive job creation. The critical and most challenging growth phase tends to be from a few employees, through 20, 50 or 100 staff members. Ventures that scale rapidly are not confined to high technology but cut across all sectors. The disciplines of greatest need to scale successfully are sales, marketing, organization design, product management and internationalization – all difficult skillsets to find.

The February 2017 report of Canada’s Advisory Committee on Economic Growth, “Unlocking Innovation to Drive Scale and Growth,” identifies five critical elements in the innovation ecosystem that it believes need to be present to enable companies to grow into industry leaders. They are:

- Access to talent, especially experienced business talent;
- Access to risk capital, and to the value-added mentoring support that world-class venture investors can bring;
- Connectivity, with customers, partners, start-ups, investors, universities and colleges;
- Customers, both commercial and government; and
- Enabling public sector programs.

³⁴ Stangler, Dane, Ewing Marion Kauffman Foundation, “The Age of the Entrepreneur: Demographics and Entrepreneurship,” Presentation to the Innovation for Jobs Summit, March 2013 (<http://i4j.info/wp-content/uploads/2013/05/i4jDaneStanglerDemographicsandEntrepreneurship-1.pdf>). Accessed on August 4, 2017.

³⁵ Oslo Manual: Guidelines for Collecting and Interpreting Innovation Data, 3rd edition (OECD, 2005)

The Council expressed concern that the Canadian environment in many of these areas is subscale and fragmented.³⁶

Orangeville and Area Small Business Enterprise Centre: The Orangeville and Area Small Business Enterprise Centre (SBEC), which has been part of Orangeville Economic Development for the benefit of the entire County since it was established in 2003, is one of 57 Ontario Small Business Enterprise Centres that are supported financially by the Ontario government and are part of the ONE Network. The focus is on assisting entrepreneurs, business start-ups and small businesses that have been in existence for five years or less and have ten or fewer employees. Advisory services are offered at no cost.

The SBEC offers Ontario government-originated programs such as Summer Company and Starter Company Plus. In 2016, the SBEC was selected to provide a pilot Cultural Entrepreneurship program which had 21 participants, resulting in 16 detailed business plans and grants totalling \$50,000. This success reflects the Orangeville Economic Development team's and the SBEC's wider focus. Hopefully, the pilot program will spawn further opportunities to encourage and support cultural entrepreneurship.

In 2016, the SBEC fielded 3,247 inquiries and engaged in 608 business consultations. The Centre was involved with 106 start-ups with 208 jobs created. Thirty-two workshops and events attracted 918 attendees. About half of the business consultations involve Orangeville clients. The remainder are from Dufferin County or communities bordering Dufferin, or are entrepreneurs looking to locate in the community.

The SBEC provides shared computer spaces that clients can access, but it does not have the ability to offer dedicated space to new and emerging firms that have promise and are seeking on-going mentoring, connections to early-stage funding, and extensive counselling on revenue growth and scaling.

Dufferin County has increased its financial contribution for the SBEC to support a further expansion of the Centre's activities and presence to other parts of the County beyond Orangeville. Discussions among municipal partners and the Province will be required to consider available funding, needs and options in order to establish a plan for the SBEC in the wider context of business retention and expansion and innovation and entrepreneurship programming. Among possible subjects are the provision of dedicated incubation and soft landing space, additional points of delivery, and other partnership opportunities.

Innovation Guelph: The Ontario Regional Innovation Centre (RIC) with responsibility for Orangeville and Dufferin County is Innovation Guelph. Innovation Guelph is open to engagement with Dufferin County but has not yet taken proactive steps to define how it can best work with clients and situations in the County, including Orangeville. Like the Small Business Enterprise Centres throughout Ontario, the RICs benefit from Ontario government funding and are part of the ONE Network.

The Innovation Guelph mandate is directed, more narrowly than SBECs, to providing mentorship and business support programs and services to help innovative enterprises start, grow and thrive. As such, Innovation Guelph caters to firms and ventures that focus on innovation and/or on scaling rapidly. The definition of innovation extends beyond just technology to any type of innovation, including in the business model. Innovation Guelph offers programs that are intensive and structured and that offer

³⁶ Advisory Council on Economic Growth, "Unlocking Innovation to Drive Scale and Growth," February 6, 2017.

diagnostics, mentoring, and assistance tailored to need. In addition, Innovation Guelph also offers programs for social enterprises (Good Biz Guelph), the Rhyze Project for Women, and certifications, such as in human resources, through a new online learning centre. From the Innovation Guelph perspective, the key is to identify specific ventures that are candidates to benefit from their resources.

In addition to the City of Guelph, Innovation Guelph has a relationship with Wellington County Economic Development that will provide some guidance and benchmarks for a Dufferin County and Orangeville relationship. Wellington County contributes \$20,000 per year and there are cross-memberships on related committees. Linkages with Innovation Guelph are also likely to be a source of other connections for Orangeville and the County with the Guelph ecosystem.

Other Innovation Partners: Orangeville Economic Development has supported innovation-oriented events in partnership with Humber and Georgian Colleges, the Ontario Centres of Excellence (OCE Inc.), the Centre for Business & Economic Development (a Community Futures Development Corporation), and the FedDev Ontario funded CME SMART program that supported manufacturing competitiveness. One-to-one meetings, established through collaboration between OCE Inc., Orangeville Economic Development, and the Dufferin Board of Trade (DBOT), provide a good example of an effective approach. County-wide collaboration will be the most productive approach to building and intensifying Orangeville’s relationships with innovation-focused organizations such as the Industrial Research Assistance Program (IRAP) associated with the National Research Council (NRC).

Centres for Entrepreneurship & Innovation at Georgian and Humber Colleges: Opportunities exist to work with the two colleges that have an existing Orangeville presence to connect with their entrepreneurship and innovation centres. Georgian College has drawn on the resources of its Henry Bernick Entrepreneurship Centre in Barrie, including delivery of a 2015 food entrepreneurship event in partnership with the Town of Orangeville. Georgian’s assets are being augmented. Funding was announced in January 2017 for a new Advanced Technology, Innovation and Research Centre at Georgian’s Barrie Campus which will include the Centre for Research, Innovation and Commercialization (C-RIC) comprising incubator, changemaker and fabrication space.³⁷ In Humber College’s case, the Humber Centre for Entrepreneurship (formerly HumberLaunch) is located at the Lakeshore Campus. Humber’s Dean of Applied Research & Innovation has visited Orangeville to explore expanded links.

Collaboration with other Post-Secondary Educational Institutions: Beyond the collaboration with Humber and Georgian, there should also be carefully targeted complementary opportunities to connect Orangeville businesses and food enterprises with specialist facilities, resources, and programs at other nearby post-secondary institutions. These efforts will be more powerful and likely to succeed if collaboration is orchestrated through the County economic development coordinating committee. Among the more obvious matches to pursue are Sheridan College’s Davis Campus in Brampton which focuses on advanced manufacturing, especially its Centre for Advanced Manufacturing and Design Technologies (CAMDT), and the University of Guelph related to (but certainly not limited to) the agriculture, equestrian and food sectors.

³⁷ Georgian College website, Media Release, “Funding announced for Advanced Technology, Innovation and Research Centre at Barrie Campus,” January 9, 2017 (<http://www.georgiancollege.ca/student-news/funding-announced-for-advanced-technology-innovation-and-research-centre-at-barrie-campus/>). Accessed on February 21, 2017.

Town of Orangeville Procurement from Innovative Local Companies: At all three levels of government in Canada, programs have been recently introduced that signal support for innovation by creating new procurement processes that support innovative early-stage companies.

Finding first customers is a critical preoccupation of emerging companies. The design of the innovator-friendly government procurement processes therefore focuses on creating a process for requests for proposals where the government agency can be the first public sector client for what is often a less than fully proven product or service. Proposals are typically invited for technologies or approaches that can provide solutions for defined areas of need.

Programs that have been introduced at the Federal and Ontario levels include:

- **Innovative Solutions Canada**, announced in the 2017 Federal Budget with an initial \$50 million commitment, allocates a portion of funding from federal departments and to early-stage research and development, late-stage prototypes, and other goods and services from Canadian entrepreneurs and innovators. The Budget indicates that the program will be designed to be scalable, so that other Canadian jurisdictions can take part in the future, if they so wish.
- **Build in Canada Innovation Program (BCIP)**, created in 2010 and made permanent after a two-year trial, seeks to bridge the pre-commercial gap faced by emerging companies, by buying pre-qualified late-stage research and development innovations for Federal departments to test. After testing, the BCIP provides feedback to suppliers on the performance of their products or services.
- **Small Business Innovation Challenge (SBIC)**, introduced in 2017 and delivered by Ontario Centres of Excellence (OCE Inc.), is directed to high-potential, technology-driven start-ups and SMEs able to offer solutions to public sector business challenges. The first two areas of interest identified were “digital identity” from the Ministry of Government and Consumer Services (MGCS), and “vehicle occupancy detection” from the Ministry of Transportation (MTO).

A municipal example is provided by the City of Guelph which launched a pilot initiative in 2016. The **Guelph Civic Accelerator** program called for proposals from “solution partners” to address specific complex municipal problems (e.g. enabling citizens to detect water leaks and reduce use; maximizing the value of downtown parking space; and how to facilitate public feedback on planning decisions). The Guelph Civic Accelerator involves partnerships with the local University, the Chamber of Commerce, Innovation Guelph, and Canada’s Open Data Exchange.

A new Orangeville procurement initiative might focus on the innovative solutions the Town could benefit from to tackle tourism way-finding via social media tools; access to downtown parking; provision of smart, electronic signage; and utilization of open data.

NOTES AND ABBREVIATIONS

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

² **Abbreviations**

CBED = Centre for Business & Economic Development (CFDC)

DBOT = Dufferin Board of Trade

DM8 = Seven Other Dufferin County Municipalities

DCED = Dufferin County Economic Development

FEDDEV = FedDev Ontario

GAC = Global Affairs Canada

GC = Georgian College

HC = Humber College

IG = Innovation Guelph

IRAP = Industrial Research Assistance Program – NRC

MIT= Ontario Ministry of International Trade

MEDG = Ontario Ministry of Economic Development & Growth

OASBEC = Orangeville & Area Small Business Enterprise Centre

OCE = Ontario Centres of Excellence Inc.

OED = Orangeville Economic Development

OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs

SC = Sheridan College, Brampton Campus

SED = Shelburne Economic Development

UG = University of Guelph

4. Attracting New Investment

External direct investment attraction is exceptionally competitive. Throughout the world, there are literally tens of thousands of economic development organizations actively seeking to attract new investment to their jurisdictions. Understandably, to hope to be successful, investment attraction initiatives must be exceedingly well researched and highly targeted on companies in sub-sectors, niches and specialized areas for which economic development organizations have developed compelling value propositions that readily differentiate their region from most others. Comprehensive web-site based location data and an ability to respond promptly and fully are essential, as international firms and their site selection professionals will move quickly to a short list of three to five locations.

The Strategy Update assesses and comments on Orangeville sector priorities in Sectors of Focus (Section E), emphasizing the importance of choice, concentration of resources, and realism.

A Collaborative Approach to Investment Attraction: In two tier municipalities like Dufferin County, the approach to investment attraction invariably is to adopt a County-wide approach to external investment attraction. Dufferin County has endorsed its first Economic Development Strategic Plan, positioning the County in a coordinating role for fielding investment inquires, coordinating responses, and generating leads as part of a collaborative effort with the municipalities.

The reasons for adopting a collaborative approach are well accepted. First, prospective investors that are considering expansion or a new location look initially at larger economic regions to see what the region as a whole offers. Subsequently, they will evaluate sites, local taxes and incentives and the more precise fit of a community with their requirements, but this generally comes only after selecting or narrowing down the broader regions under consideration. Prospective investors want to work with a single point of contact who can provide the information by responding to all their requirements. Second, external investment attraction – especially foreign direct investment (FDI) – requires extensive analysis of priorities, the development of robust value propositions, and the identification of companies and countries to target. Together with travel, this is an inherently more time consuming and expensive aspect of economic development. It makes abundant sense to share costs on a regional basis to get a foot-in-the-door with prospects, create an impactful presence at suitable events, respond comprehensively to inquiries, make appropriate referrals, and invite and host prospects and influencers.

An important driver for regional collaboration has also been the ability to access matching funding from senior government partners. The Federal and provincial governments actively favour cooperative

approaches in their funding decisions. For example, the Invest Canada-Community Initiatives (ICCI) matching funding from Global Affairs Canada goes only to upper tier and regional entities.

Orangeville’s Role in Investment Attraction: The Orangeville Economic Development team will be an active participant in shaping plans for investment attraction in the working level County economic development coordinating committee proposed in the County Economic Development Strategic Plan. The development of the new collaborative approach will occur during 2018. Orangeville needs to ensure that the Town’s assets, interests, differentiators and sites are reflected in the collaborative County-wide investment attraction effort. As well, the Orangeville Economic Development team will participate directly in many of the collaborative initiatives that are part of the annual plans developed by the County economic development coordinating committee. Orangeville and the other municipalities will be involved in demonstrating how their locations meet the investor requirements and in hosting prequalified prospects whose requirements they can match.

The contacts, intelligence and leads that Orangeville obtains from its BR+E and innovation involvement contribute important information to support investment attraction efforts. In this connection, the survey undertaken as part of the 2016 Orangeville BR+E project indicated that 8.4% of the Orangeville respondents saw an opportunity to attract related supply and services businesses. Orangeville is also best able to play an important role in identifying and recruiting local company executives who are prepared to meet with visiting prospects to share their insights about Orangeville as a place to do business. Orangeville, as host to largest manufacturing concentration, will have a special interest and be able to play a prominent role in investment attraction efforts in that sector particularly.

Pan Regional Co-opetition: As County-wide cooperation to attract new investment evolves, opportunities may be identified to build or be involved in collaborative investment attraction arrangements with other jurisdictions. The intensity of the competition for investment attraction is behind the adoption of regional investment attraction models in Ontario that aggregate the efforts of like-minded competing jurisdictions to jointly target and pursue prospective international investors. Cost sharing is more economical and a group effort more powerful.

Several sector-oriented pan-regional groups have been formed in Ontario including the Ontario Food Cluster (OFC), the Ontario Technology Corridor (OTC), the Ontario Manufacturing Communities Alliance (OACA), and the Ontario CleanTech Alliance (OCTA). There are also regional groups such as Ontario East, the Southwestern Ontario Marketing Alliance (SOMA), Toronto Global, and the Hamilton-Niagara Partnership. Consideration of whether alliances of these types would be beneficial will require close study and thorough discussion by the new County economic development coordinating committee.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.4 NEW INVESTMENT ATTRACTION				
Strategy Section	Goals, Objectives & Actions	Priority¹	Timing	Lead & Partners²
D.4	<p>GOAL: Attract new investment to Orangeville</p> <p>OBJECTIVE: Participate in the development and delivery of a coordinated County-wide attract external investment attraction program</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Identify, pursue and attract investment prospects 2. Contribute, as a member of the County-wide economic development coordinating committee, to the creation and development of an external investment attraction program that will align with Orangeville’s priorities and strengths 3. Ensure County economic development colleagues are familiar with the assets and value propositions for external investment in Orangeville 4. Participate in investment attraction initiatives and pursue leads, when and where Orangeville can match prospects’ requirements 	A	On-Going	OED & DCED
		A	2017-2018	DCED, OED & DM8
		A	On-Going	OED, DCED & DM8
		A	On-Going	OED & DCED
<p>Funding:</p> <ul style="list-style-type: none"> • Global Affairs Canada’s Invest Canada Community Initiatives (ICCI) provides matching funding to upper-tier municipalities for Foreign Direct Investment (FDI) related projects on a competitive basis 				
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Performance Metrics should concentrate on outcomes (the number of new investments and the jobs and amounts and how they continue to grow), supplemented by measures of activities likely to lead to the outcomes (investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where OED has influenced outcomes) 				
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <p>DM8 = Seven Other Dufferin County Municipalities OED = Orangeville Economic Development</p> <p>DCED = Dufferin County Economic Development</p>				

5. Talent and Workforce Development

Highly qualified personnel are the assets that firms invariably seek and want to access in association with expansions and new investments in developed countries such as Canada, the US, and western Europe. Firms considering expansion or new facilities want verifiable information from economic development officials on the availability of the talent that they require. In addition, with businesses becoming more and more technology- and knowledge-intensive, they will look favourably on locations that are attracting and retaining talent and that have the ability to provide further training, reskilling and lifelong learning.

Dufferin County Workforce Development Committee: To address workforce and talent issues in Dufferin County, the Workforce Planning Board of Waterloo, Wellington and Dufferin (WPBWWD) recently convened a new Dufferin County Workforce Development Committee. The Committee's role will be to engage community partners in labour market research and planning processes that lead to finding local solutions to local issues. Having a more formalized network for information gathering and decision making seeks to inspire cooperative efforts among partners.

The Committee will consider collaborative research and initiatives that can better define local workforce availability and demand, needs for training and reskilling, and initiatives that can best match jobs with qualified applicants. The Workforce Planning Board has access to extensive data sources, but additional funding from partners is often required for studies and analysis that can capitalize on this valuable resource. The Town Economic Development staff are active participants in this Committee.

A valuable resource with which Orangeville Economic Development liaises is the Dufferin Human Resource Group whose members are professionals who have first-hand knowledge and expertise on which to draw.

Insights from the 2016 Business Retention and Expansion Survey: Consistent with other jurisdictions, there appears to be a degree of misalignment in Orangeville between the skills that employers say they seek and the skills the workforce offers. Orangeville employers indicate that they have difficulty finding suitably qualified people to fill vacancies, while at the same time prospective workers say that they encounter problems finding suitable positions. Wage expectations may also be a factor.

The 2016 Business Retention and Expansion survey of Orangeville manufacturers indicated that, though 21 businesses (60%) had increased their workforce within the previous 3 years, the majority of respondents rated the availability of qualified workers as "poor to fair." This points to a level of concern that begs to be addressed. The good news was that it was offset to an extent by the number of local businesses that rated their ability to retain employees as "good to excellent" (76%) and the stability of their workforce as "good to excellent" (67%).

The survey identified specific occupations that were the most difficult to recruit (Exhibit 15). A job fair was held subsequently in November 2016 in collaboration with the Workforce Planning Board of Waterloo, Wellington and Dufferin (WPBWWD). The job fair drew 26 local employers and more than 440 job seekers, suggesting that a repeat event is merited in 2018. Access to Lynda.com (from LinkedIn) which offers courses in business, technology and creative skills has also been arranged.

Exhibit 15 Most Difficult to Recruit Occupations Identified in Orangeville Business Retention & Expansion Program Interviews with 36 Manufacturing Companies Survey Results and Action Plan – October 2016		
Engineers (Mechanical)	Project Management (Within Engineering)	Assembler
Cold Heading Operator	Electricians/Trades	CNC Operator
General Labourers	Manual Machining & Assembly	Tool & Die
Cabinet Makers	Graphic Designers	Office Staff
AutoCAD Operators/Designers	Extrusion Operator	Maintenance Personnel
Designer	Manufacturing Engineers	Shipping/Receiving
Mechanics	Millwrights	Welder/Fitters
Engineering (Electrical/Civil)	Screen Print Finishing Operators	Electronics Technician
Mold Maker- Blow Mold Design	AZ Truck Driver	Plastic Welding Operators
Source: Orangeville Business Retention & Expansion Program – Manufacturing Sector – Survey Results & Action Plan – October 2016		

Public Survey Feedback: Concern about labour availability also was evident in the public survey undertaken in conjunction with the development of the Economic Development Strategy Update. Among the respondents who operate or work at a business or organization in Orangeville, labour availability was the weakness or challenge that was chosen second most often (after the cost of living). Among strengths, the availability of a skilled workforce ranked low (tied with two others for ninth out of fifteen) (See Appendix A for a full summary of survey results).

Keeping and Attracting Talent: Future economic growth in Orangeville will depend to a large extent on the retention and attraction of highly qualified people.

With the high-cost of housing in Toronto and the GTA more generally, Orangeville is a potentially attractive urban option with its somewhat lower prices and better availability for single-family and other more spacious residential accommodation. The pressures of escalating Toronto housing prices have already had an impact as young technology and creative workers are attracted to relatively more affordable hubs such as Hamilton and Waterloo Region. The lack of high-speed, high-capacity broadband in Orangeville is viewed as a handicap in attracting talent, especially younger people. The availability of rental accommodation where newcomers can live initially is also an important consideration.

Except for those who create their own jobs, the availability of desirable jobs and the means to readily connect with them are at the centre of talent attraction initiatives. Involved employers who are hiring are the best talent attraction asset. Factual information on living costs, housing availability, schools and neighbourhoods is essential. Social media and a dedicated website are at the core of most campaigns to attract talent. Extensive use is made of video, including coverage of people who celebrate their decisions to move out of a high cost GTA environment. Priority is given to prospects who have school and family ties to the area. Friends and family will be primary influencers. Orangeville will be attractive to couples with or expecting children, looking for a more affordable family-oriented community. A willingness and ability to assist spouses find employment may be decisive.

Once affordable and reliable high-speed broadband can be assured, Orangeville should also target the attraction of job-creating entrepreneurs, creative artists and professionals, and lone eagles. These individuals are often able to make personal lifestyle choices to base their businesses in attractive places to live such as Orangeville, provided they can access affordable and reliable high-speed broadband.

Indicative talent attraction initiatives that Ontario communities have mounted include Wellington County (Live and Work Wellington);³⁸ Perth County, Stratford and St. Marys (Opportunity Lives Here);³⁹ and Gravenhurst (A Place to Live, Work 365 Days a Year).⁴⁰

Immigrant Attraction: Immigrant attraction is also an important component, especially as the rate of growth of Canadian-born entrants to the workforce plateaus. Immigrant attraction initiatives are founded on community structures – typically collaborative, upper tier led, municipally-supported immigration partnerships – that facilitate settlement and integration of newcomers, including information and programs to match immigrant workers and labour market needs. Informative immigrant websites are a standard feature, some 30 of which are currently linked to the Ontario government’s master website, OntarioImmigration.ca. The local Immigration Partnerships typically benefit from Federal funding (Immigration, Refugees and Citizenship Canada), while their websites are supported by the Ontario government (Ministry of Citizenship and Immigration). The Ontario Ministry of Agriculture, Food and Rural Affairs’ program, Community Immigrant Retention in Rural Ontario (CIRRO), provides a comprehensive toolkit and guidance for communities seeking to develop attraction and retention strategies.

About one-third of immigrants initially land in the Toronto area, drawn at least in part by ethnic community support there. Well-targeted initiatives that capitalize on ethnic media and networks can introduce them to job opportunities which may lead them to move to a more affordable – but not too distant – community. Efforts to attract immigrants can also draw on the connections of the diaspora already living in Orangeville and area.

Commuting Trends: Detailed data from the 2016 Census on labour mobility, including commuting, was released by Statistics Canada in December 2017. In-depth analysis of the data in conjunction with County and Workforce Planning Board colleagues should be pursued to identify occupations where there are notable numbers of Orangeville and area residents who are currently commuting to more distant jobs and who may be attracted to opportunities closer to home. The growth of the population in Dufferin County over the past five years – particularly in Shelburne and Mono – means that consequential new patterns may have emerged. More broadly, trends since the 2011 and earlier Censuses should be examined to determine whether more people are finding work in their own communities or close to home. Workforce and workplace matching initiatives, such as job fairs, can be planned to target promising occupational and skill areas.

Around 10,680 people were working at fixed places of work in Orangeville in 2016 based on Statistics Canada commuting patterns data. This excludes people working at home (815), commuter flows of less than 20 persons, and people with no fixed place of work (such as landscapers) who may work in various parts of the community or in several communities. The actual number of people that worked in

³⁸ See Live and Work Wellington (<https://www.wellington.ca/en/EDTalentAttraction.asp> and <http://www.wellington.ca/en/EDLiveWorkWellington.asp>).

³⁹ See Opportunity Lives Here (<http://opportunityliveshere.ca/>).

⁴⁰ See Gravenhurst: A Place to Live, Work 365 Days a Year (<http://www.gravenhurst365.ca>).

Orangeville in 2016 therefore is likely higher than the 10,680 indicated. This can be compared to an estimated 10,060 people working at fixed places of work in Orangeville in 2011 based on Statistics Canada commuting patterns data for that year, representing an increase of about 6% between 2011 and 2016. Based on the 2016 Census commuting patterns data, Orangeville attracted 5,270 people commuting from outside the community to fixed places of work in Orangeville. Additionally 5,410 of the resident labour force (people living in Orangeville) commuted to fixed places of work in Orangeville.

Of the 5,270 people who resided outside of Orangeville and commuted to jobs at fixed places of work in the community in 2016, about 53% (2,790) were from other communities within Dufferin County. Of the remaining portion, the largest numbers were from Caledon, Brampton, Wellington County, Southgate, New Tecumseth, Adjala-Tosorontio, Guelph, Mississauga, and Toronto (see Exhibit 16).

Exhibit 16: Commuting Flows to Jobs in Orangeville, Fixed Places of Work, 2016					
Community	Number	Community	Number	Community	Number
Orangeville	5,410	Melancthon	140	Grey Highlands	30
Mono	900	New Tecumseth	125	Kitchener	25
Caledon	545	Adjala-Tosorontio	110	Clearview	25
Shelburne	535	Guelph	90	Barrie	25
Amaranth	485	Mississauga	85	Guelph/Eramosa	20
Brampton	395	Toronto	75	Milton	20
Grand Valley	310	Wellington North	65	Cambridge	20
East Garafraxa	275	Halton Hills	40	Woolwich	20
Erin	220	King	35	West Grey	20
Southgate	195	Vaughan	30	Chatsworth	20
Centre Wellington	165	Newmarket	30	Essa	20
Mulmur	145	Hamilton	30		
Source: Statistics Canada - 2016 Census, Catalogue 98-400-X2016325					
Note: only commuting flows of 20+ persons reported					
Note: "Community" refers to place of residence, while "Number" refers to number of people from that community working in Orangeville.					

The employed resident labour force in Orangeville in 2016 was 15,745. The commuting flow data is based on the portion of labour that worked at a usual place of work which was 12,960 people. "A usual place of work" excludes the portion that worked at home (815), worked outside Canada (10) and those with no fixed place of work (1,955). Commuting flow data was reported for 12,740 persons, which is around 98% of the labour force living in Orangeville in 2016 that worked at fixed places of work in 2016.

A high level of resident labour outflow occurred at about 58%. Based on the reported data flows for 2016, only about 42% of the Orangeville resident labour force who worked at usual places of work were employed in the community in 2016 (which is about the same as in 2011, which was 43%). Brampton captured the highest portion of Orangeville labour outflow (1,915), followed by Mississauga (1,370). Toronto and Caledon attracted the next highest outflows at 845 and 820 respectively as shown in Exhibit 17.

Exhibit 17 Commuting Flows of Orangeville Labour Force, Fixed Places of Work, 2016					
Community	Number	Community	Number	Community	Number
Orangeville	5,410	Newmarket	100	Barrie	35
Brampton	1,915	Oakville	95	Richmond Hill	30
Mississauga	1,370	Halton Hills	75	Mulmur	30
Toronto	845	East Garafraxa	65	Kitchener	30
Caledon	820	Markham	55	King	25
Mono	390	Grand Valley	55	Waterloo	25
Vaughan	320	Wellington North	55	Essa	25
Shelburne	165	Milton	55	Oshawa	20
New Tecumseth	165	Centre Wellington	50	East Gwillimbury	20
Amaranth	135	Adjala-Tosorontio	40	Cambridge	20
Guelph	115	Aurora	35		
Erin	115	London	35		

Source: Statistics Canada - 2016 Census, Catalogue 98-400-X2016325
 Note: only commuting flows of 20+ persons reported
 Note: Chart indicates the number of Orangeville residents who work in the identified community.

Post-Secondary Educational Institutions: Two post-secondary education institutions – Georgian and Humber Colleges – have well-established programs and presences in Orangeville.

From a workforce development perspective, the local course offerings by Georgian and Humber are directed principally to office administration and to health, social and community care, including nursing, personal support, early childhood education, and pre-health sciences. Both also deliver provincially-backed programs for adults to obtain academic upgrading for high school graduation. In addition, both Colleges offer contracted corporate training programs that are tailored to the specific needs of individual companies, including in health and safety, employability skills, and manufacturing leadership and supervision.

There is an on-going discussion as to whether there is a business case that would justify the Colleges offering courses in the skilled trades that seem to be the subject of employer recruitment frustration. Demand for specific skills, for entry level workers or more experienced individuals needs to be evaluated. The follow-through to the 2016 Business Retention and Expansion Program, the Job Fair, and the work of the new Dufferin County Workforce Development Committee provide opportunities to examine this – and other workforce issues – more closely.

Within One-and-a-Half Hours of 18 Post-Secondary Institutions: Orangeville is within 125 kilometers or less than an hour-and-a-half drive away from 18 institutions of higher learning – nine of Canada’s top universities⁴¹ and nine Colleges,⁴² including the two colleges that have established Orangeville connections. Total enrollment at the nine universities was nearly 290,000 in 2014, with close to 50,000 graduating with bachelor’s degrees, almost 12,000 with master’s, and nearly 2,000 with PhDs.⁴³ The

⁴¹ University of Toronto, University of Ontario Institute of Technology (UOIT), York University, Ryerson, OCAD University, McMaster, University of Guelph, Wilfrid Laurier and the University of Waterloo.

⁴² Sheridan, Conestoga, Mohawk, Seneca, Centennial, George Brown, Durham, Georgian and Humber.

⁴³ Council of Ontario Universities, “Common University Data Ontario (CUDO)” (<http://cou.on.ca/>). Accessed on July 9, 2107.

enrollment at the nine colleges was over 145,000 in 2015-2016.⁴⁴ Orangeville Economic Development should advertise this reality, press for GO Transit links to institutions that are nearby, and build research, development and talent linkages for local companies,

Educational Attainment: As the 2016 Census data on educational attainment will not be released until November 2017, estimates from Manifold Data Mining have been utilized to provide insight on educational attainment in Orangeville compared to Dufferin County and Ontario (Exhibit 18). Based on the Manifold data, the overall educational attainment level of the population in Orangeville is lower than the Ontario average. As shown in Exhibit 18, close to 65% of the Ontario population aged 25 to 64 attained a post-secondary certificate, diploma or degree, while about 57% of persons in that age cohort in Orangeville attained post-secondary completion. However, the combined Orangeville levels for apprenticeships and college completions were both higher than the provincial averages (39% versus 31%). On the other hand, while close to 29% of the Ontario population aged 25 to 64 in 2011 attained a university certificate, diploma or degree at a bachelor level or higher, only around 15% in this age cohort in Orangeville attained that level of completion.

Exhibit 18 Highest Educational Attainment by Type, Aged 25 – 64 Years			
Highest Educational Attainment	Orangeville	Dufferin	Ontario
No certificate; diploma or degree	11.1%	11.2%	11.1%
High school diploma or equivalent	32.3%	31.1%	24.3%
Post-secondary certificate; diploma or degree	56.7%	57.7%	64.6%
Apprenticeship or trades certificate or diploma	8.9%	10.7%	7.6%
College; CEGEP or other non-university certificate or diploma	29.6%	28.0%	23.8%
University certificate or diploma below bachelor level	3.7%	2.3%	4.4%
University certificate; diploma or degree at bachelor level or above	14.5%	15.8%	28.7%
Bachelor's degree	9.8%	10.4%	17.7%
University certificate; diploma or degree above bachelor level	4.7%	5.4%	11.01%
Total population aged 25-64	15,916	32,373	-
Source: Manifold Data Mining, 2017			

⁴⁴ Ontario Government Website, "College Enrolment" (<https://www.ontario.ca/data/college-enrolment>). Accessed on July 9, 2017

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.5 TALENT AND WORKFORCE DEVELOPMENT				
Strategy Section	Goals, Objectives & Actions	Priority¹	Timing	Lead & Partners²
D.5	<p>GOAL: Have the talents and skills available that match the needs of growing and competitive businesses, and attract investment that will employ available talent</p> <p>OBJECTIVE: Attract, retain, and assist the adaption of a workforce that meets the evolving requirements of existing and new businesses</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Ensure the Dufferin County Workforce Development Committee addresses issues of importance to Orangeville interests, and participate in the funding of research and projects that respond to Orangeville economic development priorities, including for example in-depth analysis of commuting data from the 2016 Census 2. Arrange and/or participate in workforce-workplace matching initiatives, such as job fairs and programs to introduce commuters to job opportunities closer to home 3. Contribute to the development and execution of strategies and programs, including social media, website and video creation efforts, to attract and retain talent, including immigrants 4. Encourage and support public transit solutions that facilitate GTA travel connections for businesses, travel to and from Orangeville workplaces and and trips to and from post-secondary campuses 	A	On-Going	DCED, WPBWWD, OED, SED, DM8, HC & GC
		A	On-Going	OED, DCED, SED, DM8, GC, HC, OMAFRA, DBOT
		B	2018 & On-Going	DCED, OED, SED, DM8, OMAFRA & MCI
		C	2018 & On-Going	OED, DCED, SED, DM8
<p>Funding:</p> <ul style="list-style-type: none"> • Involvement in joint studies with the WPBWWD will require financial contributions to share costs • Projects involving workforce attraction, retention and development may be eligible under OMAFRA’s Rural Economic Development (RED) program, with a County led application likely being preferred. OMAFRA’s program, Community Immigration Retention in Rural Ontario (CIRRO) is also relevant. • Immigration, Refugees and Citizenship Canada supports Immigration Partnerships, typically upper tier led. The Ontario Ministry of Citizenship and Immigration helps fund immigration websites and local programs to attract and integrate new immigrants, again with joint or County-coordinated applications being preferred 				
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • The key product sought in terms of talent and workforce information is compelling, detailed data that identifies attractive and accessible talent pools that align with the interests of new investors or local business seeking to expand • Initiatives to match talent with job openings should each include metrics • Initiatives to attract talent, entrepreneurs, creative professionals and immigrants should each include metrics that set goals and permit measurement of the response 				

NOTES AND ABBREVIATIONS

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

² **Abbreviations**

DBOT = Dufferin Board of Trade

DM8 = Seven Other Dufferin County Municipalities

DCED = Dufferin County Economic Development

GC = Georgian College

HC = Humber College

MCI = Ontario Ministry of Citizenship & Immigration

OED = Orangeville Economic Development

OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs

SED = Shelburne Economic Development

WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin

6. Marketing Orangeville to Attract Investors, Tourists and Talent

In economic development, differentiation of a community's offerings to investors, talent and tourists is the key branding and marketing challenge. It is certainly not one to be taken lightly, as there are literally thousands of municipal and regional economic development agencies vying for attention.

Orangeville's key target market – whether for visitors, talent or investment – is the Greater Toronto Area (GTA). With the development of a collaborative County level external investment attraction program, increased resources will be available in the future for selected, well-targeted initiatives in other markets as well.

The current branding emphasizes Orangeville's lifestyle and quality of life. The Headwaters brand is associated with Orangeville and fits with its profile as a historic, artistic, smaller town with interesting retail, food and festival experiences – a gateway to a more rural, recreational, equestrian and farm-to-consumer environment. Authenticity is a key part of both messages, highlighted by Headwaters Tourism's "Where Ontario Gets Real" campaign, showcasing people and their attachment to community and the land.

The public survey, undertaken in association with the development of the Strategy Update, asked what differentiates the area. The responses from those owning or working at an Orangeville business or organization were heavily weighted towards lifestyle considerations and qualities associated with smaller towns. The top five choices were:

1. Natural setting and amenities;
2. Mix of urban and rural communities;
3. Less crime;
4. Higher quality of life/lifestyle opportunities; and
5. Less congested and room to grow.⁴⁵

Branding and Marketing Review: The branding and marketing strategy for Orangeville Economic Development was developed by outside consultants in 2009, with matching funding coming from what is now known as Global Affairs Canada's Invest Canada-Community Initiatives (ICCI) program. Orangeville's Economic Development and Tourism programs and ambitions have evolved significantly subsequently. A re-examination of the Orangeville economic development branding, including tourism, would be timely in parallel with the development of a new tourism strategy in 2019. This may also be a

⁴⁵ A public survey using Survey Monkey was undertaken between March 13 and April 28 with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

time when the broadband and industrial land deficits may have been or will be about to be addressed, opening opportunities for increased and revised external marketing of Orangeville.

Branding aims to establish a significant and differential presence in the market to attract and retain attention. It is often said that your brand is your promise, letting your targeted audience know what they can expect. Websites and promotional materials and events communicate your brand.

Websites: Websites are central to economic development and tourism marketing. They are the community's window to the world, information repositories for data, and the hubs for social media and e-marketing interaction with prospects. High impact visual material, including videos, has risen in importance.

A dedicated Orangeville economic development website was developed and launched in 2011. Its development was guided by a Website Gap Analysis done in 2010. A substantial redesign of the economic development and tourism websites and content update should be contemplated in 2019 as branding is reviewed and the new tourism strategy is being developed.

The current website provides access to community profile data, quick facts, a searchable database of commercial and industrial real estate listings, a directory of the principal industrial companies, brochures marketing the community, and maps. The website has brief two-page sector profiles for business and professional services, manufacturing, and creative industries, along with a dozen videos highlighting local companies and Orangeville's strengths. More extensive information could be provided on the two local colleges and on neighbouring post-secondary educational institutions, along with resources and sources of assistance that support innovation, research and development, and entrepreneurship and intrapreneurship. A social media outreach program was launched in 2012, utilizing Twitter and Facebook. Video has been incorporated. There are links to key websites, including the BIA and its list of businesses.

Orangeville's Community Profile, providing basic information, is being updated with 2016 Census information. A more comprehensive business directory encompassing all business sectors in Orangeville would be desirable.

The quarterly Orangeville Business Connections Newsletter is distributed to approximately 2,100 local and external contacts, including businesses, economic development partners and the industrial and commercial real estate community. The newsletter contains impactful profiles local companies, major events, economic development activities and featured properties.

Customer Relationship Management (CRM) System: Orangeville Economic Development has a Microsoft Customer Relationship Management (CRM) system to build well categorized, local and external contact lists, to track and pursue investment leads, and to systematically provide timely and attention-getting information to prospects and influencers. With the growth in electronic communication options now available, further investment of time and effort to ensure that this vital resource is up-to-date and actively utilized should be a high priority.

Value Propositions: To fully present its investment potential, Orangeville Economic Development needs to develop in-depth value propositions that document its strengths in selected high priority areas where adequate sites and high-speed broadband are available. Prospective sub-sectors would include food processing and plastics. The creation of value propositions for other sub-sectors may need to wait until

resolution of the broadband and industrial land deficits are addressed. The sector specific profiles currently available on the website serve to highlight some areas of strength. However, to support proactive outreach to prospects, robust in-depth value propositions for a few high priority sectors are needed to make a compelling case.

Advertising: Advertising focused on economic development has targeted site selection oriented publications and the advanced manufacturing (including plastics), creative industries, and the food and beverage sectors. More recently, a modest amount of advertising has been targeted to the GTA, as it has been a prime source of new investment. So long as the availability of suitable sites is limited, most economic development funding will be better deployed elsewhere. As is the case generally, economic development marketing is shifting rapidly from print to electronic media.

Tourism advertising is addressed in Section E.1 which discusses the sector specifically.

D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES				
D.6 MARKETING ORANGEVILLE TO ATTRACT INVESTORS, TOURISTS & TALENT				
Strategy Section	Goals, Objectives & Actions	Priority¹	Timing	Lead & Partners²
D.6	<p>GOAL: Brand and market Orangeville</p> <p>OBJECTIVE: Present a consistent, focused and authentic brand and image for Orangeville that will heighten and enhance its profile as a locale for business, tourism, and the arts and culture</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Develop in-depth value propositions for selected sub-sectors, to be available when suitable sites and broadband access are available 2. Undertake an Orangeville economic development and tourism branding review 3. Renew and update websites, including strengthening content, social media, video and e-marketing capabilities 	B	2018-2019 & On-Going	OED
		B	2018-2019	OED, HT & DCED
		B	2019-2020	OED, HT & DCED
<p>Funding:</p> <ul style="list-style-type: none"> • Funding will be required for the branding review • An increased budget is required for websites, social media and e-marketing • Value propositions would typically be contracted to consultants • Some modest additional staff time or funding is required related to inputs and updating the CRM system, Community Profile and Business Directory 				
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Website, social media, news release, and print, TV and radio metrics 				
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <p>DCED = Dufferin County Economic Development OED = Orangeville Economic Development</p> <p>HT = Headwaters Tourism</p>				

E. Sectors of Focus

Economic development programs focus on tradeable sectors. The tradeable sectors are ones where products and services are sold to external markets or to visiting tourists, thereby bringing incremental revenue into the community that enhances the community's wealth. To succeed in national and international marketplaces, firms must be highly competitive. By contrast, non-tradeable sectors tend to cater largely to local demand from residents. Examples include health, education, retail and construction. Growth or decline of non-tradeable sectors is driven mostly by population changes.

Choosing Sectors of Focus

Orangeville must judiciously focus its efforts. Priority should be given to a limited number of sectors where Orangeville has demonstrable advantages and can truly differentiate its offerings in an exceptionally competitive world. Highly-focused, well-researched and sustained proactive initiatives are required to target and reach prospects and generate the impact needed to win new investment. In-depth value propositions are required.

Choosing sectors of focus does not mean that others are unimportant and can be neglected. Widely varied opportunities exist to retain, expand and attract investment. The Orangeville Economic Development team will continue to field and identify a wide range of leads and must be ready to respond quickly and adequately.

Cross-Cutting Technologies

It is becoming more and more difficult to categorize priorities into traditional, neat sector packages. The pace of technological change continues to accelerate. Businesses are being upended or radically changed by digital- and technology-based disruptions – in ever shorter time spans.

Digitally-Based Cross-Cutting Technologies: The emergence of digitally-based technologies is blurring traditional sector boundaries, as technologies converge and are applied to many products and services. The technologies carry various labels: the Internet of Things (IoT), Big Data Analytics, the Cloud, 3D printing and 3D visualization, Augmented and Virtual Reality, robotics, imaging, GPS, cybersecurity, and Artificial Intelligence (AI) and Machine Learning, among others.

These shifts argue for modified approaches to establishing traditional sector-centred priorities for economic development strategies. Previously, strategies identified priority sectors on which to focus efforts. Each was presented as being distinct, though definitional issues were increasingly evident. The difficulties of packaging priorities into sector packages constantly grow and will continue as Orangeville's Economic Development Strategy Update is pursued.

Workforce Implications: The skill sets that businesses seek reflect this shift. Local and global businesses are now looking for prospective employees who possess digitally-based skill sets, more than they are for people who distinguish themselves by having prior sector experience and traditional sector qualifications.

The Creative Component

Other factors have arisen that are driving the blurring of traditional sector categories. The creative component is one that covers segments such as entertainment and fine arts, communications, design, software and hardware, and data sciences. More generally, it inspires the community through culture by celebrating local talent and encouraging growth in arts and culture, which also helps attract and retain young professionals.

From an economic development perspective, a vibrant creative scene is also a major attractor of tourism – both on its own and in how it enriches the local scene. The creative component also reflects itself in fields such as artisanal and specialty foods and beverages, horticulture and floriculture, architecture, design, software, interactive digital media, gaming and web design.

Government Policy Thrusts

Still other aspects that challenge traditional sector thinking are recent government policy thrusts. Major public policies increasingly cut across multiple sectors and influence a broader swath of situations. Examples are climate change, innovation and major infrastructure investments. Of the public policy initiatives, new policies to address climate change are the most prominent and likely the most consequential in the near-term.

The Ontario's Climate Change Action Plan 2016-2020 creates important opportunities for the private sector and for communities. The Plan calls for retrofitting of buildings, energy audits prior to resale of homes, net-zero building standards, provision of vehicle fueling stations and corridors, community emission reductions, methane-fuelled electricity generation, and support for research and innovation. The opportunities are addressed in Section E.4 – Professional, Engineering, Information Technology and Financial Services.

Need for Flexibility: Given the accelerating speed of change in business and the economy, economic development strategies and plans should acknowledge the need for more flexibility and more frequent reviews and updates. The future will be faster-moving, less predictable, and more turbulent. Adaptability is very important. In order to react to the new opportunities, Orangeville will need to be able to “pivot” when needed. The adage that the only constant is change will be truer than ever.

Goals for Sectors of Focus: The common goal applicable to all sectors of focus is to retain and grow existing talent, businesses and tourism, and to attract qualified talent, new businesses and tourists.

Exhibit 20 Orangeville Sectors of Focus			
SECTOR of FOCUS	RETAIN Existing Firms	NURTURE Existing Capabilities	ATTRACT Additional Investment
Tourism	A	A	B
Creative Industries	A	A	B
Manufacturing	A	A	B
Professional, Engineering, Information Technology and Financial Services	A	A	C
Explanation of Priorities: A = Good prospects are evident that merit well-targeted proactive investment of effort in the near term B = Potential is evident that justifies close attention, opportunistic initiatives and regular review to determine if prospects merit higher or lower priority C = Prospects currently do not justify proactive efforts – only responsive – but may become a B or A priority in time, based on further developments and/or evaluation			

Sectors of Focus – Public Survey Responses: In the public survey associated with the development of Economic Development Strategy Update, Orangeville respondents operating or working at a local business or organization ranked the following choices that were provided as the top five sectors that they felt would drive future economic growth:

1. Agriculture and agri-business;
2. Tourism;
3. Profession, scientific and technical services;
4. Arts, entertainment and recreation services; and
5. Manufacturing.⁴⁶

1. Tourism

Tourism is one of the largest and fastest growing economic sectors globally, with travel revenues exceeding GDP growth in recent years. Recent growth in the Canadian travel sector has strengthened as the recovery has taken hold in Canada and the US following the 2008-2009 recession, and as the lower Canadian dollar has attracted American visitors to Canada and encouraged Canadians to pursue travel options at home.

Tourism represents a significant component of the Orangeville Economic Development program. The sector has grown in importance and there has been a notable evolution in marketing in the sector and in the Headwaters area over the past decade. The linkage of tourism with arts and cultural assets is strengthened by having the Economic Development staff as the cultural sector lead for the Town. Geographically, the focus and draw of Orangeville realistically remains the Greater Toronto Area (GTA) and the Greater Golden Horseshoe (GGH).

⁴⁶ A public survey using Survey Monkey was undertaken covering the area between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

Tourism ranked as the second most important sector to drive future economic growth in the public survey associated with the Strategy Update, as chosen by people who operate or work at a business or organization in Orangeville.⁴⁷

Orangeville is well located at the centre of the Headwaters tourism region, positioning that invites special attention. The Town's principal tourism attractions are its heritage downtown business and restaurant district centred on Broadway; the Art Walk of Tree Sculptures; the Opera House and its resident professional theatre company, Theatre Orangeville; and the Credit Valley Explorer (CVE) scenic excursion train, as well as Island Lake, immediately adjacent to Orangeville. Tourism benefits immensely from festivals and special events including the annual Blues and Jazz Festival. Tourists are predominantly day trippers.

Visitor Services: The Orangeville Visitor Information Centre opened in 2012 and is prominently located at the intersection of Highway 10 and Buena Vista Drive. Operating on a seven-day-a-week schedule (with winter and holiday exceptions), delivery of visitor services is contracted to Theatre Orangeville at an annual cost of \$46,012 (2016).

The Visitor Information Centre fielded just over 7,700 inquiries during 2016, up 13% from 2015. October was the peak month, coming in slightly ahead of July. Walk-ins comprise slightly over 70% of inquiries, with telephone queries outnumbering email by two-to-one for the remainder. Travellers from southwestern Ontario account for half of the inquiries, with 31% from Orangeville and 12% from central, northern and eastern Ontario. The shares for the rest of Canada (179 inquiries), the US (74) and international (121) are smaller, indicating that Orangeville and area is not widely known as an attraction outside of Ontario.

The range of the requests to the Visitor Information Centre is broad, reflecting strong interest in arts and culture, the Credit Valley Explorer, tree sculptures, and the Island Lake Conservation Area (Exhibit 21).

The development of an updated tourism strategy in 2020 will provide an opportunity to review the Visitor Information Centre model and operation and, among other aspects, to consider whether collaboration with other area jurisdictions is desired or advised.

⁴⁷ A public survey using Survey Monkey was undertaken covering the area between March 13 and April 28, with 50 responses from people who operate or work at a business or organization in Orangeville. The survey was open to the public so the sample is not statistically random or representative. See Appendix A for a summary of the survey results.

Exhibit 21 Orangeville Tourism Visitor Information Centre 2016 Requests by Category	
Nature of Request	Number
Directions and Maps	3,127
Arts and Culture	1,442
Credit Valley Explorer (Excursion Train)	1,270
Community and Other	1,165
Things to Do	1,146
Tree Sculptures	1,121
Island Lake Conservation Area	1,078
Dining	664
Trail and Hiking Information	490
Shopping	422
Accommodation	144
Heritage Historical Sites	125
TOTAL	12,194
Source: Town of Orangeville Economic Development	
Note: This enumerates requests, not the number of inquiries	

Tourism Website and Social Media: Since 2012, Orangeville Economic Development has had a stand-alone tourism website (<http://orangevilletourism.ca/>). The site attracted 161,222 page views and 121,444 unique page views in 2016, compared to 191,379 and 142,200 in 2015, with the top pages being the Credit Valley Explorer and festivals and events. The audience – 12,554 – is overwhelmingly Canadian – almost 94%.

Orangeville Economic Development is active on social media in support of tourism and arts and culture events and attractions. In 2016, a mobile web app was created for the Art Walk of Tree Sculptures that provides both written and verbal information on each sculpture. Social media features more and more prominently as a source of information, recommendations and shared experiences. Further enhancements and targeting should be explored and developed, especially given the richness of Orangeville’s history, historical properties, arts and culture events and opportunities for walkable tours.

Credit Valley Explorer: The Town’s acquisition of the Orangeville-Brampton Railway in 2000, principally to sustain a twice weekly freight service that is vital to certain Orangeville manufacturers, opened the way for the establishment of a scenic excursion train – the Credit Valley Explorer (CVE) – that starts and ends in Orangeville. This is an important destination attraction upon which Orangeville can further capitalize. A new train station on Town Line was opened in 2007. The Explorer’s trip winds through the picturesque Niagara Escarpment, and is noted for a curved, 349-metre long trestle over the Credit River near Belfountain in Caledon. Attracting about 14,000 riders annually on 65 to 80 trips (including charters), the most popular tours – accounting for about 80% of the passengers – are the Santa Train in November and December and the Scenic Tours in September and October. The excursion train is operated under contract to the same group, CANDO, that operates the twice weekly freight service.

Orangeville Economic Development staff receive detailed performance data on the Credit Valley Explorer (CVE) on an ongoing basis with a view to enhancing its impact, improving the passenger experience, and strengthening its viability. There would be merit in engaging expert professional advice to evaluate the operations, consider options, and develop a medium-term business plan that draws on the relevant experience of other comparable operations.

Group Tours: Group bus tours are an important source of bookings for the Credit Valley Explorer, accounting for well over half of all passengers. Theatre Orangeville also targets bus tours as a source of patrons. With a view to lengthening stays, conscious efforts are made to ensure that bus tour operators and the groups they bring are made aware of Orangeville’s other attractions. Further collaborative initiatives, including those around major festivals or events, could be productive. Membership in the Ontario Motor Coach Association (OMCA) and coordinated participation in its events could be productive.

Sports Tourism: Sports tourism is an attractive market for many Ontario destinations. The market includes local and regional minor and amateur tournaments in a vast range of sports, along with provincial, national and international events. The availability of local facilities are the fundamental drivers, with benefits flowing principally to hotels, motels, restaurants, fast-food providers, and retailers. Orangeville has focused on this market, and achieved a degree of success. Lacrosse, given its popularity locally, is an example. Orangeville Economic Development focuses on distributing tourism information during tournaments. A sports tourism workshop was mounted, brochures have been developed, and Council established a reserve to support bids and hosting opportunities. The principal constraint in terms of potential local benefit is the limited amount of local accommodation, meaning that many teams need to commute to and from hotels and motels elsewhere, limiting the economic impact potential of the sports tourism sector.

Visitor Guides and Advertising: Launched in 2010, a key publication for Orangeville is the annual Visitor Guide, 18,000 copies of which are distributed by a contractor in selected locations throughout the GTA and across southwestern Ontario, including key hubs such as Union Station and Toronto Pearson International Airport. In addition, Orangeville takes advertisements in other widely distributed Ontario tourism guides, such as the Explore Ontario map (100,000 copies), Etractions Exploreboard marketing platform, the Festivals and Events Ontario Guide, Summer Fun Guide (250,000 copies distributed in ONroute Service Centres), and Niagara Escarpment Views. Tourism videos featuring Orangeville attractions were created in 2017, featuring the Farmers’ Market, Taste of Orangeville, Savour the Flavours, Island Lake and the Rotary Ribfest. These initiatives are featured on the website and introduced weekly through social media posts.

Way-finding Signage: As of 2016, Orangeville had installed 21 municipal way-finding signs to direct people to key destinations, while also emphasizing the Town’s branding. Developing the signage was a recommendation of the 2010 Tourism Development and Marketing Plan. The Town’s total investment to date of \$55,000 has leveraged additional Orangeville BIA and Central Counties Tourism Association funding for a total investment of \$109,750.

Food Services Sector: Employment statistics bear out Orangeville’s strong reputation as a dining location. The number of jobs in Orangeville’s accommodation and food services sector in 2016 was 1,526, with a growth of 271 jobs or 22% from 2011 (compared to 16% growth in Ontario). The sector location quotient is 1.40. The majority of jobs are in the food services and drinking establishments with 1,437 jobs in 2016, and a growth of 230 jobs or 19% from 2011 and a location quotient of 1.58.

Headwaters Tourism: Headwaters Tourism – the destination marketing organization for Dufferin County, Caledon and Erin – packages the area’s significant tourism products, clusters and experiences; creates supportive industry partnerships; and attracts visitors through its branding and marketing of the

region externally. Headwaters Tourism is also the main partner and interlocutor for the region with the Ontario and Federal government agencies and programs.

Headwaters Tourism has transformed significantly over the past decade. Created out of collaborative, but underfunded efforts by the region’s artistic and craft sector to attract interest from Toronto, the organization has evolved since 2012 into an award-winning tourism destination marketing organization.

Recently, Headwaters Tourism has differentiated the region with its “Where Ontario Gets Real” campaign focusing on the area’s people and their connections to appealing communities, the land and local experiences. The five segments on which Headwaters Tourism focuses are:

- Horse country;
- Fresh and local;
- Arts and Heritage;
- Fun and festivals; and
- Nature.

These segments align well with Orangeville’s offerings.

Dufferin County – of which Orangeville represents a significant share – accounts for an estimated 45% of the tourism in the Headwaters area, or over 390,000 visitors and \$30 million in visitor spending annually. The tourism sector makes an annual contribution to municipal tax revenues in Dufferin County estimated at \$788,400.⁴⁸

Funding for Headwaters Tourism: The principal funding for Headwaters Tourism is provided by Dufferin County, and the Towns of Caledon and Erin, calculated on a per capital basis, with the current agreements covering the four year period from 2016 to 2019. Dufferin County’s annual contribution of \$86,459 in 2017 rises to \$89,872 in 2019. Mono and Shelburne have both chosen to contribute per capita amounts and have Board representation. An Orangeville Economic Development staff member joined the Headwaters Tourism Board of Directors as an ex-officio member in 2017.

Beyond the municipal support totalling \$231,000 in 2017, Headwaters Tourism also gets relatively modest additional program revenue from local tourism operators under its “Leading with the Best” marketing partnership program. Virtually all the Headwaters Tourism marketing programs, including its annual Visitors Guide, are funded on a breakeven basis each year with specific contributions from advertising and program partners. Headwaters Tourism is a lean operation which has been providing value to its stakeholders.

Municipal Role in Tourism: As a complement to the Headwaters Tourism role, Orangeville has the responsibility of working with its local businesses and BIA, to identify, develop and inventory the tourism assets in its jurisdiction, to build the capacity and readiness of businesses to cater to visitors, to address infrastructure and general needs (including signage and public facilities), and to service general visitor inquiries. In addition, the attraction of tourism-related investment is a responsibility of the municipality, though Headwaters Tourism would cooperate by sharing the market data and information to which it has access.

⁴⁸ Headwaters Tourism Presentation to Dufferin County General Government Services Committee, “Dufferin County: Investing in regional tourism,” January 2017.

Tourism Strategy: Municipal tourism strategies provide an effective approach to defining the direction for municipal activities, and are welcomed by Headwaters Tourism as a basis for ensuring complementarity and collaboration. The Town’s 2010 Tourism Development and Marketing Plan⁴⁹ has been embraced by Central Counties Tourism and has assisted the Town of Orangeville in securing additional funding to support various initiatives. There have been pivotal changes and developments since the report was prepared, and virtually all the implementable recommendations have been acted upon. A new tourism strategy would be timely. The Dufferin County Economic Development Strategic Plan envisages the development of a County tourism strategy, possibly as early as in 2019. Depending on how this evolves, there may be an opportunity for Orangeville to participate in or develop a strategy in parallel to a County initiative.

The respective responsibilities and relationships are outlined more fully in Exhibit 22, prepared by Headwaters Tourism.

**Exhibit 22
TOURISM SECTOR ROLES**



Source: Headwaters Tourism

Attracting Investment in Accommodation: Orangeville has limited facilities providing overnight accommodation. The potential market is seen as being limited because of its close proximity to the GTA. Orangeville Economic Development has indicated that additional hotel investment would be welcome. There is a prime location in the westerly portion of the Town that is currently designated and zoned to permit hotel use. However, a planning application to further the development has yet to be received. Development charges were waived to encourage investment in the Best Western Hotel. The Investment Development Office in the Ontario Ministry of Tourism, Sport and Culture can be a potential partner in developing outreach to prospective investors on signature projects for which strong business cases have been developed.

Ensuring a High Quality Visitor Experience: Improving the quality of the visitor experience through hospitality training and management and workforce development is also important to the further

⁴⁹ Mitchell Westlake, “Tourism Development and Marketing Plan,” January 2010.

growth of Orangeville tourism. Orangeville Economic Development can be a catalyst in encouraging and supporting industry and BIA-led programs to develop service standards that assure world-class experiences for visitors and ensure those who engage visitors locally are brand ambassadors. Tourism is the largest employer of youth in Ontario, with over a third of employees aged 15 to 24 years.⁵⁰

Post-Secondary Connections: Georgian College has a full-time Recreation and Leisure Studies program, based in Barrie, with a curriculum covering community recreation, outdoor adventure, arts, culture, heritage, leisure, fitness, retirement activities, life enrichment in long term care, adaptive-therapeutic recreation, facility operations, programming and event planning. Business administration fundamentals are incorporated into courses. Experiential learning opportunities include a paid co-op work semester, field trips, and participating in several events or programs working with children to seniors. With the close association that Georgian College has with Orangeville, there may potential for tie-ins with the program, at a minimum including the co-op semester assignments and field trips.

E. SECTORS OF FOCUS				
E.1 TOURISM				
Strategy Section	Objectives & Actions	Priority¹	Timing	Lead & Partners²
E.1	<p>OBJECTIVE: Encourage expanded and enhanced tourism offerings and capacity, and delivery of memorable experiences to increased numbers of visitors to Orangeville</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Continue to build the strong marketing partnership with Headwaters Tourism, ensuring that Orangeville tourism partners, assets, initiatives, and events are featured and involved 2. Engage expert advice to evaluate and develop a business plan for the Credit Valley Explorer with a view to strengthening its viability and enhancing its offering, including learnings from other comparable operations 3. Continue to expand way-finding signage 4. Expand information available to visitors, especially electronically via social media and through cross-promotion of attractions such as the Credit Valley Explorer, Theatre Orangeville, Island Lake, shops and restaurants, and festivals 	A	On-Going	OED, HT, TO, DCED, BIA
		A	2018	OED
		B	On-Going	OED, BIA & CCT
		B	On-Going	OED, TO & BIA

⁵⁰ Ontario Ministry of Tourism, Culture and Sport, "Growing Tourism Together: A Strategic Framework for Tourism in Ontario," 2016 (http://www.mtc.gov.on.ca/en/tourism/pdf/strategic_framework.pdf). Accessed on August 7, 2017.

Strategy Section	Objectives & Actions	Priority ¹	Timing	Lead & Partners ²
E.1 Con't	5. Continue to coordinate increased focus on attracting bus tours, especially centred on the Credit Valley Explorer and Theatre Orangeville	A	2018 & On-Going	OED, TO & HT
	6. Review Visitor Information Centre operations and opportunities for collaboration with municipalities as appropriate	B	2019	OED, TO, BIA, DCED & DM8
	7. Support training for the hospitality workforce and operators to enhance the Orangeville visitor experience	B	2018 & On-Going	OED & DCED
	8. Attract additional accommodation investment through marketing of the existing designated and zoned site	C	On-Going	OED & MTCS
	9. Continue to target sports tourism that aligns with availability of accommodation in Orangeville	C	On-Going	OED
	10. Continue to seek and evaluate opportunities to build new and expanded assets that strengthen cultural tourism	B	On-Going	OED, OACC, DAC, TO & BIA
	11. Develop a new multi-year Orangeville tourism strategy to commerce in 2020	B	2020	OED, HT, DCED & BIA

Funding:

- Tourism promotion often involves extensive partnering and matching funding, including with local travel trade partners
- On-going funding is required for way-finding signage (which has previously benefited from contributions from the Orangeville BIA and Central Counties Tourism)
- Modest funding will be required for the tour bus initiative, including membership in the Ontario Motor Coach Association
- Funding will be required for the Credit Valley Explorer business plan and for the tourism strategy development

Performance Metrics:

- Reliable tourism statistics are generally not available at the municipal level other than for specific attractions and visitor servicing functions. The latter statistics are therefore the main metrics to be monitored annually.

NOTES AND ABBREVIATIONS

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

² **Abbreviations**

BIA = Orangeville Business Improvement Area

CCT = Central Counties Tourism

DAC = Dufferin Arts Council

DM8 = Seven Other Dufferin County Municipalities

DCED = Dufferin County Economic Development

HT = Headwaters Tourism

MTCS = Ontario Ministry of Tourism, Culture & Sport

OACC = Orangeville Arts and Culture Committee

OED = Orangeville Economic Development

TO = Theatre Orangeville

2. Creative Industries

The Orangeville creative sector has been a significant part of the Town’s identity. The arts and culture offerings are intertwined with tourism and provide signature attractions for travellers. The presence of high quality arts and culture is also a key factor in attracting and retaining talent, including youth. Recognizing the importance of arts and culture and their linkages with the Town’s economic development, leadership and responsibility for culture at the Town of Orangeville is a grouped with economic development and tourism and is part of the portfolio of the Town’s Business, Tourism and Culture Coordinator.

Orangeville’s Cultural Plan: The centrality of culture and its socio-economic contributions were highlighted in the March 2014 Municipal Cultural Plan, “Orangeville’s Cultural Advantage,” which offered detailed recommendations around the themes of leading and connecting, capacity and place, identity and innovation, and creative growth and investment.⁵¹ The report praised Orangeville’s strong small-town spirit, beautiful natural and built heritage, the presence of civic leadership, Orangeville’s proven cultural anchors, support of local businesses, and the growing success of culinary-related events. The challenges, the report indicated, were enhancing coordination and collaboration among arts and cultural stakeholders; increasing the arts and cultural focus in municipal activities; finding appropriate, accessible and affordable venues and spaces; developing an identifiable “brand” and value proposition; and achieving the critical mass of cultural activities that will draw visitors more frequently and for longer stays.

The Cultural Plan has provided focus for varied actions. The progress in implementation is being tracked by the Town’s Arts and Culture Committee and Orangeville Economic Development. An electronic Arts and Culture newsletter was launched in 2014. Successes have included Canada 150 Community infrastructure funding for renovations to the Mill Street Public Library; transforming the Mayor’s Breakfast for the Arts into an evening celebration of the arts; attracting Business for the Art’s artsVest training, mentoring and matching funding support (\$23,000) for five local arts and culture organizations that raised a further \$61,000; focussing on “Business of the Arts” as the topic at the 2014 Bridges to Better Business event; reworking a part-time Town position to become the Business, Tourism and Culture Coordinator; strengthened social networking and the launch of the cultural map on the Town’s website in 2014; and contributing to the realization of the construction of a covered outdoor floating stage at Island Lake. A “Summer Attraction” strategy was piloted in 2017 based on the results of the 2016 survey which identified live music and culinary arts as high-demand areas for focus. A notable initiative was the Ontario government’s selection in 2016 of the Orangeville and Area Small Business Enterprise Centre to offer a pilot training and mentorship program targeting entrepreneurs in the arts and cultural sector. Among the 21 participants, 16 detailed business plans resulted and grants of \$50,000 were distributed. The success of this initiative should encourage further initiatives to support entrepreneurship in arts, culture, and the creative industries.

The Cultural Plan recommended undertaking a feasibility study for an Orangeville Cultural Centre with the hope of building the Centre within ten years (i.e. by 2024). Estimated costs of such a feasibility study have been discussed but potential funding sources need further evaluation.

⁵¹ “Orangeville’s Cultural Advantage: Municipal Cultural Plan with Appendices,” March 2014.

A five-year update or renewal of the Municipal Culture Plan should be considered for 2019 to reassess the way forward and to sustain momentum. Wider county collaborations could strengthen Orangeville's role as an anchor for the arts scene in the region.

Best Practices in Growing Creative Clusters: As its critical mass, quality and impact of events grows, Orangeville has reason to aspire to be among the southern Ontario communities that the public readily identifies as a leading venue for arts and culture, along with established centres such as Stratford, Niagara-on-the-Lake, Drayton and Guelph. To strengthen its creative cluster, Orangeville should be alert to best practices in these other municipalities. One avenue to consider is membership in the Creative City Network of Canada. In the US, a highly regarded, national, state-of-the-art program is the Pittsburgh Technology Council's Creative Industries Network. Economies could be achieved if a membership were taken out in the name of the County. There may also be opportunities to arrange workshops that would discuss best practices in other communities.

Town of Orangeville Support for Arts and Cultural Enterprise: The Town of Orangeville offers direct support to cultural activities. Contributions in 2016 were made to:

- Theatre Orangeville:
 - \$15,000 for its contribution towards cultural and economic development in the Town; and
 - \$20,000 for a portion of the fixed costs associated with the responsibilities of managing the Opera House;
- Orangeville Rotary Ribfest: \$7,500; and
- Dufferin Cultural Resource Circle: \$2,000.

Creative Sector Jobs Growth: Orangeville has seen significant increases in job categories closely related to the creative sector. The arts, entertainment and recreation services sector accounted for 230 jobs in 2016, with a growth of 57 jobs or 33% from 2011 (compared to a 12% job growth in Ontario). Reported separately are the 188 jobs in the motion picture and sound recording industries.

Orangeville Economic Development has not yet put a concerted focus on the attraction of film and video productions, though it is playing a helpful, mainly responsive role and beginning to develop policies regarding support for film makers. Sporadic inquiries are received and serviced by the Town, often relating to areas surrounding Orangeville. In April and May 2017, portions of eight episodes of a TV thriller aimed at millennials were filmed downtown and elsewhere.

Major film and video productions usually want locations where they can readily access ultra-high-speed broadband fibre to permit overnight editing in central locations. This is an aspect that should be considered as Orangeville looks to address current deficiencies in high-speed broadband access.

When high-speed optical broadband fibre is available, Orangeville Economic Development should take the initiative to formally designate a part-time film and video production position to play a proactive role to promote Orangeville, scout out and provide information on filming locations, and facilitate municipal arrangements for crews, including road closures and the provision of parking.

Ontario Film and Television Tax Credit (OFTTC): Orangeville is fortuitously situated just outside the Greater Toronto Area (GTA), meaning that productions that are undertaken can benefit from enhanced

refundable tax credits under the Ontario Film and Television Tax Credit (OFTTC). The OFTTC is generally calculated as 35% of the eligible Ontario labour expenditures incurred by a qualifying production company with respect to an eligible Ontario production. Productions that are shot in Ontario entirely outside of the Greater Toronto Area (GTA), or that have at least five location days in Ontario (or in the case of a television series, the number of location days is at least equal to the number of episodes), and at least 85% of the location days in Ontario are outside the GTA, receive a 10% bonus on all Ontario labour expenditures incurred for the production. Wholly animated productions which create at least 85% of key animation in Ontario outside of the GTA qualify for the regional bonus.⁵²

Post-Secondary Linkages: Humber College has a School of Creative and Performing Arts which has a strong focus on arts and culture management, including offering a graduate certificate program in Arts Administration and Cultural Management. Given the local presence of Humber and the growth of Orangeville’s arts and culture scene, opportunities should be explored for mutually beneficial Orangeville linkages that could be developed with the School, including co-op assignments, case studies, and seminars.

E. SECTORS OF FOCUS				
E.2 CREATIVE INDUSTRIES				
Strategy Section	Objectives & Actions	Priority¹	Timing	Lead & Partners²
E.2	<p>OBJECTIVE: Support growth, greater recognition, and external audience attraction for Orangeville’s arts and culture</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Continue to pursue recommendations in the 2014 Municipal Culture Plan and consider the benefits of a five-year update or renewal in 2019 to sustain momentum 2. Celebrate successes with the Orangeville community and draw external attention to the growing critical mass and excellence of Orangeville’s arts and entertainment sector 3. Benchmark Orangeville’s creative sector offerings and evolution against other similar communities, whether through visits or membership in an entity such as the Creative City Network of Canada 4. Establish film and video attraction programs and policies designed to encourage filming and productions in Orangeville and surrounding region 	A	On-Going	OED & OACC
		B	On-Going	OED, OACC, TO, BIA & DAC
		B	2018 & On-Going	OED, OACC, DCED, TO, BIA & DAC
		C	2019 & On-Going	OED

⁵² Ontario Media Development Corp. website (http://www.omdc.on.ca/film_and_tv/tax_credits/ofttc.htm). Accessed on April 15, 2017.

Principal Manufacturing Sub-Sectors: The largest manufacturing sub-sector in Orangeville is plastics products at 564 jobs in 2016, representing employment growth of 12.4% from 2011 and a location quotient of 8.00. Dairy products accounted for 144 jobs in 2016, with a 7.02 location quotient, and will grow further as a result of new investment. Machinery manufacturing also accounts for a relatively high number of jobs at 269, and had significant jobs growth between 2011 and 2016 at about 76% compared to 14% growth in Ontario, and a location quotient of 2.25. Commercial furniture products also occupy a growing niche.

Plastics Cluster: Comprising about a quarter of all manufacturing jobs in Orangeville, the plastics cluster merits particular attention to ensure its retention and growth and to identify supply chain and other related opportunities for new investment. The Orangeville cluster is a subset of a larger cluster in the region. Orangeville Economic Development has already been supportive of local management in at least one expansion by a foreign-owned firm. The Orangeville Brampton Railway is important to several firms and its viability would be strengthened by incremental freight.

Food Processing and Beverages: Recent growth in Orangeville’s manufacturing sector has centred on food processing. In 2017, Florentina Foods, a processor of frozen entrees and other food products for retail and food service clients, committed to a new plant. Earlier, Quality Cheese chose Orangeville for a new facility.

Orangeville is well located to attract additional food and beverage investment. Pending the availability of further serviced industrial land, opportunities may lie with emerging specialty processing facilities that capitalize on local production and that can benefit from the food-to-fork and other trends that attract travellers to the Headwaters area. The explosive growth of craft brewing, micro-distilleries, hard cider producers and wineries – all of which have strong links to tourism – are important entrepreneurial niches. There may also be potential for Orangeville and Dufferin County to establish linkages with Toronto area food incubators by providing spaces in Orangeville with shared kitchen and freezer facilities where early-stage graduates can accelerate the growth of their business, and move closer to sources of supply.

A Bridges to Better Business event, “Food Entrepreneurship: From Concept to Kitchen to Commercialization,” is slated for November 2017 as a follow-through to a successful similar 2015 event.

In May 2017, the Town of Orangeville indicated its support for the Headwaters Food Charter and Action Plan, presented by the Headwaters Food and Farming Alliance (HFFA), and focused on creating a healthy and sustainable food system by outlining values, principles, and priorities for food and farming. The HFFA annually publishes the “Headwaters Fresh Food Guide” which highlights farm-gate and farm market sources of food. Economic Development staff actively participate in the HFFA.

Technological Change and Productivity: The competitiveness of the manufacturing operations in Orangeville that survived the 2008-2009 recession was severely tested. The survey associated with the 2016 Business Retention and Expansion program highlighted several encouraging indicators about the current overall health of the Orangeville manufacturing sector:

- A majority of the manufacturers (52%) stated that their primary product was in the emerging or growing stage of its life cycle;
- Sixty-nine per cent of businesses indicated an increase in productivity;

- Eighty-six per cent advised that they have plans to modernize their facilities or equipment; and
- Seventy-four per cent reported that they made a major investment in the last two years.

In the survey, 40% identified their industry as growing, while 42% categorized it as stable. A small percentage (8.6%) indicated a decline.

The Centre for Business and Economic Development (CBED), the FedDev Ontario affiliated Canadian Futures Development Corporation (CFDC), based in Collingwood has been a source of lending support for Orangeville’s manufacturing sector. Economic Development staff represents the Dufferin community on the CBED funding committee and on its Board of Directors.

The BR+E report on the manufacturing sector calls identified numerous actions that are being pursued.

Manufacturing Research, Innovation and Competitiveness: Rapid technological change and competitive pressures continue to apply pressure to manufacturers. Successful firms will benefit from the additional edge that can be gained from accessing innovation and research assistance and funding that is available through links with post-secondary educational institutions and from Federally and Provincially supported organizations, such as Ontario Centres of Excellence (OCE Inc), the National Research Council’s Industrial Research Assistance Program (IRAP-NRC), Centre for Business and Economic Development (CFDC), and the Ontario Regional Innovation Centre with responsibility for Orangeville and Dufferin County, Innovation Guelph. Many Orangeville manufacturers could likely benefit from linkages with Sheridan College’s nearby Davis Campus in Brampton which houses the Centre for Advanced Manufacturing and Design Technologies (CAMDT), while the food processing sector could profit from ties to the University of Guelph and possibly as well from college linkages with Georgian College, which previously partnered in 2015 food entrepreneurship program, and with Conestoga College’s Institute of Food Processing Technology. Looking to the future, Humber College indicated in 2016 that it was proceeding with a Centre for Technology and Innovation on its North Campus as an idea accelerator with programs focused on sustainable building practices, automated manufacturing and human-centred technology-enabled solutions.

Workforce Planning, Employee Training and Attraction: A central concern of Orangeville’s manufacturing community, as reflected in the report on the 2016 Business Retention and Expansion survey, is workforce planning, employee training and attraction. This was the area of assistance that drew the most notable response. Separately, a significant majority of respondents (82%) rated the availability of qualified workers as “poor to fair,” as they did their ability to attract new employees (69%). Humber and Georgian Colleges have indicated that they have found that company training needs can best be met through contracted individual corporate programs designed to meet particular needs.

EDCO Advanced Manufacturing Network: Orangeville’s involvement in manufacturing should be seen in the context of the broader southern Ontario manufacturing scene and its many sub-sectors. In this connection, the Economic Developers Council of Ontario (EDCO) launched an Advanced Manufacturing Network project in 2016 to allow economic development groups to collaborate and share information. The Network is being developed on a platform similar to the one used for the Food and Farming Alliance’s Agri-Food Asset Mapping Project. The project inventories the manufacturing assets and tracks supply chains within the sub-sectors mapping strengths, synergies and gaps to be identified. In light of the relative strength of its manufacturing sector and its ownership of the railway, there could be value for Orangeville. The benefits and costs should be evaluated. The return on investment could be

heightened if a membership is taken out by the County (or in its name) and involvement and information shared with Shelburne, other municipalities and the County.

Bringing Manufacturers Together: As a follow-through to the 2016 Business Retention and Expansion meetings with manufacturers, one of the proposed actions is the development of periodic manufacturing summits to provide educational opportunities and networking activities specific to the sector. This could align with the Dufferin Board of Trade’s initiative to re-establish a Dufferin County manufacturing group, to fill a gap left when the Dufferin County Manufacturers Association discontinued operations. Collaboration with Shelburne and the County would heighten the impact of the event.

E. SECTORS OF FOCUS				
E.3 MANUFACTURING				
Strategy Section	Objectives & Actions	Priority¹	Timing	Lead & Partners²
E.3	<p>OBJECTIVE: Support business retention, growth and new investment attraction in Orangeville’s manufacturing sector</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Pursue the action plan developed subsequent to the 2015-2016 manufacturing sector BR+E program, including the convening of a manufacturing summit, addressing workforce shortages, and support for programs that respond to identified interests and needs of manufacturers 2. Evaluate the feasibility of partnerships with Toronto food and beverage incubators and the development of a shared food and beverage acceleration space in Orangeville to which some of the start-ups could graduate and locate 3. Support further events centred on food and beverage sector entrepreneurship, innovation, start-ups, and scaling, based on County-wide collaboration that includes the agriculture sector’s supply capabilities 4. Assist manufacturers to access research and innovation resources, including at nearby post-secondary institutions 5. Evaluate participation in the Economic Developers Council of Ontario’s Advanced Manufacturing Network. 	A	On-Going	OED, WPBWWD & DBOT
		A	2017-2018	OED, DCED, OMAFRA & DFA
		A	On-Going	OED, DCED, OMAFRA, GC & DFA
		B	2018 & On-Going	OED, DCED, SED, HC, GC, SC, UG, OCE & IRAP
		C	2017	OED, DCED & SED

<p>Funding:</p> <ul style="list-style-type: none"> • If a prima facie case exists for a food and beverage incubator in Orangeville, a study to develop a business case that would attract funding would likely be the next step • The cost that would be incurred in joining the EDCO Advanced Manufacturing Network would be a key aspect of the evaluation 												
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR+E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where OED has influenced outcomes) 												
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <table> <tr> <td>DBOT = Dufferin Board of Trade</td> <td>OED = Orangeville Economic Development</td> </tr> <tr> <td>DCED = Dufferin County Economic Development</td> <td>OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs</td> </tr> <tr> <td>DFA = Dufferin Federation of Agriculture</td> <td>SC = Sheridan College, Brampton Campus</td> </tr> <tr> <td>GC = Georgian College</td> <td>SED = Shelburne Economic Development</td> </tr> <tr> <td>HC = Humber College</td> <td>UG = University of Guelph</td> </tr> <tr> <td>IRAP = Industrial Research Assistance Program – NRC</td> <td>WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin</td> </tr> </table>	DBOT = Dufferin Board of Trade	OED = Orangeville Economic Development	DCED = Dufferin County Economic Development	OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs	DFA = Dufferin Federation of Agriculture	SC = Sheridan College, Brampton Campus	GC = Georgian College	SED = Shelburne Economic Development	HC = Humber College	UG = University of Guelph	IRAP = Industrial Research Assistance Program – NRC	WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin
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HC = Humber College	UG = University of Guelph											
IRAP = Industrial Research Assistance Program – NRC	WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin											

4. Professional, Engineering, Information Technology and Financial Services

The shift in the economy from manufacturing to services jobs puts the focus on Orangeville as a potential location for professional services businesses such as higher skilled engineering, environmental, architectural, finance, technical, and scientific services. Notable local firms include R.J. Burnside and Millennium One. As professional services firms invariably depend on access to high-speed optical fibre, its limited availability and the high cost of new broadband connections will severely limit interest in investment and expansion until it is addressed.

Orangeville has seen encouraging growth from 2011 to 2016 in two principal professional, scientific and technical services sub-sectors. The levels of employment, the numbers of companies, and concentration of jobs in each are still relatively modest, nonetheless. Engineering, architectural and related services accounted for 229 jobs in 2016, an increase of 47 jobs since 2011 or 26%. The concentration of employment in Orangeville in this segment was about average for Ontario. Another sub-sector, computer systems design and related services, accounted for 219 jobs in 2016, up 20% from 2011.⁵⁴

These two segments account for a large portion of the employment in Orangeville in professional, scientific and technical services. Orangeville has 92 enterprise locations in the category as a whole, excluding Indeterminate operations, according to Canada Business Patterns data.⁵⁵ About two-thirds of the operations (apart from Indeterminate) have fewer than five employees. The largest employer fell within the 100 to 199 employee size bracket, while three other locations had 20 to 49 employees and eleven employed 10 to 19 people.

⁵⁴ See Appendix B, Exhibit 5.

⁵⁵ The indeterminate category includes locations with no employees or only contracted workers. According to Canadian Business Patterns data for June 2016, as reported by EMSI Q3 2016 Dataset (Version 2016.3), there were 162 indeterminate operations in the professional, scientific and technical services category in Orangeville. See Appendix B, Exhibit 6.

In addition, in the separately reported information and cultural industries sector, data processing, hosting and related services operations in Orangeville accounted for 274 jobs in 2016, a jump of 55% since 2011. The concentration of jobs in Orangeville in this segment is much higher than the provincial average. There are only five locations in Orangeville with 5 or more employees and none has more than 50 employees.

Orangeville Economic Development has taken initiatives in the past to connect with the engineering community. To support local professional firms, two Engineering Connection events were held in 2011 in collaboration with the Workforce Planning Board of Waterloo, Wellington and Dufferin. In addition, Engineering Month has been proclaimed annually.

Potential Additional Service Sector Segments: There are other segments within the professional, scientific and technical services sector that merit attention if Orangeville can demonstrate that it has the affordable high-speed broadband that is required, and that a company establishing an operation will be able to access qualified talent. These include segments where the jobs demand highly educated and skilled staff – especially, for example, consulting engineering, construction, environmental, architecture, design, financial services, communications technology, software, and human resources, payroll and accounting. Careful analysis is needed as to the professional service sub-sectors where Orangeville can advance its strongest cases. Many operations are staffed with professionals who do not need to have frequent face-to-face personal interaction with clients and who welcome the opportunity to work in more affordable locations that offer lifestyle advantages. The experience of the existing operations should be carefully monitored and steps taken to ensure their expansion, as the success of the incumbents is a critical advertisement to others. Moderate-sized regional and satellite operations for GTA-based companies represent the best prospects initially. Outside of the downtown Toronto core, larger operations have favoured locations such as Markham, Mississauga, Oakville and Burlington which provide ready access to larger talent pools.

Identifying Talent Pools: Some of the talent base will likely be Orangeville or nearby residents who find the region's lifestyle and relative affordability to their liking but who are commuting to jobs in the GTA. 2016 Census data on commuter patterns will be released in November 2017 and should be examined in detail. Where it can be shown that notable numbers of local residents are commuting to jobs elsewhere, a business case can be built for the establishment of new operations that will give them opportunities to work closer to home.

Commercial Office Space: Service sector firms will be candidates for prime commercial office space in and near Orangeville's downtown, as well as in other prospective commercial office areas. Some downtown commercial space suited to professional services firms was available in mid-2017. Planning ahead to a time when more affordable ultra-high-speed broadband may be more widely available, consideration should be given to the areas and situations that offer promise for further commercial development that will attract professional services operations.

Ontario Government's Climate Change Action Plan: The Ontario government's recent comprehensive Climate Change Action Plan 2016 – 2020 addresses its ambitious plans to reduce greenhouse gases in order to fight climate change. The Plan creates new opportunities, many for service or service-driven businesses.

Orangeville could be an important base of operations for the contractors, designers, engineers and technicians who will build the new net zero carbon emission buildings and homes that the updated

Building Code will mandate by no later than 2030. The government will also be retrofitting social housing apartments, providing funding for educational institutions to improve the energy efficiency of their buildings, and supporting research and pilot programs for innovation, including design and engineering of tall wood-frame buildings. Also, by 2019, free energy audits will be required before a home can be listed for sale. Before the program launches, the province will be supporting development of energy audit training programs. Humber College School of Applied Technology has a well-established Sustainable Energy and Building Technology diploma program which includes energy auditing.

The Ontario government will focus on helping the agri-food sector adopt low-carbon technologies, for example for greenhouses and grain dryers. The government also plans to fund commercial-scale demonstration projects that use methane from agricultural materials or food waste and these upcoming projects should be monitored.

E. SECTORS OF FOCUS				
E.4 PROFESSIONAL, ENGINEERING, INFORMATION TECHNOLOGY & FINANCIAL SERVICES				
Strategy Section	Objectives & Actions	Priority¹	Timing	Lead & Partners²
E.4	<p>OBJECTIVE: Retain, grow and attract professional, engineering, information technology, business support, and financial services operations to Orangeville</p> <ol style="list-style-type: none"> 1. Reach out through individual calls to the larger local professional and business services firms to understand their needs, challenges, opportunities, and the support required to encourage expansion 2. Assess the near-term opportunities for business attraction and expansion in Orangeville related to Ontario’s Climate Change Action Plan, including possible post-secondary linkages 3. As part of a broadband strategy, identify existing and prospective commercial office space and developments where suitably robust and affordable broadband is and will be available, as an input for development of a business attraction plan for the professional and business services sector 4. Determine which sub-sectors in the professional and business services have the talent base available to merit business attraction activity, examining particularly commuting patterns and the skill sets of those commuting to jobs outside of Orangeville, as reported in the 2016 Census 	A	2018 & On-Going	OED
		B	2017 & On-Going	OED, DCED & HC
		B	2018 & On-Going	OED
		C	2018	OED & WPBWWD

<p>Funding:</p> <ul style="list-style-type: none"> • When high-speed broadband access is assured, funding to develop one or more value propositions may represent a good investment
<p>Performance Metrics:</p> <ul style="list-style-type: none"> • Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR+E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where OED has influenced outcomes)
<p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <p>DCED = Dufferin County Economic Development OED = Orangeville Economic Development</p> <p>HC = Humber College WPBWWD = Workforce Planning Board of Waterloo, Wellington & Dufferin</p>

F. Resource Implications

The major framework initiatives identified in the Economic Development Strategy Update will initially claim considerable staff time. The most extensive commitments are likely to be defining how to ensure that serviced industrial land can be brought to market, and participating in the development of a strategic plan to increase the availability and affordability of high-speed broadband.

The development of a broadband strategy will involve several other functional groups at the Town, apart from the Economic Development team. The strategy development’s starting point would be to identify the full range of varied contributions that can be marshalled or leveraged from all potential partners to produce mutually beneficial outcomes for the participants, including any financial contribution by the Town.

Less pressing, but linked to the supply of suitable serviced industrial buildings, is the proposed analysis of older industrial buildings to determine the merits of a Community Improvement Program that would encourage adaptive reuse. This analysis could be contracted out.

The creation and subsequent implementation of a sustainability plan will claim considerable time on the part of the Economic Development team but will be spread over a period of time.

The County’s involvement in economic development should serve to limit future increases in Orangeville’s contributions to the Orangeville and Area Small Business Enterprise Centre (SBEC). The growing Dufferin County contribution to the SBEC should support the expansion of services and the SBEC’s reach to other areas of the County. County contributions could also open the way for consideration of the SBEC’s growth and positioning over the medium-term, including addressing the currently limited shared space for clients and the provision of incubation and soft landing spaces. With the County’s outreach, fuller consideration can be given to how to get prospective Orangeville clients involved with Innovation Guelph. An understanding needs to be reached between the Town and the County and expectations established with Innovation Guelph, but an annual contribution to Innovation Guelph (perhaps of up to \$20,000 in total) would likely rest with the County or involve a significant County share.

Involvement in the Dufferin County Workforce Development Committee will mean that partners will be contributing to costs of studies and projects. There is potential to move quickly in late 2017 and early

2018 in several priority areas, given the importance of talent and workforce issues and the availability of additional 2016 Census data.

Future County involvement in tourism, in addition to its existing financial support for Headwaters Tourism, may provide a basis for Orangeville to partner on a mutually beneficial County-wide basis in some of its initiatives such as the Visitor Information Centre and creation and distribution of the annual Visitor Guide.

A collaborative County-wide approach to relationships with Federal and Ontario officials and programs will bring greater engagement with Dufferin County and Orangeville. This should increase the critical mass of participants and financial contributors having a potential interest in well-targeted events designed to respond to identified local business needs. Developing closer relationships with selected post-secondary institutions for research, testing, prototyping and talent should also be more realizable on a County-wide basis.

Funding will be required for several major projects:

- The development of a new Tourism strategy to commence in 2020;
- Branding Review (2018/2019);
- Website Updates (2019/2020); and
- Expert Report and Business Plan for the Credit Valley Explorer (CVE).

Budgets will need to be defined but could fall in the \$30,000 to \$60,000 range each. Participation in the Economic Developers Council of Ontario's Advanced Manufacturing Network project should be evaluated.

Continued funding should be provided for way-finding signage and for increased e-information sources for visitors – hopefully matched again by Central Counties Tourism and other sources.

The initiatives suggested to study best creative cities practices will require modest increments in travel budgets to participate in benchmarking visits to Southern Ontario communities and to attend the annual Creative City Network summit.

The investment in the development of a few selected in-depth value propositions for high priority sub-sectors and niches will be required once the timeframes are clear as to when the impediments of industrial land and broadband availability will be addressed. Development of these value propositions would normally be contracted to a consultant.

The creation of a film and video production attraction capacity, once a positive story can be told with respect to high-speed broadband, will principally require staff time – possibly in the order of 20% of an officer's time.

Many events that respond to local businesses' priority interests will continue to operate on the basis of direct cost recovery by Orangeville Economic Development, the Orangeville and Area Small Business Enterprise Centre, the County, Federal and Ontario partners, the Dufferin Board of Trade and the Dufferin Federation of Agriculture.

The presumption is that any studies related to the Orangeville Brampton Railway will be funded by ORDC.

G. Implementation Priorities and Phasing

The most immediate economic development issues are the lack of availability of vacant, serviced industrial land and buildings and the gaps and high costs associated with high-speed broadband. Both of these challenges severely limit Orangeville's ability to make a business case for new investment and could risk potential business expansions by existing firms. Action to remedy these deficits is needed before most proactive initiatives to seek new investments can be justified.

Orangeville Brampton Railway issues around increased long-term viability for the freight service remain a priority to be further explored.

As the working level County economic development coordinating committee is established in 2018, Orangeville Economic Development staff will be extensively involved, especially through 2018, in developing County-wide plans that are relevant to and benefit the Town of Orangeville.

Collaborative projects and programs will be discussed within the Dufferin County Workforce Development Committee and relevant recommendations forwarded for Orangeville Council consideration as required. The workforce and talent issues emanating from the Dufferin County Workforce Development Committee in late 2017 and 2018 merit early attention.

Assuming the new County economic development coordinating committee is able to tackle the essential and significant inaugural programs, joint discussions might be launched during 2018 with Innovation Guelph to define how to support its involvement with Dufferin County and Orangeville clients.

There are several areas where investment attraction initiatives are not directly dependent on the availability of high-speed broadband or vacant, readily serviced industrial land. Most of the action plans for the tourism and creative industries can move forward as indicated. As well, as proposed in Section D.3 on manufacturing, the exploration of the concept of shared acceleration space to attract early-stage food and beverage ventures can be an early priority. Business retention and expansion (BR+E) programs and outreach can be given priority in 2018 and 2019.

Areas where there will be less activity or a hold on new initiatives, pending the availability of serviced industrial land and broadband, are:

- Participation in investment attraction activities in manufacturing and professional and business services; and
- The establishment of a role to attract film and video productions.

Advocacy for transportation-related issues will require research involving varied groups in the County and municipalities in order to make a strong fact-based case. The background material that is developed will assist in making informed assessments of what advocacy timelines are realistic and how to marshal municipal efforts locally.

Appendices

Appendix A

Public Economic Development Survey Results

Subsample of Dufferin County Respondents that Operate or Work at a Business or Organization in Orangeville

A public survey using Survey Monkey was undertaken covering Dufferin County between March 13 and April 28. Of the responses, 50 were from people who operate or work at a business or organization in Orangeville. The survey was undertaken as background for the parallel development of economic development strategies for Orangeville and Dufferin County. The survey was open to the public so the sample is not statistically random or representative.

Are you a resident in Dufferin County?

Answer Options	Response Count	Response Percent
Yes	45	90.0%
No	5	10.0%

If yes, in which municipality do you live?

Answer Options	Response Count	Response Percent
Orangeville	34	75.6%
Mono	5	11.1%
Amaranth	2	4.4%
Shelburne	2	4.4%
Grand Valley	1	2.2%
East Garafraxa	1	2.2%
Melancthon	0	0.0%
Mulmur	0	0.0%

In Which Sector?

Answer Options	Response Count	Response Percent
Government	12	24.0%
Manufacturing	6	12.0%
Education services	4	8.0%
Professional, scientific or technical services	4	8.0%
Health services	4	8.0%
Engineering services	3	6.0%
Real Estate	3	6.0%
Non-profit	3	6.0%
Agriculture	2	4.0%
Tourism	2	4.0%
Retail trade	2	4.0%
Finance or insurance	1	2.0%
Construction	1	2.0%
Accommodations	0	0.0%
IT/Computer technology	0	0.0%
Legal or accounting	0	0.0%
Food services	0	0.0%
Other	1	2.0%

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

Answer Options	Response Count	Response Percent
Location	28	58.3%
Natural setting and natural amenities	21	43.8%
Lifestyle opportunities	20	41.7%
Easy access to larger communities	19	39.6%
Agricultural lands and farms	15	31.3%
Highway accessibility	11	22.9%
Recreation	9	18.8%
Downtowns and shopping	7	14.6%
Highway transportation and Rail	3	6.3%
Health care	3	6.3%
Availability of skilled workforce	3	6.3%
Housing affordability	2	4.2%
Manufacturing base	1	2.1%
Housing availability	0	0.0%
Other	2	4.2%

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

Answer Options	Response Count	Response Percent
Cost of living	33	68.8%
Labour availability	20	41.7%
High-speed internet	18	37.5%
Public transportation	16	33.3%
Cost of new development	13	27.1%
Encouraging innovation/entrepreneurship	10	20.8%
Employment lands availability	9	18.8%
Lease space availability	7	14.6%
Development approvals process/timelines	2	4.2%
Other	10	20.8%

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

Answer Options	Response Count	Response Percent
Agriculture and agri-businesses	20	42.6%
Tourism	20	42.6%
Professional, scientific and technical services	18	38.3%
Arts, entertainment and recreation services	18	38.3%
Manufacturing	15	31.9%
Real estate	14	29.8%
Retail	11	23.4%
Health care	8	17.0%
Educational services	4	8.5%
Other	2	4.3%

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

Answer Options	Response Count	Response Percent
Natural settings and amenities	37	77.1%
Mix of urban and rural communities	30	62.5%
Less crime	27	56.3%
Higher quality of life/lifestyle opportunities	25	52.1%
Less congested and room to grow	19	39.6%
Strong agricultural base	12	25.0%
Housing Affordability	4	8.3%
Vibrant complete urban communities	3	6.3%
Stability of workforce	1	2.1%
Labour and talent	1	2.1%
Strong manufacturing base	0	0.0%
Other	1	2.1%

Appendix B

Selected Economic Base and Sector Exhibits

Exhibit 1: Orangeville’s Job Portion of Dufferin County Jobs by Sector, 2016

NAICS Code	Description	Orangeville	Dufferin County	Orangeville % of County
11	Agriculture, forestry, fishing and hunting	65	935	7.0%
21	Mining, quarrying, and oil and gas extraction	0	31	0.0%
22	Utilities	152	196	77.6%
23	Construction	989	1,773	55.8%
31-33	Manufacturing	1,906	2,511	75.9%
41	Wholesale trade	344	765	45.0%
44-45	Retail trade	2,690	3,467	77.6%
48-49	Transportation and warehousing	325	494	65.8%
51	Information and cultural industries	458	483	94.8%
52	Finance and insurance	368	525	70.1%
53	Real estate and rental and leasing	200	342	58.5%
54	Professional, scientific and technical services	753	1,195	63.0%
55	Management of companies and enterprises	0	55	0.0%
56	Administrative and support, waste management and remediation services	699	1,211	57.7%
61	Educational services	968	1,560	62.1%
62	Health care and social assistance	2,338	3,104	75.3%
71	Arts, entertainment and recreation	230	575	40.0%
72	Accommodation and food services	1,526	2,146	71.1%
81	Other services (except public administration)	1,341	1,810	74.1%
91	Public administration	572	882	64.9%
X0	Unclassified	202	293	68.9%
	Total	16,127	24,354	66.2%

Source: EMSI, Version 2016.3

Exhibit 2: Job Growth and Location Quotients in Orangeville

NAICS Code	Description	2011 Jobs	2016 Jobs	2011 – 2016 % Change	2011-2016 Ontario % Change	2011 Location Quotient	2016 Location Quotient
11	Agriculture, forestry, fishing and hunting	67	65	-3.0%	-5.8%	0.20	0.20
21	Mining, quarrying, and oil and gas extraction	0	0	0.0%	4.6%	0.00	0.00
22	Utilities	163	152	-6.7%	-9.1%	1.58	1.53
23	Construction	853	989	15.9%	11.2%	0.83	0.84
31-33	Manufacturing	1,605	1,906	18.8%	0.9%	1.22	1.41
41	Wholesale trade	414	344	-16.9%	6.0%	0.60	0.46
44-45	Retail trade	2,547	2,690	5.6%	6.9%	1.49	1.48
48-49	Transportation and warehousing	210	325	54.8%	13.2%	0.31	0.42
51	Information and cultural industries	285	458	60.7%	7.5%	0.94	1.49
52	Finance and insurance	458	368	-19.7%	8.1%	0.72	0.55
53	Real estate and rental and leasing	213	200	-6.1%	17.7%	0.69	0.57
54	Professional, scientific and technical services	740	753	1.8%	10.4%	0.73	0.67
55	Management of companies and enterprises	0	0	0.0%	-12.2%	0.00	0.00
56	Administrative and support, waste management and remediation services	839	699	-16.7%	6.0%	1.10	0.85
61	Educational services	830	968	16.6%	8.8%	0.82	0.87
62	Health care and social assistance	2,283	2,338	2.4%	9.5%	1.42	1.29
71	Arts, entertainment and recreation	173	230	32.9%	11.8%	0.61	0.73
72	Accommodation and food services	1,255	1,526	21.6%	16.1%	1.34	1.40
81	Other services (except public administration)	1,226	1,341	9.4%	-0.3%	1.71	1.79
91	Public administration	550	572	4.0%	-2.4%	0.57	0.59
X0	Unclassified	241	202	-16.2%	-15.8%	1.00	0.89
	Total	14,952	16,127	7.9%	6.6%		

Source: EMSI Version 2016.3

Exhibit 3: Job Change and Location Quotients – Significant Manufacturing Sub-sectors in Orangeville

NAICS Code	Description	2011 Jobs	2016 Jobs	2011 – 2016 % Change	2011-2016 Ontario % Change	2016 Location Quotient
311	Food manufacturing	142	183	28.9%	-2.2%	0.91
321	Wood product manufacturing	92	95	3.3%	0.0%	1.06
325	Chemical manufacturing	113	162	43.4%	5.9%	2.06
326	Plastics and rubber products manufacturing	571	646	13.1%	3.3%	7.64
331	Primary metal manufacturing	87	83	-4.6%	1.4%	1.67
333	Machinery manufacturing	153	269	75.8%	13.7%	2.25
336	Transportation equipment manufacturing	66	87	31.8%	13.7%	0.53
337	Furniture and related product manufacturing	64	89	39.8%	1.8%	1.51

Source: EMSI Version 2016.3

Exhibit 4: Industry Segments in Orangeville with the Highest Location Quotients

NAICS Code	Description	2016 Jobs	2011 – 2016 % Change	2016 Location Quotient
5182	Data processing, hosting and related services	274	54.8%	18.30
3259	Other chemical product manufacturing	125	58.2%	12.40
4922	Local messengers and local delivery	107	Insf. Data	10.08
3261	Plastic product manufacturing	564	12.4%	8.00
3115	Dairy product manufacturing	144	45.5%	7.02
8114	Personal and household goods repair and maintenance	179	5.9%	6.29
3339	Other general-purpose machinery manufacturing	154	73.0%	5.56
2373	Highway, street and bridge construction	186	53.7%	3.81

Source: EMSI Version 2016.3

Exhibit 5: Highest Job industry Segments in Orangeville

NAICS Code	Description	2016 Jobs	2011 – 2016 % Change	2016 Location Quotient
7225	Full-service and limited-service eating places	1,434	19.4%	1.81
6111	Elementary and secondary schools	717	8.0%	1.14
4451	Grocery stores	712	25.6%	1.98
3261	Plastic product manufacturing	564	12.4%	8.00
6221	General medical and surgical hospitals	466	-10.7%	0.98
9130	Local, municipal, and regional public administration	408	4.3%	1.11
6241	Individual and family services	389	19.0%	2.76
8121	Personal care services	381	24.5%	2.56
8111	Automotive repair and maintenance	359	1.1%	2.78
4461	Health and personal care stores	340	15.6%	1.98
2382	Building equipment contractors	327	7.9%	1.15
6231	Nursing care facilities	277	-1.1%	1.77
5182	Data processing, hosting and related services	274	54.8%	18.30
4481	Clothing stores	243	-4.7%	1.50
5413	Architectural, engineering and related services	229	25.8%	1.03
5415	Computer systems design and related services	219	20.3%	0.89
6211	Offices of physicians	210	23.5%	1.39
4441	Building material and supplies dealers	210	-0.9%	1.81
5617	Services to buildings and dwellings	206	-6.4%	0.75
2361	Residential building construction	206	35.5%	0.88

Source: EMSI Version 2016.3

Exhibit 6: Number of Locations of Enterprises in Orangeville

NAICS Code	Description	Indeterminate ¹	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500+	Total Excluding Indeterminate
11	Agriculture, forestry, fishing and hunting	35	11	3	1	1	0	0	0	0	16
21	Mining, quarrying, and oil and gas extraction	1	0	0	0	0	0	0	0	0	0
22	Utilities	4	0	0	1	0	0	0	0	0	1
23	Construction	172	62	22	14	7	0	1	0	0	106
31-33	Manufacturing	41	17	8	11	6	5	4	0	0	51
41	Wholesale trade	35	11	11	10	4	1	0	0	0	37
44-45	Retail trade	74	60	40	31	14	9	3	2	0	159
48-49	Transportation and warehousing	100	29	2	2	1	1	1	0	0	36
51	Information and cultural industries	17	3	0	2	3	0	0	0	0	8
52	Finance and insurance	73	15	7	3	1	9	0	0	0	35
53	Real estate and rental and leasing	379	22	5	2	0	0	0	0	0	29
54	Professional, scientific and technical services	162	63	14	11	3	0	1	0	0	92
55	Management of companies and enterprises	45	1	0	0	0	0	1	0	0	2
56	Administrative and support, waste management and remediation services	79	26	11	5	4	1	0	3	0	50
61	Educational services	24	7	4	0	1	0	0	0	0	12
62	Health care and social assistance	94	48	15	11	12	3	1	0	1	91
71	Arts, entertainment and recreation	36	5	3	0	6	0	0	0	0	14
72	Accommodation and food services	13	16	14	17	13	8	1	0	0	69
81	Other services (except public administration)	104	58	37	5	3	0	0	0	0	103
91	Public administration	0	0	0	0	0	0	1	1	0	2
X0	Unclassified	232	53	3	3	0	0	0	0	0	59
	Total	1,720	507	199	129	79	37	14	6	1	972

Source; Canada Business Patterns, June 2016, as reported by EMSI Version 2016.3

¹ Indeterminate = The indeterminate category includes locations with no employees or only contracted workers