

County of Middlesex Economic Development Strategic Plan

January 2014



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1 Introduction

The ability of a city, county or region to adapt to change is the most important component of its economic strength. When forces of change are only incrementally different year over year, then the workforce and the infrastructure of a region requires no great adjustment in approach or thinking. But when there are major structural changes in the regional, national or world economies, then flexibility is no longer a luxury. The province of Ontario and by extension Middlesex County is facing such a change, as evidenced by the continuing decline of manufacturing and the growing importance of the service sector to the province's economy. This change is being brought on by forces we are all familiar with – the integration of global markets or “globalization”, corporate consolidation and continuing improvements to technology and communications.

The result is that old economy models that relied on an unlimited supply of labour, along with cost structures that depend on proximity to markets and customers have become unsustainable. This is further impacted by an aging population, the availability of lower cost labour in off-shore locations and the rationalization of goods and services along national and international distribution channels. The result is that communities and regions across Canada are coming to terms with the need to re-tool their economic development efforts to ensure what they do is relevant to their business community and contributing to a healthy and sustainable local economy over the long term.

It is worth pointing out however, that *economic development* is not the same as *economic growth*. Where growth relates to an absolute change in numbers – more people, more businesses, and more building permits, economic development is often concerned with improvements, or the progress being made within a community or region. This can be defined as increases in the local standard of living, increases to household income, a more balanced tax assessment ratio to enable the provision of local services and amenities, or a level of business investment in excess of the cost to attract and retain those businesses.



1.1 Objectives and Outcomes

Middlesex County completed an economic development strategy in 2008, in partnership with its local municipalities. While progress has been made in the implementation of that plan, the ensuing years have provided both challenges and opportunities not contemplated in 2008. This includes the emergence of a number of new economic development stakeholders with mandates to identify and act on regional issues that advance the economic sustainability of Southwest Ontario. These factors suggest the need to revisit the economic development programming and services provided by the County.

In particular, the 2013 Strategic Plan is focused on:

- **Providing a vision for the delivery of economic development services;**
- **Identifying the core business areas for the Economic Development Department; and**
- **Guiding the economic development activities and investments for the County.**

The preparation of this Plan has been highly collaborative and is premised on having the local municipalities, economic development partners, and external organizations working together to achieve a strong and united approach to economic development in Middlesex County.

More strategically however, the Plan will be used to inform residents, businesses and elected officials on the challenges and opportunities facing the County in the years to come, and the actions required to ensure sustainable economic growth and strengthen the County's competitive position. This includes opportunities to:

- **Attract and retain business investment;**
- **Increase employment;**
- **Grow the municipal tax base; and**
- **Enhance capacity for community development**

Ultimately, the *Economic Development Strategic Plan* will serve as a guide for the strategic investment of both public and private sector resources, in ways that make the most of the County's business and community assets.

1.1.1 Measuring Return on Investment

In principle, a municipality should not pursue an economic development program or service without an understanding or appreciation for the effects that such a project will have on the community or region. For this reason, local officials engaged in economic development need to consider the direct effects on the public treasury, local employment and the general quality of life effects of economic development.

To effectively measure this 'return on investment' however, requires the use of metrics or performance measures that illustrate the relationship between an economic development program or service and the jobs, assessment or economic impact that may result. A best practice review undertaken for the Economic Development Association of Canada (EDAC) provides the



following guidelines for the development of metrics to be used by economic development departments or related organizations.

- **Measures should reflect activities, but also outputs and most importantly outcomes. Some aspect of quality and customer satisfaction should be part of the outcome measures as well.**
- **Measures should be identified for major activities as opposed to all activities.**
- **Targets should be specified separately from measures.**
- **Some measures may make sense to track on a monthly basis, whereas others will only be meaningful on a quarterly, semi-annual or even annual basis. This then will drive the computing platform for data maintenance.**
- **All measures must be explicitly defined.**
- **All measures must have a specified data source.**
- **All measures should be revisited following a period of data collection (for at least 6 months) to determine their usefulness and value.**
- **Measures that require client input/feedback will involve the development of data collection instruments.”¹**

The County of Middlesex’s Economic Development Strategic Plan proposes programs and services aimed at growing the area economy. Given the need to understand the return on investment for these activities, it must be noted that programs will be relatively easy to quantify in terms of effectiveness and by establishing performance targets. Services, on the other hand, are less tangible and often more difficult to measure because they are often demand based and subject to uncontrollable variables.

Regardless, services like business attraction, retention and expansion, business facilitation and marketing are critical to creating a positive business environment for the County. for this reason there is value in assigning performance measures that demonstrate effectiveness of the County’s economic development activities and investment.

1.2 Approach and Methodology

The primary objective for any economic development strategic plan is to improve the livability and quality of life of a community or region, through sustained economic growth. This in turn fosters the creation of high quality jobs, attracts investment, and increases wealth and opportunity for area residents.

To do this, consideration must be given to the underlying condition of a local economy and its climate for investment, both in terms of public and private sector investment. This is achieved through a solid understanding of a region’s performance against a range of economic indicators

¹ “Performance Measurement in State Economic Development Agencies” Andrew Young School of Policy Studies at Georgia State University, 2004



combined with an analysis of current and emerging business and industrial investment trends and input from the community at large.

The approach employed in the completion of the *County of Middlesex Economic Development Strategic Plan* has involved the following steps:

- **An economic base analysis including socio-economic data for Middlesex County providing demographics, household data, education, labour force, employment resources and the business climate.**
- **A community asset mapping exercise to identify the range of local assets that could be effectively leveraged for the purposes of community economic development.**
- **A review of existing economic development studies, reports, policy documents and initiatives undertaken by the County, the local municipalities or external economic development agencies and organizations.**
- **A high level assessment of the various economic development stakeholders' mandates and programs for the purposes of recommending the most effective means of supporting the County's vision for economic development.**
- **Input from elected officials, local senior municipal staff, business and community stakeholders, external agencies and organizations and members of the public in the form of one-on-one interviews, focus groups, and an online survey.**

The result is a forward thinking, locally based economic development strategic plan that is reflective of the vision, values and aspirations of Middlesex County.

1.3 Financial Implications

The *County of Middlesex Economic Development Strategic Plan* is intended as a high level plan focused on the growth and diversification of the economy over the long term. It does not include specific financial cost estimates for individual projects or actions. Costing will be done through the development of an overarching Implementation Plan that articulates the resources required to move the plan forward.

It must be noted however, that while direct investments in economic development may create fiscal pressures for the County in the short term, it will be the foundation to the long term sustainability and resilience of the economy.

1.4 Notes on Data

This report has used a wide variety of data to support an economic base analysis for Middlesex County. Every effort has been made to ensure consistent time series, and that the most recent data has been used where available.

In particular the report has relied on Statistics Canada's Population Census and National Household Survey information, Business Pattern Data and the Census of Agriculture.



2 Strategy Development Process

“Good economic development planning enhances competitiveness – that is the ability of a city or region to compete with other regions for investment, talent, and local and export markets”.² In the case of the *County of Middlesex Economic Development Strategic Plan*, this process has been informed by extensive research and analysis together with input from the County’s elected officials, business and stakeholder community and the residents.

Economic Development Strategic Plan

Steering Committee	Focus Groups	Community Survey
<ul style="list-style-type: none"> Elected Officials and Staff Ec. Dev. Organizations Business Representative 	<ul style="list-style-type: none"> 4 Focus Groups Across County <ul style="list-style-type: none"> Community Leaders Residents Businesses 	<ul style="list-style-type: none"> Business Operators Community Organizations Residents
Economic Analysis and Background Review	One on One Stakeholder Interviews	Organizational Assessment
<ul style="list-style-type: none"> Key Demographics Labour Force and Employment Industry Analysis Creative Economy Analysis Community Asset Mapping 	<ul style="list-style-type: none"> Elected Officials Real Estate Community Agricultural Operations Retailers Chambers Of Commerce Entrepreneurs 	<ul style="list-style-type: none"> Interviews with SWEA, SWOTC, SCOR, Tourism Middlesex, SOMA, Ontario Food Cluster, OMAF, CFDC Business Associations

² “Economic Development Strategies: Best Practices” Dr. Larissa Muller, 2007



2.1 Economic Analysis

The starting point for the *Economic Development Strategic Plan* was a comprehensive analysis of the local and broader regional and provincial economy. This resulted in an economic base analysis that details the County's recent performance against a select range of demographic and economic indicators considered relevant to the development of the economic development strategic plan, combined with an analysis of current and emerging business and industry sector trends. Consideration was also given to reports, studies, and previous economic development strategies that were seen as having a direct impact on the current and future economic development activities of the County of Middlesex. In this regard, the analysis concluded:

- **The *County of Middlesex Official Plan*, anticipates a population of 75,950 people by 2016, and 79,080 in 2021. While strong population growth is often a factor in an investment attraction decision, the historic trends suggests that population growth varies across the County, with some communities expanding (Strathroy-Caradoc and Middlesex Centre) and others experiencing a loss in population (Southwest Middlesex and North Middlesex).**
- **Attracting and welcoming new Canadians into rural communities will be an important element of building a workforce in the future, even though rural communities tend to experience lower levels of immigration than urban areas³. The analysis suggests that while the percentage of immigrants arriving in Ontario and moving to the London Economic Region as a whole is increasing, Middlesex County is lagging in the attraction of new Canadians, which means local businesses will need to recruit from the City of London.**
- **An analysis of the County's labour force profile is also an indicator of the competitiveness of the local economy. The results of the analysis suggest that between 2006 and 2011 the total labour force of the County decreased by an estimated 830 people, or 2.1%, to a total of 39,030 people. The number of people employed in Middlesex County also declined, by 3.8% or 1,440, and the number of unemployed people increased by 615, or 38.6%. The unemployment rate over the same period was 5.7%, lower than both the London Economic Region and the Province. This result however, suggests a tight labour market, where businesses may be challenged in finding some workers.**
- **The top five industries by employment for Middlesex County residents are health care and social assistance, manufacturing, retail trade, construction, and agriculture, forestry, fishing and hunting. Employment in four of these industries (all but healthcare), declined between 2006 and 2011. The largest employment losses were seen in manufacturing (1,525) and agriculture (745).**
- **The decline in agricultural employment is due in part to the integration of technology in farming operations, but also the trend towards farm consolidation. The analysis confirmed that while there are fewer small farms, the number of larger farms is on the**

3 "Where are Immigrants Residing Now? Focus on Rural Ontario" Rural Ontario Institute, <http://ruralontarioinstitute.ca/file.aspx?id=bb401b41-d9c1-42ee-b5e6-92ecbce4bd30>, 2013



increase. Farm receipts have also increased by 6.2%, from \$568,648,721 in 2005 to \$604,345,554 in 2010.

- Consideration has also been given the profile and character of the local business community as this can provide an indication of what the local economy can attract and retain by way of business investment. In 2012, Statistics Canada Business Patterns data suggests there were 2,309 businesses (with employees) in the County, a decrease of .3% since 2008. By comparison, sole proprietor and home-based businesses, total 3,784; an increase of 7%.

The construction sector comprises the highest number of businesses with employees, while agriculture comprises the largest number of total businesses.

Manufacturing operations are the County's largest employers, with 5 businesses employing 200-499 employees, and 5 businesses employing 100-199 employees

- The analysis also reviewed the number of 'creative class' workers that live in the County as this 'creative' labour force place a high value on access to diverse cultural and heritage experiences as well as the natural environment, all of which contribute to the County's quality of place experience. In this instance, the analysis reveals that 29.6% of the local labour force is comprised of creative class workers. While this number is significant, the challenge will be to foster growth of creative occupations within the manufacturing and agriculture sectors. It should be noted that arts and culture related occupations in Middlesex County make up the lowest percentage of the labour force in the creative class.

The results of the detailed assessment have been used to inform the subsequent phases of the project and the stakeholder discussions about the opportunities and the challenges facing the County in its efforts to enhance its value proposition for the attraction of business, investment and residents to the region.

A comprehensive summary of the economic base analysis can be found in **Appendix A** within the *Appendix Report*.

2.2 Community Asset Mapping

Community asset mapping has grown to prominence as an essential tool in community and regional economic development. Asset mapping identifies existing resources that could be leveraged to support economic development initiatives and can form the foundation for strategic planning and benchmarking measures over time. Asset mapping may also act as a catalyst for partnerships. Leaders can see common interests and organizational links which can motivate them to strengthen or form new partnerships. Lastly, asset mapping can also be used as a tool to assist in engaging stakeholders in local development issues.

For the purposes of the *County of Middlesex Economic Development Strategic Plan*, a preliminary asset mapping exercise was undertaken. The mapping exercise consists of utilizing



local organizational datasets⁴ to build a database of local community assets⁵. The exercise focused on four distinct areas:

- **Historical Assets:** Assets that promote sense of place and identity
- **Natural Assets:** Assets that showcase environmental leadership and quality
- **Cultural Assets:** Assets that deliver cultural amenities and products
- **Agricultural Assets:** Assets that focus on agricultural production and promotion within the community

The initial source of asset mapping data was drawn from *infoCanada*⁶. In urban communities, *infoCanada* can provide upwards of 75-80% of resource inventories/databases. However, in the context of rural communities such as villages and towns outside of London it tends to generate less data. The results do not reflect an assessment of the assets economic development potential to the County, but rather serve to inform a discussion around the importance of local assets for community-based economic development.

The exercise identified more than 300 community based assets ranging from historical, to natural, cultural assets, along with over 2,000 agricultural assets. The results demonstrate the unique resources, experiences and quality of place elements that could differentiate Middlesex County from other regions of the province, if leveraged effectively.

A complete summary of findings for the community asset mapping exercise can be found in **Appendix B** of the *Appendix Report*.

2.3 Stakeholder Consultation

Given the importance of securing broad-based support for the *Economic Development Strategic Plan*, an extensive consultation process was required. One-on-one interviews and small group discussions were conducted in September 2013 that included elected officials and senior management from Middlesex County and the local municipalities, senior business leaders, key community and regional stakeholders and economic development partners. These discussions provided further insight into trends related to the performance of the local economy, and the County's economic development activities.

Over 30 individual and group discussions were conducted with local stakeholders across the County. In addition, interviews were also conducted with external economic development agencies and organizations thought to have a bearing on Middlesex County economic development programming. Further input has also been sought from the Project Steering Committee which is comprised of a range of municipal, business and non-for-profit stakeholders.

In addition to the foregoing, four focus group discussions were conducted in October 2013. The focus group discussions provided further opportunity to solicit input and advice from a broader

4 Sources included: infoCanada, Online Directories, Tourism Middlesex, Invest in Middlesex, Middlesex Tourism, CFDC, and local community guides and websites.

5It should be noted that there has been no effort to verify the quality or veracity of these assets with the larger community.

6 infoCanada consolidates information from Statistics Canada and Local Yellow Pages



stakeholder group on the opportunities, challenges and suggested next steps for economic development in the County.

Lastly, an electronic survey directed primarily to Middlesex's businesses and the broader community was administered in cooperation with the County and several of the County's local economic development partners. As of September 2013, input has been obtained from more than 170 business and community members across the County.

A detailed consultation process can be found in **Appendix C** in the *Appendix Report*.

2.4 Aligning with Other Plans

In preparing the *County of Middlesex Economic Development Strategic Plan*, consideration has been given to a range of County-led plans that will have a direct bearing on the implementation of the plan and the overall development of the County in the coming years.

2.4.1 County of Middlesex Official Plan, 2008

The current *County of Middlesex Official Plan* directs and guides the County in land use policy and physical planning on a broad basis. The intention of the *Official Plan* is to establish an upper tier policy framework that provides guidance to the local municipalities in their local official plans and zoning by-laws. In addition, the *Official Plan* also sets a framework for coordination and cooperation amongst the local municipalities and the County on planning and development issues that transcend municipal boundaries.

The *Official Plan* (OP) has obvious implications for the *Economic Development Strategic Plan*. The *OP* acknowledges the role that agriculture plays in the local economy and the need to evolve the policies of the *OP* with the ever evolving agricultural industry. The Plan also recognizes the contribution that policy can make to the diversification of the economic base. Policies considered most relevant to the development of the *Economic Development Strategic Plan* include:

- **The County will monitor the supply of employment land to ensure that a sufficient supply is available throughout the County and particularly in those municipalities with access to provincial highways and major arterial roads;**
- **The County cooperate with local municipalities, the business community and other agencies to ensure that employment centres are served by modern infrastructure;**
- **The County encourage local municipalities to provide a balanced mix of housing to ensure a sufficient labour force and reduce the need for commuting;**
- **The County encourage local municipalities to promote a high standard of urban design to create healthy communities which attract investment;**
- **The County support local municipalities to promote economic development opportunities adjacent to Provincial 400 series highways where justified through an amendment to the local official plan; and,**



- **The County support the retention of educational, health, cultural and religious facilities to ensure that the County's communities are provided with those opportunities that facilitate growth and well-being. Such facilities provide a vital role in small communities and add economic vitality and a sense of place where quality of life is considered a major attraction for growth and development.**

These elements from the *Plan* are fundamental in shaping the goals of the *Economic Development Strategic Plan* and consistent with the strategic priorities that have emerged in its development.

An update to the *County of Middlesex Official Plan* is planned for 2014. It is essential that the values and aspirations that have been reflected in the *Economic Development Strategic Plan* also be reflected and supported by the Official Plan, as a means to ensure economic growth and prosperity in the County.

2.4.2 Middlesex County Economic Development Strategy, 2008

The current economic development strategy for Middlesex County was completed in 2008. The *Strategy* identified areas of focus for economic development, as well as a number of associated economic development activities. The *Strategy* contained a proposal as to how economic development responsibilities should be divided among different organizations that are responsible for the delivery of economic development programming and services.

The 2008 *Strategy* was focused on four strategic themes:

- **Enhancing the Business Environment:** The *Strategy* recommended ways for the County to take action that would improve the local business environment. Examples include; the Business Visitation program and collaborative research with Western University and Fanshawe and the business community.
- **Manufacturing:** The focus for manufacturing in the *Strategy* was to retain employment, diversify and expand into food processing, networking and development of new markets in Asia, among other related initiatives. Examples include; cooperative programs with the manufacturing sector, conducting an industrial land analysis, improving local infrastructure (high speed internet and public transportation).
- **Agriculture and the Bio-economy:** The *Strategy* promotes the potential of agriculture based bio-products to join the County's strength in agriculture with manufacturing capacity and proximity to future adopters. It recommended that the County develop an agricultural committee and a biomass feedstock stakeholder taskforce to pursue biomass, biofuel and specialized crop farming products and operations in the County.
- **Tourism:** The predominant recommendation for tourism was the development of a tourism destination marketing organization (now Tourism Middlesex). Additional recommendations included: Marketing current tourist attractors, adjusting bylaws to support small business (i.e. sidewalk cafes), and strategic partnerships to improve the Tourism message.

The 2008 *Economic Development Strategy* also suggested the following roles and responsibilities for the Economic Development Office:



- That the County take a lead role in investigating public transportation and high speed internet, investment attraction activities for the agriculture and manufacturing sectors, and County wide tourism projects, as well as basic economic development activities.
- That the County assist lower tier municipalities lead business retention activities, site specific tourism projects, and basic economic development activities (lead handling) when the first contact is the municipality
- That the County assist other economic development stakeholders lead in the following areas:
 - Business Networking with the Chamber of Commerce
 - Assist the Community Futures Development Corporation in establishing an enterprise centre
 - Assist the Elgin Middlesex Oxford Local Training Board in workforce development for the region
 - Promote and assist the Destination Marketing Organization in becoming the eventual lead role in tourism development across the County (in 2008 the lead organization for tourism was the Community Futures Development Corporation)

The Economic Development Strategic Plan has built on the recommendations of the 2008 strategy and reflects the implementation efforts undertaken by the Economic Development Office since that time.

County of Middlesex FDI Strategy

The *County of Middlesex Foreign Direct Investment Strategy* was completed in 2012 and suggests that the County is moderately well positioned for Foreign Direct Investment (FDI) attraction. Recommendations include:

1. Strengthen economic development function: The County should strengthen the core of its diverse economic foundation and assure that the primary businesses in its basic sector are positioned for success.
2. Selective Proactive International Marketing: The County should engage in selective, highly targeted international marketing initiatives to increase access to prospective investors and active opportunities. This will enable Middlesex County to gain early visibility to prospects and their opportunities and increase the number of locational investment leads considering the County.
3. Develop Investor Customer Service Excellence: To distinguish itself from competitors, the County should achieve excellence in responding to potential investment opportunities by developing high standards for servicing investors. In a highly competitive environment, areas providing prompt and complete request for information responses and site visits that anticipate customer needs gain advantage. The economic development team at the County and local levels must be able to respond quickly with accurate and complete data and to convey competitive advantage to requests from prospective investors and their representatives.



The *Strategy* recommends the development of regional partnerships to support FDI attraction including resources and cooperation with the Southwest Economic Alliance (SWEA), regional sector based groups, and the London Economic Development Corporation (LEDC). An in-County lead generation protocol to manage investment inquiries was also recommended.

County of Middlesex Employment Lands Needs Study

An *Employment Land Needs Study* was completed in 2011. The report concluded that the existing land inventory in the County of Middlesex was sufficient to accommodate the anticipated future demand for employment lands. The report also suggested that the amount, location and market choice of serviced lands would need to be monitored to ensure that supply met the ongoing demands of business.

Recommendations with implications for the development of the *Economic Development Strategic Plan* are as follows:

1. Market choice and employment land protection, including:

- The adoption of a framework for reviewing employment land conversions;
- Modification of County-wide land use policy to allow for select commercial, accessory retail, and community institutional uses in employment areas; and,
- Ongoing and regular monitoring of employment land inventory to ensure adequate market choice.

2. Targeted marketing of employment areas, including:

- Development of a system for tracking County-wide development-related data;
- Preparation of more comprehensive marketing materials and centralized resources to highlight vacant and available employment lands and identify employment areas;
- Greater regional and sector-specific collaboration on industrial and employment lands marketing activities;
- More targeted marketing of high-priority employment areas.

3. Longer term planning and development of employment lands, including:

- Consideration of short- to medium-term servicing of Komoka West employment lands;
- Study into medium- to long-term options for employment land development in Thames Centre and along the Highway 401 corridor; and,
- Consideration of longer-term development opportunities in South Ilderton, subject to market choice and employment land inventory.

2.4.3 Elgin Middlesex Oxford Workforce Planning and Development Board Local Labour Market Plan, 2012

Elgin, Middlesex, and Oxford Workforce Planning and Development Board has recently completed a Labour Market Plan in partnership with a variety of regional and community stakeholders, including the County of Middlesex. The *Local Labour Market Plan* is a statistics



driven report that addresses labour force retention issues including the training and skills requirements to develop and retain a strong local labour force that will sustain economic growth in the region. The *Plan* also provides recommendations that support improvements to the local labour force.

The *Plan* anticipates that there will be future labour shortages across multiple sectors. This is a result from a combination of a lack of skilled workers and an aging population, a fact confirmed in the Economic Base Analysis. The report also noted that the County of Middlesex experienced some challenges during the recent economic recession with several manufacturing plants either shutting down, or scaling back work and ultimately their workforce. While conditions have improved, many employers do not know what to do about labour issues and have sacrificed growth as a result.

The *Local Labour Market Plan* suggests that businesses have failed to adapt to current trends and recommended that the region and its economic partners:

- **Encourage Middlesex businesses to participate with industry boards to work with the local universities and colleges to develop course curriculum to improve local workforce skills;**
- **Provide materials and resources to increase awareness of available careers to high school students;**
- **Develop a Middlesex County resource directory for business support and training services; and,**
- **Promote employment recruitment alternatives**

The *Economic Development Strategic Plan* is set to position the County's role in workforce development and attraction as it relates to the economic sustainability of the region. Further promoting and supporting the work completed by the Workforce and Planning Board will assist in improving the County's economic potential.

2.5 Leveraging Regional Economic Development

There are a number of regional agencies and organizations that are directly involved in the delivery of economic development programming in southwestern Ontario. In addition, there are several organizations whose mandate includes initiatives considered relevant to the *County of Middlesex Economic Development Strategic Plan*. The following table details these organizations together with their respective mandates, programs and resource requirements from participating communities.



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
Tourism Middlesex	<p>Through local and regional initiatives Tourism Middlesex will ensure that Middlesex County is recognized as a destination that attracts and provides visitors with a value added tourism experience.</p>	<p>Tourism marketing and management of the visitor centre</p> <p>Product development in conjunction with SWOTC</p>	<p>County of Middlesex</p>	<ul style="list-style-type: none"> ■ Recently completed Tourism BR+E ■ Taste and Tour Middlesex Conference ■ Ontario Barn Quilt Trail Project, ■ War of 1812 Bicentennial Celebrations ■ Doors Open Campaign ■ Website, calendar and Visitor's Guide produced ■ Cross marketing at county events ■ Cruise the Coast marketing campaign with SWOTC 	<p>Open membership to be introduced in 2015</p> <p>Staff/Council time required to participate in governance</p> <p>Recently have requested on-going financial support from the County of Middlesex to become sustainable – presently operating with special project funding.</p>
				<ul style="list-style-type: none"> ■ 	



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
The Business Help Centre, Community Futures Development Corporation (CFDC)	<p>The mission of the Business Help Centre of Middlesex County is to support our communities through the fostering of business and economic development thereby creating economic sustainability and growth.</p>	<p>Products and services to promote small business growth and community economic development</p>	<p>Middlesex County</p>	<ul style="list-style-type: none"> ■ Business Consulting and Planning ■ Small Business Financing ■ Community Economic Development, including downtown revitalization, value-added agriculture and tourism initiatives (tourism guide, heritage trail) ■ Small business education series ■ Centre for Non-Profit Collaboration ■ Entrepreneurial Library ■ Social enterprise development ■ Young entrepreneur programming (summer camps, loans, competitions, business internships) ■ Middlesex County Socio-economic Impact Assessment 	<p>No cost of membership</p> <p>Staff/Council time required to participate in governance</p> <p>Additional resources may be required to support some initiatives</p>



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
Ontario Food Cluster	The Ontario Food Cluster builds international trade and investment opportunities for the expanding 3,200 company agri-food and beverage sector in its service area.	Attracting Foreign Direct Investment in the agri-food and beverage sector	Cities of Brantford, Hamilton, Guelph and London, Counties of Elgin, Middlesex, Niagara Region, and Windsor-Essex Waterloo Region	<ul style="list-style-type: none"> ■ Lead generation ■ Investment missions 	Membership cost of approximately \$4,500 per year Staff time may be required to attend investment missions
Southwest Economic Alliance (SWEA)	A regional development alliance of municipalities, post-secondary institutions, broader public sector, and private sector companies focused on building the economy in Southwest Ontario	SWEA fosters leadership, cooperation and capacity-building in the following areas: Regional research and joint initiatives Region-branding Advocacy for policy, planning & capacity building	15 counties or single tier municipalities and seven cities bounded by Essex County in the west and Wellington County in the east	<ul style="list-style-type: none"> ■ Chair in Regional Economic Development Initiative ■ Regional Broadband ■ Passenger Transportation Summit ■ Intelligent Region Benchmarking ■ Sustainable Food Systems ■ Regional Transportation Improvements ■ Passenger Transportation Summit 	Membership cost of approximately \$4,000 per year but based on population Staff/Council time required to participate in governance



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
Southwestern Ontario Marketing Alliance (SOMA)	SOMA works with all levels of government and the private sector to promote the advantages of locating within the region.	<p>Services include:</p> <ul style="list-style-type: none"> Attracting Foreign Direct Investment Confidential site selection assistance Economic development services including business links and opportunities for trade and investment Development/sale of industrial land 	<p>Municipalities of Aylmer, Ingersoll, Stratford, St. Thomas, and Woodstock.</p> <p>The area stretches across Elgin, Middlesex, Oxford and Perth counties.</p>	<ul style="list-style-type: none"> Strategic economic analysis for four county areas Sector specific studies for food processing and green energy sectors Creation of investment brochures Development of advertisements for each industrial sector Trade missions – 2 planned for 2014 Lead generation (up to 150 investment leads) 	<p>Membership cost is approximately \$30,000/yr which includes Ontario Food Cluster Membership (OFC)(\$4,500)</p> <p>Staff time may be required to attend investment missions, however per-diem are offered to defray cost</p> <p>Opportunity to attend OFC meetings</p>
Southwest Ontario Tourism Corporation (SWOTC) – Regional Tourism Organization One	Taking a leadership position, Southwest Ontario Tourism Corporation proudly and collaboratively works with all tourism stakeholders to champion tourism as a vital economic driver.	Focused on tourism marketing, tourism workforce development, tourism product development and investment attraction.	Chatham-Kent, Elgin County, Haldimand County, London, Middlesex County, Norfolk County, Oxford County, Sarnia-Lambton, Windsor-Essex-Pelee	<ul style="list-style-type: none"> SWOTC has determined themed clusters to focus on as priorities. Tier A include winery and culinary, motorcycling, festivals and waterfronts. Tier B priorities include birding, cycling, agri-tourism and camping. 	<p>No public membership</p> <p>Staff/Council time required to participate in governance</p>



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
South Central Ontario Region Economic Development Corporation (SCOR)	<p>SCOR's mandate includes:</p> <p>Infrastructure that fosters economic development</p> <p>The development of human capital in support of economic development</p> <p>Sector development with a focus on agriculture and agri-food value-added processing.</p>	<p>Champion and advocate: for policy change, for securing project funding and other valuable resources</p> <p>Communicator: a mechanism to coordinate, disseminate and share information</p> <p>Facilitator: coordinating and connecting SCOR and its partners</p>	<p>The County of Brant, (County of Elgin), Middlesex County, Norfolk County and Oxford County and associated municipalities and communities</p>	<ul style="list-style-type: none"> ■ Local food ■ Value chain development ■ Workforce and youth employment ■ Infrastructure development ■ Connecting businesses with business services ■ Greenbelt Foundation funding to develop local food aggregation and distribution sites across region ■ RED proposal to support sector/value chain development in forest product/wood manufacturing / agriculture 	<p>Membership cost of approximately \$35,000 per year</p> <p>Staff/Council time required to participate in governance</p>



Organization	Mandate	Role	Service Area	Projects/Initiatives	Resource Requirements
Elgin Middlesex Oxford Workforce Planning and Development Board	Workforce Planning Boards help improve understanding of and coordinate community responses to labour market issues and needs.	Current priority areas include Labour Market Information Availability Accessing Services Employee Training Young Adults Education Entrepreneurs (and Small Business) New Canadians Mature Workers Apprenticeship (and Skilled Trades)	Municipalities of the Counties of Elgin, Middlesex and Oxford and the Cities of London and St. Thomas	<ul style="list-style-type: none"> ■ Workforce Focus (publication) ■ Literacy and Apprenticeship (promotional material) ■ Manufacturing Study ■ Workforce Supports for Employers (marketing plan) ■ Work-Life Balance Brochure ■ Ability First Social Media Campaign ■ Manufacturing Tours ■ Oxford Invitational Youth Robotic Challenge ■ Employer One Survey / Discovery Jobs 	No cost of membership Staff/Council time required to participate in governance Additional resources may be required to support some initiatives



3 Determining Priorities

Based on the foregoing, nine strategic priorities have emerged to inform the creation of an *Economic Development Strategic Plan for the County of Middlesex*. These priorities represent the areas that most directly affect the long term economic vitality of the County. They were developed with input from the stakeholder community, the analytic work of the consulting team and the active involvement of the Project Steering Committee.

3.1 Invest in the County's Infrastructure

When businesses are deciding where to locate their operations, or what location would be ideal for expansion, available 'infrastructure' is often a key factor in their decision making. For this reason, municipalities must be responsive to the needs of the businesses they are looking to attract, but also the business community already present in their community or region, if they are to be competitive. While these needs may vary depending on the nature of the business or industry sector, the availability of serviced, high quality and shovel ready employment lands is essential. As noted earlier, the Middlesex County completed an *Employment Land Needs Study* in 2011⁷, which found that sufficient employment lands are available in the County to meet anticipated demand. However, the report also suggested that the County must better capitalize on the opportunities provided by the existing supply, its proximity to the greater London Region, and its access to the Highway 401 and 402 corridors as well as other major transportation infrastructure.

While land and utility services and costs will always be scrutinized as part of the broader site selection process, advances in technology have also elevated the importance of the Internet in economic development and business site selection. As with other utilities, the availability, quality, and competitiveness of broadband service is an issue in investment attraction and in the retention of existing businesses.

⁷ Study does not make use of recent Statistics Canada National Household Survey data



The quality of internet access and mobile phone service in rural areas is a challenge facing many rural areas across Canada, and Middlesex is no exception. The Middlesex County Library, as part of the larger Rural Broadband Initiative has worked to improve broadband services in the region with some success; however, broadband internet access is not consistent across the region, and access for businesses remains an issue. It has been suggested that the rural areas surrounding the towns in the County are underserved and that the internet solutions offered to businesses by internet providers are not sustainable, or are inadequate for the needs of businesses.

The availability of broadband infrastructure is also an issue being explored by the Western Ontario Wardens' Caucus (WOWC). Presently, the WOWC is completing a study to determine the feasibility of a Regional Area Network in South Western Ontario. This work is intended to address options and costs, as well as funding partners and market interest in the project.

The lack of public transportation infrastructure between Middlesex County and the City of London has also emerged as an issue for businesses looking to attract workers from the City of London. This is particularly relevant for businesses looking to attract lower skilled workers that may not have access to an automobile. While there is little that the County can do by way of providing this type of transportation, given the cost to do so, it does raise the question of whether the lack of infrastructure diminishes the County's competitive advantage to attract some forms of industry or business investment. The County should continue to explore the feasibility of public/private transit system consistent with the recommendations provided in the 2008 *Economic Development Strategy*.

While it is true that the availability of infrastructure is an important aspect of economic development and the determination of a community's overall competitiveness, there are cost implications that must be considered in determining an appropriate solution to any of these issues. There is also input needed from other levels of government and the private sector. The County together with the municipalities can control and expedite the development of employment lands; however, it is the local municipalities that will bear the upfront costs to service these lands. In terms of broadband access and public transportation, the County must work with local and regional partners to determine an appropriate response for delivering these services that is both efficient and cost effective.

3.2 Enhance Communication and Networking Opportunities

In economic development as in business, an unknown opportunity is a missed opportunity. With an increasingly competitive and rapidly evolving business environment, current information on industry trends, strong relationships with local business and good networks that can inform investment attraction and community development efforts is essential for any economic development office.

There are a range of stakeholders in Middlesex County already delivering economic development and related services across the region. As well, several of the local municipalities have either dedicated economic development staff, or staff in other departments with economic development



functions. Where possible the County needs to identify and clarify where it can add value to local initiatives, but also where a broader more regional approach to an economic development opportunity or issue is required (e.g. investment attraction). Many of the municipalities expressed a desire for collaboration and cooperation if it enabled them to leverage the knowledge and experience of the larger economic development community.

The economic development strategic plan for Middlesex County needs to address both of these concerns. Firstly, the plan must recognize the work currently being done at the local level and in other organizations across the County, and articulate a position for County-level economic development that fills current 'gap' areas of service delivery or enhances existing areas of service delivery. It must also articulate areas where new external partnerships and collaboration can advance the interests of the County or local advocacy efforts already underway.

Some of the most prevalent suggestions from this perspective included: establishing the County as a 'broker' of economic development information and research; lead generation; business services and resources; the provision of standardized economic tools for Business Retention and Expansion (BR+E) and Downtown Revitalization; maintaining an available land/space inventory; regional marketing and communications that promote the investment attraction opportunities for business and lifestyle opportunities for new residents; and the facilitation of partnership opportunities with key stakeholder communities (e.g. post-secondary institutions).

The size of Middlesex County was often presented as a barrier to effective communications between the local municipalities, between business leaders, and more broadly, with the County. Economic development practitioners and representatives of the local municipalities have suggested that they often feel un-informed about the economic development activities of other communities and the County. Increased communications and face to face networking opportunities within the County's economic development community are therefore important to ensure that economic development efforts at all levels are aligned, effectively supported and speaking with a single voice. Coordination also reduces confusion for local businesses or investment leads interested in engaging with economic development staff or programs. This in turn can increase the funding and business support being leveraged by County business.

3.3 Broaden Business Retention + Expansion Programming Effort

Business retention and expansion programming is a valuable tool in economic development, as it provides information about emerging strengths and challenges facing the local economy and more specifically, the local business community. Given the economic impact and job creation attributed to existing business, this type of economic development programming must factored more significantly in the County's economic development effort.

In Middlesex, significant changes in the business community have been observed in recent years, including the loss of manufacturing operations and associated employment, fewer small farms and more large farms, a growing number of professional service firms and an increasing number of sole proprietor or home based businesses. In this regard, BR+E surveys can help to inform the County's understanding and response to the needs of a particular sector or sub-sector,



and in some instances it may also help to retain business investment and employment in the region. Participants in the consultation phase of this project have suggested that not enough is being done to retain and grow the businesses already present in the County.

An effective BR+E program however, is not a one off exercise. County and municipal staff must ensure that regular and thorough interviews are conducted with the local business community, in order to be properly informed as the needs of those businesses or sectors and to provide relevant business support services. Further, data gathered through BR+E programs can inform the success of a larger economic development program and support investment attraction activities by identifying investment and supply chain development opportunities.

While the local municipalities may wish to approach a BR+E program on a municipal wide basis, there is strong justification to complete BR+E surveys on a sector by sector basis, as evidenced by the recent Tourism BR+E conducted by Tourism Middlesex. The needs of a retailer located in Strathroy-Caradoc will be very different from that of a manufacturer in the same community. However, that same manufacturer may share similar concerns or challenges as a manufacturer in Thames Centre.

Depending on the scope of the BR+E program, volunteers can be recruited to supplement or complete the business interviews, although this is not ideal. If the survey is small, say focused on a downtown then it can be completed in this fashion. In the case of major employers, or influencers in the County this is best done by economic development staff.

3.4 Leverage Proximity to London

Middlesex's economic fortunes are tied to the success of the larger region, in essence, Middlesex's economy will prosper if London's economy continues to expand and improve. Residents of Middlesex routinely commute to employment in the City of London and local businesses recruit from a larger regional labour pool that includes the City of London. The County has also attracted businesses from the city that have been looking for lower cost options for their operations while still retaining the proximity to the local market and access to the larger U.S. and Canadian markets via the 400 series highways. Residents of London are also regular visitors to local festivals and events, farmers markets and recreational amenities located in the County.

Despite the benefits and opportunities afforded the County and to a lesser extent the City of London, the alliance between the two municipalities is weak. While this is due in part to available resources, consideration must be given to leveraging the economic development efforts of the City of London, in much the same way as other external economic development organizations. This is particularly true when it comes to FDI attraction and tourism promotion and development. The City of London has recently completed a *Cultural Plan* that may also provide opportunities to develop the County's tourism offerings around place-based cultural tourism.

Many of the issues impacting the growth of the Middlesex economy will also require a regional effort. For example, workforce attraction and development and immigration are issues being addressed at a regional level with the City of London and the Elgin Middlesex Oxford Workforce Planning and Development Board as partners in this effort.



In addition, business networking opportunities through the London Chamber of Commerce are routinely used by local businesses as a way to gain access to the larger London and area market and strengthen local business operations. London's Small Business Centre also provides support for small business operators and entrepreneurs. The need to enhance and promote local business networking opportunities and provide better support for small business operations emerged as issues in the context of developing the Economic Development Strategic Plan.

3.5 Pursue Targeted Investment Attraction Opportunities

Investment attraction programming comprises projects and activities that attract new business investment or jobs to the County from another location. Businesses relocate or open a new location when business needs or conditions motivate a change in location or expansion; for example, when a business expands beyond the capacity of a particular site or market.

However, investment attraction programming, particularly foreign direct investment attraction requires considerable resources to do effectively and an upfront investment on the part of the municipality or region. A municipality must be competitively positioned in terms of its website content, key messaging (including target sectors and regional workforce), business and lifestyle information and be prepared to develop and maintain strong communications with the stakeholder community (e.g. ICI brokers, government influencers, surrounding municipalities and regional economic development organizations). It must also have the capacity to respond quickly to lead generation opportunities and more often than not, be able to provide 'shovel ready' employment land or a suitable vacant building.

The strategic advantages for undertaking investment attraction programming reported on in the *Foreign Direct Investment Study* completed for Middlesex County in 2011 were reflected again during the consultation phase of the Economic Development Strategic Plan. These factors include the County's position in, and access to the larger London region, its access to three U.S. border crossings via Highways 401 and 402, the diversity of the larger regional economy and the available workforce, the availability of shovel ready industrial properties and a reasonable business cost environment.

However, the *FDI Study* also suggested that the County lacked an identity that would differentiate it from the City of London, had no marketable 'clusters' of business or industry to build a compelling marketing effort and had a weak alliance with the City that was reflected in the County's image and available resources. Since completing the *FDI Study*, the County has been proactive in engaging with and leveraging the investment attraction efforts of external stakeholders (e.g. Ontario Food Cluster Initiative), although more resources are required to sustain this effort (e.g. membership in Southern Ontario Marketing Alliance – SOMA). The County has also completed an employment land strategy that addresses the long term needs resulting from population and employment growth in the County and has advanced an in-County lead protocol for handling business and investment enquiries. However, it must be pointed out that foreign direct investment attraction is a specific type of investment attraction activity that also involves participation in trade missions (including those undertaken by the City of London),



attendance at trade shows, hosting and facilitating investor visits and the direct involvement of economic development staff, as well as political leaders and business ambassadors. In this regard, it will be important for the County to consider how best to leverage the FDI efforts of the City of London (where they are focused on similar target sectors), as well as the larger organizations like the South Ontario Marketing Alliance (SOMA).

Given the nature of this effort, a coordinated, targeted and regional approach is essential. Investors or government influencers have little time or interest in talking with multiple contacts to secure needed information (e.g. regional workforce profile). For this reason, a one window approach is seen as the most effective and efficient way to manage business or investor interest in the County. The County has lead generation protocols in place but needs to restate the protocol as awareness and utilization are not uniform across municipal contacts, indicating the potential for investors to be confused and misdirected.

3.6 Develop Community Based Tourism

One of the major themes to emerge during the consultation phase of the Economic Development Strategic Plan was the need to gain a better understanding of the potential of the region's tourism sector, particularly as it relates to community-based tourism opportunities.

Community-based tourism is often considered as one component of a broad-based plan to improve rural economies⁸. This type of tourism is characterized as locally situated development that uses tourism assets to generate economic, social, and cultural benefits within a community⁹. Community-based tourism can be understood as a bottom-up approach to tourism planning and development that incorporates local individuals and businesses in the planning process, in a meaningful way¹⁰. Based on the results of Plan's community asset mapping exercise, there is strong evidence of a concentration of community-based tourism assets that could provide the basis for a place based tourism program. These assets range from cultural experiences, natural heritage features, culinary and agri-tourism adventures, and cultural related enterprises. It must be pointed out however, that the viability and veracity of these assets will need to be tested further with community input.

Tourism Middlesex has recently completed a *Tourism BR+E study* that engaged more than 60 tourism operators and related business to examine ways to improve the local tourism environment. The objective of the study was to demonstrate an active commitment to achieving a pro-business environment in the tourism industry. The results of the survey suggested that there are a significant number of businesses with plans to expand their operation. These same businesses identified the lack of tourism signage and the expensive cost of marketing/advertising as key impediments to advancing the growth of the sector. It should be pointed out that the County has begun to implement its *Tourism Signage Strategy* with the intent to improve community signage and directions to local tourism products in the short and long term.

⁸ "Realizing Rural Community Based Tourism Development" Peter A. Johnson, Journal of Rural and Community Development, 2010

⁹ Ibid.

¹⁰ "The value of tourism in rural communities" Reid 2003; Jamal & Getz 1999; Reed 1997; Butler 1998



The perceived fragmentation of local tourism marketing efforts, the consistency of leadership, reliance on volunteer resources, and lack of concentrated tourism product development efforts were also raised as concerns with respect to Tourism Middlesex. In this regard, participants suggested that the County needs to capitalize on the tourism promotion efforts of the City of London and the Southwestern Ontario Tourism Corporation (SWOTC). With the recent completion of the London Cultural Plan, which places an emphasis on cultural and heritage assets in their place-making and tourism product development, there may be further opportunity to advance a unique and authentic tourism offering in Middlesex.

The County's location also provides a great opportunity for a sustainable tourism product. Surrounded by a large 'rubber tire' market (day-trippers) within an hour drive away, tourism development could support downtown revitalization efforts and create community benefits through capacity building, economic impact and product delivery¹¹.

3.7 Support Sustainability of Small Business

Entrepreneurs and small business operations are a critical component of the Middlesex economy. In fact, 79% of all businesses in the County have less than 10 employees. If consideration is given to home based business and sole proprietor operations this percentage is even higher.

Stakeholder consultation highlighted the importance of small business to both the local and regional economy and confirmed the need for more business support services that were better geared to the needs of small business. This included assistance with marketing and promotion, access to innovation services support, access to capital and education and training, including how to leverage the Internet as part of overall business planning.

Given the number of small business in the County, it is also be important to understand their site location decisions. Small businesses are more likely to rent space rather than build new, and are often seeking affordable rental space in a community or downtown that will be convenient and attractive to their customers. Many of the stakeholders suggested that improvements to the commercial core areas of the County, including façade improvements, upper storey development, and streetscaping would assist with the attraction and retention of these small businesses, and it would also contributed to more foot traffic in the downtown thereby supporting other businesses. There was a strong sense that the *Main Street Program* could help to address some these needs coupled with the development of Community Improvement Plans. Many stakeholders perceived this to be a more urgent concern for some municipalities based on the needs put forward by business associations and small business owners.

Middlesex Community Futures Development Corporation (CFDC) is mandated to support small business and provide business counseling services, as well as a loan program to support the financial needs of small business. Currently the CFDC has over 6 million dollars in the Middlesex County loan portfolio, access to core Federal funding and multiple provincial service contracts to directly support to Middlesex County businesses. The CFDC has suggested that the use of these

¹¹ "Realizing Rural Community Based Tourism Development" Peter A. Johnson, Journal of Rural and Community Development, 2010



services is undersubscribed in Middlesex County creating an opportunity for the County to partner with the CFDC and the local municipalities to engage local business. The Ontario Ministry of Rural Affairs is well positioned to support small business programming.

3.8 Focus on Workforce Attraction

Communities, provinces and countries alike have come to understand the importance of creating and retaining a skilled, resilient workforce. While the significance of this effort may vary from one community or industry to another, competitive positioning and economic sustainability will be significantly influenced by the ability of local businesses to access talent when it is needed.

Ensuring access to skilled labour is a growing challenge for many communities. In addition, the distinction between so-called 'skilled' and 'non-skilled' work has become increasingly blurred. When coupled with an aging workforce, the skills now demanded by employers place considerable pressures on the supply side of the labour market equation.

An aging workforce is problematic for economies where there are a high proportion of workers in goods producing sectors (manufacturing, agriculture, forestry and construction) where there is a higher proportion of employment filled by workers aged 55 and over. This finding points to the possibility of skill shortages as these older workers retire. Industry sectors where there is a younger workforce (i.e. aged 15-24 years) include retail trade, information, culture & recreation, accommodation and food services¹².

Immigration, female participation rates and educational attainment levels are further influencing the labour market. Immigration in particular is changing the ethnic and cultural diversity of Canada's labour force, as an increasing proportion of people are foreign-born or part of a visible minority group. It is estimated that in 2031, the proportion of the foreign-born population in the labour force will reach 33% (or 1 in 3 persons), and a similar portion (32%) will be visible minorities.¹³

Middlesex County has not been immune to these larger labour force trends. While unemployment is low in the County, the workforce is older and there is evidence of a decline in the core working age population (i.e. aged 30-39 years). In addition, immigration levels in the County are behind the City of London and the province. These factors could present challenges for investment attraction and retention efforts, particularly if County businesses must recruit workers from outside the area. Given these trends more emphasis on workforce attraction and marketing the County to these workers is needed. This includes a focus on lifestyle, local amenities, and the vitality of the local communities.

Given the regional nature of many of these issues, active engagement in the workforce attraction and workforce development activities of the Elgin Middlesex Oxford Workforce Planning and Development Board will be essential to addressing the long term needs of Middlesex County business.

¹² "Projected Trends to 2031 for the Canadian Labour Force" Martel, L. Et al, Statistics Canada, Catalogue No.11-010-X, <http://www.statcan.gc.ca/pub/11-010-x/2011008/part-partie3-eng.htm>, 2011.

¹³ "Projected Trends to 2031 for the Canadian Labour Force" Martel, L. Et al, Statistics Canada, Catalogue No.11-010-X, <http://www.statcan.gc.ca/pub/11-010-x/2011008/part-partie3-eng.htm>, 2011.



3.9 Expand Understanding of County's Agricultural Sector

The province's agricultural sector has experienced profound changes in recent years. Demands have changed in the form of increasing retailer concentration and complex patterns of consumer preferences – leading to sophisticated market-driven strategies around agricultural demands¹⁴. Farmers and agricultural businesses across Ontario have demonstrated uneven abilities to adapt and adjust to these ongoing changes whether it is learning to utilize e-commerce marketing towards their product or anticipating significant labour force changes.

The agriculture industry has a significant impact on the economic growth and stability of a rural community. It has the potential to create employment, build the economy in rural communities and grow Ontario's Gross Domestic Product¹⁵. The impact in Middlesex County is evident both in the number of people employed in agriculture and the diversity of the sector and its related supply chain.

The Elgin Middlesex Oxford Workforce Planning and Development Board has recently completed an agriculture and labour force analysis that presented a strong understanding of the County's current agricultural workforce and business patterns. However, changes in labour force demand, and emerging investment opportunities indicate the need to update the study's findings. Key recommendations from the study suggest the need for strategies that will encourage young people to enter farming careers and encourage supporting research and development opportunities around agricultural issues, processes and product.

The recent census profile suggests that the County has a strong agricultural sector that includes producers, processors and related food manufacturing. Several of these businesses have been awarded for their work in food innovation processes. The County is well positioned to build on this investment and its manufacturing history to attract further opportunities including bio-products, functional foods and nutraceuticals.

Both University of Western Ontario and Fanshawe College have increased their research and development capacity for agricultural related issues and challenges. In addition, SOMA has prepared detailed profiles on food processing initiatives and opportunities in Southwestern Ontario. Middlesex stands to gain from this effort through their participation in SOMA, and as part of the Ontario Food Cluster Initiative. The City of London is also an active member of the Food Cluster Initiative, providing further opportunity for collaboration and cooperation around investment attraction.

SWOTC is also supporting agritourism opportunities. The tourism organization developed an Agri-tourism toolkit that aims to assist farmers and local operators improve their business in a growing market. Middlesex County can assist these farmers by further supporting SWOTC's efforts with their local farmers. A great example of this would be to include agri-tourism signs within the Tourism Signage Strategy.

¹⁴ "The Handbook of Research on Entrepreneurship in Agriculture and Rural Development" Gry Agnete Alsos, Sara Carter, Elisabet Ljunggren, Friederike Welter, 2011

¹⁵ "Rural Economic Development" Ontario Federation of Agriculture, <http://www.ofa.on.ca/issues/overview/rural-economic-development.aspx>



The foregoing strategic priorities provide a strong framework for an Economic Development Strategic Plan. The following section addresses this issues and opportunities with specific recommendations that will address the desired outcomes for Plan.



4 Economic Development Strategic Plan

4.1 Vision

Vision statements present an image of future success, based on what is attainable in reality – it should be built on the strengths, opportunities and capacity of a community or region.

The *County's Official Plan* has presented a vision for Middlesex County that is premised on building a healthy community through the protection of the agricultural community; the management of growth and the creation of a vibrant economy.

Building on this vision and the larger contribution of the stakeholder community, the *Economic Development Strategic Plan* advances the following vision statements:

- Middlesex will leverage its strategic location in the attraction of new business, investment and skilled workers while protecting and retaining its countryside image and community spirit.
- Middlesex will leverage the lifestyle choices, economic vitality and natural environment that makes the County an attractive place to live, work and do business.
- Middlesex will foster economic diversification efforts that enhance the strengths of the regional economy and build on the County's history of entrepreneurship to provide resilient employment and investment in the region.



4.2 Goals, Objectives and Actions

The Middlesex County's Economic Development Strategic Plan is underpinned by three high level goals, intended to anchor all strategic initiatives or ensuing actions on the part of the County's Economic Development Office. The goals also support the vision for the County as articulated in the *County's Official Plan*.

The goals, objectives and related actions should be viewed as a starting point based on community input and research at a point in time. It is not meant to serve as an exhaustive list of all activities that could, or will engage the County's economic development staff and its partners. New actions will emerge throughout the lifespan of this *Strategic Plan* and partnership organizations will emerge or change. County staff should allow for continuous assessment of how these new actions contribute to the overall success of the strategy. It is also implicit by the nature of the Plan that the County will need to collaborate and cooperate with its community partners to ensure its effective implementation.

For the purposes of this plan, goal, objective and action are defined as follows:

- **GOALS:** The vision and desired outcomes that emerged from the strategic planning process and a view of the aspirations of the County's citizens and stakeholders.
- **OBJECTIVES:** How these goals are to be achieved and what must be accomplished in the next five years.
- **ACTIONS:** Direct the County and its stakeholders to those essential issues or opportunities that must be addressed over the next five years – short term, medium term and long term.

The following *Goals* and *Objectives* guide the *County of Middlesex Economic Development Strategic Plan*:

GOALS	OBJECTIVES
Goal 1 A Supportive Environment for Business and Investment	Enhance the County's competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors
Goal 2 A Proactive and Targeted Approach to Business Growth and Attraction	Implement an investment attraction program focused on sector opportunities with a history of competitiveness and export orientation or demonstrate potential for growth.
Goal 3 A Commitment to Community Sustainability and Growth	Build community capacity for economic growth and development through effective leadership and communication



4.3 Recommendations

Goal 1: A Supportive Environment for Business and Investment

Objective: Enhance the County's competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors

Actions

1. Continue to explore efficient and cost effective options to expand the County's broadband infrastructure as a means for attracting and retaining business investment in the County.
 - 1.1. Determine the broadband capacity of the region's business parks and the feasibility of increasing capacity, as appropriate.
 - 1.2. Consider incorporating broadband expansion into road construction projects where appropriate
2. Ensure the County Official Plan provides a clear and progressive vision, policies and implementation mechanisms to direct and manage growth in the County and that they support the attraction of business investment throughout the County's sectors, as well as the needs of the County's small business operators, entrepreneurs and home based businesses.
3. Explore the opportunities to create a County level Community Improvement Plan (CIPs) to make use of grants and tax incentives that will jump start business development and investment (e.g. agriculture sector).
 - 3.1. Promote the preparation of CIPs at the local level, as a way to support downtown revitalization (façade improvements, upper storey office and residential development, adaptive reuse of vacant buildings etc.) and ensure the region's commercial cores are more attractive to business, investment and visitors and complement the efforts of the Main Street Program.
 - 3.2. Explore opportunities to create County-wide standards for local CIP geared to the agricultural sector.
4. Work with local partners to promote and actively expand the resources available to support small business and start-ups, as it relates to the delivery of training, business counselling and financial assistance to small business operators and entrepreneurs in Middlesex County.
 - 4.1. Work with Middlesex CFDC to create and promote an internet toolkit for managing a business' online presence including internet planning, website development, e-marketing, social media etc.
 - 4.2. Continue to promote the County's online master directory of business services and support available to local business and entrepreneurs. This should include a master list of external public sector funding programs available to both SME and larger business operations.



5. Promote the Middlesex CFDC's Business Help Centre and its efforts to provide guidance and support to start-ups and existing small businesses recognizing the uniqueness of the County's small business community.
 - 5.1. Identify opportunities to host recurring events and networking opportunities in Middlesex County and engage local chambers of commerce and Middlesex CFDC as partners.
 - 5.2. Work with business and community stakeholders to identify a list of Middlesex mentors willing to provide business assistance and coaching to small business operators and entrepreneurs. (e.g. Innovation Synergy Centre in Markham)
6. Work to create an entrepreneurial spirit among students and youth (18-30 years) in Middlesex County.
 - 6.1. Examine and catalog existing programs and opportunities that currently support youth entrepreneurship in the London and Middlesex region, including efforts being undertaken the Workforce Planning and Development Board. Promote existing services.
 - 6.2. Develop a youth entrepreneurship committee to identify and advance support activities and training needs for students and youth considering starting a small business.

Goal 2: A Proactive and Targeted Approach to Business Attraction

Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.

Actions

7. Promote the County's lead generation protocol for the management of investment attraction opportunities. The County should manage any County-developed investment leads and be the central point of contact for DFAIT, MEDT and OMAF/OMRA. (See Appendices).
8. Continue to maintain an inventory of available serviced and un-serviced commercial and industrial land, as well as vacant commercial and industrial buildings in the County and make the information available on the County's website (investinmiddlesex.ca). Include information considered relevant to a prospective business or investor.
 - 8.1. Monitor the availability of serviced employment land in the County against longer term demand.
9. Continue to upgrade the County's website (investinmiddlesex.ca) to include greater functionality and GIS capabilities.
 - 9.1. Promote the elements and characteristics of the County (and local municipalities) and the larger region that would attract new residents to community including proximity to the City of London.



- 9.2.** Continue to profile business success stories that illustrate the range of business investment and sector opportunities in the County's target sectors. Engage community stakeholders (Local Municipalities, Chambers of Commerce, BIAs, CFDCs etc.) in the identification of local success stories.
- 10.** Focus marketing of serviced industrial lands on advanced manufacturing, agri-business, construction, professional and business services, and transportation and warehousing sectors.
- 10.1.** Consider the opportunity for marketing efforts that target larger footprint retail and commercial operations to the County.
- 11.** Support industrial land marketing with a comprehensive package of employment and development-related data, which can be used for inquiries and incoming Requests for Information (RFI) from other levels of government and site selectors.
- 11.1.** Target short-term marketing of shovel-ready and fully-serviced areas with the closest proximity to London and the closest proximity to the 400 series corridors.
- 11.2.** Pursue opportunities to participate in EDCO's¹⁶ Certified Site Program as a way to advance the marketability of the County's industrial properties.
- 12.** Continue to pursue opportunities to cooperate more fully with the London Economic Development Corporation (LEDC), including greater collaboration around immigration opportunities, agri-business investment attraction and the hosting of federal and provincial international investment representatives as a means to attract both new domestic and foreign investment in the County.
- 13.** Tailor international marketing efforts on advanced manufacturing and agriculture/agri-business opportunities to gain better visibility with prospects and increase the number of investment leads considering the County.
- 14.** Continue to cultivate relationships with federal and provincial foreign investment intermediaries that support the investment attraction goals of the County.
- 14.1.** Implement the recommendations of the County's FDI Strategy as it relates to leveraging regional and sector partnerships.
- 14.2.** Actively participate in the investment attraction efforts of the Ontario Food Cluster, including at least one trade mission a year.
- 15.** Develop an Agriculture/Agribusiness sector strategy that provides clear direction on matters related to the growth and sustainability of the agricultural economy in the County. The strategy should:
- 15.1.** Assess the impact of the agriculture/agribusiness sector in Middlesex County.
- 15.2.** Identify and prioritize opportunities related to local food, value-added agriculture and supply chain development.

¹⁶ Economic Developers Council of Ontario



- 15.3. Identify opportunities to leverage the research capabilities of Western University and Fanshawe College.
- 15.4. Support the “Engage Western” initiative as an opportunity for projects to connect students and departments with local business and the community.
- 15.5. Build awareness of business and investment opportunities in specialized crops, value added food products and local food.
- 15.6. Identify opportunities for workshops/seminars that highlight methods that producers and Agri-food suppliers can utilize to enhance their business capabilities.
- 15.7. Address issues of succession planning and workforce development.
- 15.8. Support the active marketing and promotion of investment opportunities in this sector.

Goal 3: A Commitment to Community Sustainability and Growth

Objective: Build community capacity for economic growth and development through effective leadership and communication.

Actions

16. Create a Middlesex Economic Development Partnership Forum that meets quarterly to explore and discuss issues and opportunities for economic development in the County.
 - 16.1. Participants should include representatives from local municipalities, business associations, support agencies and local economic development stakeholders.
 - 16.2. Sessions should provide opportunities to inform participants on local and regional economic development efforts, enable the sharing of information, investment opportunities, seek solutions to problems and connect people to available resources.
 - 16.3. Support the CFDC’s development of a Centre for Non-Profit Collaboration aimed at strengthening the local non-profit sector.
 - 16.4. Engage in the implementation of the 2013 “Middlesex County Impact of Socio-Economic Needs on Human Needs Report”
17. Implement a Business Retention + Expansion (BR+E) program that uses a standardized approach to implementation, interviews and surveys, database templates, etc.
 - 17.1. Work with local municipalities to develop/complete a visitation program in each of the County’s target sectors (starting with manufacturing); have the County collect and report on the regional findings to better inform the area municipalities and County Council of the challenges facing the County.
 - 17.2. In collaboration with the local municipalities identify the top 25 companies in the County that should be jointly visited (County and Municipality) on an annual or



biannual basis. These should include companies that are on a significant growth trajectory, are major employers and contributors to the regional economy, have high value-added products, or likely export a high percentage of their products.

- 18.** Take an active role in the labour force planning efforts of the Elgin Middlesex Oxford Workforce Training and Development Board.
 - 18.1.** Leverage the Employer One survey tool, Vicinity Jobs reporting , and sectoral reports to gather intelligence of the issues and challenges confronting local businesses
 - 18.2.** Support the effective implementation of the local labour market plan.
- 19.** Cooperate with the Middlesex CFDC to implement a Main Street Program, as a means to attract business investment to the commercial cores of the County, create attractive public spaces, and support residential growth.
- 20.** Form a County Agriculture Advisory Committee to facilitate a shared knowledge exchange on the issues and opportunities for investment in the region's agricultural sector including workforce development.
 - 20.1.** Explore partnership opportunities between the County's agriculture sector and the region's post-secondary institutions.
 - 20.2.** Assist with the implementation of the County's Agricultural Sector Strategy
 - 20.3.** Pursue opportunities to collaborate with the London Chamber of Commerce Agri-business Committee.
- 21.** Form a County Tourism Advisory Committee and facilitate a shared knowledge exchange of the opportunities for investment and growth of the region's tourism sector.
 - 21.1.** Support the creation of a regional tourism strategy that focuses on agri-tourism and community based tourism opportunities. Strategy should include a vision and a priority setting exercise to better define tourism product offering, ways to determine and measure economic impact, and relevant performance metrics.
 - 21.2.** Build on the community asset mapping work in the Economic Development Strategic Plan with input from community stakeholders.
 - 21.3.** Create an online, searchable tourism business directory. Host directory on Tourism Middlesex.
 - 21.4.** Expedite the implementation of the County's Signage strategy. Including the opportunity of integrating agri-tourism signs into the strategy.
 - 21.5.** Work with local partners to identify opportunities to bundle local tourism efforts to create a more unique/attractive product for consumers/visitors. Leverage the marketing and promotional efforts of the City of London, SWOTC and Tourism Middlesex.



4.4 Implementation

The foregoing action plan assumes that Middlesex County will take more of a leadership role in the delivery of economic development programming and services in the region. The completion of this strategy and action plan will inform the business planning process that incorporates the short term priorities set out in the strategy and articulates the resources required to move forward with the strategy's implementation.

The findings from the supporting background research and analysis presented in Appendices to this report have informed the development of the goals, objectives and actions contained in the Economic Development Strategic Plan. Taking into consideration the current delivery structure for economic development across Middlesex County and the broader region, the outcome from the strategy development will enable a more collaborative effort and targeted approach to economic development activities and programming.

One of the key considerations in the implementation of the proposed economic development program will be an understanding and communication of how the strategy is to be resourced. While this includes the financial resources required to move forward, there is a growing sense of need to provide clarity around the vision for economic development and the roles and responsibilities of both economic development staff and external community organizations and agencies. This is relevant from the perspective of potential investors and their desire for a one stop approach to gathering information and assistance but also in terms of how to leverage partnership opportunities and business development. With a high level of community interest and engagement in economic development, consideration must be given to a delivery model that will achieve the greatest results for the County over the long term.



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
<p>1. Continue to explore efficient and cost effective options to expand the County’s broadband infrastructure as a means for attracting and retaining business investment in the County.</p> <p>1.1. Determine the broadband capacity of the region’s business parks and the feasibility of increasing capacity, as appropriate.</p> <p>1.2. Consider incorporating broadband expansion into road construction projects where appropriate</p>				■	■	■
<p>2. Ensure the County Official Plan provides a clear and progressive vision, policies and implementation mechanisms to direct and manage growth in the County and that they support the attraction of business investment throughout the County’s sectors, as well as the needs of the County’s small business operators, entrepreneurs and home based businesses.</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
<p>3. Explore the opportunities to create a County level Community Improvement Plan (CIPs) to make use of grants and tax incentives that will jump start business development and investment (e.g. agriculture sector).</p> <p>3.1. Promote the preparation of CIPs at the local level, as a way to support downtown revitalization (façade improvements, upper storey office and residential development, adaptive reuse of vacant buildings etc.) and ensure the region’s commercial cores are more attractive to business, investment and visitors and complement the efforts of the Main Street Program.</p> <p>3.2. Explore opportunities to create County-wide standards for local CIP geared to the agricultural sector.</p>				■	■	■
<p>4. Work with local partners to promote and actively expand the resources available to support small business and start-ups, as it relates to the delivery of training, business counselling and financial assistance to small business operators and entrepreneurs in Middlesex County.</p> <p>4.1. Work with Middlesex CFDC to create and promote an internet toolkit for managing a business’ online presence including internet planning, website development, e-marketing, social media etc.</p> <p>4.2. Continue to promote the County’s online master directory of business services and support available to local business and entrepreneurs. This should include a master list of external public sector funding programs available to both SME and larger business operations.</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
<p>5. Promote the Middlesex CFDC’s Business Help Centre and its efforts to provide guidance and support to start-ups and existing small businesses recognizing the uniqueness of the County’s small business community.</p> <p>5.1. Identify opportunities to host recurring events and networking opportunities in Middlesex County and engage local chambers of commerce and Middlesex CFDC as partners.</p> <p>5.2. Work with business and community stakeholders to identify a list of Middlesex mentors willing to provide business assistance and coaching to small business operators and entrepreneurs. (e.g. Innovation Synergy Centre in Markham)</p>				■	■	■
<p>6. Work to create an entrepreneurial spirit among students and youth (18-30 years) in Middlesex County.</p> <p>6.1. Examine and catalog existing programs and opportunities that currently support youth entrepreneurship in the London and Middlesex region, including efforts being undertaken the Workforce Planning and Development Board. Promote existing services.</p> <p>6.2. Develop a youth entrepreneurship committee to identify and advance support activities and training needs for students and youth considering starting a small business.</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
Recommended Performance Metrics						
<ul style="list-style-type: none"> ■ New business start-ups as percentage of all businesses in the community ■ New business investment attracted – dollars and number of businesses ■ Per cent of business leads that choose to locate in community/region ■ Average business size changed over time ■ Increased competitiveness of businesses ■ Number and/or per cent of business program participants still in business 1 - 5 years after start-up ■ Number of business issues addressed ■ Number of business survey (BR+E) projects ■ Dollar value of public investment in development projects ■ Percentage of total costs for private investment ■ Total number of private investors ■ Private investment leveraged from public investment ■ Change in BIA levies ■ Occupancy and vacancy rates for <ul style="list-style-type: none"> ● Industrial ● Retail ● Offices ● Residential ● Accommodations ● Commercial ● Downtown 						



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
7. Promote the County's lead generation protocol for the management of investment attraction opportunities. The County should manage any County-developed investment leads and be the central point of contact for DFAIT, MEDT and OMAF/OMRA. (See Appendices).				■	■	■
8. Continue to maintain an inventory of available serviced and un-serviced commercial and industrial land, as well as vacant commercial and industrial buildings in the County and make the information available on the County's website (investinmiddlesex.ca). Include information considered relevant to a prospective business or investor. 8.1. Monitor the availability of serviced employment land in the County against longer term demand.				■	■	■
9. Continue to upgrade the County's website (investinmiddlesex.ca) to include greater functionality and GIS capabilities. 9.1. Promote the elements and characteristics of the County (and local municipalities) and the larger region that would attract new residents to community including proximity to the City of London. 9.2. Continue to profile business success stories that illustrate the range of business investment and sector opportunities in the County's target sectors. Engage community stakeholders (Local Municipalities, Chambers of Commerce, BIAs, CFDCs etc.) in the identification of local success stories.				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
<p>10. Focus marketing of serviced industrial lands on advanced manufacturing, agri-business, construction, professional and business services, and transportation and warehousing sectors.</p> <p>10.1. Consider the opportunity for marketing efforts that target larger footprint retail and commercial operations to the County.</p>				■	■	■
<p>11. Support industrial land marketing with a comprehensive package of employment and development-related data, which can be used for inquiries and incoming Requests for Information (RFI) from other levels of government and site selectors.</p> <p>11.1. Target short-term marketing of shovel-ready and fully-serviced areas with the closest proximity to London and the closest proximity to the 400 series corridors.</p> <p>11.2. Pursue opportunities to participate in EDCO's¹⁷ Certified Site Program as a way to advance the marketability of the County's industrial properties.</p>				■	■	■
<p>12. Continue to pursue opportunities to cooperate more fully with the London Economic Development Corporation (LEDC), including greater collaboration around immigration opportunities, agri-business investment attraction and the hosting of federal and provincial international investment representatives as a means to attract both new domestic and foreign investment in the County.</p>				■	■	■

¹⁷ Economic Developers Council of Ontario



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
13. Tailor international marketing efforts on advanced manufacturing and agriculture/agri-business opportunities to gain better visibility with prospects and increase the number of investment leads considering the County.				■	■	■
14. Continue to cultivate relationships with federal and provincial foreign investment intermediaries that support the investment attraction goals of the County. 14.1. Implement the recommendations of the County's FDI Strategy as it relates to leveraging regional and sector partnerships. 14.2. Actively participate in the investment attraction efforts of the Ontario Food Cluster, including one trade mission a year.				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
<p>15. Develop an Agriculture/Agribusiness sector strategy that provides clear direction on matters related to the growth and sustainability of the agricultural economy in the County. The strategy should:</p> <p>15.1. Assess the impact of the agriculture/agribusiness sector in Middlesex County.</p> <p>15.2. Identify and prioritize opportunities related to local food, value-added agriculture and supply chain development.</p> <p>15.3. Identify opportunities to leverage the research capabilities of Western University and Fanshawe College.</p> <p>15.4. Support the “Engage Western” initiative as an opportunity for projects to connect students and departments with local business and the community.</p> <p>15.5. Build awareness of business and investment opportunities in specialized crops, value added food products and local food.</p> <p>15.6. Identify opportunities for workshops/seminars that highlight methods that producers and Agri-food suppliers can utilize to enhance their business capabilities.</p> <p>15.7. Address issues of succession planning and workforce development.</p> <p>15.8. Support the active marketing and promotion of investment opportunities in this sector</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
Recommended Performance Metrics						
<ul style="list-style-type: none"> ■ Total expenditures on economic development activities ■ Total capital expenditure or investments ■ Percentage of total municipal budget towards economic development ■ Funding leveraged through expenditures or investments ■ Jobs created (fulltime, part-time, contract, seasonal) <ul style="list-style-type: none"> ● Due to new businesses - start-ups ● Due to businesses relocating there ● Due to existing businesses expanding ■ Increases in the number of jobs in specific sectors, i.e., tourism ■ Number of workers, numbers in selected industry/sector/occupation ■ Percentage of residents locally employed, in specific sectors, i.e., creative class ■ Proportion of total employment in targeted sector/ all sectors ■ Change in the number of businesses in a community, a region or in specific sector ■ Number of business registrations or business related licenses issued ■ New business start-ups as percentage of all businesses in the community ■ New business investment attracted – dollars and number of businesses ■ Per cent of business leads that choose to locate in community/region ■ Amount of exports and trade activity ■ More breakouts to new markets and growth ■ Increased competitiveness of businesses 						



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
<p>16. Create a Middlesex Economic Development Partnership Forum that meets quarterly to explore and discuss issues and opportunities for economic development in the County.</p> <p>16.1. Participants should include representatives from local municipalities, business associations, support agencies and local economic development stakeholders.</p> <p>16.2. Sessions should provide opportunities to inform participants on local and regional economic development efforts, enable the sharing of information, investment opportunities, seek solutions to problems and connect people to available resources.</p> <p>16.3. Support the CFDC’s development of a Centre for Non-Profit Collaboration aimed at strengthening the local non-profit sector.</p> <p>16.4. Engage in the implementation of the 2013 “Middlesex County Impact of Socio-Economic Needs on Human Needs Report”</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
<p>17. Implement a Business Retention + Expansion (BR+E) program that uses a standardized approach to implementation, interviews and surveys, database templates, etc.</p> <p>17.1. Work with local municipalities to develop/complete a visitation program in each of the County's target sectors; have the County collect and report on the regional findings to better inform the area municipalities and County Council of the challenges facing the County.</p> <p>17.2. In collaboration with the local municipalities identify the top 25 companies in the County that should be jointly visited (County and Municipality) on an annual or biannual basis. These should include companies that are on a significant growth trajectory, are major employers and contributors to the regional economy, have high value-added products, or likely export a high percentage of their products.</p>				■	■	■
<p>18. Take an active role in the labour force planning efforts of the Elgin Middlesex Oxford Workforce Training and Development Board.</p> <p>18.1. Leverage the Employer One survey tool, Vicinity Jobs reporting , and sectoral reports to gather intelligence of the issues and challenges confronting local businesses</p> <p>18.2. Support the effective implementation of the local labour market plan.</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
19. Cooperate with the Middlesex CFDC to implement a Main Street Program, as a means to attract business investment to the commercial cores of the County, create attractive public spaces, and support residential growth.				■	■	■
20. Form a County Agriculture Advisory Committee to facilitate a shared knowledge exchange on the issues and opportunities for investment in the region's agricultural sector including workforce development. 20.1. Explore partnership opportunities between the County's agriculture sector and the region's post-secondary institutions. 20.2. Assist with the implementation of the County's Agricultural Sector Strategy 20.3. Pursue opportunities to collaborate with the London Chamber of Commerce Agri-business Committee.				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
<p>21. Form a County Tourism Advisory Committee and facilitate a shared knowledge exchange of the opportunities for investment and growth of the region’s tourism sector.</p> <p>21.1. Support the creation of a regional tourism strategy that focuses on agri-tourism and community based tourism opportunities. Strategy should include a vision and a priority setting exercise to better define tourism product offering, ways to determine and measure economic impact, and relevant performance metrics.</p> <p>21.2. Build on the community asset mapping work in the Economic Development Strategic Plan with input from community stakeholders.</p> <p>21.3. Create an online, searchable tourism business directory. Host directory on Tourism Middlesex.</p> <p>21.4. Expedite the implementation of the County’s Signage strategy. Including the opportunity of integrating agri-tourism signs into the strategy.</p> <p>21.5. Work with local partners to identify opportunities to bundle local tourism efforts to create a more unique/attractive product for consumers/visitors. Leverage the marketing and promotional efforts of the City of London, SWOTC and Tourism Middlesex.</p>				■	■	■



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
Recommended Performance Metrics						
<ul style="list-style-type: none"> ■ Funding granted ■ Total number of partners ■ Total number of projects ■ Increased levels of local training/ education available ■ Local regional partnerships – number of partnerships, size of partnerships, type of partnerships ■ New business start-ups as percentage of all businesses in the community ■ New business investment attracted – dollars and number of businesses ■ Per cent of business leads that choose to locate in community/region ■ Average business size changed over time ■ Increased competitiveness of businesses ■ Number and/or per cent of business program participants still in business 1 - 5 years after start-up ■ Dollar value of public investment in development projects ■ Percentage of total costs for private investment ■ Total number of private investors ■ Private investment leveraged from public investment 						

County of Middlesex Economic Development Strategic Plan

Appendix Report

December 2013



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A. Economic Base Analysis

The County of Middlesex is located in southwestern Ontario with easy access to Highways 401 and 402. While largely comprised of rural communities, the economic development prospects of the County are in many ways tied to the success of its regional market. The County shares the relative strengths of the London region in terms of investment attraction, and its lower property taxes and costs present the prospect of accommodating companies attracted by the regional market that London drives. The County also exhibits a strong and expanding agricultural sector with farm receipts in excess of \$600 million.

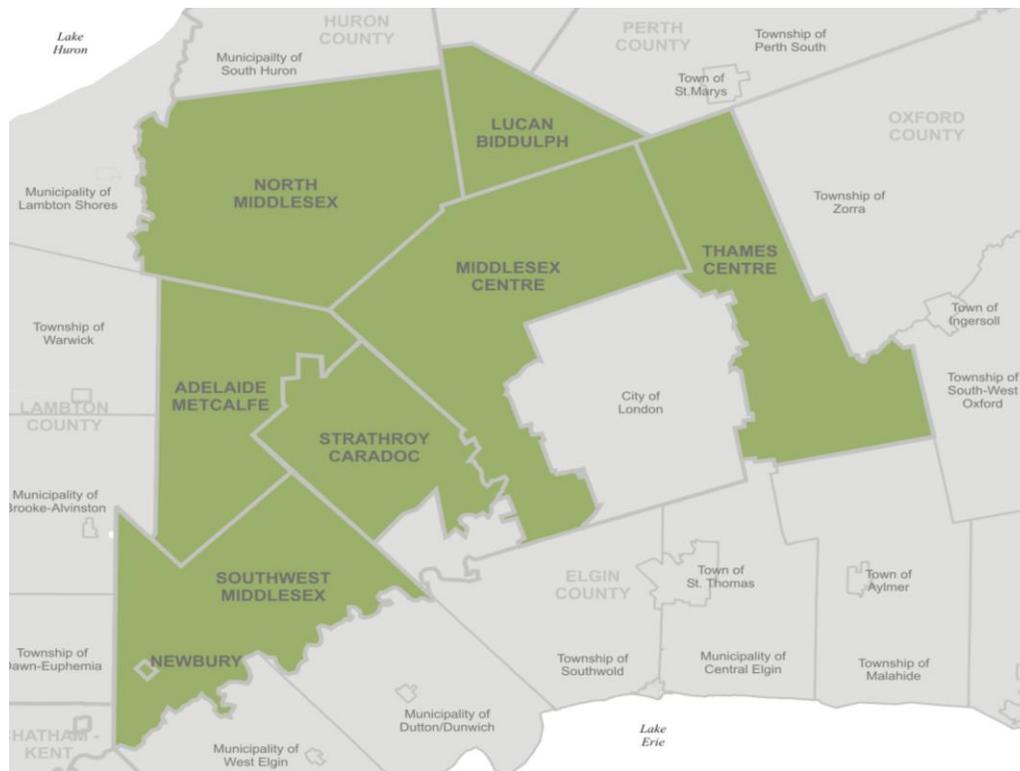
The historic towns and villages of its lower-tier municipalities coupled with the region's agricultural landscapes contribute to the County's strong rural character and appeal.

The lower-tier municipalities that make up the County of Middlesex include:

- Adelaide Metcalfe
- Lucan Biddulph
- Middlesex Centre
- Newbury
- North Middlesex
- Southwest Middlesex
- Strathroy-Caradoc
- Thames Centre

Figure 1 illustrates the political boundaries of the County and its lower-tier municipalities. The map also highlights the positioning of the County around the City of London.

FIGURE 1: MAP OF COUNTY OF MIDDLESEX AND MUNICIPALITIES



Source: County of Middlesex



The goal of this economic base analysis is to provide a detailed understanding of the economy of the County of Middlesex that can be used to inform the creation of an economic development strategy. The profile includes current information on the demographics of the County, the changes in the composition of its business community, and its labour force, as well as a spotlight on the creative economy and the agriculture sector. The discussion also reflects on the findings of the County's 2008 strategy.

Economic Development Strategy for Middlesex County, 2008

The current economic development strategy for the County of Middlesex was completed in 2008. The strategy identified areas of focus for economic development as well as a number of associated economic development activities. The strategy contains a proposal as to how economic development responsibilities should be divided among different organizations that are responsible for the delivery of economic development programming and services.

The strategic themes of the 2008 strategy include the following:

1. **Enhancing the Business Environment:** Activities include ways for the County to take action that improve the local business environment.
2. **Manufacturing:** The focus for manufacturing is retaining employment, diversifying into food processing, networking and developing new markets in Asia, among other related initiatives.
3. **Agriculture and the Bio-economy:** The strategy promotes the potential of agriculture based bio-products to join the County's strength in agriculture with manufacturing capacity and proximity to future adopters.
4. **Tourism:** The major activity here is the development of a tourism destination marketing organization, marketing current tourist attractors, and adjusting bylaws to support small business (i.e. sidewalk cafes)

The role and responsibilities recommended in the 2008 Economic Development Strategy for economic development organizations are summarized as follows:

- The County take a lead role in investigating public transportation and high speed internet, investment attraction activities for the agriculture and manufacturing sectors, and County wide tourism projects, as well as basic economic development activities.
- Lower tier municipalities lead business retention activities, site specific tourism projects, and basic economic development activities (lead handling) when the first contact is the municipality
- Other economic development stakeholders lead in the following areas:
 - Chamber of Commerce – business networking
 - The Business Help Centre: Community Futures Development Corporation (CFDC) lead development of an enterprise centre
 - Elgin Middlesex Oxford Workforce Planning and Development Board (EMOLTB) lead role in workforce development
 - A new Destination Marketing Organization as an eventual tourism lead role (in 2008 the lead organization was the CFDC)



1.1 Demographic Characteristics

1.1.1 Population Change

The population of Middlesex County has seen an increase of 4.4% over the five years from 2006 to 2011, to reach 73,000 people. While significant, the population of Middlesex increased more slowly than the population of Ontario, which grew by 5.5% during the same period.

FIGURE 2: POPULATION TRENDS AT THE COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON) AND ONTARIO, 2001-2026

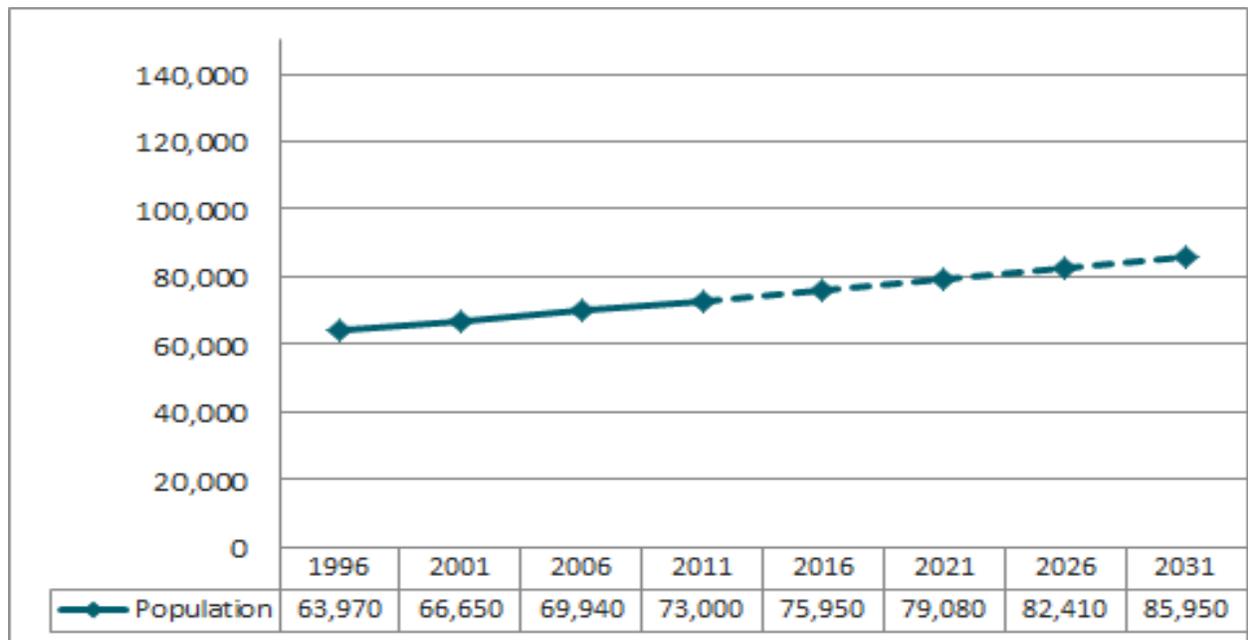
	2001	2006	2011	2016	2021	2026	2031
Middlesex	66,650	69,940	73,000	75,950	79,080	82,410	85,950
% Change		4.9%	4.4%	4.0%	4.1%	4.2%	4.3%
Ontario	11,896,663	12,665,346	13,366,294	14,034,227	14,816,038	15,673,290	16,532,677
% Change		6.5%	5.5%	5.0%	5.6%	5.8%	5.5%

Source: Statistics Canada estimates, 2001-2012, County of Middlesex Employment Land Needs Analysis and Ontario Ministry of Finance projections, reference scenario, 2016-2026. Adapted by Millier Dickinson Blais Inc.

Note: County population data for 2006 does not include the population of the Oneida 41 reserve, which creates an exaggerated increase in the overall growth rate from 2006 to 2011. The population of the Oneida 41 reserve in 2011 was 1,282.

The rate of population growth rate remains fairly consistent between 2011 and 2031; the County of Middlesex is expected to grow between 4.0% and 4.3% per year, at an average of 4.2%, while Ontario's population is expected to grow between 5.0% and 5.8% per year, at an average of 5.5%.

FIGURE 3: POPULATION TREND, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), 1996-2031



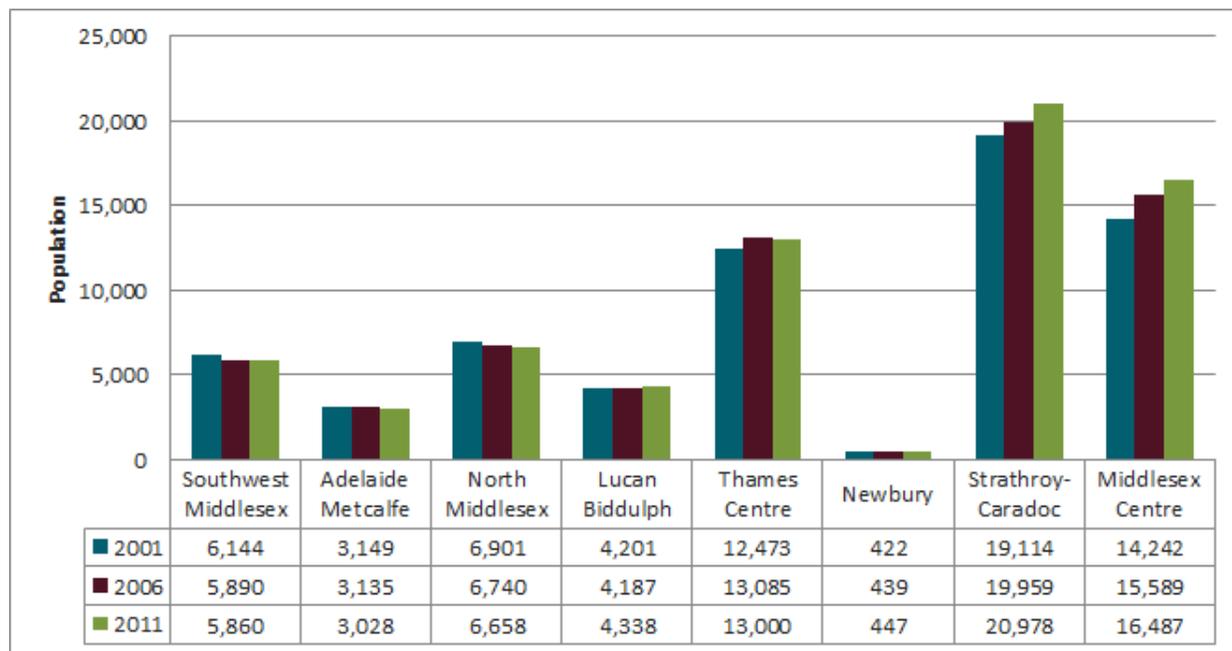
Source: Statistics Canada Census, 1996- 2011, and County of Middlesex Employment Land Needs Analysis. Adapted by Millier Dickinson Blais Inc.



The County of Middlesex Official Plan, anticipates a population of 75,950 people in 2016, and 79,080 in 2021. Depending on the nature of the demographics, a positive population trend is a good foundation for economic development, and can be a deciding factor in an investment attraction decision.

It should be noted however, that population growth varies across the County, with some communities expanding and others experiencing a loss in population. Figure 4 illustrates how this population growth is distributed across the lower tier municipalities.

FIGURE 4: POPULATION OVER TIME, COUNTY OF MIDDLESEX MUNICIPALITIES, 2001, 2006, 2011



Source: Statistics Canada Census, 2001, 2006, 2011. Adapted by Millier Dickinson Blais Inc.

The data suggests that:

- The municipalities of Middlesex Centre and Strathroy-Caradoc have experienced the highest net growth, with increases in population of 15.8%, or 2,245 people, and 9.8%, or 1,864 people, respectively.
- Over the past ten years, Southwest Middlesex has experienced a loss of 4.6% of its population, which represents more than 280 people. The decline is more pronounced from 2001-2006, with a minimal net loss from 2006-2011.
- North Middlesex has experienced a more consistent loss in population, with a total of more than 240 fewer people, representing 3.5% of the population over the ten year period.

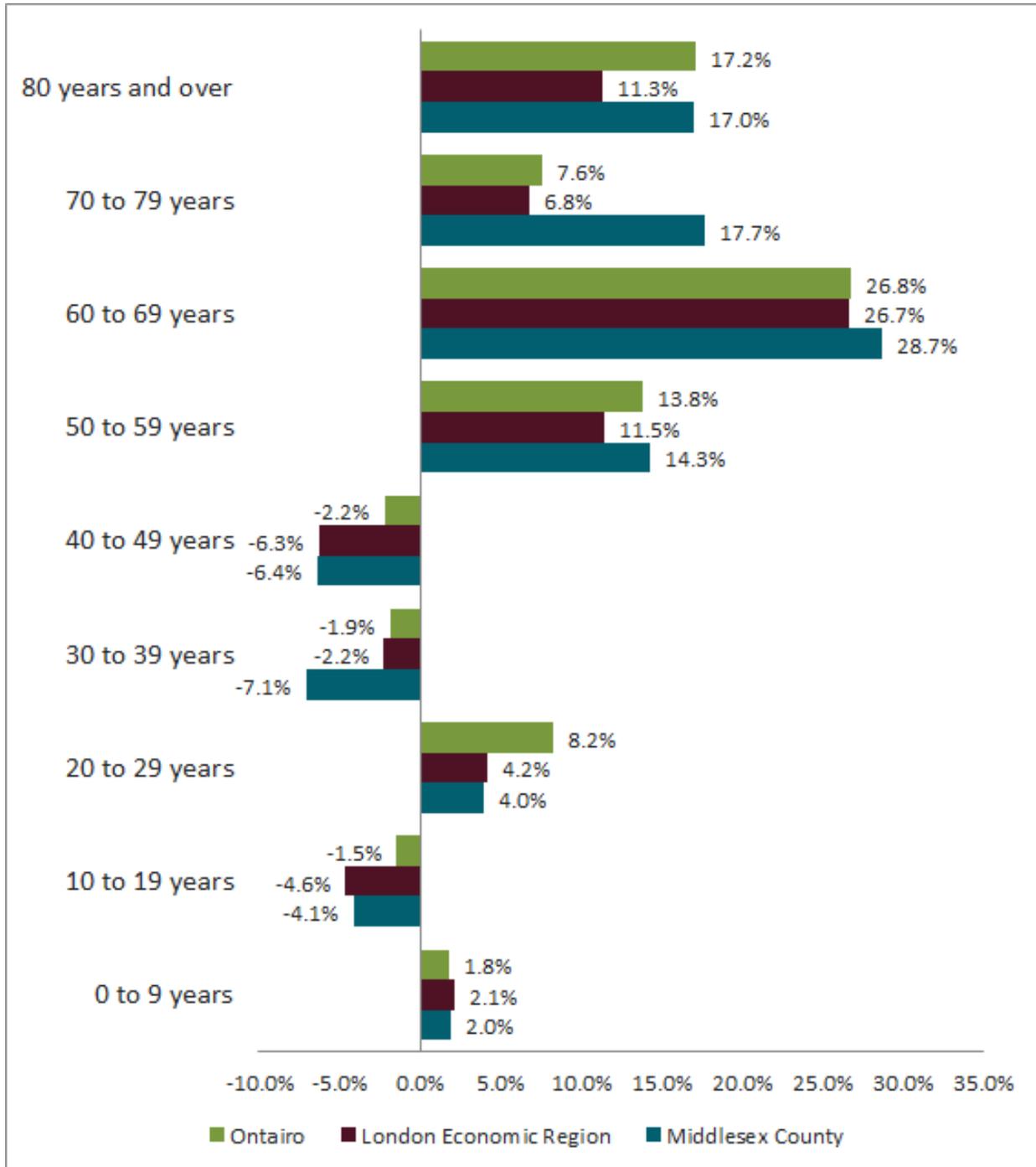
1.1.2 Population by Age

To further understand the impact of population demographics on the County, the change in population is analyzed by age group, and compared with the London Economic Region¹ and the Province of Ontario.

¹ The London Economic Region is comprised of Elgin, Oxford and Middlesex Counties and the City of London



FIGURE 5: CHANGE IN POPULATION FROM 2006 TO 2011 BY AGE GROUP, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), LONDON ECONOMIC REGION, ONTARIO



Source: Statistics Canada Census, 2006, 2011. Adapted by Millier Dickinson Blais Inc.

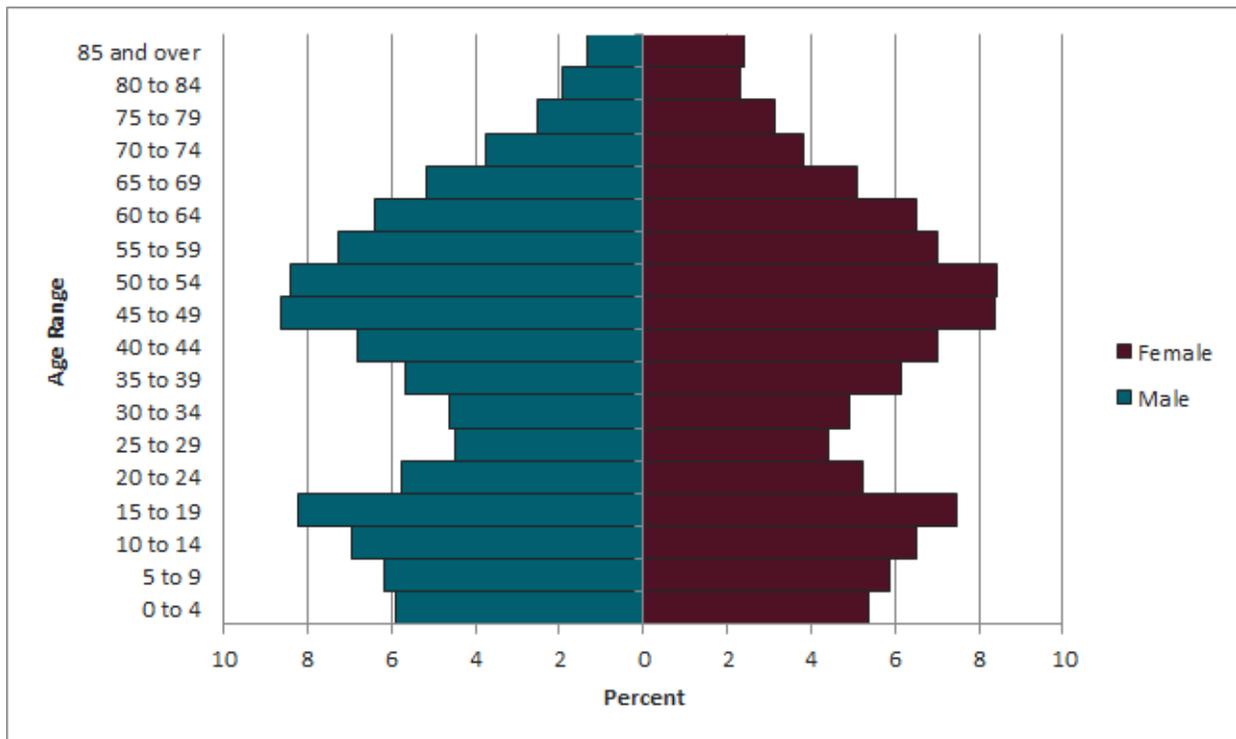


The populations of Middlesex County, the London Economic Region and the Province of Ontario are generally similar in overall trends, but differ in the degree to which these trends are expressed. The highlights of percentage change in the population, by age group, are summarized as follows:

- In children between the ages of 0-9, the changes in population of Middlesex, London Economic Region and Ontario were similar; while the rate of growth in the number of youth aged 10-19 was similar between Middlesex and the London Economic Region, but much lower than Ontario.
- With respect to young adults between the ages of 20-29, the population in Middlesex increased, but increasing proportionately less than Ontario.
- The population between the ages of 30 -39 decreased by more than double the percentage of decrease in the London Economic Region and Ontario; also, the population between the ages of 40-49 declined to the same degree when compared with Ontario.
- The population of every age group between the ages of 50- 80 increased to a greater degree in Middlesex than in the London Economic Region or Ontario.

The population pyramid in Figure 6 illustrates the age and gender distribution within the population of the County of Middlesex in 2011.

FIGURE 6: POPULATION PYRAMID, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON) 2011



Source: Statistics Canada Census 2011. Adapted by Millier Dickinson Blais Inc.

Residents between the ages of 45-54 represent the largest percentage of the population in 2011. The lower percentage of school aged children (5-14) and young adults (20-34) in the population is important to monitor, as it may indicate a future skills shortage. Currently there are not enough workers to replace those who can be expected to retire from the workforce in the next 5-15 years. An anticipated lack of



workers is a negative factor in business investment decisions. The region’s low unemployment rate is another indicator of a tight labour market.

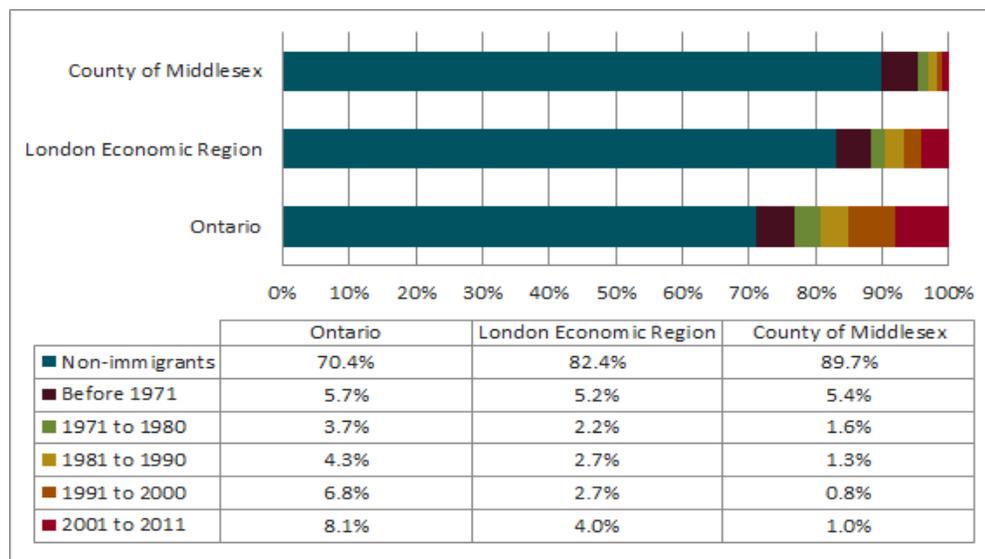
The median age for the County of Middlesex is unavailable due to data limitations, however the combined median age of Middlesex and London increased from 38.5 in 2006 to 39.8 in 2011. The City of London alone has a median age of 39.3. Both figures are less than the median of the Ontario population, which is 40.4 years of age. The inclusion of London suggests that the median age of the County of Middlesex is likely higher than the provincial average a further indication of an aging population and the tightening of the labour market.

1.1.3 Immigration and Ethnic Diversity

Immigration supports population and workforce growth, as well as entrepreneurship, and it has throughout Canada’s history. However, immigration is expected to become even more important for Canada and by extension Ontario, in the future. Statistics Canada reports that immigration represented two thirds of the net increase in Canada’s population by 2006, and that from 2030 onwards, immigration is expected to represent the full net increase in Canada’s population².

Therefore, attracting and welcoming new Canadians into communities is an important part of building a workforce for the future. This is a particular concern for rural communities since they tend to experience lower levels of immigration than urban areas³. One reason for the concentration of immigrants in urban areas is often an existing community of new Canadians who live in these areas and thus support integration. The presence of immigrants and ethnic diversity however, will become increasingly important to economic development to all communities in the future.

FIGURE 7: PERCENTAGE OF IMMIGRANTS IN COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), LONDON ECONOMIC REGION, AND ONTARIO, 2011



Source: Statistics Canada Census 2006, National Household Survey 2011

² Population Growth in Canada, Statistics Canada, 2008 [Online: <http://www.statcan.gc.ca/pub/91-003-x/2007001/4129907-eng.htm>]

³ Where are Immigrants Residing Now? Focus on Rural Ontario, Rural Ontario Institute, July 2013. [Online: <http://ruralontarioinstitute.ca/file.aspx?id=bb401b41-d9c1-42ee-b5e6-92ecbce4bd30>]



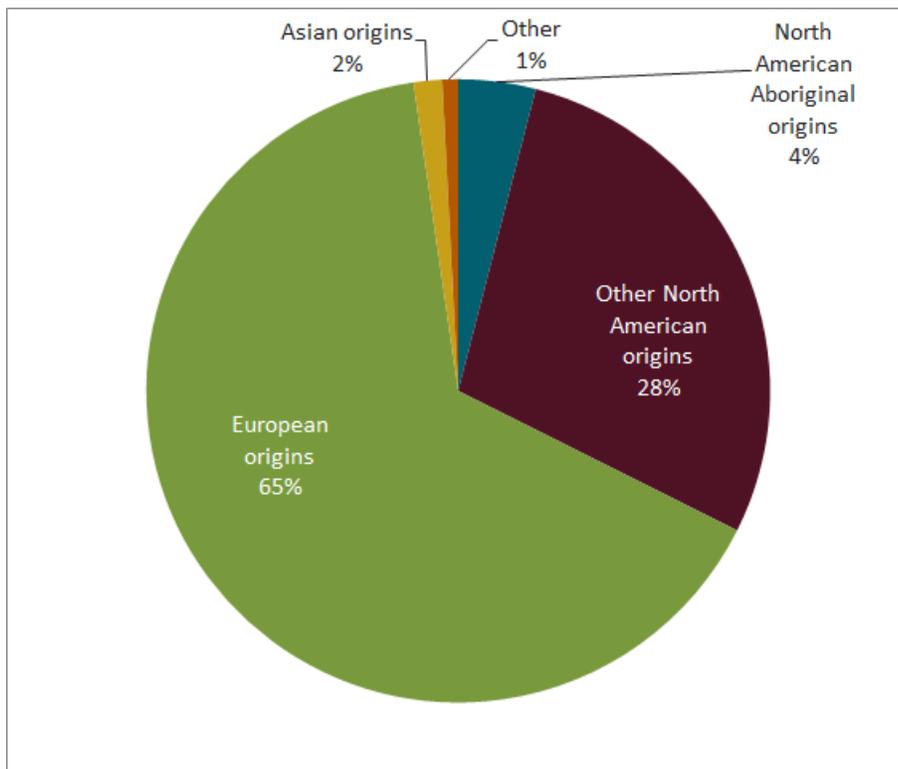
Figure 7 illustrates the percentage of immigrants in Ontario relative to the London Economic Region⁴ and that of County of Middlesex. The percentage of immigrants arriving in Ontario and in the London Economic Region as a whole is increasing, while in Middlesex, the figure hovers at around 1%. Also, the percentage of immigrants in Middlesex County who arrived before 1971 is higher than the combined percentage of immigrants since that time.

Low levels of immigration in a community can be a disincentive for new Canadians to make their home or open a business in Middlesex County. It could also be a disincentive for attracting foreign direct investment depending on workforce requirements.

Many economic development and community organizations in Middlesex County and the London Economic Region are already undertaking strategies to support the attraction and retention of newcomers to Canada. The County of Middlesex understands that a successful immigrant population can enhance welcoming efforts in communities that seek to attract new Canadians, as well as international efforts to attract foreign direct investment.

Immigration is related to ethnic diversity, but in fact it is a distinct concept. The ethnic diversity of Middlesex County is another way of understanding the regional population.

FIGURE 8: ETHNIC ORIGIN, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2011



Source: Statistics Canada, National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.

The ethnic origin of the population of Middlesex County in 2011 is illustrated in Figure 8. The chart echoes the previous immigration chart, where the majority of the ethnic population is European in origin;

⁴ The London Economic Region includes the Counties of Oxford, Elgin and Middlesex, as well as the City of London.

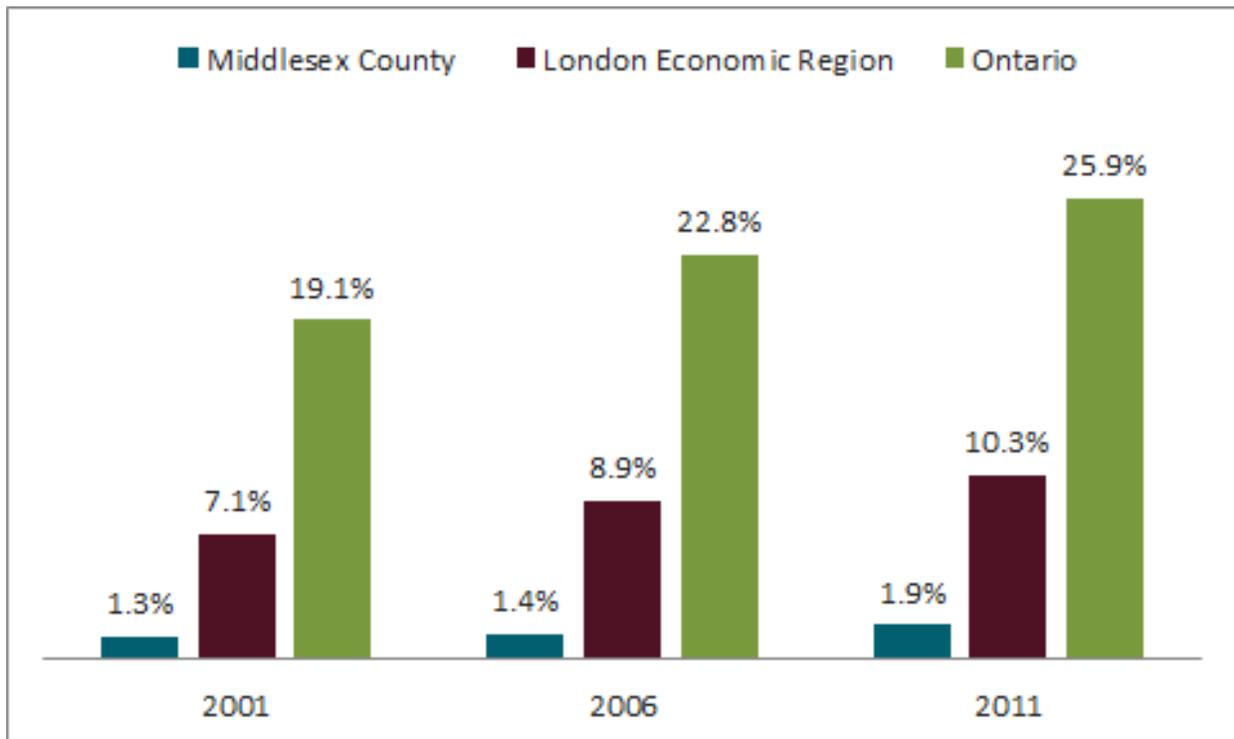


the British Isles, with 49,000 and Western Europe, with close to 21,000, being the primary groups representing European ethnicity. The next most significant group are those of other North American origins, which is dominated by Canadians. The majority of the Aboriginal population is made up of 3,210 First Nations people and just over 300 Métis.

Residents of the County who are South Asian in origin generally come from Lebanon, East Indian, Sri Lankan, Chinese, Korean, and Vietnamese. People of Korean ethnicity represented the largest population, with a total of approximately 300 residents; the rest of the ethnicities represent between 100 and 150 residents.

In addition to ethnicity, visible minorities are another way to understand the composition of the communities. Visible minorities are defined by Statistics Canada as persons, other than Aboriginal peoples, who are non-Caucasian in race, or non-white in colour.

FIGURE 9: PERCENTAGE OF VISIBLE MINORITIES IN THE POPULATION, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), LONDON ECONOMIC REGION, AND ONTARIO, 2001, 2006, 2011



Source: Statistics Canada Census 2001, 2006 and National Household Survey 2011. Adapted by Miller Dickinson Blais Inc.

The percentage of visible minorities in the County of Middlesex is slowly increasing, but is still low and increasing more slowly than the broader economic region and the province as a whole. Visible minorities are an important part of ethnic diversity, bringing new ideas and traditions into communities. Figure 10 provides more detail about the visible minority populations within the County.



FIGURE 10: VISIBLE MINORITY POPULATION, COUNTY OF MIDDLESEX, 2011

Visible Minority Population	Number of People
South Asian	295
Korean	295
Black	165
Latin American	115
Chinese	90
Southeast Asian	75
Filipino	65
Arab	65
Japanese	50
West Asian	15

Source: National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.

Of the visible minority groups in Middlesex, those of South Asian (East Indian) and Korean backgrounds represent the largest populations. These findings are consistent with ethnic origin information.

After considering the ethnic origins and visible minorities within Middlesex County, The County may have greater potential to attract immigrants from the areas of Asia that are represented in the County's population, because people often migrate to a location where there is an existing population from the same cultural background⁵.

1.1.4 Educational Attainment

There are many different opinions about the future of the economy, however there is general consensus on the fact that Canada's economic opportunities are becoming more knowledge based, and that there will be fewer low skilled employment opportunities available in the future. A 2010 provincial policy report states, "What we do know is that an increasing proportion of the jobs that will exist will require a level of education or training beyond secondary school, be it an apprenticeship, a diploma, a degree, a certificate, an industry credential, or a professional qualification"⁶.

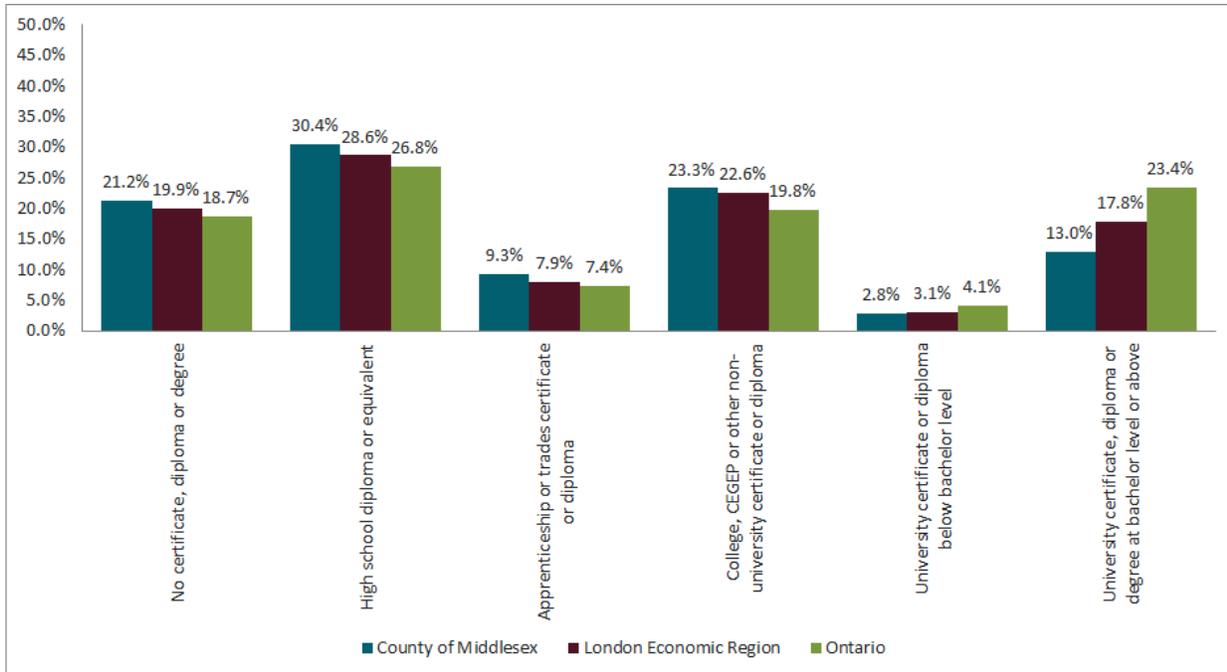
Educational attainment of the residents of Middlesex is therefore an important aspect of economic development, as education levels are related to the future prosperity of the economy. Figure 11 compares the educational attainment of residents of Middlesex with the London Economic Region and Province of Ontario.

⁵ Ibid.

⁶ People Without Jobs, Jobs Without People: Ontario's Labour Market Future, Rick Miner, Feb 2010. [Online: <http://www.collegesontario.org/policy-positions/MinerReport.pdf>]



FIGURE 11: EDUCATIONAL ATTAINMENT OF MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), LONDON ECONOMIC REGION AND ONTARIO, 2011

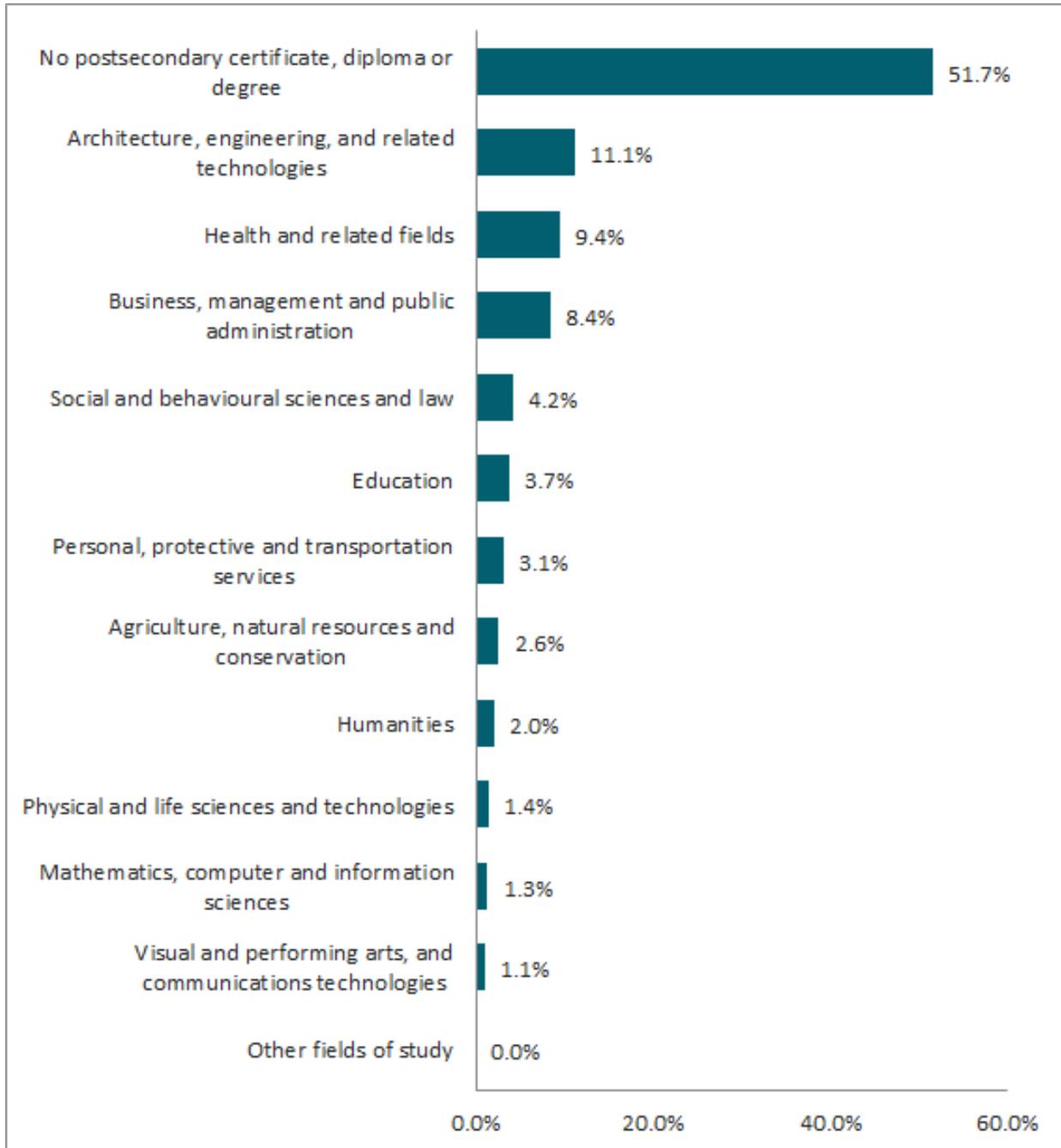


Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

When compared with the London Economic Region and the Province of Ontario, the County of Middlesex has a higher level of citizens with no secondary or high school education, however this likely equates to the older age cohorts of the population. In contrast, the County has a higher proportion of apprenticeship or trades training and college level education than both comparative groups. Ontario and the London Economic Region have a higher percentage of people with university certificates, diplomas or degrees.



FIGURE 12: FIELD OF STUDY OF POPULATION OVER 15 YEARS OF AGE, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), 2011



Source: Statistics Canada National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.

The leading field of study of residents of Middlesex is architecture, engineering, and related technologies, at 11%, followed by health and related fields at 9% and business, management and public administration at 8%.

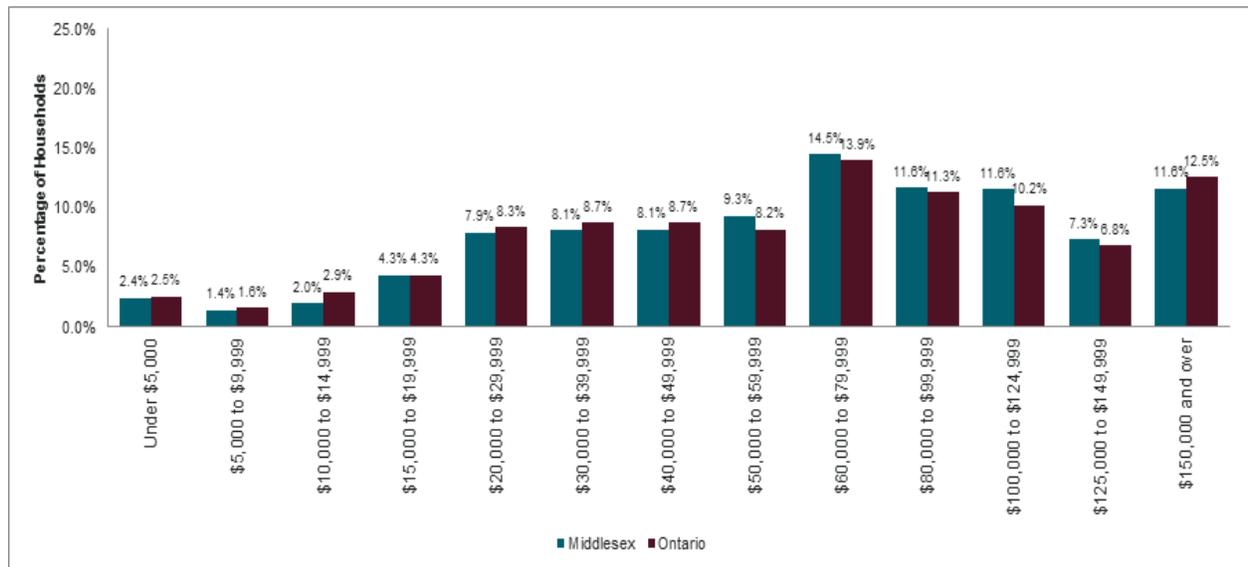


1.1.5 Household Income

Household income is an indicator of the socio-economic qualities of Middlesex County, and competitive income levels can be an advantage when seeking to attract both workers and investment to the area.

Figure 13 compares the distribution of incomes in the County with the Province of Ontario. In summary, incomes in Middlesex County tend to be more concentrated in the range of \$50,000 per year to \$150,000 per year than is the case in Ontario.

FIGURE 13: HOUSEHOLD INCOME DISTRIBUTION OF MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), AND ONTARIO, 2011



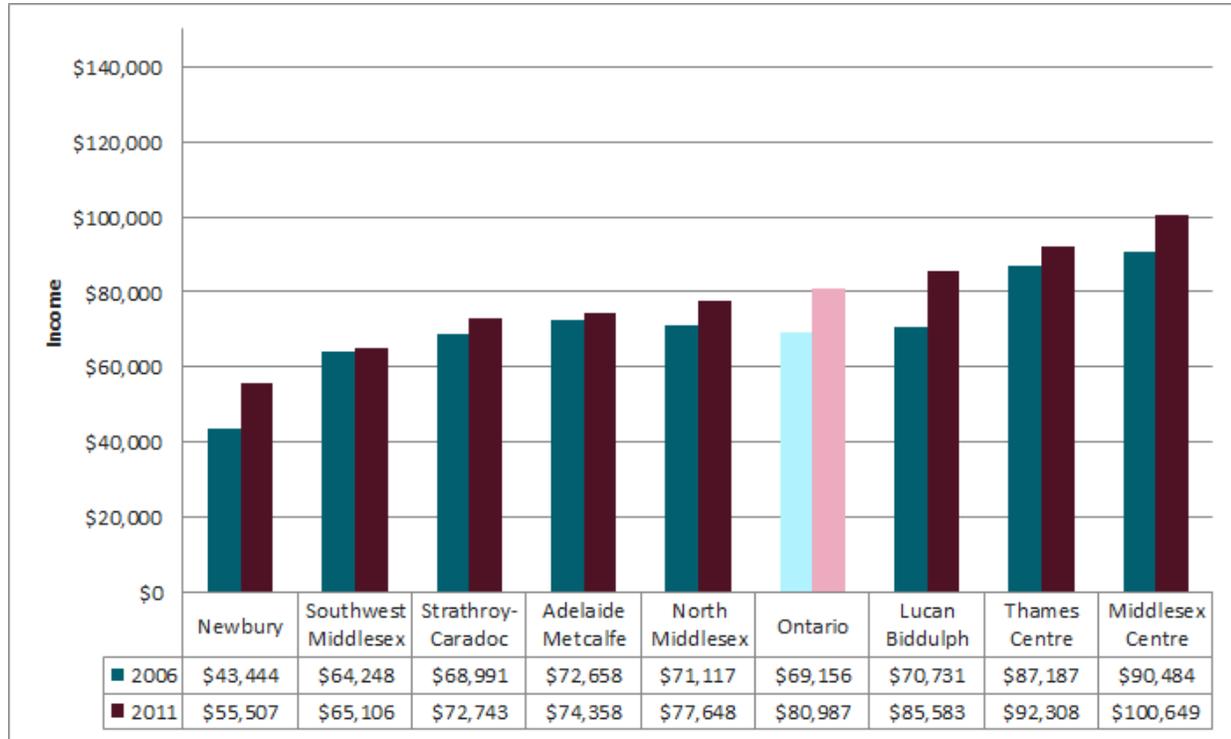
Source: National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.

A lower percentage of households in Middlesex have before tax incomes of less than \$49,000 as compared to Ontario. A slightly higher percentage of households in Middlesex earn between \$50,000 and \$149,999 dollars per year, as compared to Ontario. However, across Ontario, there are a higher percentage of households earning more than \$150,000 than are found in Middlesex County.

In Figure 14, the median family income of the lower-tier municipalities in the County of Middlesex is compared with that of the Province of Ontario.



FIGURE 14: MEDIAN FAMILY INCOME, MIDDLESEX COUNTY LOWER TIER MUNICIPALITIES, 2006, 2011



Source: Statistics Canada National Household Survey, 2011 and 2006 Census. Adapted by Millier Dickinson Blais Inc.

The median income in all of the lower-tier municipalities increased over the period of 2006 to 2011. The greatest percentage increase in median income between 2006 and 2011 was experienced in Newbury, 27% and Lucan Biddulph, 21%. The median income of Ontario increased by 17% during the same period.

The communities with the highest median family income are Middlesex Centre, with just over \$100,649, and Thames Centre, with \$92,308. These municipalities are located in proximity to the City of London.

As illustrated there is a large difference in median incomes within Middlesex County. Typically, areas with lower median income may be attractive to goods oriented business investment, if sufficient labour and infrastructure is also available. Service oriented business, on the other hand, are more likely to choose an area with higher median incomes, as this equates to more disposable income.

1.2 Labour Force Profile

The labour force profile of the County of Middlesex is an important aspect of the County's competitiveness for economic development. The following section outlines resident labour force characteristics and growth patterns, labour force composition by industry and occupation, place of work for the County's resident labour force, and commuting patterns.

While the previous section outlined the skill levels and growth factors that impact the resident labour force, the following section provides insight on specific industries in which that skilled labour force is employed, the occupations they occupy, and the regions they work in.



1.2.1 Labour Force Characteristics

Between 2006 and 2011 the total labour force of the County of Middlesex decreased by an estimated 830 people, or 2.1%, to a total of 39,030 people. It is important to note that these figures describe the employment status of residents, regardless of whether or not the jobs themselves are located in the County.

In Figure 15, the labour force activity in the County of Middlesex is compared with the London Economic Region and the Province of Ontario. The number of people employed in Middlesex County also declined, by 3.8% or 1,440, and the number of unemployed people increased by 615, or 38.6%. In turn, the participation rate⁷ and the employment rate⁸ decreased, while the unemployment rate⁹ increased over the period. The County has a lower unemployment rate than the London Economic Region and Ontario, indicating a tight labour market where finding workers may be a challenge. This may be due, in part, to lower labour market participation in Middlesex County, which could be related to the previous discussion on the relatively high number of residents retiring or nearing retirement.

The employed population in the London Economic Region declined and the unemployed population increased; however, the size of the labour force increased in the larger region, by just over 3,000 people, or 0.9%. This dynamic led to a greater increase in the unemployment rate in the London Economic Region.

The London Economic Region and the County of Middlesex have a different dynamic than the Province of Ontario, where the labour force has grown by 4.2%, along with increases in the employed and unemployed population. Altogether, despite labour force growth the participation rate and employment rate declined and the unemployment rate increased.

⁷ The participation rate is the percentage of the population over the age of 15 that is participating in the labour force.

⁸ The employment rate is the percentage of the population over the age of 15 that is employed.

⁹ The unemployment rate is the percentage of the labour force that is unemployed.



FIGURE 15: LABOUR FORCE ACTIVITY, POPULATION OVER 15 YEARS OF AGE, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), LONDON ECONOMIC REGION AND ONTARIO, 2011

	County of Middlesex		
	2006	2011	Change
Total population aged 15 years and over	54,970	58,305	3,335
In the labour force	39,860	39,030	-830
Employed	38,260	36,820	-1,440
Unemployed	1,595	2,210	615
Not in the labour force	15,115	19,285	4,170
Participation rate	72.5%	66.9%	-5.6%
Employment rate	69.6%	63.2%	-6.5%
Unemployment rate	4.0%	5.7%	1.7%

	London Economic Region		
	2006	2011	Change
Total population aged 15 years and over	491,850	513,790	21,940
In the labour force	333,720	336,770	3,050
Employed	314,520	309,395	-5,125
Unemployed	19,200	27,370	8,170
Not in the labour force	158,120	177,030	18,910
Participation rate	67.8%	65.5%	-2.3%
Employment rate	63.9%	60.2%	-3.7%
Unemployment rate	5.8%	8.1%	2.4%

	Ontario		
	2006	2011	Change
Total population aged 15 years and over	9,819,420	10,473,670	654,250
In the labour force	6,587,580	6,864,990	277,410
Employed	6,164,245	6,297,005	132,760
Unemployed	423,335	567,985	144,650
Not in the labour force	3,231,840	3,608,685	376,845
Participation rate	67.1%	65.5%	-1.5%
Employment rate	62.8%	60.1%	-2.7%
Unemployment rate	6.4%	8.3%	1.8%

Source: Statistics Canada National Household Survey, 2011, Census, 2006. Adapted by Millier Dickinson Blais Inc.



In summary, the total labour force declined in size between 2006 and 2011 in the County, although it is growing in the larger London Economic Region and across Ontario. The number of people employed in Middlesex County also declined from 2006 to 2011. These facts, combined with a low unemployment rate, could be a concern in attracting new investment, as it may suggest a tightening labour market.

1.2.2 Labour Force by Industry

Overall employment identifies the size and the nature of the labour force, but to understand more about the sectors in which individuals are employed we must assess the composition of the labour force by industry. Generally, concentrations of employment in particular industries might indicate a cluster of skill sets and competitive advantage in the local economy.

The leading industries in terms of the share of the labour force employed by that industry in 2011 are outlined in Figure 16

FIGURE 16: TOTAL LABOUR FORCE POPULATION AGED 15 YEARS AND OVER BY INDUSTRY, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), 2011

	2006 Labour	% of all industries	2011 Labour	% of all industries	Change 2006-2011
All industries	39,540	100.0%	38,215	100%	-1,325
Health care and social assistance	4,425	11.2%	4,970	13.0%	545
Manufacturing	6,285	15.9%	4,760	12.5%	-1525
Retail trade	3,890	9.8%	3,730	9.8%	-160
Construction	3,450	8.7%	3,490	9.1%	40
Agriculture, forestry, fishing and hunting	3,885	9.8%	3,140	8.2%	-745
Educational services	2,145	5.4%	2,595	6.8%	450
Other services (except public administration)	1,890	4.8%	2,075	5.4%	185
Transportation and warehousing	1,850	4.7%	1,945	5.1%	95
Accommodation and food services	1,850	4.7%	1,730	4.5%	-120
Public administration	1,180	3.0%	1,710	4.5%	530
Wholesale trade	2,085	5.3%	1,705	4.5%	-380
Professional, scientific and technical services	1,600	4.0%	1,575	4.1%	-25
Finance and insurance	1,630	4.1%	1,570	4.1%	-60
Administrative and support, waste management and remediation services	1,390	3.5%	1,295	3.4%	-95
Arts, entertainment and recreation	650	1.6%	695	1.8%	45
Real estate and rental and leasing	505	1.3%	440	1.2%	-65
Information and cultural industries	460	1.2%	405	1.1%	-55
Utilities	295	0.7%	285	0.7%	-10
Mining, quarrying, and oil and gas extraction	55	0.1%	65	0.2%	10
Management of companies and enterprises	25	0.1%	30	0.1%	5

Source: Statistics Canada National Household Survey, 2011 and Census 2006. Adapted by Millier Dickinson Blais Inc.

The top industries, in which residents of Middlesex are employed, are health care and manufacturing, which lead the top five industries by approximately 1,000 employees. Leading industries are:

- Health care and social assistance 13%
- Manufacturing 12.5%
- Retail trade 9.8%



- Construction 9.1%
- Agriculture, forestry, fishing and hunting 8.2%

In four of these sectors, employment declined from 2006 to 2001. People employed in manufacturing declined by 1,525 from 2006 and 2001, and employment in agriculture declined by 745. Another sector which experienced a decline is wholesale trade, which was reduced by 280 people.

These trends are further evidence of the decline of manufacturing in Ontario and the move towards smaller, more advanced manufacturing operations which employ fewer people. The decline in agricultural employment is due in part to the integration of technology in farming operations, but also the trend of farm consolidation.

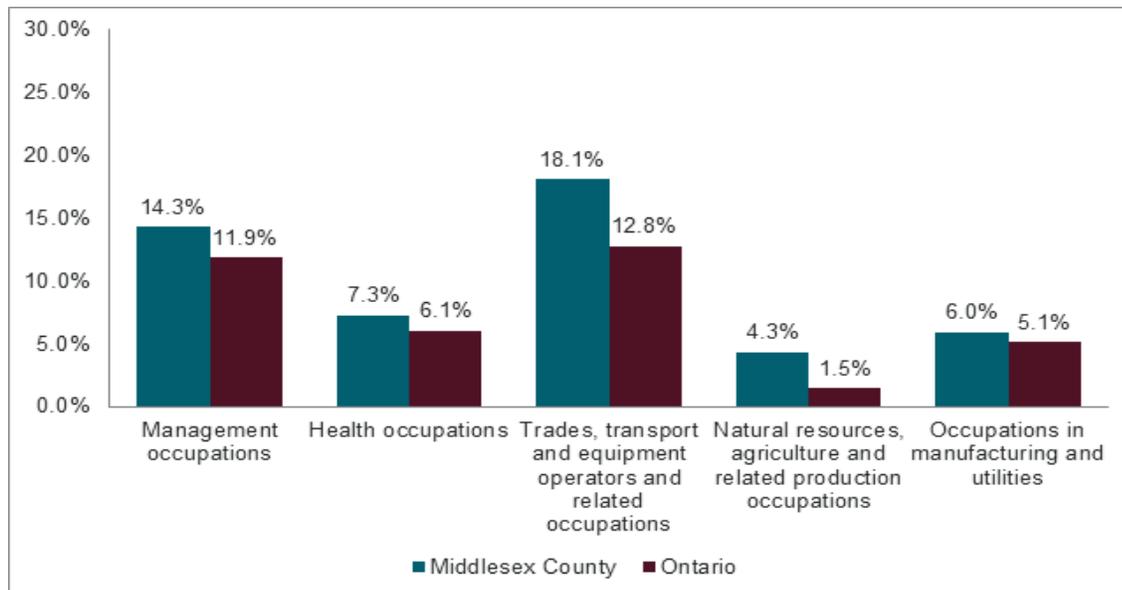
The health care sector saw an increase of 545 workers and other areas of public sector employment also increased, including educational services, by 450, and public administration, by 530.

The strong performance of service based sectors such as the public sector, retail services and health care, is related to the growth in the local and regional population. These industries tend to follow population growth rather than lead the development of the economy. The labour force contractions in manufacturing and agriculture are important as they are more indicative of the strength of Middlesex's export based economy.

1.2.3 Labour Force by Occupation

The composition of the labour force can also be analyzed by occupation. By looking at the occupational composition of the resident labour force, the specific competencies and skills of the individuals living in the County can be better understood. Figure 17 shows the concentration of occupations in Middlesex County.

FIGURE 17: OCCUPATIONS MORE CONCENTRATED IN COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON) THAN IN ONTARIO, 2011



Source: Statistics Canada National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.



The occupations that are more concentrated in Middlesex include:

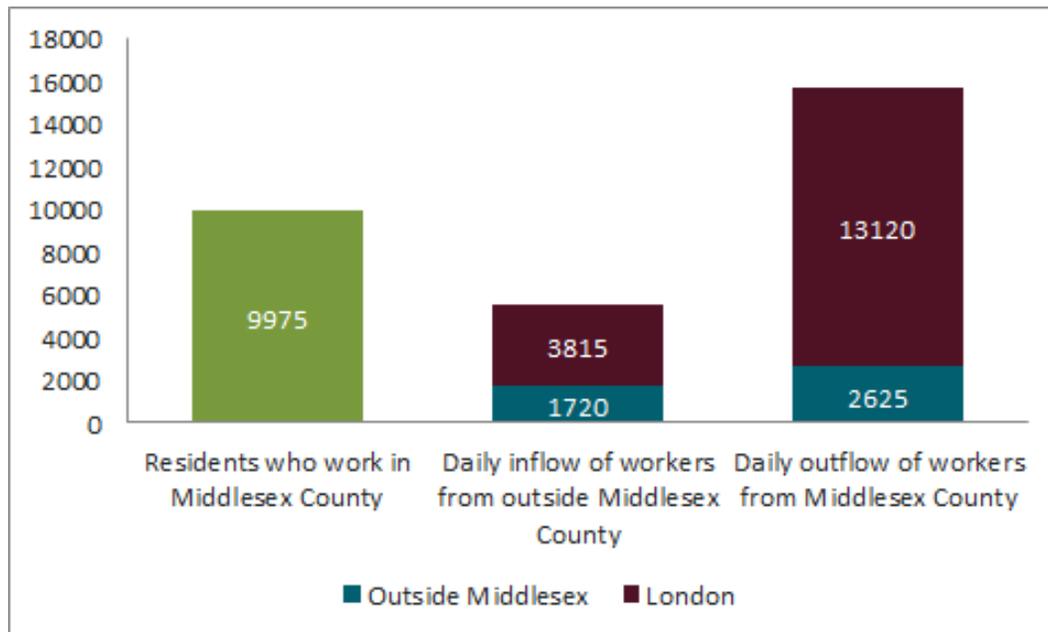
- Management occupations 14.3%
- Health occupations 7.3%
- Trades, transport and equipment operators and related occupations 18.1%

The concentration of workers in the trades and in agriculture related occupations in Middlesex is higher than Ontario. Middlesex also has a higher concentration of management occupations in its economy than Ontario, likely due in part to the proximity of the City of London and the lifestyle choices of these workers – working in London and living in Middlesex. Health occupations are also more concentrated in Middlesex than in Ontario, again likely due to the proximity of the City of London and the concentration of health care institutions.

1.2.4 Labour Flow and Commuting Patterns

The movement of the Middlesex County labour force provides information about the mobility of workers, and the interconnectedness of the Middlesex economy with that of neighbouring communities and counties, particularly London.

FIGURE 18: COMMUTING FLOWS IN AND OUT OF THE COUNTY OF MIDDLESEX, 2011



Source: National Household Survey, 2011. Adapted by Millier Dickinson Blais Inc.

Figure 18 shows that the number of residents leaving Middlesex County for work on a daily basis is 15,745, more than 50% higher than the number of residents who work in the County, which is 9,975. In addition, the number of residents commuting to London is higher than the number of residents who work in Middlesex County. This can be seen as a detriment to the County's economy, as residents may purchase goods and services from London rather than closer to home. However, proximity to a city can also be a benefit, as County residents can enjoy urban amenities that may not be available in more rural communities, adding to their quality of life. There are also a considerable number of people commuting to



Middlesex from London, which shows that London is also a source of labour for businesses in Middlesex. This is positive, as access to and availability of a larger labour force is necessary for investment attraction and business retention efforts in the County.

1.3 Industry Sector Analysis

The industry sector analysis provides a thorough overview of the business community and employment trends in specific industry sectors.

1.3.1 Location Quotient Analysis

The purpose of a Location Quotient (LQ) analysis is to identify areas of competitive advantage and gaps in the economy. LQ's can be calculated using the number of businesses or by employment. Employment data has been used in this analysis. A LQ with a value greater than 1.25 indicates a concentration of economic activity that is greater than the overarching region, and may indicate a competitive advantage. A LQ of less than 0.75 suggests that Middlesex is under represented in terms of employment in that particular industry, relative to the province.

FIGURE 19: EMPLOYMENT BY INDUSTRY LOCATION QUOTIENT, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON) COMPARED TO ONTARIO, 2006, 2011

	LQ 2006	LQ 2011	Change	%
Agriculture, Forestry, Fishing and Hunting	5.6	5.4	-0.1	-2.6%
Construction	1.5	1.5	0.0	-0.6%
Health Care and Social Assistance	1.2	1.3	0.1	6.0%
Other Services (except Public Administration)	1.0	1.2	0.2	20.1%
Manufacturing	1.1	1.2	0.0	4.3%
Transportation and Warehousing	1.0	1.1	0.1	12.3%
Wholesale Trade	1.1	1.0	-0.1	-12.0%
Educational Services	0.8	0.9	0.1	12.1%
Retail Trade	0.9	0.9	0.0	-1.8%
Utilities	1.0	0.9	-0.1	-9.2%
Management of Companies and Enterprises	0.5	0.8	0.3	65.7%
Arts, Entertainment and Recreation	0.8	0.8	0.1	11.6%
Finance and Insurance	0.8	0.8	-0.1	-10.8%
Public Administration	0.6	0.7	0.1	18.1%
Administrative and Support, Waste Management and Remediation Services	0.7	0.7	0.0	0.9%
Accommodation and Food Services	0.7	0.7	0.0	-0.8%
Real Estate and Rental and Leasing	0.7	0.6	-0.1	-12.2%
Professional, Scientific and Technical Services	0.6	0.5	0.0	-3.0%
Information and Cultural Industries	0.4	0.4	0.0	-9.1%
Mining, Quarrying, and Oil and Gas Extraction	0.4	0.4	0.0	7.1%

Source: Statistics Canada Census, 2006, 2011. Adapted By Millier Dickinson Blais Inc.

A low location quotient may present an opportunity for a new entrant into the market or indicate strong regional competition in that industry.



Figure 19 lists the industry sectors in Middlesex and the concentration of employment in these industries. The industry with the highest location quotient, a figure of over five, is agriculture. Such a strong location quotient indicates that employment in the agriculture sector is more concentrated in Middlesex than it is in Ontario. The construction sector also has a relatively high location quotient, of 1.5.

Industry sectors with a low location quotient and a relatively low concentration of employment in comparison to Ontario include:

- Public Administration
- Administrative and Support, Waste Management and Remediation Services
- Accommodation and Food Services
- Real Estate and Rental and Leasing
- Professional, Scientific and Technical Services
- Information and Cultural Industries
- Mining, Quarrying, and Oil and Gas Extraction

In summary, the economy of the County of Middlesex has a distinct competitive advantage in the agriculture sector as compared to the Province of Ontario, and a high concentration of in the construction and health care sectors.

1.3.2 Business Patterns Assessment

The number and type of businesses in a community helps to identify areas of competitive advantage. Statistics Canada's Canadian Business Patterns Data provides a record of business establishments by industry and size. This data is collected from the Canada Revenue Agency (CRA). The business data collected for the County of Middlesex includes all local businesses that meet at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of \$30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by "Total", "Indeterminate" and "Subtotal" categories. The business locations in the "Indeterminate" category include the self-employed (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Patterns Data uses the Canada Revenue Agency as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included.

A detailed review of the business patterns data for the period between 2008 and 2012 for the County of Middlesex, excluding the City of London, provides an understanding of the growth or decline of businesses over the five-year period and the key characteristics that define the County's business community. When combined with the broader industry analysis, the business patterns information will assist in understanding the key industry opportunities for the County.



FIGURE 20: NUMBER OF BUSINESS LOCATIONS, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), BY GREATEST NUMBER OF BUSINESS LOCATIONS WITH EMPLOYEES, DEC 2012

	Total	Ind.	Sub.	1-4	5-9	10-19	20-49	50-99	100-199	200-499	500 +
Total	6093	3784	2309	1359	474	242	163	41	21	9	0
Construction	854	442	412	253	100	42	12	4	1	0	0
Agriculture, Forestry, Fishing and Hunting	1681	1330	351	248	63	23	12	5	0	0	0
Retail Trade	417	173	244	108	77	34	17	6	1	1	0
Other Services (except Public Administration)	379	178	201	145	39	12	4	1	0	0	0
Professional, Scientific and Technical	431	289	142	109	22	6	3	1	1	0	0
Health Care and Social Assistance	196	60	136	78	20	16	14	2	5	1	0
Manufacturing	208	79	129	49	25	21	20	4	5	5	0
Wholesale Trade	206	89	117	62	24	12	16	3	0	0	0
Transportation and Warehousing	250	144	106	68	16	10	8	1	1	2	0
Administrative & Support, Waste Management, Remediation Services	207	103	104	58	27	16	2	1	0	0	0
Accommodation and Food Services	128	28	100	30	23	26	12	6	3	0	0
Finance and Insurance	269	179	90	49	10	5	23	2	1	0	0
Real Estate and Rental and Leasing	496	420	76	57	13	4	2	0	0	0	0
Arts, Entertainment and Recreation	76	42	34	14	1	7	9	2	1	0	0
Management of Companies and Enterprises	206	186	20	13	5	0	1	1	0	0	0
Public Administration	14	0	14	3	2	0	5	2	2	0	0
Educational Services	24	11	13	7	1	3	2	0	0	0	0
Mining, Quarrying, and Oil and Gas Extraction	16	8	8	5	1	2	0	0	0	0	0
Information and Cultural Industries	29	21	8	2	4	2	0	0	0	0	0
Utilities	6	2	4	1	1	1	1	0	0	0	0

Source: Statistics Canada, Canadian Business Patterns, Dec 2012. Adapted by Millier Dickinson Blais Inc.

Figure 20 illustrates that agriculture has, by far, the greatest total number of business enterprises among the sectors, with over 1,600 businesses (27%). The construction and agriculture sectors also accounts for the highest number of businesses with employees in the County of Middlesex.

The industries with the most significant number of businesses in Middlesex County, with employees (the subtotal column), are as follows:

- Construction, 412
- Agriculture, Forestry, Fishing and Hunting, 351
- Retail Trade, 244
- Other Services (except Public Administration), 201
- Professional, Scientific and Technical Services, 142

Figure 21 shows the changes in the composition of the business community over time. There are several points of caution to consider in interpreting business patterns data collected in two time periods.

- Businesses can change from one industry category to another between counts as they are measured by their primary business activity. As an example, a facility may provide both construction and oil and gas extraction support services and the majority of revenue earned by either portion of the business might change over time.
- Business counts are located according to postal code. If the mailing address changes or the postal code boundaries change so will the business count.



- A change in the number of businesses in any size category might not be in indication in growth or decline in number of businesses in that category, it may rather be a reflection of growth or contraction in the number of people employed in an individual business.

With these cautions in mind, the number of business locations in the County of Middlesex has been stable, with a very slight decrease in the number of business locations with employees between 2008 and 2012.

FIGURE 21: BUSINESS PATTERNS TIME PERIOD COMPARISON, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), DEC 2008 AND DEC 2012

	2008			2012			Change	%
	Total	Ind.	Subtotal	Total	Ind.	Subtotal	Subtotal	
All Business Locations	5842	3527	2315	6093	3784	2309	-6	-0.3%
Real Estate and Rental and Leasing	345	299	46	496	420	76	30	65.2%
Finance and Insurance	238	168	70	269	179	90	20	28.6%
Agriculture, Forestry, Fishing and Hunting	1539	1205	334	1681	1330	351	17	5.1%
Health Care and Social Assistance	157	28	129	196	60	136	7	5.4%
Retail Trade	425	185	240	417	173	244	4	1.7%
Accommodation and Food Services	126	30	96	128	28	100	4	4.2%
Mining, Quarrying, and Oil and Gas Extraction	14	10	4	16	8	8	4	100.0%
Public Administration	13	1	12	14	0	14	2	16.7%
Arts, Entertainment and Recreation	71	38	33	76	42	34	1	3.0%
Information and Cultural Industries	23	13	10	29	21	8	-2	-20.0%
Utilities	10	3	7	6	2	4	-3	-42.9%
Construction	851	433	418	854	442	412	-6	-1.4%
Professional, Scientific and Technical Services	433	285	148	431	289	142	-6	-4.1%
Management of Companies and Enterprises	225	199	26	206	186	20	-6	-23.1%
Educational Services	34	15	19	24	11	13	-6	-31.6%
Wholesale Trade	258	134	124	206	89	117	-7	-5.6%
Transportation and Warehousing	284	170	114	250	144	106	-8	-7.0%
Administrative and Support, Waste Management and Remediation Services	194	82	112	207	103	104	-8	-7.1%
Manufacturing	240	93	147	208	79	129	-18	-12.2%
Other Services (except Public Administration)	362	136	226	379	178	201	-25	-11.1%

Source: Statistics Canada Business Patterns, Dec 2008 & Dec 2012. Adapted by Millier Dickinson Blais Inc.

The sectors with a substantial increase in the number of businesses with employees from 2008 to 2012 include the following:

- Real Estate and Rental and Leasing (+30)
- Finance and Insurance (+20)
- Agriculture, Forestry, Fishing and Hunting (+17)



Manufacturing and other services, with the exception of public services, have experienced an overall loss in the number of businesses during the period, representing approximately 25 and 18 businesses respectively.

1.4 Creative Economy

There is increasing recognition of the importance of creativity, culture and quality of place in economic development¹⁰. Rural communities are seeking to understand how to manage the impact of the emerging knowledge economy, changing nature of agriculture and the recent decline of manufacturing, as well as the national migration from rural communities to urban centres¹¹. The creative economy is a relatively new way of approaching these challenges, by focusing on occupations and businesses, as well as individuals that tend to generate innovation.

Creative industries and occupations encompass a wide range of knowledge-based jobs in which innovation and creativity drives value creation. These industries and occupations encompass sectors such as science and medicine, financial services, engineering, among others.

Given that this “creative” labour force values diverse cultures, heritage experiences and access to the natural environment, the cultural economy has become an important consideration for economic development in rural communities where natural and heritage assets are often found. Enhancing quality of place and creating attractive amenities are two ways to draw talented and diverse people into an economy, who in turn can become drivers of business investment. Tourists are also attracted to similar amenities, leading to an increased return on investment.

Creativity in the Labour Force: Occupational Categories:

The following occupational groupings are used to understand the concentration of specific skill sets in the local community. Again, note that occupations are held by County residents, although their place of work may not be in the County.

- **Creative occupations** – The growing number of people who are paid to think. These include scientists and technologists, artists and entertainers, and managers and analysts.
- **Service occupations** – Where work involves little autonomy, and occupations are focused on the delivery of services, including food-service workers, janitors, and clerks.
- **Physical occupations** – Consisting of people who use physical skills and carry out relatively repetitive tasks, such as tradespersons, mechanics, crane operators, and assembly line workers.
- **Forestry, fishing and forestry occupations** – Workers are paid to remove natural resources from the earth. These jobs include farmers, oil and gas well drillers, and mine labourers.

According to the definitions above, a distinguishing feature of creative occupations is their ability to cut across industry sectors and can impact both traditional and emerging industries. The skills needed for creative occupations tend to be heavily weighted towards analytical and social intelligence skills, both of which play a significant role in a knowledge driven economy.

¹⁰ Benchmarking the Creative Economy in Rural Ontario, Martin Prosperity Institute, 2012 [Online: <http://martinprosperity.org/2012/02/28/benchmarking-the-creative-economy-in-rural-ontario/>]

¹¹ Ibid.



Figure 22 provides an overview of the occupational groups, as described above, in the County of Middlesex. Service occupations make up the greatest portion of the labour force, followed by creative occupations and physical occupations.

FIGURE 22: CREATIVE, SERVICE AND PHYSICAL OCCUPATIONS, COUNTY OF MIDDLESEX (WITHOUT CITY OF LONDON), 2011

Occupational Group	Total	% Share
Service Occupations	15,675	42.5%
Creative Occupations	10,900	29.6%
Physical Occupations	8,730	23.7%
Farming, Fishing and Forestry Occupations	1,540	4.2%
Total	36,845	

Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

1.4.1 Creative Economy Profile

Creative class occupations are the second largest occupational group in Middlesex County with 10,900 members. In general these occupations require higher levels of educational attainment and a greater level of individual autonomy. People in these occupations are essentially paid to think and as a result earn high annual incomes, on average. The level of expertise and the nature of the work completed by creative class workers makes them a sought after group when it comes to economic development. As employment trends continue to shift away from manufacturing, providing an economic environment that is supportive of the needs of creative workers is a significant consideration in crafting the economic development strategic plan.

In Figure 23, the creative class occupations are outlined in detail, along with the employment and percentage of the total workforce that each occupation represents. The leading occupations within creative occupations are:

- Administrative and financial supervisors and administrative occupations, 5.4%
- Professional occupations in education services, 3.9%
- Specialized middle management occupations, 2.9%
- Technical occupations related to natural and applied sciences, 2.6%



FIGURE 23: CREATIVE OCCUPATIONS, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2011

Creative Occupation	Total	% Share
Administrative and financial supervisors and administrative occupations	1,980	5.4%
Professional occupations in education services	1,425	3.9%
Specialized middle management occupations	1,075	2.9%
Technical occupations related to natural and applied sciences	965	2.6%
Professional occupations in nursing	880	2.4%
Professional occupations in natural and applied sciences	720	2.0%
Technical occupations in health	700	1.9%
Professional occupations in business and finance	670	1.8%
Senior management occupations	620	1.7%
Professional occupations in law and social, community and government services	570	1.5%
Professional occupations in health (except nursing)	540	1.5%
Technical occupations in art, culture, recreation and sport	525	1.4%
Professional occupations in art and culture	230	0.6%
Subtotal	10,900	29.6%

Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

The prevalence of administrative and management occupations among residents of Middlesex is high considering the size of the regional economy, and may be explained by individuals commuting to work in London, as described in Figure 18. In this case, the benefits of creative workers will be experienced to a greater extent in the place of work; Middlesex also receives some benefits from creative residents should they become involved in civic organizations and community initiatives.

Service class occupations differ from the creative occupations in that workers in these jobs generally have less workplace autonomy and receive lower pay. Due to the type of works undertaken by the service class, they tend to be concentrated in specific industries such as retail trade, hospitality and tourism and real estate and rental and leasing. In Middlesex County, service occupations account for 42.5% of the total labour force, as outlined in Figure 24. Top service occupations include:

- Middle management occupations in trades, transportation, production and utilities, 6.9%
- Service support and other service occupations, 4.6%
- Sales representatives and salespersons - wholesale and retail trade, 4.4%
- Office support occupations, 4.0%

Tourism is another sector which is linked to the creative occupations, due to the inclusion of arts and culture related employment in creative class groupings. The arts and culture related occupations in Middlesex County make up the lowest percentage of the labour force in the creative class.

- Technical occupations in art, culture, recreation and sport at 525, or 1.4% of the labour force
- Professional occupations in art and culture, represent 230 or 0.6% of the labour force.

While the numbers are not large, these occupations can have a disproportionate impact on the growth of the local economy, particularly creative workers. As mentioned, creative-cultural occupations can play a key role as attractions and assets in the area's tourism offering. While the assessment can provide an indication of the size of the creative cultural industries, more detailed analysis needs to be undertaken to identify these assets, and determine how best to support and leverage them in economic development and tourism service delivery.



FIGURE 24: SERVICE OCCUPATIONS, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2011

Service Occupation	Total	% Share
Middle management occupations in trades, transportation, production and utilities	2,550	6.9%
Service support and other service occupations, n.e.c.	1,695	4.6%
Sales representatives and salespersons - wholesale and retail trade	1,625	4.4%
Office support occupations	1,485	4.0%
Service representatives and other customer and personal services occupations	1,315	3.6%
Middle management occupations in retail and wholesale trade and customer services	1,135	3.1%
Sales support occupations	915	2.5%
Paraprofessional occupations in legal, social, community and education services	815	2.2%
Service supervisors and specialized service occupations	760	2.1%
Retail sales supervisors and specialized sales occupations	675	1.8%
Care providers and educational, legal and public protection support occupations	670	1.8%
Distribution, tracking and scheduling co-ordination occupations	630	1.7%
Assisting occupations in support of health services	625	1.7%
Finance, insurance and related business administrative occupations	490	1.3%
Occupations in front-line public protection services	290	0.8%
Subtotal	15,675	42.5%

Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

The leading farming, fishing and forestry occupation is workers in natural resources, agriculture and related production, which represents 2.4% of the labour force. The remaining occupations in this occupational grouping are summarized in Figure 25.

FIGURE 25: FARMING, FISHING AND FORESTRY OCCUPATIONS, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2011

Farming, Fishing and Forestry Occupation	Total	% Share
Workers in natural resources, agriculture and related production	870	2.4%
Harvesting, landscaping and natural resources labourers	465	1.3%
Supervisors and technical occupations in natural resources, agriculture and related production	205	0.6%
Subtotal	1,540	4.2%

Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

The physical class occupations are most closely associated with manufacturing but also include skilled trade and construction workers. In the past, these workers were the major driving force of local, provincial and national prosperity. Today the jobs of these workers are often under threat as many firms look to shift lower value-added activities overseas to lower cost regions. As this trend has unfolded, the jobs that have tended to remain local have been higher skilled job functions. Figure 26 shows all physical occupations along with employment and percentage of the workforce represented. Top physical occupations that make up a large part of the labour force in Middlesex are:

- Industrial, electrical and construction trades, 6.1% of the labour force
- Transport and heavy equipment operation and related maintenance occupations, 4.8% of the labour force
- Maintenance and equipment operation trades, 4.0% of the labour force
- Assemblers in manufacturing, 2.7% of the labour force



FIGURE 26: WORKING OCCUPATIONS, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2011

Physical Occupation	Total	% Share
Industrial, electrical and construction trades	2,245	6.1%
Transport and heavy equipment operation and related maintenance occupations	1,770	4.8%
Maintenance and equipment operation trades	1,485	4.0%
Assemblers in manufacturing	995	2.7%
Other installers, repairers and servicers and material handlers	545	1.5%
Trades helpers, construction labourers and related occupations	540	1.5%
Labourers in processing, manufacturing and utilities	475	1.3%
Processing and manufacturing machine operators and related production workers	410	1.1%
Processing, manufacturing and utilities supervisors and central control operators	265	0.7%
Subtotal	8,730	23.7%

Source: National Household Survey, Statistics Canada, 2011. Adapted by Millier Dickinson Blais Inc.

Occupations leading employment growth in the Ontario economy in 2012 were service based occupations including accommodations and food services¹². Commentators have observed that service-based work is slowly replacing manufacturing employment in the economy at the provincial, national and North American levels.¹³ Some researchers point to the rise of automation in the economy, notably in manufacturing, for this relative decline¹⁴. As such, creative occupations and service based occupations are expected to grow in prominence, in terms of employment, as the manufacturing sector continues to transform and reorganize.

In the County of Middlesex, physical occupations contribute significantly to the local economy. The challenge for economic development will be to encourage positive growth of creative occupations that support the manufacturing and agricultural sectors, where a significant concentration of employment and local business strength lies. The County needs to support the growth of manufacturing occupations as well as the creative sector by becoming competitive in the attraction of technology-based manufacturing.

1.4.2 Creative Businesses and Enterprises

An analysis was also undertaken to identify the creative establishments present within the County of Middlesex, using Canadian Business Patterns data provided by Statistics Canada. Relying on a review of secondary research, creative businesses and enterprises can be categorized in the following areas:

- Advertising
- Architecture
- Artists
- Business Consulting
- Design
- Education
- Engineering
- Film
- Games
- Heritage
- Marketing
- Museums
- Music
- Performing Arts
- Photographic Services
- Web + Software
- Public Relations
- Publishing
- Radio + Television

The business locations in the County of Middlesex have been reviewed and categorized using this guide, and the leading industries in terms of creative business locations are:

- Consulting, with a total of 73 businesses; 13 business with employees

¹² Labour Market Bulletin, Ontario, Annual Edition, Human Resources and Skills Development Canada, 2012 [Online: <http://www.hrsdc.gc.ca/eng/jobs/lmi/publications/bulletins/on/annual2012.shtml>]

¹³ A Shift from Manufacturing, New York Times, Amanda Cox, Charles Duhigg, Xaquín G.V., Mika Grondahl, Haeyoun Park, Graham Roberts, Karl Russell [Online: http://www.nytimes.com/interactive/2012/01/20/business/the-iphone-economy.html?_r=0]

¹⁴ How Technology is Destroying Jobs, MIT Technology Review, David Rotman, July 2013 [Online: <http://www.technologyreview.com/featuredstory/515926/how-technology-is-destroying-jobs/>]



- Engineering, with a total of 68 businesses; 30 businesses with employees
- Culture Support Services, with a total of 22 businesses; 8 businesses with employees

It is important to note that engineering businesses likely have a stronger direct economic impact, due to the higher number of businesses with employees. The specific categories leading within engineering are engineering services, and other scientific and technical consulting services. Leading culture support services in Middlesex include business associations, grant-making and giving services, as well as professional and other membership organizations.

Figure 27 also shows that creative businesses and enterprises have declined by a total of 37 businesses, or 14%, between 2008 and 2012. The majority of the decline is in consulting, which reduced by 34 business location, or 32%. Business also increased in the following areas:

- Architecture, which increased by 7, or over 100%
- Engineering, which increased by 5, or 8%
- Independent Artists, Writers, Performers, increased by 4, or 100%

It is important to note that changes in the categorization of businesses over the time period can contribute to perceived losses. For example, if the business of a firm formerly engaged in consulting shifted in to a more specific field such as engineering or architecture, this may contribute to the changes in these figures. Despite these considerations, it appears that there has been an overall decline in consulting, although the magnitude of the decline is not certain.

FIGURE 27: CREATIVE BUSINESSES AND ENTERPRISES, MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2008 & 2012

	2008			2012			Total Change
	Total	Ind.	Subtotal	Total	Ind.	Subtotal	
Consulting	107	79	28	73	60	13	-34
Engineering	63	44	19	68	38	30	5
Culture Support Services	29	17	12	22	14	8	-7
Design	18	16	2	16	14	2	-2
Architecture	6	3	3	13	7	6	7
Advertising	12	6	6	13	9	4	1
Printing	14	5	9	10	3	7	-4
Photography	11	7	4	10	8	2	-1
Independent Artists, Writers, Performers	4	4	0	8	6	2	4
Motion Picture and Video Industries	11	7	4	7	6	1	-4
Publishing Industries	5	1	4	6	2	4	1
Performance Arts	3	1	2	6	3	3	3
Antiques	6	3	3	5	1	4	-1
Museums and Heritage Sites	4	1	3	3	1	2	-1
Radio and Television	2	1	1	3	3	0	1
Post-Secondary Education	5	3	2	2	1	1	-3
Sound Recording	0	0	0	2	2	0	2
Music Stores	1	1	0	1	1	0	0
Art Dealers	4	3	1	0	0	0	-4
Internet Publishing	0	0	0	0	0	0	0
Pottery and Ceramics	0	0	0	0	0	0	0
TOTAL	305	202	103	268	179	89	-37

Source: Canadian Business Patterns, Statistics Canada, 2008, 2012. Adapted by Millier Dickinson Blais Inc.



Proximity to the City of London may influence the presence of consulting and engineering firms in the County of Middlesex, as it is fairly easy to service the City from the County.

The growth in artists, writers, performers, when combined with the performance arts, is encouraging, as these types of business locations can also represent tourism assets. However, the numbers are small overall, and do not appear to indicate a concentration in fine arts.

While the lack of a concentration in arts and heritage related businesses may present challenges for tourism, the presence of engineering and consulting enterprises is a potential economic development asset to build on.

1.5 Agriculture

The agriculture sector stands out as an important component of Middlesex County economy. For this reason, a more detailed assessment of the sector is called for, to understand the dynamics of farming in the County and how the sector has changed over time.

Number of Farms and Farm Receipts

Across Canada, farms have been growing bigger and smaller farms have been disappearing; Middlesex County is also experiencing this trend. Figure 28 outlines the number of farms in the County of Middlesex by the acreage of the farm.

FIGURE 28: NUMBER OF FARMS IN MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2006 & 2011

	2006	2011	Change	%
Under 10 acres	131	98	-33	-25.2%
10 to 69 acres	614	595	-19	-3.1%
70 to 129 acres	481	488	7	1.5%
130 to 179 acres	233	171	-62	-26.6%
180 to 239 acres	207	194	-13	-6.3%
240 to 399 acres	295	264	-31	-10.5%
400 to 559 acres	157	154	-3	-1.9%
560 to 759 acres	93	91	-2	-2.2%
760 to 1,119 acres	82	74	-8	-9.8%
1,120 to 1,599 acres	41	52	11	26.8%
1,600 to 2,239 acres	17	19	2	11.8%
2,240 to 2,879 acres	9	12	3	33.3%
2,880 to 3,519 acres	2	5	3	150.0%
3,520 acres and over	3	3	0	0.0%
Total number of farms	2365	2220	-145	-6.1%

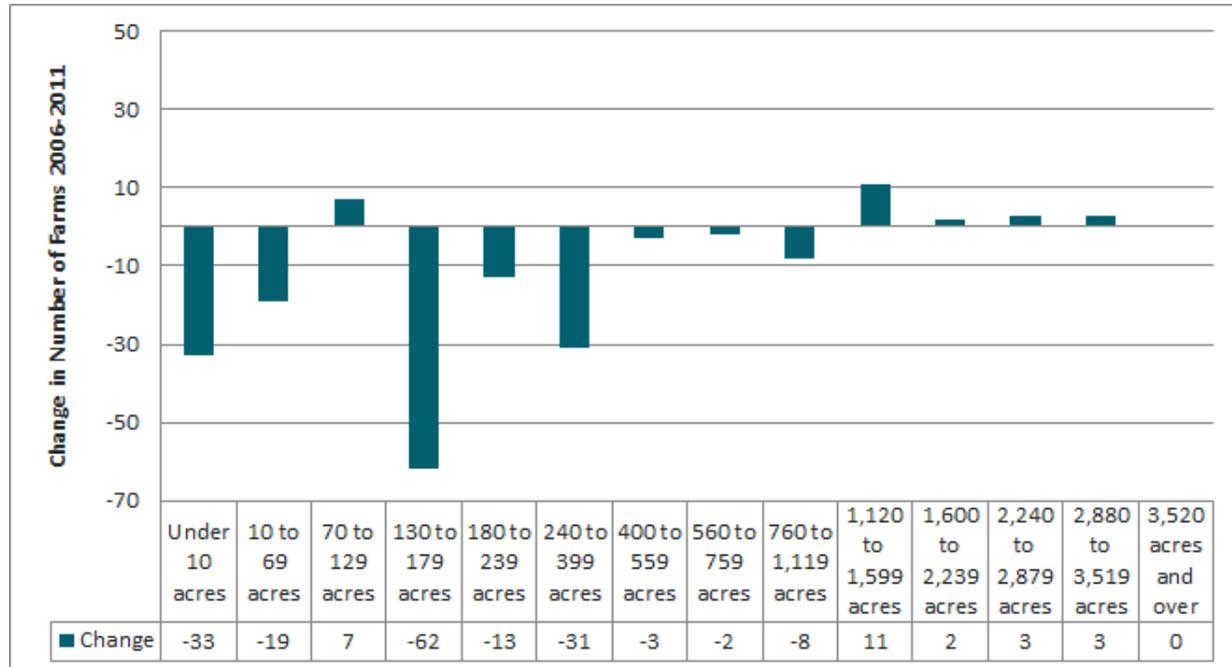
Source: Statistics Canada Agricultural Census, 2006 & 2011. Adapted by Millier Dickinson Blais Inc.



The data shows that there has been a substantial loss of in the number of small farms in the County of Middlesex. In general there has been a decrease in each size category under approximately 1,000 acres, with the exception of a small increase in farms between 70 and 129 acres. The total number of farms in the County of Middlesex declined by 145 farms from 2006 to 2011.

The change in the number of farms by size category is further illustrated in Figure 29.

FIGURE 29: CHANGE IN NUMBER OF FARMS IN MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2006-2011



Source: Statistics Canada Agricultural Census, 2006 & 2011. Adapted by Millier Dickinson Blais Inc.

The consolidation of farms into larger properties is a national trend. The number of farms in Canada decreased by 10.3% from 2006 to 2011, while the average size of a Canadian farm increased from 728 acres to 778 acres during the same period, a gain of 6.9%¹⁵.

Some analysts view this change as positive, leading to greater economies of scale; however others are concerned at the loss of smaller farms, which often support more families and rural populations. Others see both small and large farms as sustainable and desirable for different reasons, each requiring a different economic development approach¹⁶. For example, small farms tend to focus on niche industries such as organics and local food. These types of farms are more amenable to local food strategies. Larger farms tend to be more mechanized and require more support in terms of technology, research and development, and strong farming support services, for example, in areas such as precision farming.

Figure 30 shows the change in total gross farm receipts in the County, categorized by the number of farms reporting different income levels. The columns marked minimum are an approximation of the minimum overall level of farm receipts and the interpretive power of the figures is limited to that purpose.

¹⁵ Snapshot of Canadian Agriculture, Statistics Canada, Chapter One, 2011 [Online: <http://www.statcan.gc.ca/pub/95-640-x/2012002/00-eng.htm>]
¹⁶ Big Farms Small Farms; Strategies in Sustainable Agriculture to Fit All Sizes, Hugh Maynard and Jacques Nault, Agr. September 2005 [Online: http://www.aic.ca/pdf/AIC_2005_ENG.pdf]



FIGURE 30: TOTAL GROSS FARM RECEIPTS IN MIDDLESEX COUNTY (WITHOUT CITY OF LONDON), 2006 & 2011

	2006	2011	Change	%
Under \$10,000	362	275	-87	-24.0%
\$10,000 to \$24,999	434	394	-40	-9.2%
\$25,000 to \$49,999	349	342	-7	-2.0%
\$50,000 to \$99,999	310	307	-3	-1.0%
\$100,000 to \$249,999	382	345	-37	-9.7%
\$250,000 to \$499,999	263	237	-26	-9.9%
\$500,000 to \$999,999	171	187	16	9.4%
\$1,000,000 to \$1,999,999	70	97	27	38.6%
\$2,000,000 and over	24	36	12	50.0%
TOTAL	2365	2220	-145	-6.1%

Source: Statistics Canada Agricultural Census, 2006 & 2011. Adapted by Millier Dickinson Blais Inc.

The data shows that although the number of farms reported lower levels of farm receipts, the number of high income earning farms increased. Overall that trend suggests farms had a greater return on receipts.

Changes in the Type of Farming

The number of farms classified by industry group identifies the types of farms operating in the County and any changes in the farming that are taking place.

FIGURE 31: FARMS CLASSIFIED BY INDUSTRY IN MIDDLESEX COUNTY, 2006 & 2011

	2006	2011	Change	% Change
Dairy cattle and milk production including feedlots	123	103	-20	-16.3%
Beef cattle ranching and farming, including feedlots	272	153	-119	-43.8%
Hog and pig farming	176	103	-73	-41.5%
Chicken egg production	39	50	11	28.2%
Broiler and other meat-type chicken production	24	26	2	8.3%
Turkey production	11	11	0	0.0%
Other poultry production	10	5	-5	-50.0%
Sheep farming	38	31	-7	-18.4%
Goat farming	10	11	1	10.0%
Horse and other equine production	166	163	-3	-1.8%
Livestock combination farming	72	60	-12	-16.7%
All other miscellaneous animal production (includes apiculture)	14	15	1	7.1%
Soybean farming	393	290	-103	-26.2%
Dry pea and bean farming	26	16	-10	-38.5%
Wheat farming	84	123	39	46.4%
Corn farming	160	389	229	143.1%
Other grain farming	447	440	-7	-1.6%
Potato farming	2	3	1	50.0%
Other vegetables (except potato) and melon farming	37	35	-2	-5.4%
Fruit and tree-nut farming	37	25	-12	-32.4%
Nursery and tree production	41	30	-11	-26.8%
Floriculture production	22	19	-3	-13.6%
Tobacco farming	26	7	-19	-73.1%
Hay farming	68	60	-8	-11.8%
All other miscellaneous crop farming	64	49	-15	-23.4%

Source: Statistics Canada Agricultural Census, 2006 & 2011. Adapted by Millier Dickinson Blais Inc.



Figure 31 shows that it is not only the size of farms that is changing. The number of farmers engaged in corn farming has increased dramatically, by 229 farms, while hog and pig farming decreased by 73 farms and cattle ranching has decreased by more than 119 farms.

Transitions between crops and the use of land are generally motivated by higher returns in the area that is growing. These transitions can be supported through economic development activities that share best practices, technologies and experiences throughout the farming community.

Organic farming is sometimes associated with the capacity to develop local food systems, as the local food movement is based on values of sustainability and environmental awareness. Organic farming activity in Middlesex County is summarized in Figure 32.

FIGURE 32: ORGANIC FARMING IN MIDDLESEX COUNTY, 2011

Organic Farming	2011
Total Organic products	27
Certified organic products	25
Transitional organic products	3
Organic hay or field crops	26
Certified organic hay or field crops	25
Transitional hay or field crops	1
Organic fruits, vegetables or greenhouse products	4
Certified organic fruits, vegetables or greenhouse products	4
Transitional fruits, vegetables or greenhouse products	0
Organic animals or animal products	11
Certified organic animals or animal products	10
Transitional animals or animal products	1
Certified organic herbs, spices or garlic products	1
Other certified organic products	1

Source: Statistics Canada Agricultural Census, 2011. Adapted by Millier Dickinson Blais Inc.

Middlesex County has a few farms engaged in organic farming, concentrated in hay and field crops and organic animals or animal products.

1.6 Background Review

A strong economic development strategic plan is based on the foundation of past work and with consideration of initiatives that the County of Middlesex is currently undertaking. The background review records past work and existing strategic objectives of the County of Middlesex in order to begin to create such a foundation.

1.6.1 External Trends

The following trends are evident upon review of past strategic planning. The following factors have therefore shaped the past and current economic development activities of Middlesex County.



- **Agriculture** is an important sector to Middlesex, leading the priorities of the Official Plan of the County of Middlesex, among many other strategic documents. The sector is identified as a longstanding leader in the County's economy in the past economic development strategy, the FDI strategy, and is a focus of business profiles. The past economic development strategy identifies international investment, the local food movement, and new agricultural products as a few important trends within the sector.
- **Manufacturing** is described as experiencing change and seeking new demand for particular products. Middlesex is responding by looking to more international opportunities to attract investment and develop markets. Food processing as a focus area within manufacturing demonstrates a strong linkage back to agriculture, Middlesex's leading sector.
- **Workforce recruitment** is a priority area in economic development communications, and some communities are experiencing more population retention challenges than others.
- **Infrastructure development** is a priority in the past economic development strategy and is now the focus of some regional economic organizations such as SCOR and SWEA.
- **Internet based communications** are becoming more critical for economic development practice including the FDI strategy and marketing strategy. The importance of improved internet access to attract businesses and residents to the County is mentioned in the past economic development strategy as well.
- **Research relationships** and the importance of regional post-secondary institutions to economic development is continually repeated in the Middlesex County economic development newsletter and in the previous economic development strategy.
- **Land inventory** findings include an overall availability of land for anticipated future developments, and a commitment to monitoring land use and development on an ongoing basis.
- **Scarcity of water** is seen as a challenge and water rights and access is commonly identified as a factor for business development. This issue is connected with the agriculture sector.
- **Tourism** is a priority in the marketing plan of Tourism Middlesex, in the signage strategy and in the past economic development strategy.

1.6.2 Existing Strategic Planning

FDI Strategy

The Foreign Direct Investment Strategy finds that the County of Middlesex is moderately positioned for FDI attraction. Recommendations include increasing the resources allocated to economic development by \$90,000 per year to build the capability of the department to manage FDI capacity.

The strategy identified the following key attributes for the County of Middlesex with respect to FDI attraction:

- **Positive** – Location on 401/402 Highways and access to three border crossings with the United States, Middlesex has the advantages of the London Region with lower taxes and generally lower land costs



- **Negative** – Middlesex lacks a reputation beyond the traditional agriculture sector, and has a comparatively small economic development budget and limited staff resources

The recommendations of the FDI Strategy are summarized as follows:

1. Strengthen economic development function

- Deepen the County Economic Development Staff
- Build from the Existing Employer Base
- Capitalize on 2011 Core Initiatives

2. Selective Proactive International Marketing

- Cultivate Federal and Provincial Foreign Investment Intermediaries
- Leverage Regional and Sector Partnerships

3. Develop Investor Customer Service Excellence

- Continuously Improve the Website
- Improve Location Prospect Response
- Fast Track Regulatory Permitting for Quality Development Projects

The FDI strategy also recommends the development of regional partnerships to support FDI attraction including with SWEA, regional sector based groups and the London EDC.

Employment Land Needs Analysis

The Employment Land Needs Analysis, completed in 2011, finds that the total land inventory in Middlesex County is sufficient to accommodate the anticipated demand for employment lands. However, the amount of serviced land and the availability of particular locations and a variety of property sizes do need to be monitored to ensure that supply is available to meet demands.

The study developed the following summary statistics on County of Middlesex lands:

- Middlesex County's total gross supply of vacant employment lands totals 1,049 ha (2,593 acres).
- The amount of net vacant industrial lands, which will be potentially available to accommodate long-term demand is approximately 703 ha (1,737 acres). Adjusted for land vacancy, the supply totals 598 net ha (1,477 net acres).
- The supply of serviced "shovel ready" vacant employment land totals 261 net ha (645 net acres).
- Middlesex County's employment base is forecast to increase from 24,055 in 2011 to 28,780 in 2031.

Final recommendations for the study are as follows:

1. Market choice and employment land protection, including:

- The adoption of a framework for reviewing employment land conversions;
- Modification of County-wide land use policy to allow for select commercial, accessory retail, and community institutional uses in employment areas; and,
- Ongoing and regular monitoring of employment land inventory to ensure adequate market choice.

2. Targeted marking of employment areas, including:



- Development of a system for tracking County-wide development-related data;
- Preparation of more comprehensive marketing materials and centralized resources to highlight vacant and available employment lands and identify employment areas;
- Greater regional and sector-specific collaboration on industrial and employment lands marketing activities;
- More targeted marketing of high-priority employment areas.

3. Longer term planning and development, including:

- Consideration of short- to medium-term servicing of Komoka West employment lands;
- Study into medium- to long-term options for employment land development in Thames Centre and along the Highway 401 corridor; and,
- Consideration of longer-term development opportunities in South Ilderton, subject to market choice and employment land inventory.



B. Community Asset Mapping

The Community Asset Mapping exercise undertaken for the Middlesex County Economic Development Strategy should be seen as the beginning, not the end of community asset mapping efforts. The exercise is a fundamental beginning to establishing a solid baseline of community assets that describe current conditions and provide a benchmark against which to assess future growth and change. The exercise undertaken here provides a snapshot of important assets that grow the local economy and enhance the quality of life.

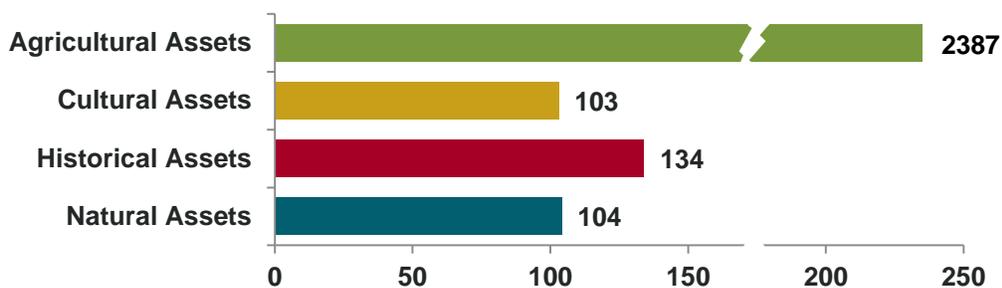
Four distinct areas were selected for the purposes of the community asset mapping exercise. The exercise looked at:

- **Agricultural Assets** – Assets that support the agricultural production and promotion within the community
- **Cultural Assets** – Assets that deliver cultural amenities and products
- **Historical Assets** – Assets that promote a sense of place and identity
- **Natural Assets** – Assets that showcase environmental leadership and quality

2.1 Community Asset Mapping Results

The results of this preliminary asset mapping exercise are the first step to identifying the County's strength in its community assets and help track change over time to inform future economic development directives. By identifying and better profiling the community's unique resources and experiences, the County can better support its economic development initiatives. The following chart illustrates the number of assets in each of the four distinct areas described above.

FIGURE 33: TOTAL NUMBER OF MIDDLESEX COUNTY ASSETS



Note: Due to data limitations the total number of cultural assets is not captured. These assets are those identifiable through the sources below. Capturing grassroots cultural organizations are challenges that exist in every community. These challenges can be overcome by direct initiatives such as a cultural mapping exercise. Agricultural assets represent the total number of farms and agricultural groups. Natural assets do not include local community parks or parkettes. Historical assets only include registered heritage properties and designated historic sites.

Source: infoCanada, Online Directories, Tourism Middlesex, Invest in Middlesex, Municipal Websites, Historic Sites of Canada, Plaques Ontario

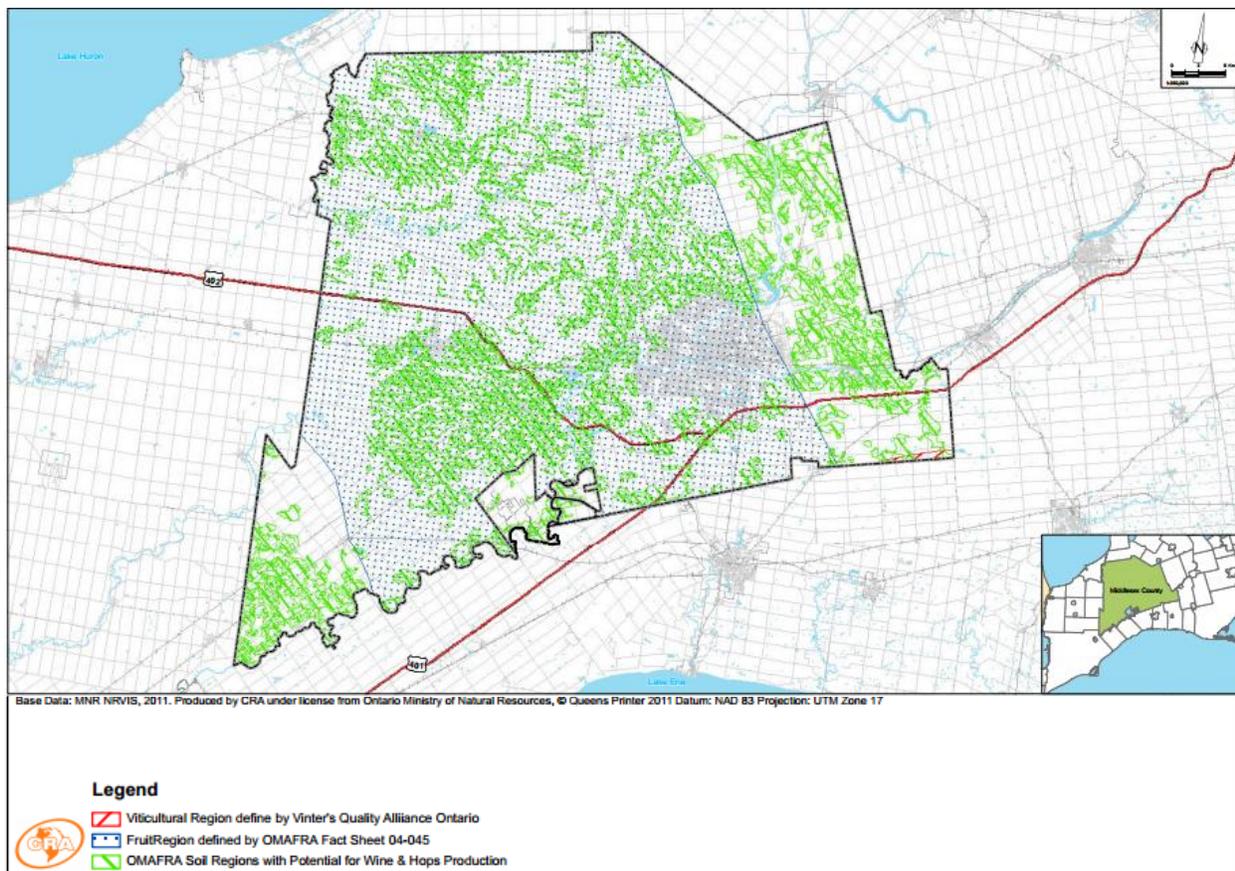


A range of factors will shape and determine how community resources are created and accessed: such as; unique histories and patterns of development; geography, population size and demographic characteristics; and economic conditions and fiscal realities. Moreover, a community's vision of economic development will evolve over time that also influences how assets are retained or improved. The community asset mapping exercise has showcased a strong based of community assets that currently exist within the County. Understanding these assets will be essential to informing the Economic Development Strategy's directions.

2.1.1 Agricultural Assets

Agriculture and agribusiness including food processing and manufacturing have been an important component of Middlesex's economy since the County was settled. Middlesex's central location in Southern Ontario and proximity to major US and Canadian markets, as well as close proximity to future adopters of bioprocesses and products including the auto and petrochemical industries, provides a clear picture that Middlesex County's agricultural assets will hold value and lead economic development for years to come.

FIGURE 34: AGRITOURISM POTENTIAL, MIDDLESEX COUNTY



Source: Regional Tourism Organization 1: Agritourism Potential in Southwest Ontario, Middlesex County



The County has over 2000 operating farms¹⁷ that range from oilseed and grain farming activity to hog and pig farming. These farms support the strength of Middlesex County's food processing industry. Agri-business leaders such as Bonduelle (leading processor of canned and frozen vegetables in Canada) in Strathroy are industry stables that Middlesex can point to the success of their agricultural assets being put into use.

Across Ontario, rural communities have also been developing innovative ways to capitalize on this traditional sector. Innovations in this sector are quite divergent with one capitalizing on the '*art of the rural*' through small value-added operations, culinary tourism, and place-based branding.

A number of communities across Ontario are taking advantage of the creative food economy as a method of economic development, population attraction and tourism, and Middlesex County has the asset base to leverage that movement. The agritourism tool kit designed by Ontario's Southwest (RTO 1) has identified potential opportunities for agritourism development across the County (Figure 34).

2.1.2 Cultural Assets

The community asset mapping exercise identified a total of 103 cultural assets – which range from cultural enterprises, community cultural organizations (smaller, often community-based groups with less formal organizational structures and infrastructure, but that are essential to the cultural vitality in the County), cultural facilities and spaces, and festival and events.

There are two types of cultural assets, **cultural businesses** (retail businesses that sell cultural products and services directly to residents and visitors such as commercial galleries and book stores) and **cultural industries** (businesses and organizations that create, produce and distribute cultural goods and services through channels not involving 'on the street' encounters with consumers such as film studios, cultural organizations, and festival organizers – several of these businesses can and do operate from traditional small scale office spaces).

For the purpose of this exercise the following categories were collected: Audio-Visual and Interactive Media Enterprises; Cultural related Funding and Professional Support Organizations; Fine Arts Schools; Food and Beverage Establishments with Live Entertainment; Live Performance (Dance, Theatre, Music); Museums and Libraries; Sound Recording Companies; and Visual and Applied Art Firms (Design, Architecture, Galleries).

Mapping results indicate that the County is home to more than 80 cultural industries– ranging from graphic designers, to artist studios, and libraries. Cultural industries and organizations are fairly spread out across the County and municipalities. This illustrates that the each municipality has a strong cultural presence.

The County's cultural businesses account for over 20 store-front cultural exchanges. Unlike the cultural industries and organizations, these businesses are predominantly located on the main streets of each municipality. These results verify that the main streets are significant corridors for cultural retail services.

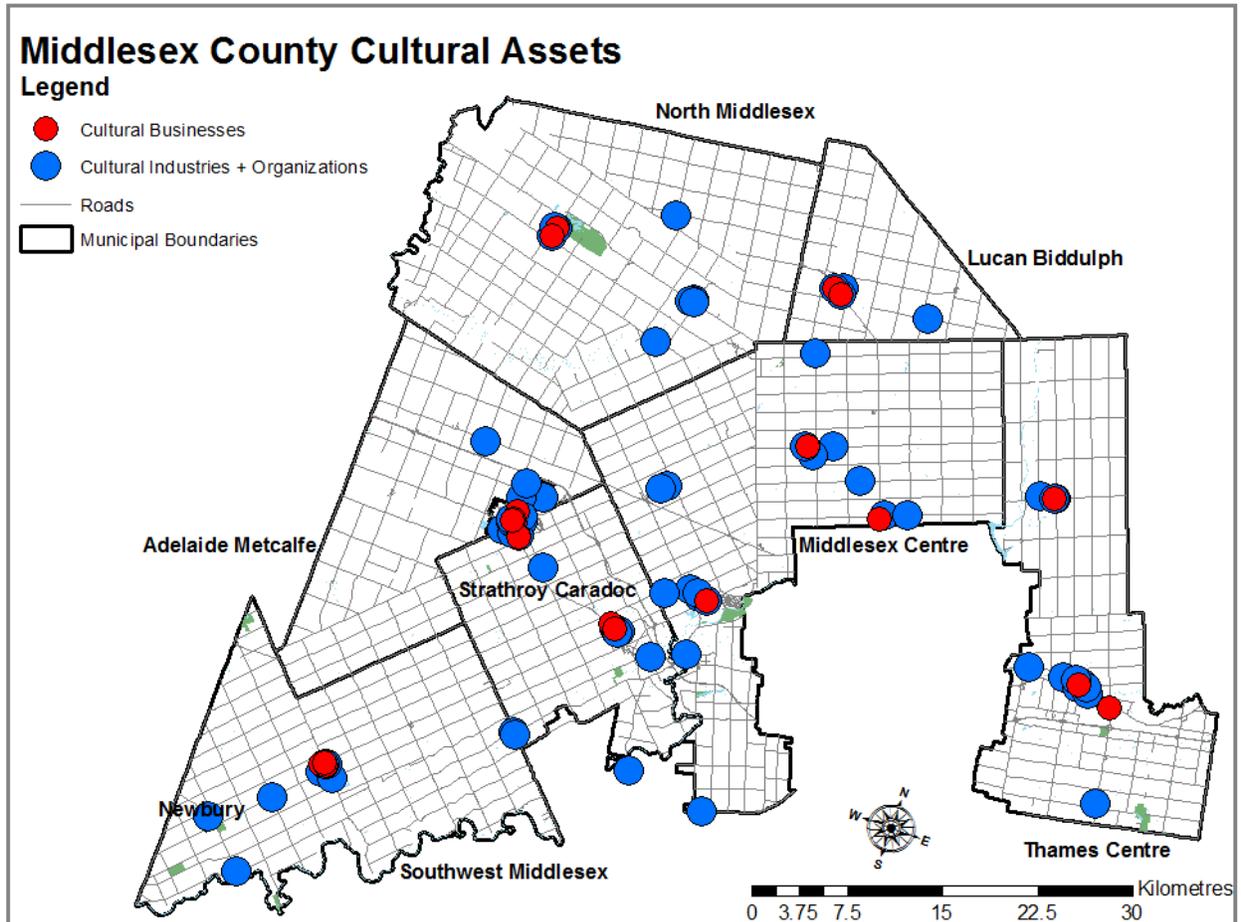
Middlesex County's **community cultural organizations** are the most challenging to locate due to their grassroots nature. These organizations included organizations with broad cultural mandates related to

¹⁷ http://www.investinmiddlesex.ca/data-centre/agriculture_at_a_glance#Farms



preserving and promoting the cultural traditions of the County or organizations dedicated to enhancing the County's heritage and artisan publicity outside of the County.

FIGURE 35: MIDDLESEX COUNTY'S CULTURAL ASSETS



Source: Millier Dickinson Blais, 2013

The County has a wide variety of **spaces and facilities** where cultural activities take place. Some represent more formally recognized cultural facilities such as Museums, Libraries, and Arenas. Others include some of the County's churches and schools that open their doors to provide spaces and facilities for smaller cultural groups and activities including community bands and choirs, and arts instruction classes.

Middlesex County has a diverse range of **festivals and events** which for purposes of mapping are defined as regular recurring events. These range from County-wide events such as Doors Open, to the smaller community-based events such as the local fairs. Festival and events can be effective generators of economic prosperity for the County; they also serve as important vehicles for community engagement and civic pride building on the quality of place of the County.

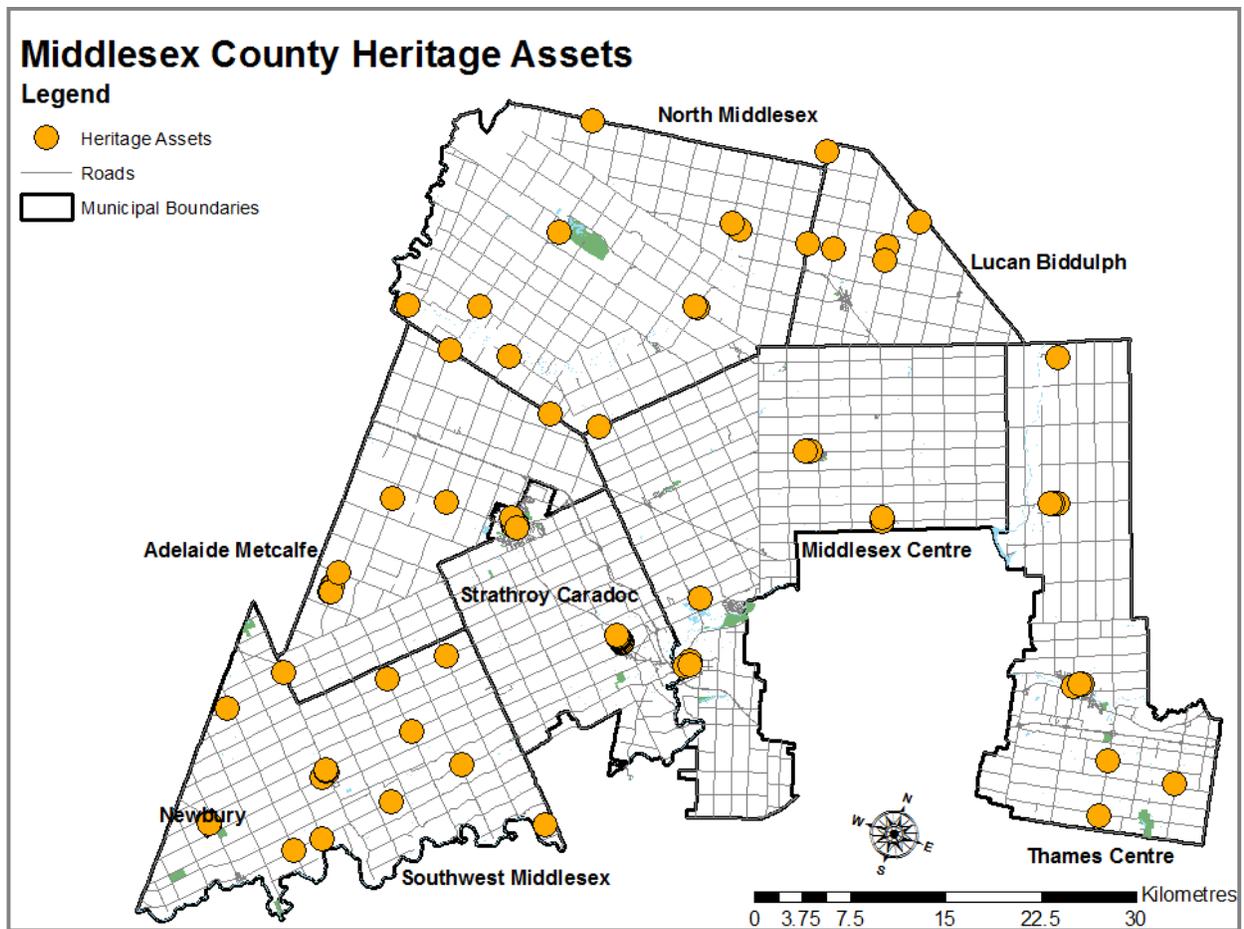


2.1.3 Historical Assets

Middlesex County's heritage assets embrace the County's rich array of history and rural character. The community mapping exercise identified several significant heritage buildings and properties as well as more modern and new history through the forms of commemorative and unique public art / historical plaque installations that add to the County's character. Over 100 significant historical assets were identified. These assets are well distributed and captured throughout the County (see Figure 36).

Investing in historic resources can strengthen a community's sense of place. Making improvements through Main Streets programs can strengthen downtowns and build on an existing asset of many small towns - their compact, walkable core. Investing in these resources can also help attract tourism.

FIGURE 36: HISTORICAL ASSETS MAP



Source: Millier Dickinson Blais, 2013

The Middlesex Heritage Trail is a strong example of integrating heritage resources with tourism development while promoting a sense of place and identity. The trail captures stories of battles, pioneer settlements, past industries (oil), historical buildings and events of yesteryear¹⁸. The preservation of these

18 <http://www.tourmiddlesex.ca/culture/heritage-trail>

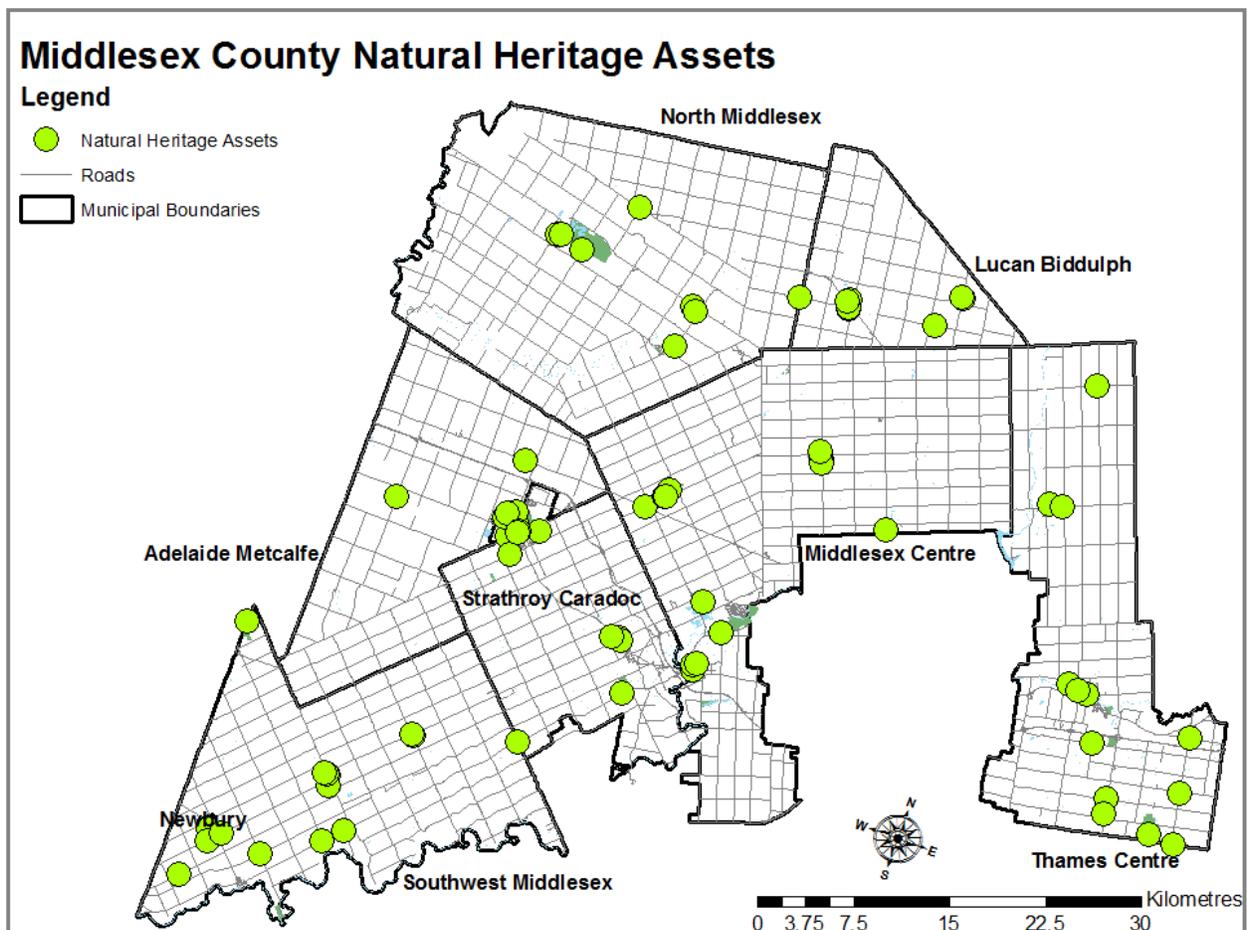


historical resources is essential to the continued efforts put into place by historical groups and institutions such as the museums that recapture and remind residents of how the County developed and came to be.

2.1.4 Natural Assets

Middlesex County's natural assets are also part of the rich rural character which assists in attracting new residents, new businesses, and new investment. The County currently is home to an extensive and diverse natural heritage system consisting of attractive landscapes, trails, parks and conservation areas. The County's natural assets illustrate the County's rural character, protecting and promoting these assets will continue to garner interest and increase and sustain tourism traffic.

FIGURE 37: MIDDLESEX COUNTY'S NATURAL ASSETS



Source: Millier Dickinson Blais, 2013

The innovative reputations of local assets can create a 'buzz' about Middlesex County, and in turn, attract more people and jobs to the County. These four distinct areas incorporate Middlesex County into many facets of their operations and share the common goal for the County to grow and prosper. The economy is constantly changing, and so assets must remain innovative in order to succeed. Assets can remain innovative if they collaborate strategically and act regionally to improve their competitive advantage.



The results do not reflect an assessment of the assets economic development potential to the county, but serve as the start of a benchmarking initiative to measure growth and the eventual potential of these assets. It is a discussion piece designed to start the conversation around the importance of community based assets. The preliminary asset mapping exercise did not capture local community input and thus is meant to be viewed as a first step in understanding the current state of resources in the County. However, the preliminary results demonstrate the unique resources, experiences and quality of place elements that could differentiate the County from other regions of the province, if leveraged effectively. Based on this premise, the potential for community-based tourism is evident.



C. Consultation Summary

3.1 Interview Summary

Over 30 key stakeholders ranging from local businesses, elected officials, town staff and economic development organizations were interviewed to provide their perspective on the key challenges and priorities that will undermine the Middlesex County Economic Development Strategic Plan. The following section provides a highlighted summary of the discussions had.

3.1.1 Challenges

The following items reflect the key challenges heard from the interview process:

- Agricultural land is too expensive to rent and operate and farmers are leaving to find cheaper alternatives. Pressures from the urban communities and highway keep the rental prices one of the highest in Ontario.
- Better integration of tourism planning and development efforts is needed to capitalize on tourism demands across the region. Solo efforts are being undertaken between different areas of the County, providing fragmented and duplicated information.
- Fragmentation of broadband and cellular infrastructure in several parts of the County.
- Limited funding and resourcing available for economic development initiatives and programs.
- Limited transportation options available for moving workers into and from London and across the County. Skilled workforce employed in London, not in the County. There is a need to draw that workforce into Middlesex.
- Local infrastructure needs to be investment ready to attract new businesses and industries.
- Michigan based regions and competitors are providing and attracting food based manufacturing opportunities.
- Official Plan and Provincial Policy Statements limit ancillary and secondary uses on agricultural land. Suburban development pressures are also absorbing limited agricultural land and changing the nature of rural communities

3.1.2 Priorities

The following items reflect the key priorities heard from the interview process:

- Middlesex County should continue to attract food processing opportunities. In recent years, food processing manufacturers such as Sand Plains Aqua Culture have moved operations into Middlesex and London's employment lands. The County's agricultural products and proximity to urban markets were a large factor in their decision to move into the County.
- The County needs to continue to improve broadband infrastructure across the County. Many businesses are looking for e-retailing opportunities as well as credit transaction ability. Without the



appropriate broadband infrastructure many businesses in rural areas will continue to struggle with their services and product development.

- The County needs to have a larger role in collaboration efforts between ‘anchor’ organizations (libraries, BIAs, Chambers, Business Centres, etc.). Understanding their needs can help improve the region’s marketing opportunities, accessibility of programs, and effectiveness of business support.
- Local educational institutions (Western and Fanshawe) are currently developing local Research and Development opportunities in several sectors across the Middlesex region. Fanshawe College’s Applied Research and Innovation department is seeking out businesses to work with students and researchers in a cooperative environment and Western University has begun to develop agricultural Research and Development programs that are rivaling Guelph’s strong agricultural program.
- Creative industries in London are looking for cheaper alternative spaces in the County. This includes space, appropriate utilities, and networks (virtually and on the ground). The County should encourage the attraction of additional creative industries by showcasing the availability of space, the availability of utilities, and the support system available to nurture and improve business development.

3.2 Focus Group Summary

Following the interview process, four focus groups were held across the County (Strathroy, Komoka, Ailsa Craig, and Dorchester). The purpose of these sessions was to solicit input and advice from the broader community on economic development. Each group explored the following questions:

1. What unique strengths and assets does the County have that will attract and sustain investment in the future?
2. What new opportunities are there to stimulate business development, investment, and interest in the County?
3. How do we make this happen in Middlesex County? Suggest 1-2 specific actions (e.g. projects, initiatives) for each opportunity.
4. What is getting in the way of stimulating economic development in the County?

The following section provides the results from the focus group sessions.

3.2.1 Group 1: Strathroy

Assets & Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

1. Location between Toronto and US border
2. Access to transportation infrastructure (air, freight, rail etc.). 400 Highways through the County.
3. Excellent agricultural base - for grow/buy local
4. Cost of doing business - competitive tax rates
5. Proximity to world class educational & research facilities. Proximity to world-class research, development in both private, public sectors



6. Strong history & heritage
7. Wide variety of services & amenities available across the County (e.g. water, sanitation, schools, health care, recreational facilities, senior's resources, etc.)
8. Lifestyle and Quality of Life - pace of life, cost of living, high quality of life for families (health care access, recreations, schools) good infrastructure
9. Proximity to London opportunity and curse and airport
10. Availability of serviced industrial land ...serviced sites and affordable land base.
11. Updated/maintained infrastructure
12. Work force to meet all needs of industry both high tech and labour
13. Private sector infrastructure. E.g. food services, automotive, etc.
14. Strong sense of community, people support rural, rural pride ... Rural urban mix - strong work ethic, safe community, good people, traditional society (though changing)
15. Urban families are migrating to rural life
16. Ability to work quicker and collectively to make it happen -> efficient, nimble, red tape?
17. Internet availability at reasonable price in rural areas (most!)
18. Main streets with great redevelopment potential.
19. Banana belt climate. A great destination for people wanting to exit Toronto. Excellent gardening for retirees. A great rural area to retire to. Way better than north and northwest and east of Toronto (but farther than the requisite 2 hours.). Climate: more predictable -> less risk

Key Opportunities

IF WE COULD ONLY FOCUS ON SIX... HIGH IMPACT AND WITHIN OUR CONTROL

#votes **Idea**

- | | |
|-----------|---|
| 11 | <p>1. Expand on agricultural-related business, industry because of our strong farm base</p> <ul style="list-style-type: none">- We could be a world leader in agricultural testing - food to feed ourselves and other nations- Move away from auto industrial development and back toward agricultural industrial development.- Take advantage of London based research/development in agricultural business- County and municipal members should be more active on all fronts that are unique. Simple stuff like supporting Red Brand sale; sponsoring 4-H. Keeping brand evident at ag events. |
| 9 | <p>2. Maintaining what you have (first priority) -> business retention: support our existing companies to grow etc.</p> <ul style="list-style-type: none">- Work closer with industries to understand, and meet, there needs and provide help where possible.- Opportunity to cluster with existing businesses already set up |



#votes Idea

- 8 3. Youth retention/repatriation/attraction/education. Develop strategy around retaining the young who leave for education. Attract them back to their home communities with incentives, opportunities, and support to start new business or practice.
- Thank the youth who DO stay and farm, start businesses, raise their families. Keep a youth focus (but not at the expense of an aging community).
- 7 4. Work together as a County and not each individual municipality ...focus on leaders in new, collaborative type projects, rather than leaders in ECD competing for same
- 7 5. Development of local markets for local food production and value added ... Choose food/culinary/processing theme for industrial park and attract food businesses. Cheese making. (E.g. case of town in Vermont.)
- increase of new & returning agriculture opportunities/ crop types i.e. berries (processing)
 - People are jumping on the bandwagon with buy local = development of value added agriculture. I.e. fast freeze for short season fruits
- 7 6. Improve marketing: Sell the niche market we have - identify what makes us special, then promote the heck out of it
- Support and promote existing service more - Asset Map what we already have here in the County & promote
- 7 7. Maximize internet access in all areas of County -> Broadband and high speed IT in partnership with Western Ontario Wardens will help attract business
- 5 8. Innovative social enterprise, collaboration and partnership across sectors e.g. Non-profits seeking alternative revenue sources... such as partnerships in developing affordable housing
- 4 9. Restart & promote a regional Main Street improvement program
- Facade programme would be beneficial for encouraging business opportunities on Main Streets
- 4 10. Growth potential for underdeveloped commercial and industrial areas (Hwy 81/Centre Rd)
- Each of the eight municipalities in the County are updating their industrial offerings through serviced land
- 4 11. Promotion of natural/cultural heritage assets
- 3 12. Demographic opportunities - growing retirement community (boomer generation)
- 3 13. Focus on attracting Creative Economy / businesses. (Richard Florida etc.) Support start-ups, incubators ...Promote home based businesses for urban immigrants
- 2 14. Low interest rates could help attract new industry
- 2 15. Niche retail/business development in smaller communities - what can we offer unique here?
- 0 17. Safe, secure and abundant water is a big plus



Implementation Ideas

NOTE: THE GROUP BRAINSTORMED IDEAS FOR EACH OF THE TOP OPPORTUNITIES.

OPPORTUNITY: Expand on agricultural-related business, industry because of our strong farm base ... local food and agricultural industrial development.

1. County and municipal members should be more active on all fronts that are unique. Simple stuff like supporting Red Brand sale; sponsoring 4-H. Keeping brand evident at all events.
2. We could be a world leader in agricultural testing - food to feed ourselves and other nations
3. Agricultural testing major asset for this prime agricultural area ... take advantage of London based research/development in agricultural business
4. Instead of having 8 serviced industrial parks with no theme and seemingly equal, pick a food processing theme (fast freeze, etc.). Target each park to attract customers.
5. Develop agricultural opportunities incentives processing, research etc.
6. Set up focus groups among organizations and educational system
7. Research/development activities at Western and local food industry - collaboration both in needs/direction heading, etc.
8. Encourage the engagement of able participants regarding new opportunities
9. Search for innovative ideas to add market & value to proven, marketable area agricultural. Products/industries
10. Ag land is our "natural resource" to sell. Is there a competitive and profitable market for what we have to offer?
11. Celebrate and promote agricultural success stories

OPPORTUNITY: Maintaining what you have (first priority) -> business retention: support our existing companies to grow etc. - Work closer with industries to understand, and meet, there needs and provide help where possible. - Opportunity to cluster with existing businesses already set up

1. Maintain competitive municipal tax and utility rates, and do everything else in our power to keep the other costs of doing business competitive.
2. Create full or part time position to maintain dialogue
3. Create a County or municipal position that works closely with our major employers in our County. Possible helping them with 5, and 10 year plans and how they can have a more effective and efficient operation. Our success depends on their success.
4. Restart the Middlesex Main Street program or other programs that give businesses the feeling that municipal government cares enough to support retaining them
5. Listen to what their needs are , facilitate opportunities or connections, and bring resources
6. Improve infrastructure to minimize business (and fussy) costs in the future. I.e. transportation, water and waste water, internet, health care etc.
7. Recognize the businesses we have already through chamber, BIA, get together, Keeping It Local Magazine, recognition of the workforce as well



8. Strengthen and support existing business advocacy groups such as Chamber of Commerce, Business Improvement Areas and Associations
9. Ask Middlesex County to assist local municipalities with interviewing techniques (or carry out this on behalf of or with local municipalities) - to determine needs, etc. of local industries. What can local gov't do to assist? What can the community do to support them?

OPPORTUNITY: Youth retention/repatriation/attraction/education. Develop strategy around retaining the young who leave for education. Attract them back to their home communities with incentives, opportunities, and support to start new business or practice.

1. Youth business mentorship program (small business, agriculture, etc.)
2. Offer start up opportunities or incubator sites
3. Create intentional relationships and opportunities for youth to actively participate in development opportunities (not just poster positions on committees, meaningful opportunities)
4. Based on the nature of this demographic 18-35, focus less on big business opportunities & more on development of social enterprises - win/win for all rural communities
5. Social enterprise and innovation go hand in hand and attract youth interest. Also, improves the social landscape creating higher quality of life, more employable workforce etc. 2 birds/1stone strategy
6. Attract the young who leave with an ongoing "come on home" program that offers financial incentives to start-up businesses and practices.
7. Promotion of lifestyle assets that attract and retain youth/ y generation
8. Build housing suitable to what that group would be looking for
9. Help heritage, tourism, and cultural businesses and organizations to put Middlesex County on the map (natural and cultural assets, barn quilt trails) and market Middlesex County as a creative, fertile, low cost place to live and do business in a virtual economy. Get hip, Middlesex!
10. Youth retention (after education) to keep the knowledge in our community for the future
11. Must retain trained individuals by providing service (transportation, cultural, etc.) and compensation they require \$\$\$\$\$
12. Work with local businesses in offering quality internships/coop opportunities for our youth in hopes of them establishing a base in our community
13. Establish stronger linkage with school and education system with needs of the community and future opportunities

OPPORTUNITY: Work together as a County and not each individual municipality ...focus on leaders in new, collaborative type projects, rather than leaders in ECD competing for same

1. Clearly define the roles to avoid duplication and competition wherever possible
2. Get strategic behind tourism and facilitate better collaboration between cfdc and tourism Middlesex.
3. We are strong as a County then we are as individual municipalities. We all stand to gain from a new or growing business(s) in the County regardless of its location within the County
4. Very easily done by involving all municipalities in the County's economic development strategies, actions



5. Take up the mantra "collaborate to compete".
6. Move toward further sharing of services to minimize cost while maintaining individuality (goals, people, unique traits)
7. Figure out how to collaborate effectively with surrounding counties and London. Middlesex has a geographic issue with the hole in the middle. Turn it into an advantage.
8. One of our defining strengths is our ability to work together effectively, this 'community' quality is gathering lots of research interest currently, timely opportunity to invest in exploring collaboration (institutions like pillar non-profit, mars social innovation centre and tamarak rural institute are interested and leading work in this area, opportunity to put Middlesex on the map as a leader in this) this also applies within youth retention point
9. Make economic development top priority
10. Good relationship with the County to help guide smaller municipalities thru this process
11. Attract boomers with money to invest in Main Street. E.g. Red rooster on Main St. Glencoe. "Come to our heritage towns with your small town aspirations." Restore our heritage buildings.
12. Help interpret or change building code to allow restoration of main street buildings. Remove barriers to main street redevelopment.

OPPORTUNITY: Improve marketing: Sell the niche market we have - identify what makes us special, then promote the heck out of it .. Support and promote existing service more

1. Asset Map what we already have here in the County & promote
2. Look at asset based community development (ABCD) models & promote information gained (we need to be seen as a glass 1/2 full, not 1/2 empty)
3. Don't forget international recognition, not just local.
4. Promote international awareness
5. Develop a comprehensive strategic marketing plan (possible new position)
6. Funding aspect important for marketing (lobby Federal & Provincial Gov't)
7. Refine and emphasize Branding / promotion for the community for ex. Norfolk County " Ontario's Garden"
8. Need to show pride in what we have, marketing strategy is very important. Use every possible outlet, internet, as well as old way, magazines, airwaves. Need a hook, what will that hook be?
9. Must spend more \$\$\$ on marketing while targeting the KEY investments which will benefit the community for the long term.
10. Effectively communicate strengths to attract/foster commercial and industrial growth through use of technology (internet, video, apps, etc.) - success stories, available lands and properties, demographic information, etc.

OPPORTUNITY: Maximize internet access in all areas of County -> Broadband and high speed IT in partnership with Western Ontario Wardens will help attract business

1. Internet access important for today's business.



2. Need a clear picture on existing service levels - what is needed to achieve the goal.
3. The County should find the resources to spend whatever is necessary and partner with whoever they can to continue the expansion of broadband service across Middlesex. This is vital for small businesspeople and the farm industry.
4. It is paramount if we want to succeed social networks are here and will only expand. We have to keep up to attract business, youth, seniors etc.
5. While strengthening internet service, create education opportunities/ promote best practices for technology to improve existing business i.e.: how farmers can use technology to enhance/augment their business.
6. Must solicit private company to improve infrastructure to maintain existing and attract new business
7. Monitor broad band development closely and help Middlesex customers get serviced. 4-g rolling out but where? What providers offer the best service where?

Implementation Ideas (selected top ideas)

QUICK WINS: ANY EASY, LOW HANGING FRUIT THAT COULD BE IMPLEMENTED IN NEXT SIX MONTHS?

1. Main street program!
2. Restart the Middlesex Main Street program or other programs that give businesses the feeling that municipal government cares enough to support retaining them
3. Develop a comprehensive strategic marketing plan (possible new position)
4. Refine and emphasize Branding / promotion for the community for ex. Norfolk County " Ontario's Garden"
5. Promote international awareness
6. Already working together that is a positive
7. Set up focus groups among organizations and educational system
8. Encourage the engagement of able participants regarding new opportunities
9. Improve infrastructure to minimize business (and infrastructure) costs in the future. I.e. transportation, water and waste water, internet, health care etc.
10. Help heritage, tourism, and cultural businesses and organizations to put Middlesex County on the map (natural and cultural assets, barn quilt trails) and market Middlesex County as a creative, fertile, low cost place to live and do business in a virtual economy. Get hip, Middlesex!
11. Maintain competitive municipal tax and utility rates, and do everything else in our power to keep the other costs of doing business competitive.

SINGLE MOST IMPORTANT ACTION THAT MUST GO IN THE PLAN

1. High speed internet access important for today's business.
2. The County should find the resources to spend whatever is necessary and partner with whoever they can to continue the expansion of broadband service across Middlesex. This is vital for small businesspeople and the farm industry.
3. Strategy to define roles of municipality/County/industry/business/associations - moving forward
4. Commitment to a strategy must spend money to make money.



5. Create a County or municipal position that works closely with our major employers in our County. Possible helping them with 5, and 10 year plans and how they can have a more effective and efficient operation. Our success depends on their success.
6. Instead of having 8 serviced industrial parks with no theme and seemingly equal, pick a food processing theme (fast freeze, etc.). Target each park to attract customers.
7. Develop a comprehensive strategic marketing plan (possible new position)
8. Need to show pride in what we have, marketing strategy is very important. Use every possible outlet, internet, as well as old way, magazines, airwaves. Need a hook, what will that hook be?
9. Social enterprise and innovation go hand in hand and attract youth interest. Also, improves the social landscape creating higher quality of life, more employable workforce etc. 2 birds/1stone strategy
10. Ag land is our "natural resource" to sell... Is there a competitive and profitable market for what we have to offer?
11. Effectively communicate strengths to attract/foster commercial and industrial growth through use of technology (internet, video, apps, etc.) - success stories, available lands and properties, demographic information, etc.
12. Research/development activities at Western and local food industry - collaboration both in needs/direction heading, etc.
13. Improve infrastructure to minimize business (and infrastructure) costs in the future. I.e. transportation, water and waste water, internet, health care etc.
14. Listen to what their needs are , facilitate opportunities or connections, and bring resources

Obstacles and Barriers

WHAT IS GETTING IN THE WAY OF ECONOMIC DEVELOPMENT?

1. Having a ready to go plan ...Focussing on the priorities... Reactive rather than proactive... Time....
2. Tax payers, and baby boomers (many folks don't want growth)
3. Lack of transportation
4. Lack of leadership at the County level. Local municipalities are too small, too few resources at the government level to be effective.
5. County's careful management of finances translates into perceive lack of enthusiasm for economic development. E.g. Not enough money to implement tourism signage strategy. Little presence in local affairs, initiatives. Good financial management and low taxes but also seeming lack of vision and leadership in ED
6. Working together. Forget about what is only good for one municipality, but think County wide
7. Lack of cohesive economic development strategy and effort between organizations, businesses, local government to move forward. How can we measure success when we don't have a plan?
8. Too many individual groups working on separate EC projects, strategies need to be developed in a more cohesive, all emphasising format
9. Lack of awareness as to where opportunity is headed and not just where it appears to be today.
10. Differences in opinions and ideology between, politicians, residents and business owners
11. Develop New marketing for your product (e.g. Vegetables)



3.2.2 Group 2: Ailsa Craig

Assets & Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

1. Location, proximity to US and GTA...close to large urban centre
2. Close to 400 series highways (402 through us)
3. Established agricultural sector ... Innovative farmers, looking to grow operations and be leaders in the industry in many cases ...large farming community, family owned business,
4. Friendly community, small town atmosphere, lifestyle
5. Rural work ethic - kids who grow up on farms
6. numerous small independent businesses ... Lots of sole practitioners, entrepreneurs
7. Proximity to London. Plus and minus
8. From a business perspective, access to potential loyal and long term employment pool and community support.
9. Location to many services (health care, schools,)
10. Access to funding (e.g. CFDC) -> open to new investments relating to small businesses (for expansion, growth)
11. Hard infrastructure (roads, water, internet?) - although it's not perfect there are good infrastructure "bones" ... Need to keep growing / developing these capabilities to attract those we really want here
12. Opportunity for day trips - close to large population w/ tourism potential
13. Affordable housing (though varies across the region)
14. Less expensive land cost for development - affordable vs. other regions (good investment)
15. Potential for being part of a "cluster" ... Though these need to be defined etc. (e.g. Food,)
16. County willing to work with community and councils
17. Captive consumer base (for buying local)
18. Aging population bringing back family for various reasons -> tourism potential
19. Heritage, recreation and small arts (museums, etc.) -> tourism

Key Opportunities

#votes Idea

- | | |
|---|---|
| 8 | 1. Market Middlesex County to outside community ...Marketing: Sell our region and the niche markets we have - identify what makes us special, then promote it *

- Internet sites that show what is available in a community |
| 8 | 2. The opportunity to CREATE the region to attract businesses that you want -> we are small region that must decide what our niche is and who we want to attract... Cannot be all things to all people. |
| 5 | 3. Comparing the current community to the ones that have the success you are looking to achieve. (E.g. Niagara on the Lake, St Jacobs, Grand Bend, Bayfield, Stratford) |
| 5 | 4. Create recreational friendly activities and natural resources e.g. Trails, Thames River etc. |
| 5 | 5. Collaborative efforts e.g. Joint marketing - join like groups (e.g. Butter tart tour, antique route etc.) ->...Opportunity to leverage the regional resources to work together. ..Working together community projects

- Communication, communication, communication amongst ourselves |



#votes Idea

- | | |
|---|---|
| 4 | 6. The "experience economy" --- what will people pay to see / do / experience that relates to stuff we already have here ... For example - agricultural tourism etc. |
| 4 | 7. Create clusters / networks that will allow independent / sole practioners etc. to grow leverage become part of a supply chain / add value (County could facilitate this - who is doing what across the County) |
| 3 | 8. Business retention & expansion: support our existing companies to grow etc. |
| 2 | 9. Restart & promote a regional Main Street improvement program ...Return of Facade Programme |
| 2 | 10. Affordable/accessible transportation system |
| 2 | 11. Hiring a diverse workforce -> employment opportunities for people with barriers to joining workforce (persons with disabilities, immigrants etc.) |
| 2 | 12. Expand on agricultural-related business, industry because of our strong farm base * - introduce new resources such as fiber flax |
| 2 | 13. Advertise excess unused or closed buildings for new or expanding business |
| 2 | 14. Private investment needs to be encouraged (e.g. Partnerships etc.) |
| 2 | 15. Get the youth involved -> encourage to engage in businesses, volunteer, NFP sector etc. |
| 1 | 16. Incubators for new business start-ups ... Leverage the experience and knowledge of business owners -> lots of wisdom... Mentoring |
| 0 | 18. Business centre support -> leverage and promote our small bus centre |
| 0 | 19. Create an investment pool ..."Build Middlesex County pool" of \$\$ for specific projects |

Implementation Ideas

NOTE: THE GROUP BRAINSTORMED IDEAS FOR EACH OF THE TOP OPPORTUNITIES.

PRIORITY: Market Middlesex County to outside community ...Marketing: Sell our region and the niche markets we have - identified what makes us special, then promote it *

1. Build our "experience economy" --- what will people pay to see / do / experience that relates to stuff we already have here ... For example - agricultural tourism etc.
2. Internet sites that show what is available in a community
3. Collaboration between tourism groups to leverage resources.
4. Communication with local businesses to determine how they are promoting their business and where there is an opportunity to collaborate.
5. Support the tourism information centre just opened on the 402 at Strathroy
6. What is the distinctive tourism offering in Middlesex County? Where are people spending \$\$\$?
 - Community-based tourism that integrates food, wine, hike, dairy farm, quilt trail, etc.
 - Day visits,



- Scenic routes
- Ag tourism: dairy farm, etc.
- Experiential tourism
- Food map
- Quilt trail

PRIORITY: The opportunity to CREATE the region to attract businesses that you want -> we are small region that must decide what our niche is and who we want to attract... cannot be all things to all people.

1. Comparing the current community to the ones that have the success you are looking to achieve. (e.g. Niagara on the Lake, St Jacobs, Grand Bend, Bayfield, Stratford, Sparta)
2. Spend the resources getting organizations aligned... Working together & collaborating (we have lots of organizations, we just need to get them aware of each other and rowing in same direction)
3. Identify "gaps".... I.e. if other communities are doing "x" can we leverage and build on something or not? Or, can we / do we need to differentiate and do something unique?
4. Engage the business community to agree on the Environment that will generate more business development and growth.
5. Evaluate current resources to understand who the community "already is" underneath misperceptions and biases.
6. Pool resources and avoid duplication and share costs.
7. Are we clear on what we have as a County? How does this fit with what the "current" demographic wants / needs and what are the projections for activities in the next 5 - 10 years.

PRIORITY: Create recreational friendly activities -> we have so many great natural resources e.g. trails, Thames River etc.

1. "Shunpiker" routes (see London Free Press) for existing trails throughout the County, canoe route through Thames with potential overnight camping sites... Day tours - walking tours, canoe etc.
2. Enhance our tourism routes and signage (e.g. 81 scenic route to Grand Bend)
3. Expand the advertising to other provinces and countries, let people know it is time to return to nature in Middlesex County. Hike snow shoe, ski the natural trails
4. Work together with existing tourism groups to create awareness with in the communities and beyond.
5. Getting groups service clubs volunteers friends of the usable trail involved in all aspects of any such idea
6. Healthy lifestyles, outdoor entertainment involving family activities and get together events,
7. Support and advertise small bed and breakfast business to host tourist
8. Can we create events? Extreme sporting events are popular. Can we create a circuit that would use assets like the conservation areas ... Maybe the trails etc. in Parkhill one weekend, and then go to Komoka Park Trails / gravel pit for another weekend event etc.?



PRIORITY: Collaborative efforts e.g. Joint marketing - join like groups (e.g. butter tart tour, antique route etc.) ->...Opportunity to leverage the regional resources to work together. ..Working together community projects - Communication, communication, communication amongst ourselves

1. Put people together that are of like minds to create movement and enthusiasm to meet their goals.
2. Introduce people to the businesses that are around them.
3. Communicate assets to folks outside the region.
4. BIAs from the various communities meet together to address similar issues/initiatives
5. Leverage existing organizations to work collaboratively with the community business groups.
6. Collaborate with Lambton to encourage shared efforts

PRIORITY: Business retention & expansion: support our existing companies to grow etc.

1. Create clusters / networks that will allow independent / sole practioners etc. to grow leverage become part of a supply chain / add value (County could facilitate this - who is doing what across the County)
2. Support BR&E with action from County level
3. Communicate and network with government groups outside of Middlesex to understand the opportunities.
4. Businesses need resources to grow, period. Access to mentors, advisors, labour, training etc.
5. If the County "inventories" existing 'clusters' /groups in a supply chain... Help connections, brainstorming on how to grow develop ... Identify what needs they have and what gaps exist

Obstacles and Barriers

WHAT IS GETTING IN THE WAY OF ECONOMIC DEVELOPMENT?

1. Lack of awareness of what is in the County
2. Collective will ...Collaboration/agreement ...all on the same page ... At the same time ... With the same priorities ... cooperation of towns/people, businesses, negative responses, CHANGE...People don't like changes
3. Each community wants their own identity -> live with amalgamation and forget the past we are 1 entity not several
4. Empire building -> silos ...integrative thinking ... Integrative focus versus silos
5. Small business owners can't close shop to get involved during business hours ... People taking/having time to meet for discussions like this.
6. The willingness to commit and stand behind a cause against significant challenge and resistance.
7. Putting the right people and resources in place to move forward quickly and effectively.
8. Some planning regulations and restrictions



3.2.3 Group 3: Komoka

Assets & Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

1. Location, proximity to large Canadian and US markets
2. Has a core of strong college/university studies...proximity to post-secondary education
3. Unique landmarks to base tourism initiatives around (Glencoe train, Donnelly heritage, Longwoods, Thames, Komoka museum, Skunks Misery)
4. Good access to excellent health facilities
5. Safe places to live, very low crime rates
6. Quality of life: urban amenities, slower pace, safe, people, less traffic, recreational facilities, great place to raise a family
7. Proximity to urban centre and services provided
8. Lower tax rates ...low property taxes...Basically lower cost for same services as city
9. Accessible staff and local governance... easy access to local government offices and officials...Friendly, "can do" attitude of municipal staff. Staff very willing and able to help.
10. Strong agricultural sector
11. Available, serviced and relatively cheap, industrial lands. ..Lots of space for development
12. Mix of land: residential, industrial, Ag,
13. Access to major transportation ... good highway access to major markets
14. People: caring...empathy... invested, involved people in each community
15. Good volunteer support... strong volunteer organizationsstrong community support
16. Excellent infrastructure within the County i.e. transportation, water, sewer, etc.
17. Strong community organizations, service clubs (Lions, Optimists, Rotary, Volunteer fire depts.)
18. Variety of business and manufacturing across the County: auto, ag, retail, mom&pop, etc.
19. Good integration of upper and lower tier governments e.g. ec dev, planning, fire dispatch etc.

Key Opportunities

#votes Idea

- | | |
|---|--|
| 7 | 1. Cohesive tourism strategy ... Use tourist attractions to fullest potential
- Unique tourist attractions for growing retirees sector (e.g. Daytrips to County -- Glencoe train, Donnelly heritage, Longwoods, Thames, Komoka museum, Skunks Misery) |
| 7 | 2. Focus on revitalization of Main Streets as shopping locations |



- Retail, commercial development in County

#votes **Idea**

- | | |
|---|--|
| 7 | 3. Small business/start-ups: boost knowledge of small business development opportunities and programming <ul style="list-style-type: none">- Promote the expansion of some current small, home based, businesses- More actively promote the CFDC function to assist new small business start-ups |
| 6 | 4. Promote value added agriculture business ...find ways to continue to add value in ag sector - through connections to post-secondary education and research; access to markets and links to commerce |
| 6 | 5. Market Middlesex County to outside community ...branding, promoting the County <ul style="list-style-type: none">- Simply more advertising. Make "Middlesex County" a recognizable name/place to outsiders.- marketing 'lower tax rates' to stimulate growth |
| 6 | 6. Buy Local! ...promote staying in community to buy ...capitalize on local food movement |
| 6 | 7. Support small Community Economic Development initiatives to build trust and ideas in our small communities (e.g. Main Street, community garden projects, farmers markets, barn quilt trail etc.) |
| 5 | 8. Provide serviced, shovel-ready land ...availability of serviced industrial lands ... Good infrastructure (water, sewer, roads, etc.) with capacity for growth |
| 5 | 9. Strengthen regional economic development relationships e.g. Pull together networks (BIAs, SCOR, SWEA etc.) across & beyond County <ul style="list-style-type: none">- Work with other communities to increase economic potential- build ED networks between Municipalities as opposed to current segmented systems |
| 4 | 10. Form stronger partnerships with post-secondary institutions (UWO, Fanshawe) |
| 4 | 11. Access to high speed internet |
| 3 | 12. Business attraction: focus on the location to the major US markets to bring in the higher employment rate companies |
| 3 | 13. Move away from traditional manufacturing, focus on technology |
| 3 | 14. Seniors strategy. Cater to businesses that support the elderly - growing market... Note: housing and care needs |
| 2 | 15. Recreation thrust: develop walking/cycling trails in communities that have none |
| 1 | 16. New market for beef, pork in EU (note; new trade agreement) |
| 1 | 17. Business retention: support our existing companies to grow etc. |
| 1 | 18. Develop websites -> community awareness... What's going on? |
| 0 | 20. Less sprawl, more high density home development, boosting population, tax base, and therefore a customer base for the local companies |



Implementation Ideas

WHAT OPPORTUNITIES ARE THERE TO STIMULATE BUSINESS DEVELOPMENT, INVESTMENT, AND INTEREST IN THE COUNTY? * STEP 1: IF WE COULD ONLY ADDRESS SEVEN OF THESE OF THESE OPPORTUNITIES * STEP 2: IMPLEMENTATION IDEAS. FOR EACH OF OUR TOP OPPORTUNITIES, HOW DO WE MAKE THIS HAPPEN IN MIDDLESEX COUNTY? SUGGEST 1-2 SPECIFIC ACTIONS (E.G. PROJECTS, INITIATIVES) FOR EACH OPPORTUNITY.

OPPORTUNITY: Cohesive tourism strategy ... use tourist attractions to fullest potential

1. Define best approach to Tourism delivery at the County level and support it!
2. Have 'one' focused tourism strategy budgeted and controlled through a single entity.
 - - Unique tourist attractions for growing retirees sector (e.g. Daytrips to County -- Glencoe train, Donnelly heritage, Longwoods, Thames, Komoka museum, Skunks Misery)
3. Develop catchy ID like Ontario's West Coast, Bruce-Grey (or Grey-Bruce?)
4. Promote individual attractions with events throughout year
5. Encourage and promote partnerships between tourist attractions i.e. Middlesex County 1 or 2 day senior's bus trip to view a number of Middlesex County tourist attractions.
6. ADVERTISE IN FREE BROCHURES EG DAYTRIPPER

OPPORTUNITY: Focus on revitalization of Main Streets

1. County play a support function (grants, incentives etc.) -> retail, commercial, shopping development in County
2. The Main Street facade renewal program (financial incentives to building owners to "renew/repair/revitalize" storefronts). ... Grants/money for facade makeovers
3. Reinstate certain programming for MS revitalization - specifically incentive programs for signage, facade, joint promotions among local business to encourage local partnerships
4. Accelerate signage program
5. Provide resources for a Main Street program initiative
6. Commitment from all municipalities to support cohesive 'retail' oriented program
7. Summer time flower baskets coupled with banners/flags from streetlight posts - beautification.
8. Partnering with local groups in developing maintenance procedures for community/main street projects
9. Community Improvement Planning at the County level to aid our many downtowns
10. Keep main streets clean and welcoming to tourists constituents
11. Promote population growth around our downtown cores - business growth will follow

OPPORTUNITY: Business retention & expansion -> Small business/start-ups: boost knowledge of small business development opportunities and programming - Promote the expansion of some current small, home based, businesses

1. More actively promote the CFDC function to assist new small business start-ups



2. Actively promote/support CFDC
3. Resources exist; just need to continue to inform and expand knowledge of them throughout our communities

OPPORTUNITY: promote value added agriculture business ...find ways to continue to add value in ag sector - through connections to post-secondary education and research; access to markets and links to commerce

1. Partner with Western/Fanshawe (and maybe even U of Guelph) regarding ag crop research, new crops to serve immigrant population, etc.
 - Explore opportunities to partner with UWO to conduct agricultural research projects
2. Continue discussions regarding the development of a food hub in Middlesex County
3. Newsletter/publication designed for County farmers - highlighting grants/programs, getting the most out of their farm, promotion of "farm gates"

OPPORTUNITY: Market Middlesex County to outside community ...branding, promoting the County

1. Simply more advertising. Make "Middlesex County" a recognizable name/place to outsiders. ... marketing 'lower tax rates' to stimulate growth
2. Determine our target audience and what they are looking for e.g. new residents? Tech start-ups?
 - Have to prioritize target markets as budgets allow. Business/Residents?
3. Make sure program is focused against target audience (as Michigan with tourism and Elgin to a lesser degree).
4. Promote Middlesex County to small business owners currently located in London - lower taxes, opportunity for growth, access to financing unique to rural areas (CFDC), quicker turnaround times with local government, etc.
5. Focus on resident attraction as part of marketing strategy as it is often overlooked in economic development

OPPORTUNITY: Buy Local! ...promote staying in community to buy ...capitalize on local food movement

1. Promote farmers' markets ... Supporting/partnering/initiating with local farmers markets
2. Connect producers with local restaurants, food processing companies, etc.
3. Provide better direction, signage to places where people can buy local...promote new signage program and make more affordable
4. Promotions from business owners to buy local (tartan days in sw middlesex)



OPPORTUNITY: Support small Community Economic Development initiatives to build trust and ideas in our small communities (e.g. Main Street, community garden projects, farmers markets, barn quilt trail etc.)

1. Use CFDC mechanism to offer local CED grant program to boost initiatives looking for support
2. Creating focus groups with invested community members to help integrate the County, Municipality and community's strategic plans within each initiative
3. Support required in order allowing for resources to be shared with local CED groups; current County ED structure does not allow time for this to be spent on this. Need to think about how to support this through partners.
4. Form a citizens' advisory committee to keep Council and staff aware of emerging needs

Implementation Ideas (selected top ideas)

SINGLE BEST ACTION THAT MUST GO IN PLAN

1. Main Street - County play a support function (grants, incentives etc.) -> retail, commercial, shopping development in County
2. The Main Street facade renewal program (financial incentives to building owners to "renew/repair/revitalize" storefronts). ... Grants/money for facade makeovers
3. More actively promote the CFDC function to assist new small business start-ups
4. Actively promote/support CFDC
5. Have 'one' focused tourism strategy budgeted and controlled through a single entity.
6. Promote farmers' markets ... Supporting/partnering/initiating with local farmers markets
7. Promote Middlesex County to small business owners currently located in London - lower taxes, opportunity for growth, access to financing unique to rural areas (CFDC), quicker turnaround times with local government, etc.
8. Promote population growth around our downtown cores - business growth will follow
9. Provide better direction, signage to places where people can buy local...promote new signage program and make more affordable
10. Determine our target audience and what they are looking for e.g. new residents? Tech start-ups?
11. Have to prioritize target markets as budgets allow. Business/Residents?

QUICK WINS: ANY EASY, LOW HANGING FRUIT THAT COULD BE IMPLEMENTED IN NEXT SIX MONTHS?

1. Simply more advertising. Make "Middlesex County" a recognizable name/place to outsiders.
2. Accelerate signage program
3. Actively promote/support CFDC
4. Connect producers with local restaurants, food processing companies, etc.
5. Create a pot for investment in small ED initiatives including MS that can be administered and promoted through existing CFDC mechanism
6. Form a citizens' advisory committee to keep Council and staff aware of emerging needs
7. Newsletter/publication designed for County farmers - highlighting grants/programs, getting the most out of their farm, promotion of "farm gates"



8. Reinstating certain programming for MS revitalization - specifically incentive programs for signage, facade, joint promotions among local business to encourage local partnerships
9. The Main Street facade renewal program (financial incentives to building owners to "renew/repair/revitalize" storefronts).
 - Grants/money for facade makeovers

Obstacles and Barriers

WHAT IS GETTING IN THE WAY OF ECONOMIC DEVELOPMENT?

1. Where to start?
2. Lack of consensus on focus
3. A lack of focus of what direction needs to be taken, as well as the collaborative effort to accomplish these directions. These take more resources than money, the primary one being time.
4. Many different partners yield many different ideas. Trying to get all the players to agree to a course of action is often difficult.
5. Focus of all 'partners' in support of the one agreed upon strategic direction because of lack of agreed strategic direction
6. Need more collaboration between organizations that are involved in economic development across the County
7. Lack of strategic direction for the County's economic development functions - we need specific goals and objectives (and a plan to get there!) As well as mechanisms to measure our progress continuously
8. Concern for loss of current ideals or way of life
9. Lack of "shovel-ready" industrial lands (area specific)
10. Lack of people to make it happen
11. People who are motivated to develop and run these programs TIME
12. Support for the idea.
13. Acceptance that fairness does not always mean equality for all (communities, municipalities) when it comes to ED
14. Limited personal agenda of some smaller groups making it difficult for County to invest

3.2.4 Group 4: Dorchester

Assets & Strengths

WHAT UNIQUE STRENGTHS AND ASSETS DOES THE COUNTY HAVE THAT WILL ATTRACT AND SUSTAIN INVESTMENT IN THE FUTURE?

1. Proximity to London as a market ...London International Airport
2. Reasonable tax base
3. Access to cheap land



4. Two 400 series highways...401 Corridor
5. Excellent County road system
6. Close to Major US Markets ...Less than 2 hours to four major border crossings
8. Small town living ... small town options for living and raising families
9. Prime agricultural land close to large markets
10. Heritage and future opportunities related to agriculture
11. Attractive residential areas in comparison to London
12. Access to skilled and educated work force
13. Post-secondary institutions as source of ideas and workers ...access to University and Fanshawe College for Technical Assistance
14. Strong K-12 school and hospitals within easy driving distance
15. Stable environment: not huge weather risks...
16. Safe place
17. Less red tape (development is easier in this County)

Key Opportunities

#votes Idea

- | | |
|----------|---|
| 8 | 1. New business attraction -> continue to minimize red-tape etc. to make the County more attractive relative to others ... promotion of economic diversification - sell all our assets e.g. land access, less taxes, etc.

- Ride on coat tails of London economic attraction with offer of lower costs

- Market benefits to London business considering expansions

- use existing companies to assist in promoting Middlesex |
| 7 | 2. Business retention & expansion -> support our existing small businesses and start-ups ...work with your existing industries with respect to like industries and expansion

- make sure present and new businesses stay connected and are informed and are familiar with new funding opportunities and government programs |
| 6 | 3. Provide more flexibility for business in rural areas through Provincial policy initiatives (i.e. PPS) e.g. provincial ag policies

- permit and promote development opportunities along 401 and 402 corridors |
| 4 | 4. Development of local markets for local food production and value added |
| 4 | 5. Maximize internet access in all areas of County -> Broadband and high speed IT |
| 4 | 6. Talent attraction to support existing industries and fuel growth in emerging industries |



#votes Idea

- Reach new talent segments by marketing advantages of Middlesex County living (see strengths *)
- Reach out to immigrant groups re: investment, skilled workforce
- 4 7. Restart & promote a regional Main Street improvement program ...Revitalize smaller community cores as centres of live-work communities
- 4 8. Ensure services (water, sewers, roads, broadband, etc.) are available immediately to serve potential businesses...have the lowest development fees
- 4 9. Housing: need to appeal to entry level buyers
- 3 10. Cohesive tourism strategy ...Dovetail city/County tourism promotion ...Agri-Tourism
- 3 11. Market Middlesex County to outside community ...Marketing: Sell our region and the niche markets we have
- 3 12. Continue to build linkages with other economic development stakeholders in Southwestern Ontario (looking for symmetries in other counties)
- 2 13. Opportunity to redefine niche area (away from manufacturing)... we can't be all things to all people... we need to focus on attracting a specific niche segment (TBD!!)... To get similar like businesses here.
- 2 14. Transportation improvements: you must have a car to get around
- 1 15. Develop clusters of "country-style" communities close to major market amenities (small town Quality of Life)
- 0 17. Diverse number of small business to provide support -> supply chain is strong

Implementation Ideas

***** STEP 1: PRIORITIZE OPPORTUNITIES. IF WE COULD ONLY FOCUS ON SIX OF THESE... HIGH IMPACT AND WITHIN INFLUENCE/CONTROL OF COUNTY *** STEP 2: BRAINSTORM ACTIONS. FOR EACH OF OUR TOP OPPORTUNITIES, HOW DO WE MAKE THIS HAPPEN IN MIDDLESEX COUNTY? SUGGEST 1-2 SPECIFIC ACTIONS (E.G. PROJECTS, INITIATIVES) FOR EACH OPPORTUNITY.**

OPPORTUNITY: New business attraction -> continue to minimize red-tape etc. to make the County more attractive relative to others ... promotion of economic diversification - sell all our assets e.g. land access, less taxes, etc.

1. Continue to minimize red-tape etc. to make the County more attractive relative to others.
 - \$\$\$\$ talks, promote lower land prices, lower taxes, less red tape,
2. implement employment land strategy recommendations
3. Ride on coat tails of London economic attraction with offer of lower costs
 - Target the same development clusters as London but emphasize quality of life and lower costs. "get 25% more in our community"
 - market benefits to London business considering expansions



4. Highlighting the earlier idea of the business to business engagement - an ad campaign of some kind highlighting a range of businesses in Middlesex County
 - use existing companies to assist in promoting Middlesex
5. Think Regional Economic Development and promote using a regional ED approach in leading sectors, vs. County specific. ... Need to build region wide strategies and work together

OPPORTUNITY: Business retention & expansion -> support our existing small businesses and start-ups ...work with your existing industries with respect to like industries and expansion

1. make sure present and new businesses stay connected and are informed and are familiar with new funding opportunities and government programs
2. Direct outreach to businesses not only on expansion tools and funding, but also providing facilitated linkages to additional workforce attraction and development supports
 - Work with local municipalities to ensure they do regular visits with existing industries to discuss their needs etc.
3. reach out and link current businesses and connect through joint marketing plans

OPPORTUNITY: Provide more flexibility for business in rural areas through Provincial policy initiatives (i.e. PPS) e.g. provincial ag policies

1. Permit and promote development opportunities along 401 and 402 corridors
2. Amend County Official Plan to include "Special Policy Area" to promote and permit business development along 401 and 402 (in consultation with Province)
3. Ensure there is sufficient hydro etc. and have the PPS become flexible

OPPORTUNITY: Ensure services (water, sewers, roads, broadband, internet access etc.) are available immediately to serve potential businesses...have the lowest development fees

1. Maximize internet access in all areas of County -> Broadband and high speed IT
2. municipal investment in services
3. upper tier governments have to be more involved with innovative funding solutions to assist in hard service expansions

OPPORTUNITY: Development of local markets for local food production and value added ... Develop local food production with London as the market

1. networking opportunities for value added agricultural sector
2. local food production /marketed through agritourism/to restaurants markets provided by London
3. Develop local food economy/agri tourism by attracting London's urban dwellers to a country experience.
4. Marketing local producers with partners including Tourism London, Tourism Middlesex etc.



OPPORTUNITY: Talent attraction to support existing industries and fuel growth in emerging industries... Reach new talent segments by marketing advantages of Middlesex County living (see strengths & assets Q1 *)

1. Reach out to immigrant groups re: investment, skilled workforce ...reach out to immigrant groups but also 2nd generation immigrant groups etc. ... note: these groups initially go to Toronto, Vancouver, Montreal ... do we target the ethnic communities in these large urban centres
2. Tap into resources available in Southwestern Ontario to draw immigrant talent for available and emerging opportunities in the County - there are tools in place and available (both for businesses and newcomers)
3. Promote small town life in Middlesex in advertising
4. More affordable housing for new immigrants working in Middlesex County ... need to figure out how we can offer more entry level housing.... e.g. condos, townhomes etc.??

OPPORTUNITY: Restart & promote a regional Main Street improvement program ...Revitalize smaller community cores as centres of live-work communities

1. Local municipal funding of main street program?
2. Enhance community development through heritage preservation in small communities. Build the "cool" factor.
3. when this program was in effect ,great changes were made i.e. Strathroy etc. that made these downtown areas desirable to prospective business owners/visitors from more urban settings
4. Implement "DC" free development in designated Main Street area
5. Use where appropriate tools such as First Impressions Community Exchange (FICE), Downtown Revitalization (DR), Business Retention and Expansion (BRE), Analyst, tools via Ontario Ministry of Rural Affairs.

Obstacles and Barriers

WHAT IS GETTING IN THE WAY OF ECONOMIC DEVELOPMENT?

1. think it still comes back to the idea that you must provide affordable housing for people to live, then these people become the new work force, and then the ripple effect starts
2. Lack of diversity in the County can limit attraction to new talent segments
 - Housing affordability
 - Communication between Middlesex County stakeholders and other stakeholders in Southwestern Ontario could be enhanced. Not a lot of awareness of resources available in the County or for the County to access or vice-a-versa
 - Limited economic diversification
 - Limited job growth
3. larger economic factors beyond municipal control - example being the complete change in the auto industry over past 10 years
4. Need an ED vision and plan and work at it together (upper /lower tier)



5. need full time ED
6. Our children's quite often have become better educated with a higher student debt, therefore are more likely to find jobs outside of their home area and sometime are moving out of Ontario to find employment.
7. political in-fighting
 - lack of co-operation within region (individual goals vs. regional goals)
 - disparity of long term goals and objectives of local municipalities that form County
8. The ability to move forward as a unit. Seem to be pulled in opposite directions. Keeping focused
9. The County needs to cultivate a culture of cooperation between lower tier municipalities. Attract investment interest by developing and marketing the whole region, AND THEN compete around location advantages.
 - The County also needs to recognize that investment and labour doesn't recognized borders. The County needs to engage with other jurisdictions to market on a regional basis.
10. Through joint tourism efforts we will attract more visitors who will consider living

3.3 Survey Summary

The consultation analysis was further supplemented with an online survey for local community input. The survey provided a broad input on a range of community and economic development issues. The survey had a significant response rate. The following section contains a summary of the survey results.

Question: How do you generally feel about Middlesex County as a place to live?

- Good Place to Live
 - People generally feel that the County is a good place to live
- Family Friendly
 - Safe place to raise children
 - Clean and quiet
- Community
 - Small town feel
 - Sense of community
 - People are friendly
- Location
 - Close to major centres
- Affordable
 - Housing is reasonably priced



Question: What 3 distinctive assets or advantages does Middlesex County have on which to build a strong economy?

- Location
 - Close to major universities and colleges
 - Close to major highways, large urban centres and US border
 - Close to Great Lakes
- Local Community
 - Strong sense of community
 - Skilled and educated workforce
 - Businesses support each other
- Agriculture
 - Lots of local farms and food producers
 - Great agricultural land
 - Strong agricultural base to develop food industry
- Infrastructure
 - Good transportation network
- Land
 - Land available to build on outside of cities
 - Supply of shovel ready development land

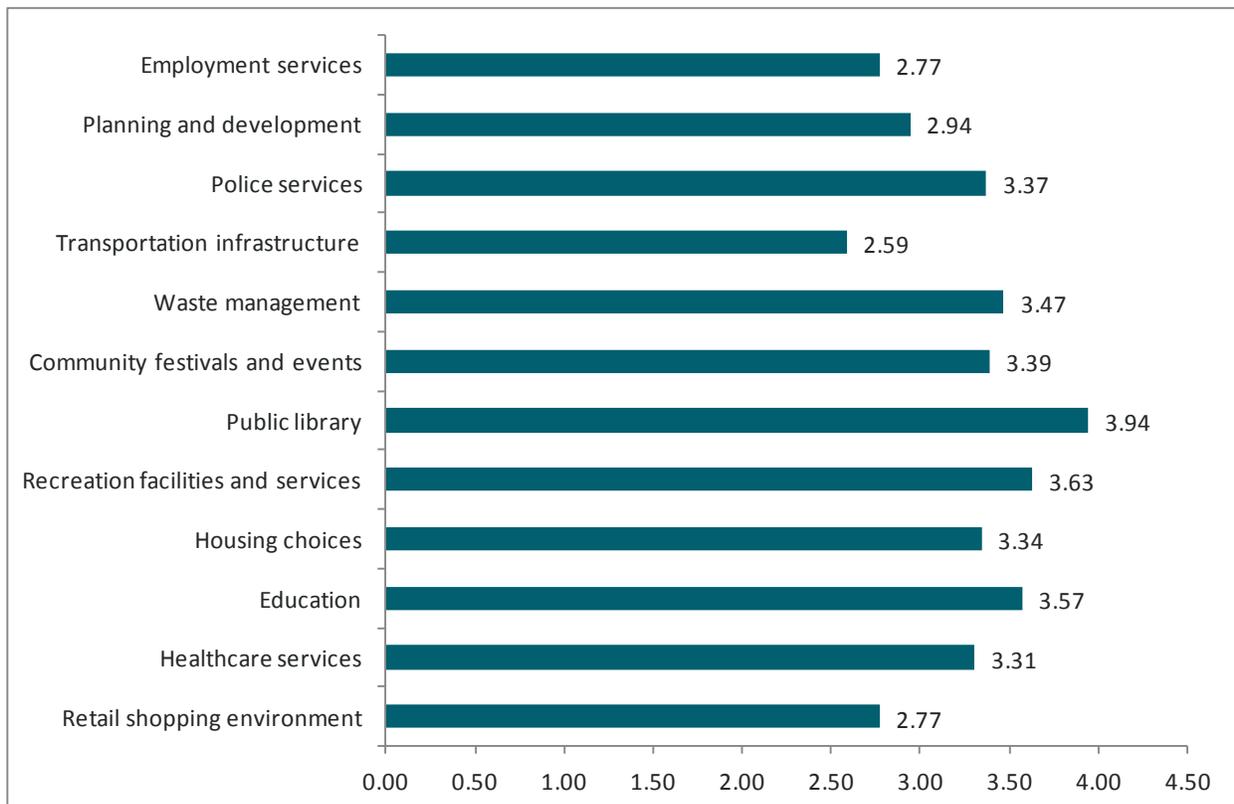
Question: What are the 3 most important community and/or business development issues you would like Middlesex County to address in the next 5 years?

- Small business support
 - Encourage small business to start up
 - Want non-financial resources to support small business owners
 - Give incentives to new businesses to locate in smaller centres in region
 - Want to see more small businesses
- Main Street Revitalization/Small town revival
 - Reduce number of vacant store fronts, vacant businesses should be filled
 - Want to revitalize the small towns in County
 - Encourage small business in downtown Strathroy
 - Want more stores and restaurants, want more diversity in shopping options
 - Want more local entertainment options
 - So people will stay in the County and not go to London for goods and services
- Municipal Services
 - Indoor pool
 - Water rates and taxes are too high



- Lower taxes for businesses
 - Want affordable housing in region
 - Maintain and improve access to health care services
- Infrastructure
 - Invest in infrastructure, in particular sidewalks, roads and traffic lights
 - Maintain or expand public transit system
 - Invest in high speed internet access
 - Manufacturing
 - Attract manufacturing business
 - Collaborate with other levels of government to re-establish manufacturing
 - Agriculture
 - Investigate value added agriculture
 - Maintain small scale owner/operator farms

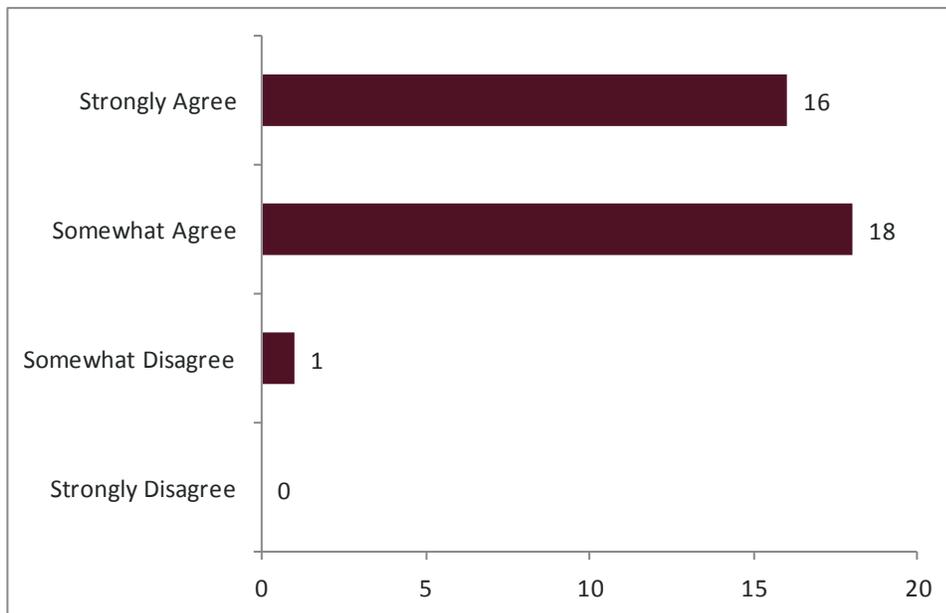
Question: Using a scale of 1-5 where 1 is 'not at all satisfied' and 5 is 'very satisfied', please rate the quality of the products and services in Middlesex County (does NOT include those provided within the City of London)





- The following categories got the highest scores: public library at 3.94, recreation facilities and services at 3.63 and education at 3.57
- The following categories got the lowest scores: transportation infrastructure at 2.59, and retail shopping environment and employment services both at 2.77
- Around 31% of responder stated that they were very satisfied with the public library
- Around 24% of responders stated they were not at all satisfied with the transportation infrastructure,
- With the exception of transportation infrastructure, less than 12% of the responses had a response of not at all satisfied for all the other categories

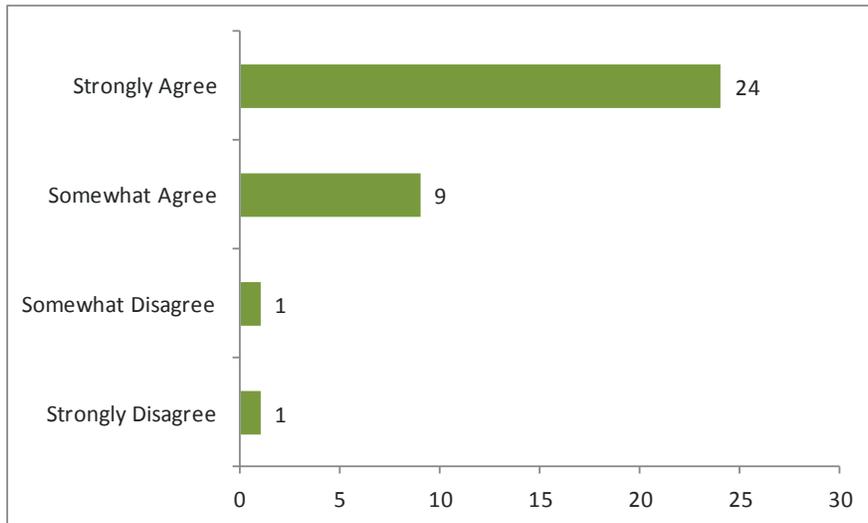
Question: Please indicate to what level you agree or disagree with the following statement: Middlesex County is a good location for a business to locate.



- 97% of responders strongly or somewhat agree that the County is a good location for a business to locate

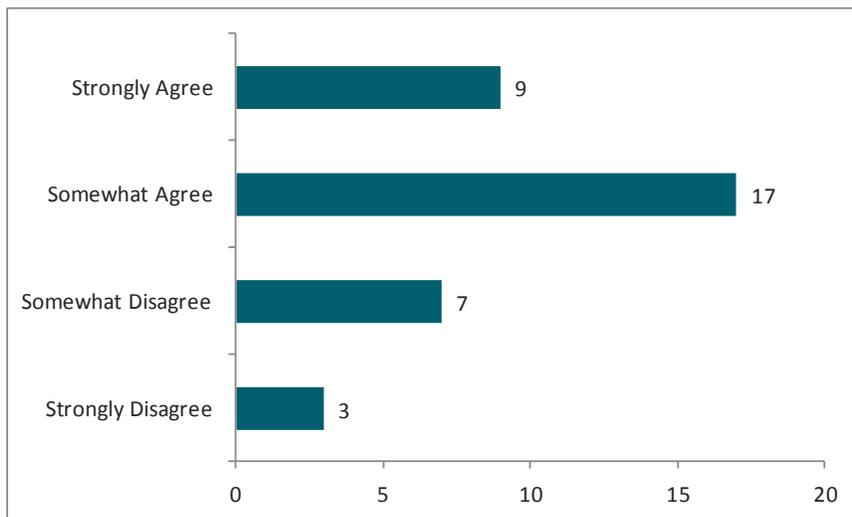


Question: Please indicate to what level you agree or disagree with the following statement: Middlesex County needs to actively pursue more commercial / industrial growth.



- The majority of respondents somewhat agree or strongly agree that Middlesex needs to pursue more commercial/industrial growth at 94%

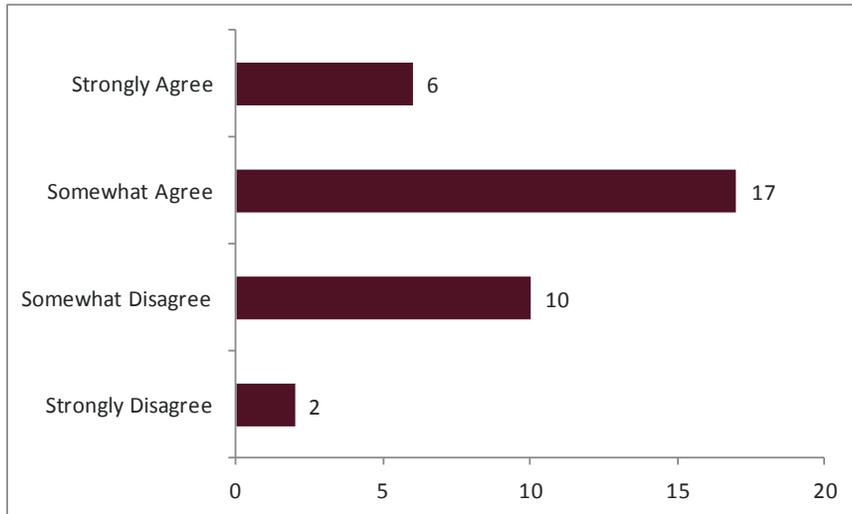
Question: Please indicate to what level you agree or disagree with the following statement: Middlesex County needs to actively pursue residential growth.



- The majority of respondents somewhat agree or strongly agree that Middlesex needs to pursue more residential growth at 72%

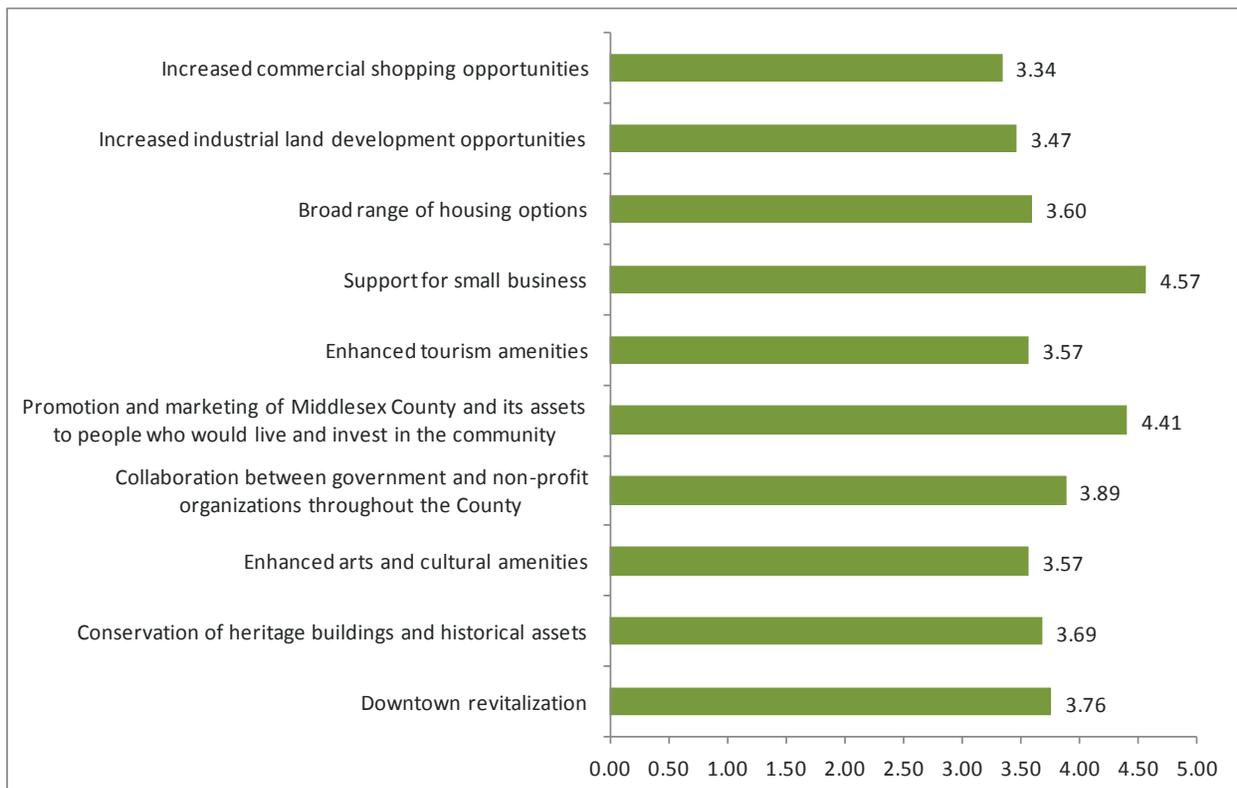


Question: Please indicate to what level you agree or disagree with the following statement: Middlesex County is welcoming of newcomers.



- The majority of respondents somewhat agree or strongly agree that Middlesex is welcoming at 66%

Question: On a scale of 1 to 5 with 1 being 'not important at all' and 5 being 'very important' please rank the following factors to the future growth of Middlesex County.





- Support for small business and promotion and marketing of Middlesex County scored the highest at 4.57 and 4.41 respectively
- Increased commercial shopping opportunities and increased industrial land development opportunities scored the lowest at 3.34 and 3.47 respectively
- 66% of responders stated that support for small business was very important while 59% stated that and promotion and marketing of the County was very important

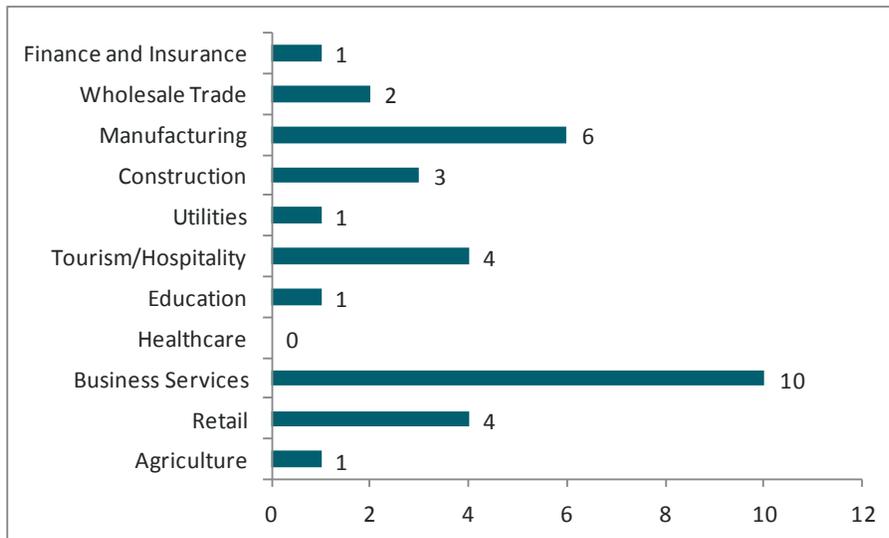
Question: What role and actions should the County of Middlesex take on to build and support a strong local economy?

- Small business support
 - Support home grown businesses
 - Give assistance to early stage businesses that do not have strong network or expertise
- Business attraction
 - Create partnerships with educational institutions to attract businesses
 - Promote quality of life in region to attract business
- Role of County and lower-tier municipalities
 - Ensure lower tier municipalities will have tools to build on their local economy
 - County should take leadership role and acts on behalf of lower tier municipalities in attracting business
 - County should direct/assist lower tier municipalities in achieving their local goals
- Industry
 - Attract manufacturing/processing jobs back into the region
 - Collaborate with different levels of government to bring back manufacturing to the region
- Downtown revitalization/small town revival
 - Lack of vibrant downtown
 - Vacant industrial buildings should be reused for new businesses



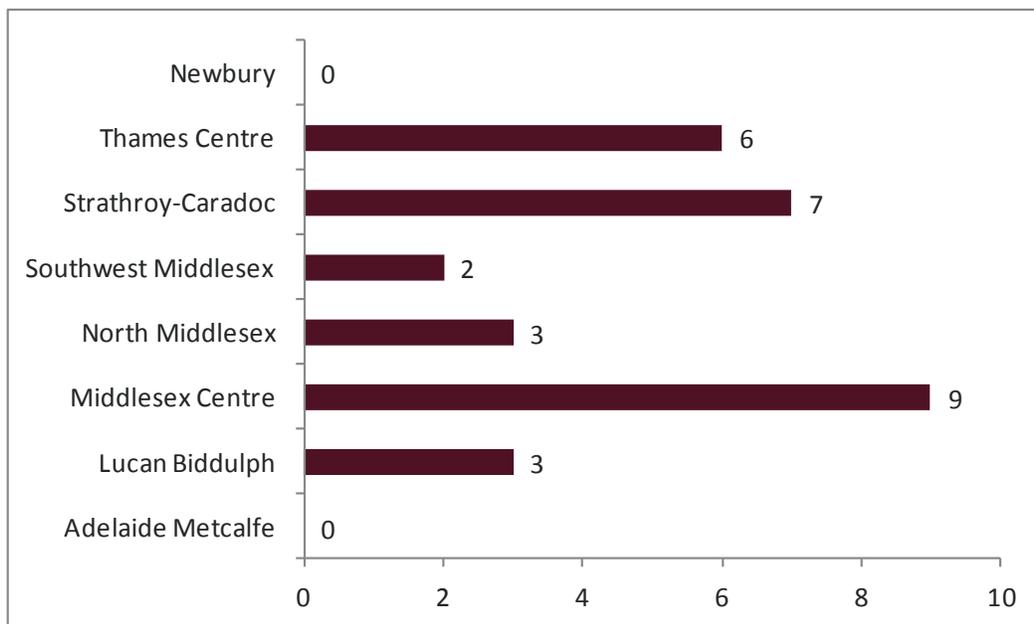
3.3.1 Business Owner or Operator Survey

Question: What type of business does your own and/or operate?



- The two largest types of businesses responders own or operate were business services at 30% and manufacturing at 18%

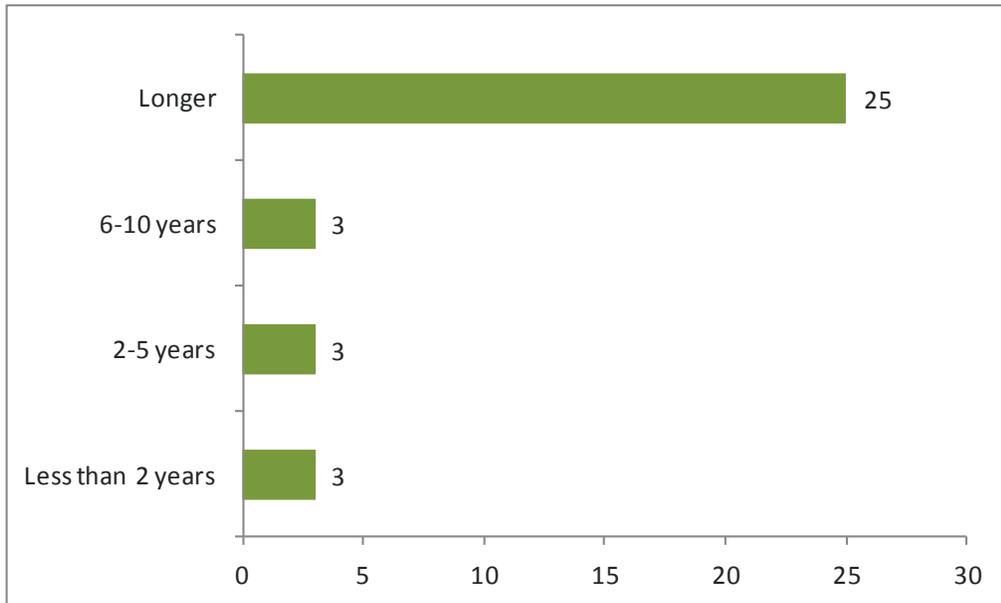
Question: What area of Middlesex County are you operating in?



- Largest portion of responders were from Middlesex at 30% and Strathroy-Caradoc at 23% and Thames Centre at 20%
- There were no responders from Newbury and Adelaide Metcalfe

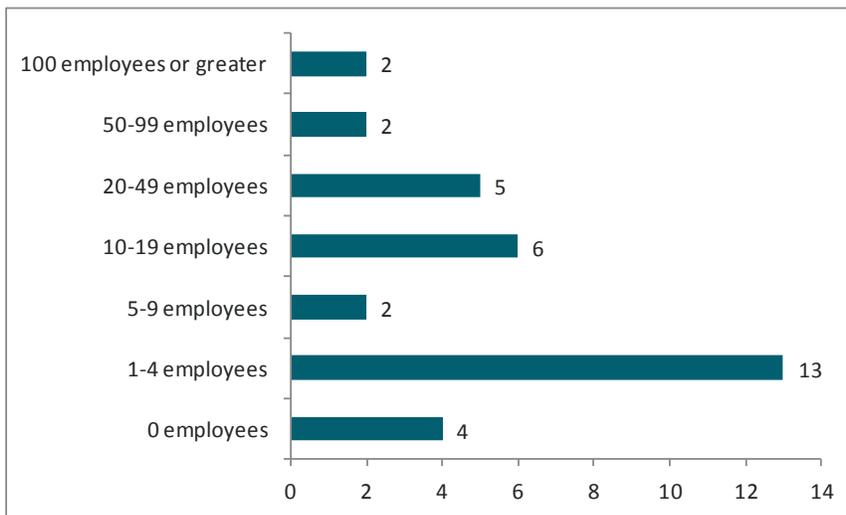


Question: How long has your business operated in Middlesex County?



- The majority of responders have been operating their businesses in Middlesex have been operating longer than 10 years at 74%

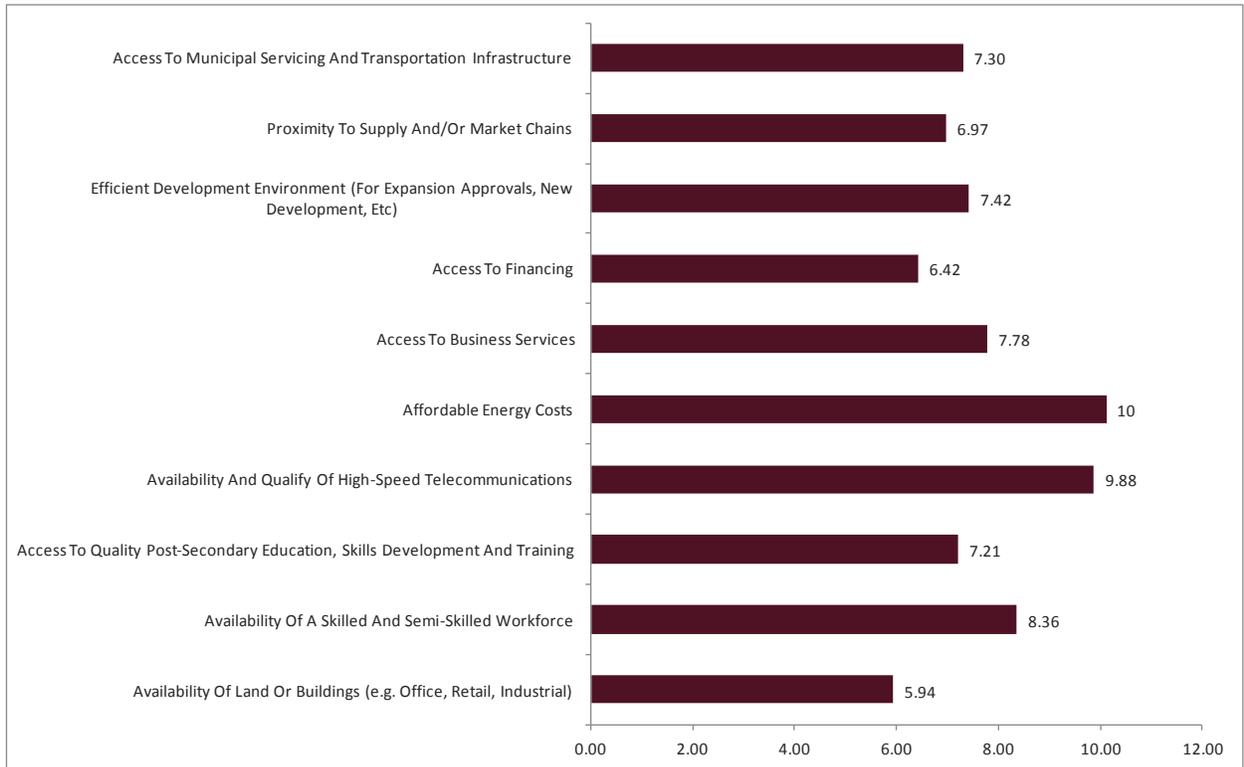
Question: How many people do you employ?



- The majority of responders employ 1-4 people at 38%
- 12% of responders have 0 employees and 6% of responders have 100 employees or greater



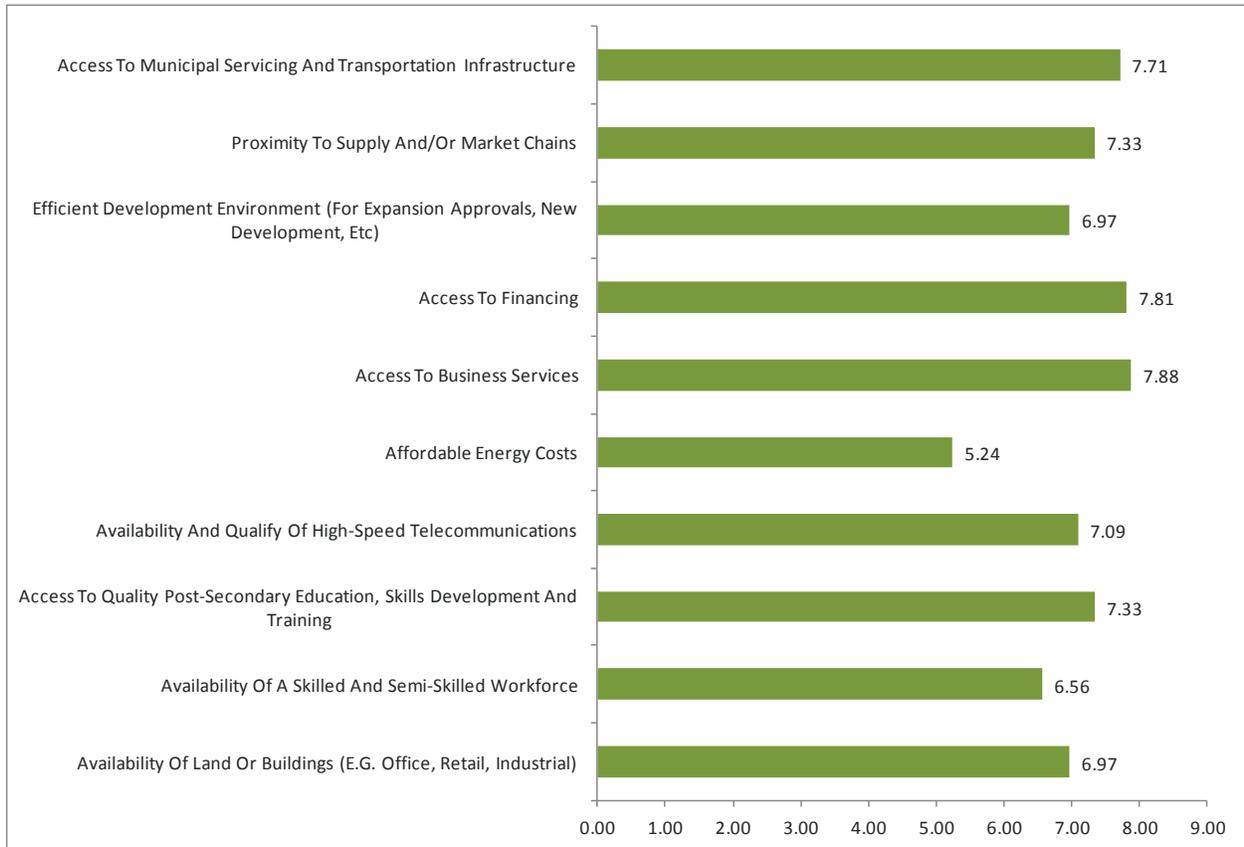
Question: Using a scale of 0 to 10 where 0 is “not at all important” and 10 is “very important”, please rate the following criteria to indicate the level of importance each one has, in ensuring the GROWTH of your business.



- Affordable energy costs and availability and qualify of high-speed telecommunications scored the highest at 10 and 9.88 respectively
- Availability of land or buildings and access to financing scored the lowest at 5.94 and 6.43 respectively
- 61% of responders stated that affordable energy costs were very important and 58% of responders said the same for high speed telecommunications



Question: Using a scale for 0 to 10 where 0 is “not at all satisfied” and 10 is “very satisfied”, please rate the following to indicate the level of your satisfaction with Middlesex County as a place to OPERATE a business.



- All but one category scored between 6.5 to 8
- Access to business services and access to financing scored the highest at 7.88 and 7.81 respectively
- The only category to score below 6 was affordable energy costs at 5.24

Question: What 3 distinctive assets or advantages does Middlesex County have on which to build a strong economy?

- Location
 - Proximity to large urban centres, such as London and others
 - Located between major transportation arteries, close to highway 402 and 401
 - Proximity to major markets in US and Canada
- Labour Force
 - Innovative population
 - Access to skilled and semi-skilled workforce
 - Experience and well educated business leaders



- Municipal Services
 - Lower commercial taxes
 - Receptive and responsive local government
 - Local politicians that listen to their constituents
- Education
 - Good local education facilities
 - Presence of colleges and universities in region
- Businesses
 - Diversity of businesses
 - Businesses in agriculture, manufacturing, services
- Agriculture
 - Strong agricultural base, good farmland
 - Good water source

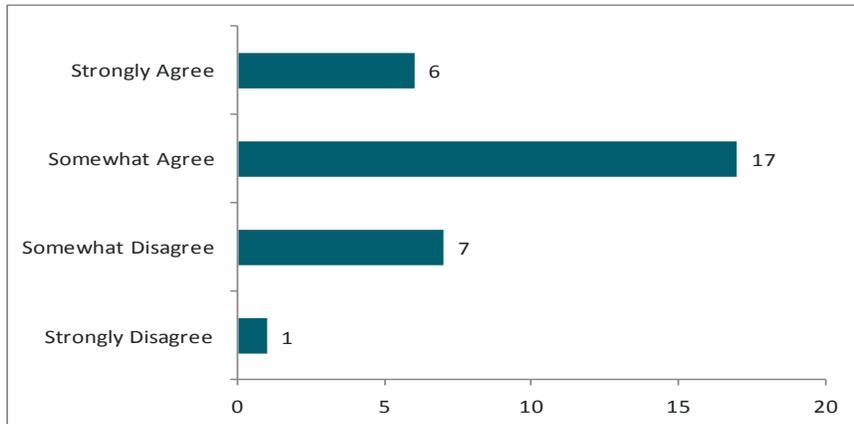
Question: What are the 3 most important community and business development issues you would like Middlesex County to address in the next 5 years?

- Infrastructure
 - High speed internet connection needed for entire region
 - Building walking/biking path to connect different communities
 - Maintain water and sewer lines
- Municipal Services
 - Need to handle high energy costs in area, especially electricity and hydro
 - Need to lower taxes
 - Want faster approvals for residential developments
- Business Attraction
 - Support the growth of small businesses in the region
 - Attract business to the area, particularly manufacturing, to create jobs in region
 - Create more grant programs for growing businesses that do not meet the current grant requirements
 - Create more incentives to attract and retain businesses in region
- Downtown revitalization
 - Want a diverse and vibrant downtown core with a diversity of shops
 - Continue to improve the main streets
 - Want the implementation of a downtown revitalization program
- Tourism
 - Promote agri-tourism in region and have better signage for this industry



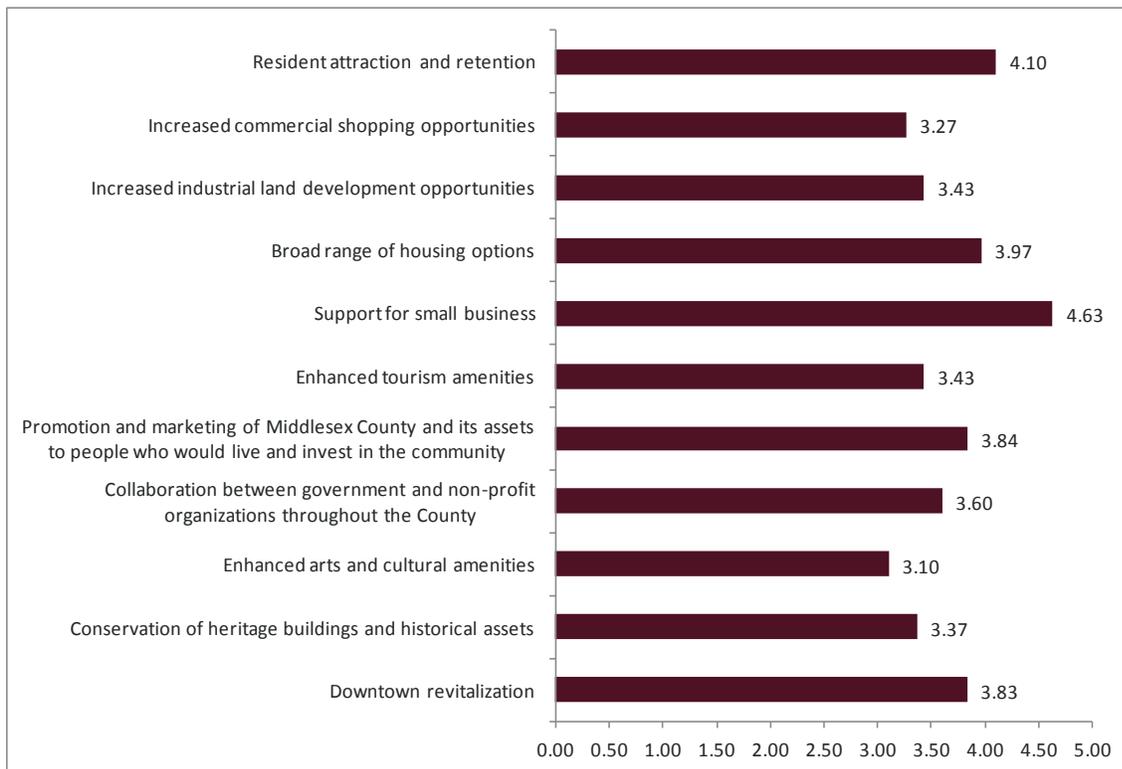
- County and lower tier municipalities roles
 - Need one economic development strategy for region
 - County needs to co-ordinate more effectively with other economic development organizations

Question: Please indicate to what level you agree or disagree with the following statement: Middlesex County is welcoming of newcomers.



- The majority of respondents somewhat agree or strongly agree that Middlesex is welcoming at 74%

Question: On a scale of 1 to 5 with 1 being 'not important at all' and 5 being 'very important' please rank the following factors to the future growth of Middlesex County.



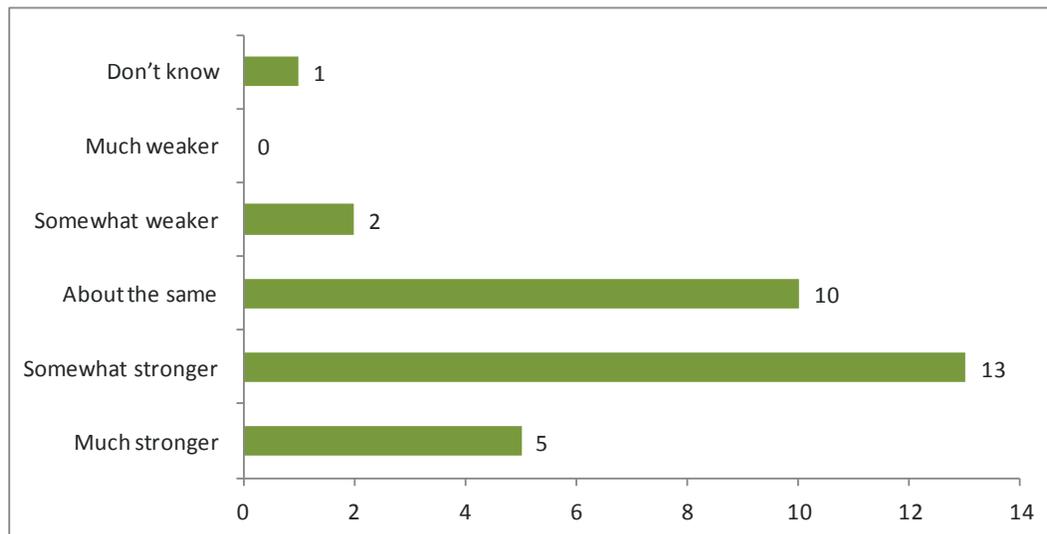


- Most categories scored between 3-4
- Only two categories scored higher than 4: resident attraction and retention at 4.1 and support for small business at 4.63
- 73% of responses stated support for small business was very important

Question: What is the primary reason for locating your business in Middlesex County?

- Quality of life
 - They reside in the County and their family resides there as well
 - Want to live, work and play in County
 - Great place to live and raise family
- Location
 - Close to major urban centres and major markets
 - Proximity to customers
 - Close to raw product supply

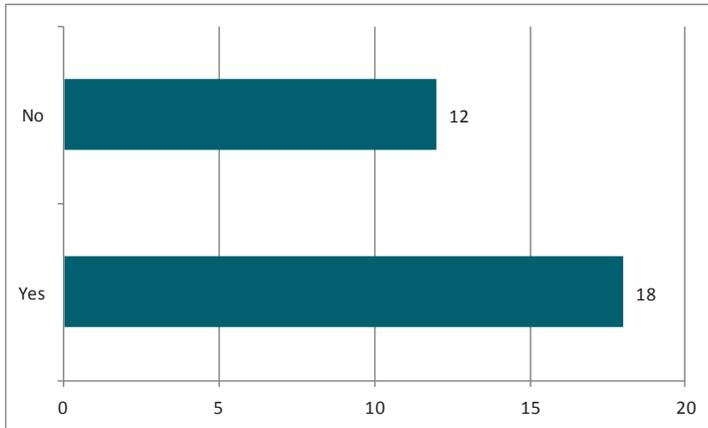
Question: How do you expect your company to perform in the next 2 years compared to the last 2 years?



- The majority of respondents expected that their company would perform somewhat or much stronger in the next two years at 58%
- 32% of respondents expected that their company would perform the same within the next two years



Question: Do you have plans to upgrade/expand your Middlesex County operation?



- 60% of responders stated that they planned to upgrade/expand their operation

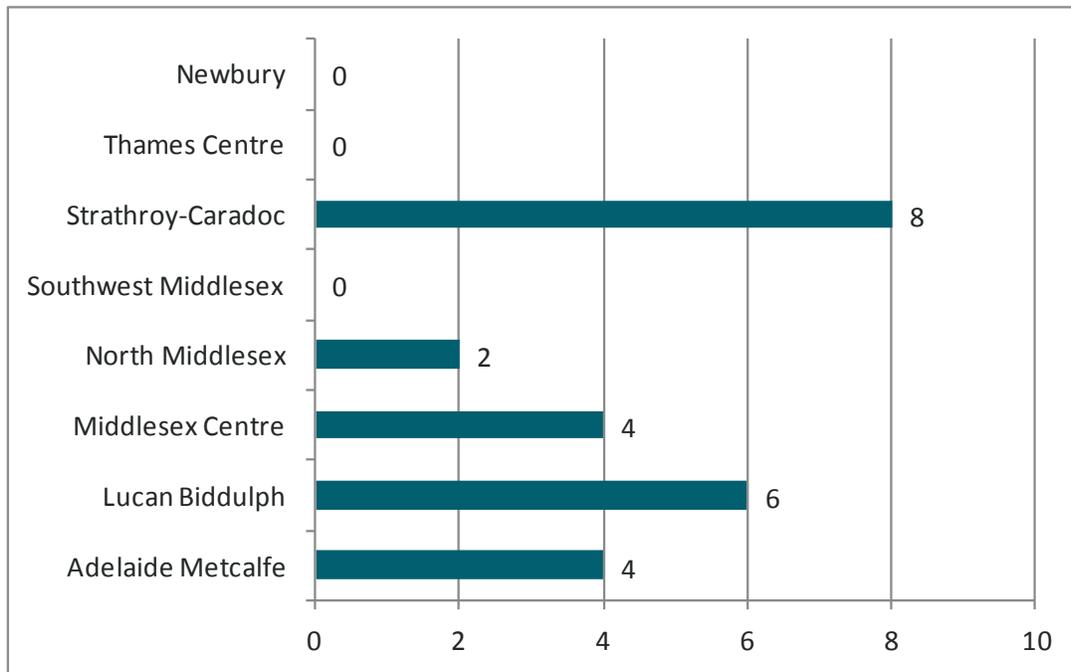
Question: What role and actions should the County of Middlesex take on to build and support a strong local economy?

- Business Attraction
 - Focus on retaining current businesses
 - Support small and medium businesses, create forum to see what services SMEs want
 - More support for and collaboration with the Business Help Centre to encourage growth in all of the communities.
 - Offer incentives for companies to locate in the region
 - Provide networking assistance to help businesses grow
- Role of County and lower tier municipalities
 - Collaborate with various groups/agencies in region to carry out economic strategy
 - Better communication between all levels of government
 - Eliminate any duplication of service
- Municipal Service
 - Keep taxes low
 - Allow for further residential development
 - Lower energy costs in order for manufacturing sector to remain competitive



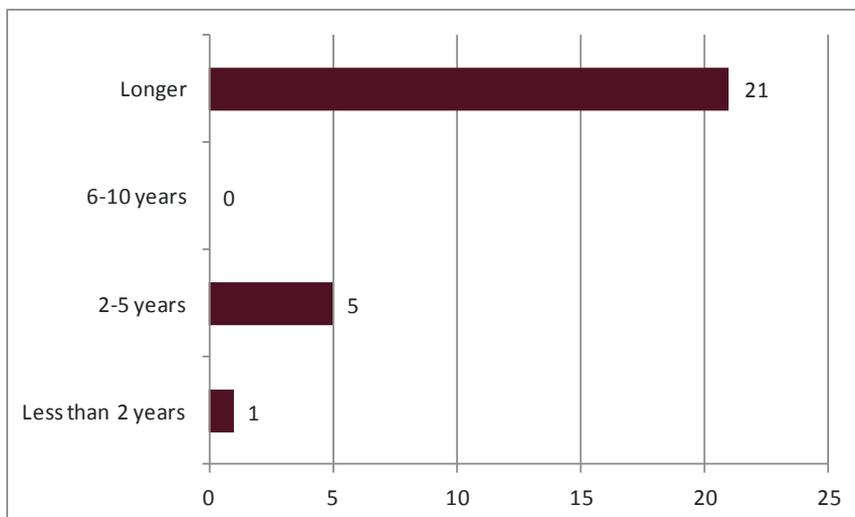
3.3.2 Organization Leadership Survey

Question: What area of Middlesex County are you operating in?



- Largest portion of responders were from Strathroy-Caradoc at 33% and Lucan Biddulph at 25%
- There were no responders from Newbury, Thames Centre and Southwest Middlesex

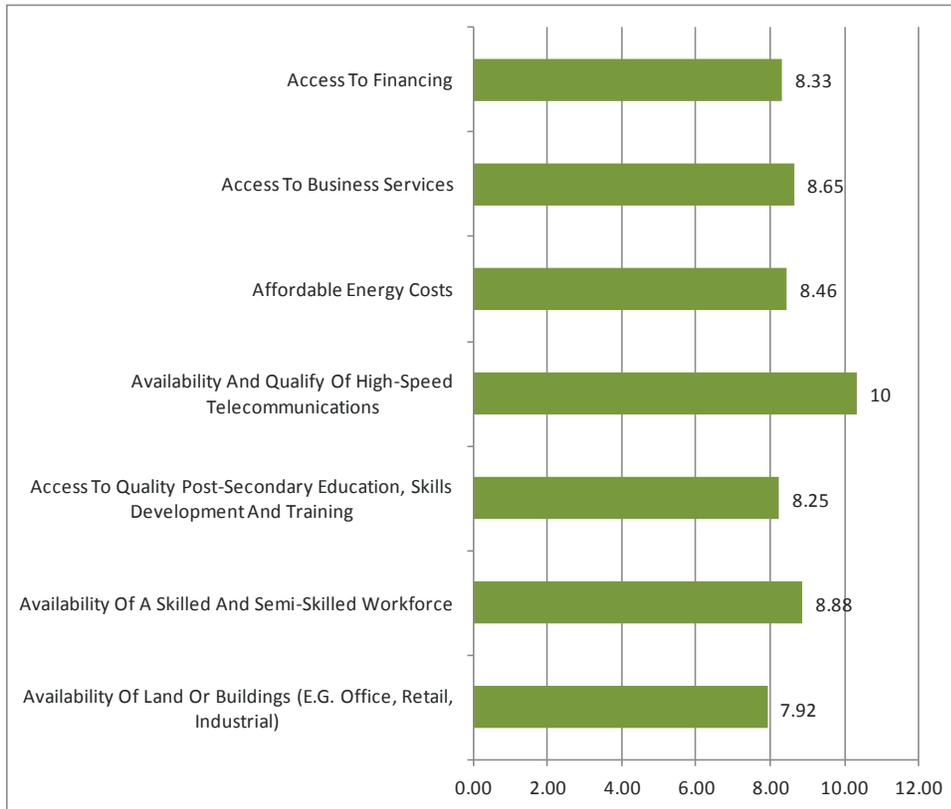
Question: How long has your organization operated in Middlesex County?



- The majority of responders have been operating their organization in Middlesex have been operating longer than 10 years at 78%



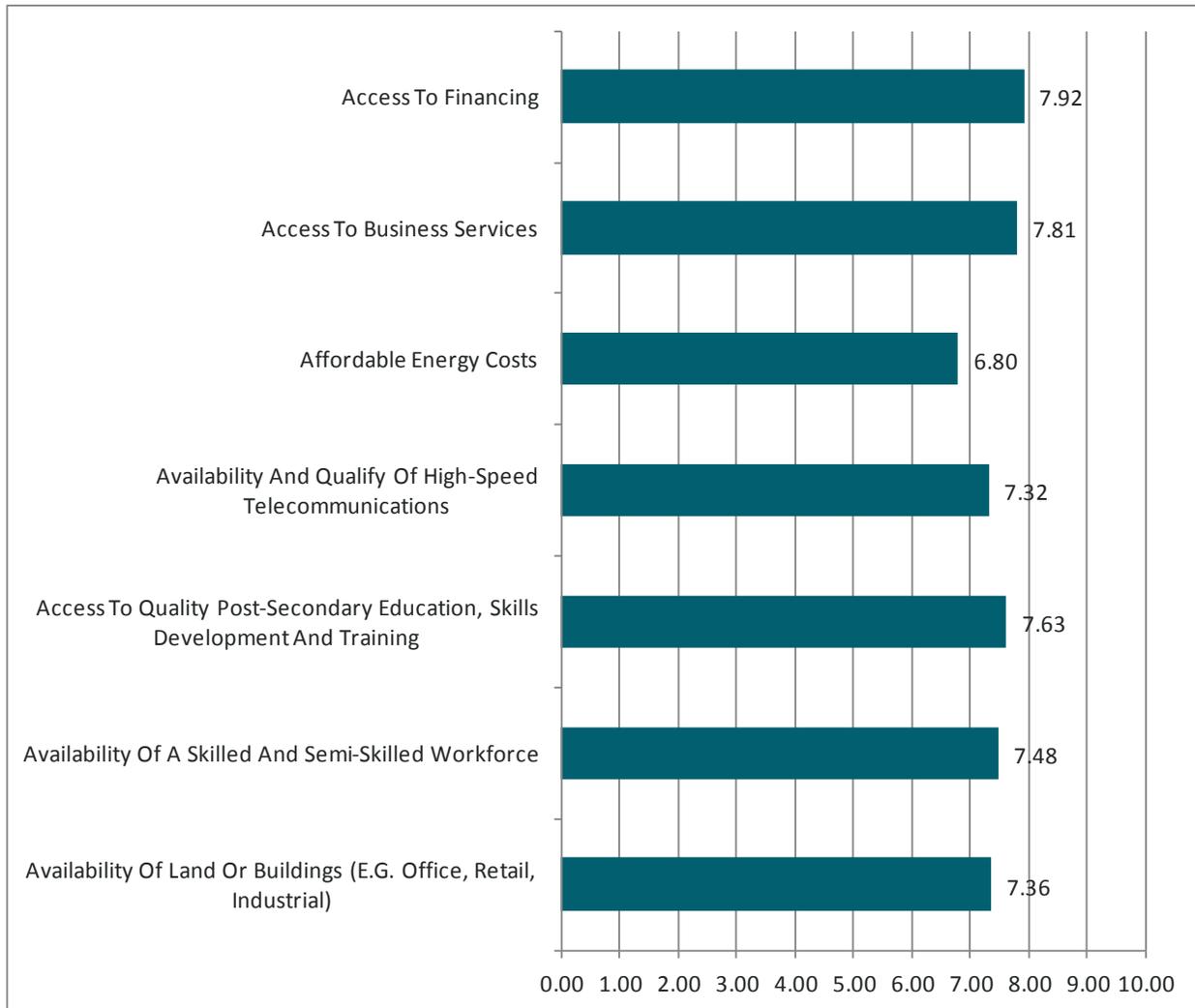
Question: Using a scale of 0 to 10 where 0 is “not at all important” and 10 is “very important”, please rate the following criteria to indicate the level of importance each one has, in ensuring the SUSTAINABILITY of your organization.



- Most categories scored between 8-9
- Availability of land or buildings was lower than 8, with a score of 7.96
- Availability and qualify of high-speed telecommunications had the highest score at 10
- 56% of responders stated that high speed telecommunications were very important



Question: Using a scale for 0 to 10 where 0 is “not at all satisfied” and 10 is “very satisfied”, please rate the following to indicate the level of your satisfaction with Middlesex County as a place to OPERATE an organization.



- Most categories scored between 7-8
- Affordable energy costs was lower than 7 , with a score of 6.80
- Access to financing had the highest score at 7.92

Question: What 3 distinctive assets or advantages does Middlesex County have on which to build a strong economy?

- Location
 - Close proximity to great hospitals in London
 - Proximity to major roads, close to highway 401 and 402
 - Proximity to major markets in US and Canada



- Quality of life
 - Have access to recreation, health care and senior resources
 - Get to have urban and rural amenities close by
 - Can live and work in the region
- Businesses sector
 - Strong rural agricultural base
 - Diversity of businesses in agriculture, manufacturing and services
- Education
 - Close proximity to post-secondary institutions
- Workforce
 - Skilled workforce that is looking for jobs
 - Lower wages compared to other regions
 - Entrepreneurial local population

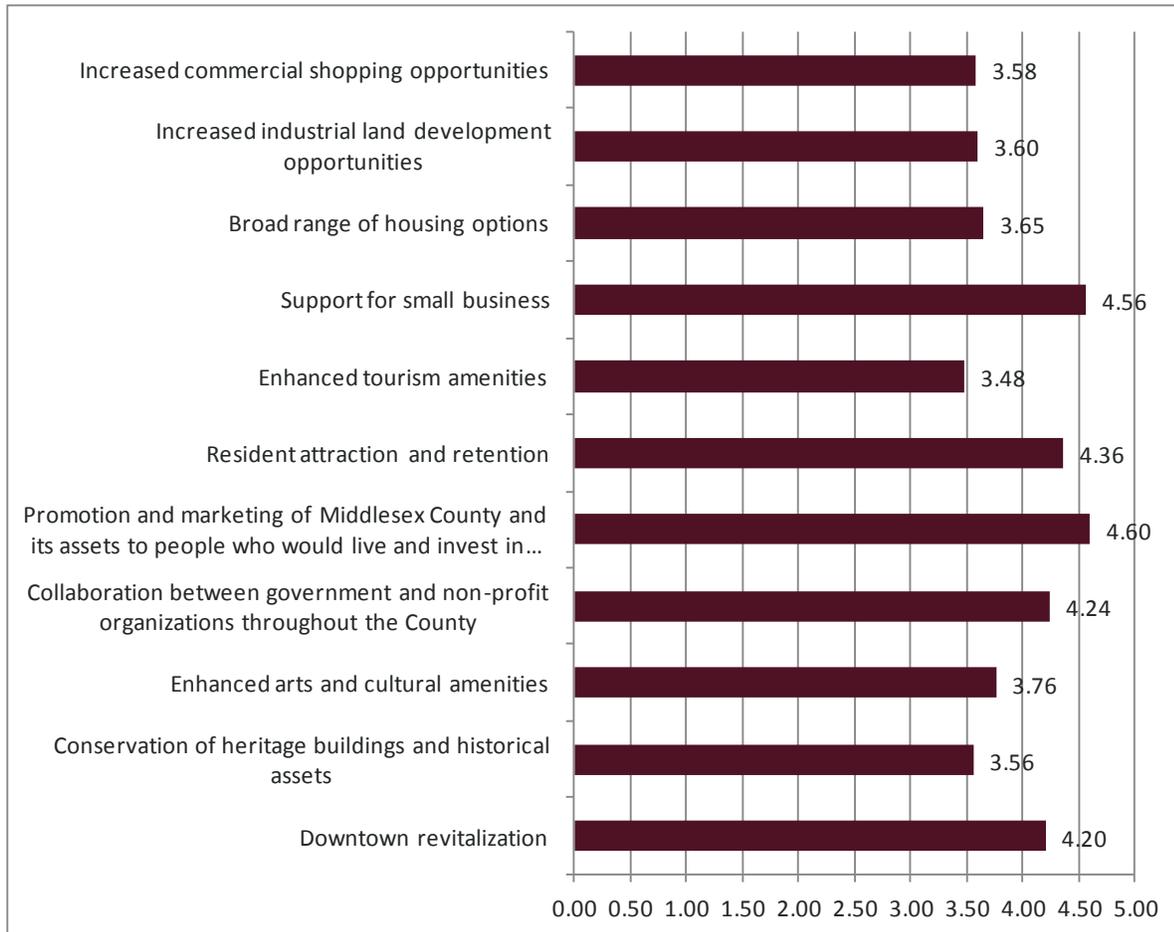
Question: What are the 3 most important community and business development issues you would like Middlesex County to address in the next 5 years?

- Infrastructure
 - Want high speed internet access County wide
 - Want expansion in transportation infrastructure
 - Want free meeting space for non-profit organizations
 - Improve public transit
- Business Attraction and Retention
 - Support and grants for small business
 - Better promotion of region and all the communities within the County to businesses and investors
 - Attract SMEs
 - Help existing business grow, assist businesses in entering new markets
 - Develop labour force to attract businesses
- Tourism
 - More funding for tourism development
 - Support rural tourism initiatives
 - Turn region into destination not pass through tourism
- Role of County and lower tier municipalities
 - Co-ordinated economic development programs
 - Sort out roles and responsibilities of different economic groups
- Downtown Revitalization



- Enhance downtown of local communities

Question: On a scale of 1 to 5 with 1 being ‘not important at all’ and 5 being ‘very important’ please rank the following factors to the future growth of Middlesex County.



- Promotion and marketing of Middlesex County and support for small business scored the highest at 4.60 and 4.56 respectively
- Enhanced tourism amenities and conservation of heritage buildings and historical assets scored the lowest at 3.48 and 3.56 respectively
- 68% of responders stated that support for small business was very important while 76% stated that and promotion and marketing of the County was very important

Question: What role and actions should the County of Middlesex take on to build and support a strong local economy?

- Role of County and lower tier municipalities
 - Collaborate with local municipalities to attract business
 - Pursue local and regional partnerships and clarify roles to support coordinated business development



- Economic development activities should not just concentrate on urban centres
- Focus on long term land use plan, in particular with respect to commercial and industrial development
- Business Support
 - Work with current businesses to open up new opportunities and markets for them
 - Support entrepreneurship through business mentorship, business incubator
 - Attract foreign direct investment
 - BR & E program
 - Support tourism initiatives that both promote and assist in the overall development of assets within Middlesex County
- Tourism and Culture
 - Support tourism, arts and culture, heritage and historical assets
 - Support tourism initiatives that both promote and assist in the overall development of assets within Middlesex County



D. Organizational Assessment

Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
<p>Infrastructure Improvements</p>	<p>Support role Participate in broader initiatives to improve broadband service and transportation networks Leverage BR+E results to understand the business case for broadband access and transportation improvements (public transportation and road improvements) Ensure lower-tier municipalities are informed of activities</p>	<p>Support role Provide information and political support as needed Servicing of shovel ready industrial land (discussed further under investment attraction)</p>	<p>Leading role Broadband and regional public transportation are areas where SWEA is well positioned to take the lead Western Ontario Warden's Caucus is completing a feasibility study on broadband access</p>	<ul style="list-style-type: none"> ▪ Middlesex holds a SWEA membership at a cost of approximately \$5,000 per year ▪ SWEA holding transportation conference next year (passenger rail); serves a large geographic area to address broadband issues ▪ WOWC's "The Broadband Project" is completing a scoping study that will outline next steps to improve access across southwestern Ontario, including resource requirements and funding partners
<p>Enhanced Communication and Networking Efforts</p>	<p>Leading role Provide a full time office presence to facilitate ongoing communication and relationship building with lower-tier municipalities and external stakeholders Share information about business development services with the business community, lower-tier municipalities and new entrepreneurs Coordinate economic development capacity building activities throughout County</p>	<p>Support role Communicate local economic development activities with municipal staff, political leadership, community members and County Engage in relationship building activities to coordinate economic development activities Provide basic economic development capacity building for committee members, staff, and community leadership</p>	<p>Support role Regional economic development organizations such as SWEA and SOMA offer networking with external economic development counterparts and external businesses Chambers play an important role in local business networking, and it is important to avoid duplicating their efforts The CFDC and the County are well positioned to work together to expand County-wide business to business networking opportunities</p>	<ul style="list-style-type: none"> ▪ Small business enterprise centre tends to support businesses in London while the CFDC covers everything except the city; this is a federal/provincial disconnect in delivery of business support services and more information in the hands of business could increase utilization



Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
<p>Business Retention + Expansion</p>	<p>Leading role Execute County-wide BR+E activities by priority sector, targeting specific subsectors and critical players, such as the top 25 employers in that sector, with purposeful questions to inform economic development activities Share information on program support for businesses while engaging in interviews Support lower-tier municipal BR+E activities with training and advice</p>	<p>Support role Joint interviews with municipal economic development contact as needed Ensure staff and/or volunteers are trained and prepared to participate</p>	<p>Support role CFDC is a good resource for business support financing OMRA business retention and expansion support program</p>	<ul style="list-style-type: none"> ▪ For the agriculture sector, particular areas such as agricultural processing, livestock or oilseed/grain production, or local food systems, would all be useful areas to target to inform future programming ▪ The manufacturing sector is an important sector as well, particularly considering recent losses in businesses and employment, what can be done to address these issues is a good BR+E topic for this sector
<p>Leverage Middlesex Proximity to London</p>	<p>Leading role Market urban proximity as an asset; London is a ready labour force and source of amenities and services that many residents enjoy Participate in LEDC and London Tourism programs where they align with the Economic Development Strategic Plan</p>	<p>Support role Municipalities which have access to London can also use proximity as a marketable asset, including a ready labour force, source of amenities and services Businesses connect with London market by participating in events and networking</p>	<p>Support role Chambers of Commerce and neighbourhood associations can work together to support the Middlesex and London business communities through networking, events and other activities London Economic Development and London Tourism programs provide opportunities to increase outcomes, project resources, knowledge and networks</p>	<ul style="list-style-type: none"> ▪ London also benefits from Middlesex, as Middlesex has abundant land and agricultural production (available inputs), not to mention communities with a high quality of life that are often preferred by workers; these assets strengthen London's value proposition



Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
Investment Attraction	<p>Leading role Continue to market the County as a whole, representing lower-tier municipalities – Enhanced marketing geared to industrial and employment land Promote County-wide protocols for lead handling in partnership with lower tier municipalities, and encourage standardized data tools for the use of external partners and investors</p>	<p>Support role Responsible for servicing industrial lands Share information with the County to facilitate marketing on behalf of the Municipality Participate in protocols for lead handling</p>	<p>Support role SOMA does not include London, therefore serving the needs of Middlesex more directly, and generates 150 leads a year for members; SOMA also covers automotive and clean tech sectors in addition to agriculture</p>	<ul style="list-style-type: none"> ▪ Part time staffing is a barrier to responsive investment attraction service, creating delays ▪ Cost of SOMA membership is approx. \$30,000 including Ontario Food Cluster membership (\$4,500); Per-diems are paid to mission participants, which can defray overall cost ▪ Implementation of the FDI Strategy suggests an increase in Economic Development funding by \$90,000 annually and 1.5 staff positions, for County to lead investment attraction activities



Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
<p>Strategic planning for tourism with a focus on community based tourism</p>	<p>Leading role Lead a regional tourism strategy including a comprehensive asset mapping exercise, resulting in a concrete 3-5 year business plan for the tourism sector with appropriate performance metrics and organizational responsibilities Develop a tourism business directory Implement signage strategy already underway</p>	<p>Support role Continue to encourage development of tourism product (e.g. local business, festivals and events) Create/maintain attractive commercial cores, public areas Work with the County to complete a regional tourism strategy and champion the contribution of local communities.</p>	<p>Support role Middlesex Tourism has completed a BR+E, which identified 40% of businesses surveyed interested in expansion, and areas of potential business development support, the organization has taken up community and County tourism marketing SWOTC is marketing more broadly and connecting tourism product with surrounding counties, creating bundled experiences and assets CFDC has a limited marketing effort</p>	<ul style="list-style-type: none"> ▪ Historically, the ability to deliver on tourism has been challenged by a piecemeal approach to planning and marketing ▪ Only by packaging local assets together from across the County can a critical mass be built that will be attractive to visitors ▪ Opportunity for community based tourism indicated by the identification of 300+ assets in Middlesex County; however, the quality and accessibility of these assets have not been confirmed at this time. ▪ Tourism is changing, and paper marketing including visitor guides are becoming less relevant; marketing tools need to be updated with a County wide, coordinated approach, focusing on online delivery, and continuous content development



Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
Support for and Sustainability of Small Business	<p>Support role Encourage downtown revitalization and coordinate/support small business support activities in lower-tier municipalities Implement BR+E findings, particularly to support creative and home based businesses that may not be located in commercial cores Commit resources to the re-invigoration of the main street program, where the County supports improved facades, street-scaping and green space projects</p>	<p>Support role Contribute funding and project management to eligible projects Have appropriate community improvement plans in place Lead small business support activities such as business directories, business success stories, business workshops and seminars, and inventory of rental properties</p>	<p>Leading role CFDC provided funding as a partner in the previous main street program – resources, workshops and programs for communities Local business associations and service agencies can support main street project development and implementation</p>	<ul style="list-style-type: none"> ▪ Previous main street program was embraced by some municipalities in the region, and with previous experience to draw from, more municipalities may engage
Workforce Attraction	<p>Support role Support the implementation of the Local Labour Market Plan Support efforts of local municipalities to welcome new residents</p>	<p>Support role Welcoming new Canadians and new residents more broadly into communities</p>	<p>Leading role Elgin Middlesex Oxford Workforce Planning and Development Board is leading research into workforce development issues in the larger region including Middlesex, and its programs are a good entry point into managing workforce challenges in a coordinated way</p>	



Strategic Priorities	Role of County	Role of Municipalities	Roles of Others	Notes
<p>Expand understanding and implications of County's agricultural sector</p>	<p>Support role Connect Middlesex with regional activities to support the development of the agriculture sector Work on leads with local municipalities, and bundle data on municipal agricultural assets into concise materials that outline the offering to investors Re-fresh Agriculture and Labour Force Analysis Study with new data and incorporate sector BR+E findings</p>	<p>Support role Prepare to respond to investment leads with information, investment attraction processes Support local food initiatives such as farmer's markets, and engage in SWEA local food program</p>	<p>Leading role Priority area for SOMA, which can coordinate role for investment attraction. Southern Ontario post-secondary institutions specializing in agriculture are good partners to support industry and research the sector. SWEA local food program can build a structure to support farm gate sales, central food distribution hub, and a local food supply chain that allows businesses to stretch beyond Middlesex. SCOR is pursuing funding from the Greenbelt Foundation to develop food aggregation and distribution sites across SW Ontario. Consideration is also being given to sector development work in emerging agricultural subsectors including wine and grape operations and industrial crops such as bio mass and rubber.</p>	<ul style="list-style-type: none"> ▪ BR+E activities and investment activities cross over into this theme ▪ The agriculture sector is continually changing, and the current dynamics of the sector require in-depth research ▪ The existing Agriculture and Labour Force Analysis Study identifies succession planning, agricultural labour force development, and the introduction of value added initiatives into farm practices



E Lead Handling Protocol

This Lead Handling Protocol was developed in the 2008 Economic Development Strategy for Middlesex County.

Principles of Lead Handling Collaborative Protocol:

This Protocol relates only to inquiries regarding industrial development.

- A spirit of cooperation, teamwork and mutual trust, shall form the basis of this Protocol, enabling us to meet the needs of the client, maximize the fiscal and human resources of all our municipal partners, and avoid duplication of efforts.
- All requests for industrial development received initially by the Middlesex County Economic Development office will be led by the County Economic Development Department, unless the request is in respect to a specific municipality. In which case, the specific municipality will be given the option to be the lead on the request. All requests initially received by a municipality will be led by that municipality unless otherwise requested.
- If a municipality refers an inquiry to the County, the latter shall represent the interests of that municipality.
- Any inquiry received by a lower-tier municipality, which they cannot accommodate, will be referred to the County for further site searches, in order to keep the potential development within the County if at all possible.
- If a client, in dealing with a specific lower-tier municipality, indicates an interest in one or more other lower-tier municipalities, the lead shall be referred to the County for further action.
- Client confidentiality shall be of the utmost importance. A client's name, if known, will only be revealed (lower-tier municipality to County or County to lower-tier municipality) with the approval of the client.
- Where possible all inquiries will be acknowledged, and where possible, responded to on the phone or email within 24 hours, at the latest. In the case of a joint submission, should the lower-tier municipality not be able to meet this deadline, the County shall prepare its own response and provide a copy of same to the lower-tier municipality involved.
- All leads generated at trade shows and/or missions will be shared with all Middlesex County lower-tier municipalities. Each municipality will make its best efforts to assist with staffing at trade shows.
- Where a general inquiry (i.e. from the Province or a site location consultant) is sent to all lower-tier municipalities and the County, the County will canvas all lower-tier municipalities as to their interest and provide assistance as required.



Contact initially made with County

County Economic Development will take the lead and will:

1. Consult with lower tier as required.
2. Contact client by phone or e-mail to clarify request and discuss requirements.
3. Prepare and send by requested deadline a response package containing:
 - a. basic brochures and literature;
 - b. follow-up with customized package with specific municipal information and documentation;
 - c. list all available sites/buildings which meet criteria;
 - d. notify lower-tier municipalities as to what information has been sent.
4. Follow up if necessary on the inquiry and provide any clarification or requested information.
5. Have client confirm which Middlesex sites best suit their needs and advise appropriate municipal contacts of client decision.
6. Participate with lower-tier municipalities in the development of a response package.
7. Coordinate a site visit for client:
 - a. tour of community and parts of County as appropriate;
 - b. municipal staff to participate in their specific community;
 - c. participate in presentation of information regarding the overall community, specific municipalities and the site(s);
 - d. ensure appropriate departments and agencies are available to provide information (Provincial ministries, HRDC, community services, Local Training Board, post-secondary institution(s), etc.).
8. Coordinate presentation of additional information from County and lower-tier municipalities as requested and/or during any follow-up visit by client.
9. Serve as a resource to assist in resolving issues during client negotiations with land/building owners and service providers.
10. Serve as a resource during start-up and on-going operations.
11. Conduct an evaluation of the project, and follow up as necessary.



Contact initially made with Lower-tier municipality

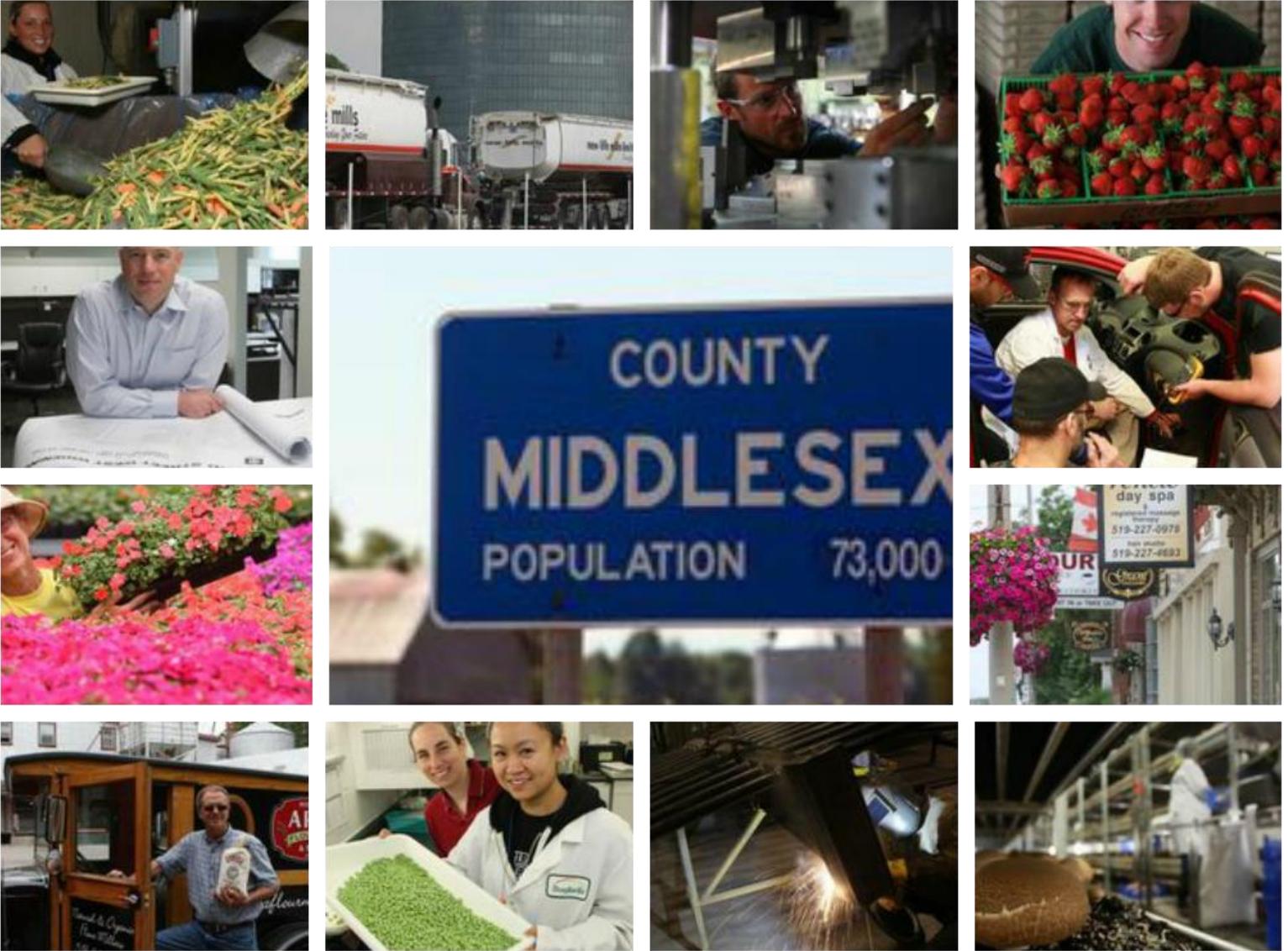
Municipality will take the lead, unless the Municipality requests the County to lead.

Municipality will respond directly to the client (or through the County Economic Development if preferred). County will be available as a resource to assist the lower-tier municipalities in responding to and developing the site selection opportunity.

If the same request is made to more than one lower-tier municipality, the County should be advised in order for the County to coordinate and develop one response package with information that presents all options in the requested municipalities, through cooperation with those municipalities.

At the request of the Municipality, the County Economic Development will provide as much as the following service as the Municipality deems appropriate:

1. Contact the lower-tier municipality and client by phone or e-mail to clarify and discuss requirements;
2. Participate in the development of a customized preliminary package with the lower-tier municipality, including basic brochures, literature and a list of all available sites/buildings meeting the criteria in the specific lower-tier municipality; and send to client;
3. Respond to a coordinated follow-up request with the lower-tier municipality:
 - a. assemble and provide additional material/information as requested;
 - b. clarify information as required.
4. Upon receiving short list of potential sites, assemble and provide additional information as requested;
5. Coordinate a site visit for client:
 - a. tour of community and requested sites;
 - b. participate in presentation of information regarding the overall community, specific municipalities and the site(s);
 - c. ensure appropriate departments and agencies are available to provide information (Provincial ministries, HRDC, community services, Local Training Board, post-secondary institution(s), etc.);
6. Coordinate presentation of additional information from County and lower-tier municipality as requested and/or during any follow-up visit by client;
7. Serve as a resource to assist in resolving issues during client negotiations with land/building owners and service providers



County of Middlesex Economic Development Strategic Plan

PROPOSED IMPLEMENTATION MATRIX

January 2014



Implementation Matrix

The foregoing action plan assumes that Middlesex County will take more of a leadership role in the delivery of economic development programming and services in the region. The completion of this strategy and action plan will inform the business planning process that incorporates the short term priorities set out in the strategy and articulates the resources required to move forward with the strategy's implementation.

The findings from the supporting background research and analysis presented in Appendices to this report have informed the development of the goals, objectives and actions contained in the Economic Development Strategic Plan. Taking into consideration the current delivery structure for economic development across Middlesex County and the broader region, the outcome from the strategy development will enable a more collaborative effort and targeted approach to economic development activities and programming.

One of the key considerations in the implementation of the proposed economic development program will be an understanding and communication of how the strategy is to be resourced. While this includes the financial resources required to move forward, there is a growing sense of need to provide clarity around the vision for economic development and the roles and responsibilities of both economic development staff and external community organizations and agencies. This is relevant from the perspective of potential investors and their desire for a one stop approach to gathering information and assistance but also in terms of how to leverage partnership opportunities and business development. With a high level of community interest and engagement in economic development, consideration must be given to a delivery model that will achieve the greatest results for the County over the long term.

The County will need to undertake a logical course of activities to reflect the direction of the Economic Development Strategic Plan, which will have related resource commitments. Each recommendation will be identified as short-term (12-18 months), medium-term (2-3 years) or long-term (3-5 years). The County will be able to measure progress towards more sector research and investment as performance measurements will be included for each goal.

Staff time will be indicated where staff resources are expected to be required in addition to existing staff resources. In total the increased responsibilities outlined here will require an increase from the current complement of two part time staff to two full time staff and one part time staff. This estimate is partially due to the estimated time required to complete projects; however, the research has found that a part time office is challenged to meet the basic requirements of the economic development function, and an increase to full time staffing is also needed to meet this standard.

Performance metrics are suggested based on industry best practices. However, the use of these indicators may be dependent on the data available. For example, metrics may only be available at a regional level, and some data points may not be tracked consistently. Metrics will need to be reviewed regularly to ensure relevancy to current activities. Equally, resource requirements are presented as estimates only, for the purposes of long range planning. Over time costs can change and confirmation of expenses is expected before undertaking projects.



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
1. Continue to explore efficient and cost effective options to expand the County’s broadband infrastructure as a means for attracting and retaining business investment in the County.	✓	✓		<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> Western Ontario Wardens’ Caucus, Area Municipalities, Business community, SWEA 	<ul style="list-style-type: none"> SWEA broadband initiative request for \$8,000 SWEA membership \$5,000
1.1. Determine the broadband capacity of the region’s business parks and the feasibility of increasing capacity, as appropriate.		✓		<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> Area Municipalities, Property Owners 	<ul style="list-style-type: none"> \$20,000 feasibility study Staff time
1.2. Consider incorporating broadband expansion into road construction projects where appropriate			✓	<ul style="list-style-type: none"> Support 	<ul style="list-style-type: none"> Engineering Department 	<ul style="list-style-type: none"> Staff time
2. Ensure the County Official Plan provides a clear and progressive vision, policies and implementation mechanisms to direct and manage growth in the County and that they support the attraction of business investment throughout the County’s sectors, as well as the needs of the County’s small business operators, entrepreneurs and home based businesses.	✓			<ul style="list-style-type: none"> Lead and Support 	<ul style="list-style-type: none"> Planning Department, Area Municipalities, Developers, Business Community 	<ul style="list-style-type: none"> Staff time
3. Explore the opportunities to create a County level Community Improvement Plan (CIP) to make use of grants and tax incentives that will jump start business development and investment (e.g. agriculture sector).	✓	✓		<ul style="list-style-type: none"> Lead and Support 	<ul style="list-style-type: none"> Planning Department, Municipalities, Business Community, Chamber of Commerce, 	<ul style="list-style-type: none"> \$50,000 – \$60,000 County wide CIP



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
3.1. Explore opportunities to create County-wide standards for local CIPs as a way to support downtown revitalization (façade improvements, upper storey office and residential development, adaptive reuse of vacant buildings etc.) and ensure the region’s commercial cores are more attractive to business, investment and visitors and complement the efforts of the Main Street Program.		✓		<ul style="list-style-type: none"> Lead 		<ul style="list-style-type: none"> TBD
3.2. Explore opportunities to create County-wide standards for local CIP geared to the agricultural sector.		✓		<ul style="list-style-type: none"> Lead 	<ul style="list-style-type: none"> In addition: Agricultural Community, Federation of Agriculture 	<ul style="list-style-type: none"> TBD
4. Work with local partners to promote and actively expand the resources available to support small business and start-ups, as it relates to the delivery of training, business counselling and financial assistance to small business operators and entrepreneurs in Middlesex County.	✓	✓	✓	<ul style="list-style-type: none"> Support and Partner 	<ul style="list-style-type: none"> Middlesex CFDC, Area Municipalities, Chamber of Commerce, Tourism Middlesex, 	
4.1. Work with Middlesex CFDC to create and promote an internet toolkit for managing a business’ online presence including internet planning, website development, e-marketing, social media etc.	✓			<ul style="list-style-type: none"> Support 	<ul style="list-style-type: none"> Business Development Canada 	<ul style="list-style-type: none"> TBD Staff time
4.2. Continue to promote the County’s online master directory of business services and support available to local business and entrepreneurs. This should include a master list of external public sector funding programs available to both SME and larger business operations.	✓	✓	✓	<ul style="list-style-type: none"> Partner 		<ul style="list-style-type: none"> TBD



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
5. Promote the Middlesex CFDC’s Business Help Centre and its efforts to provide guidance and support to start-ups and existing small businesses recognizing the uniqueness of the County’s small business community.	✓	✓	✓	Support and Partner	Middlesex CFDC, Business Community, Chamber of Commerce, Area Municipalities	TBD
5.1. Identify opportunities to host recurring events and networking opportunities in Middlesex County and engage the local chamber of commerce and Middlesex CFDC as partners.	✓	✓	✓	Support		\$2,500
5.2. Work with business and community stakeholders to identify a list of Middlesex mentors willing to provide business assistance and coaching to small business operators and entrepreneurs. (e.g. Innovation Synergy Centre in Markham)		✓		Partner		Staff time
6. Work to create an entrepreneurial spirit among students and youth (18-30 years) in Middlesex County.		✓	✓	Support	Workforce Planning and Development Board, Middlesex CFDC, Post-secondary Institutions, Boards of Education, Chamber of Commerce	



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 1 – A Supportive Environment for Business and Investment						
Objective: Enhance the County’s competitive advantage for attracting and retaining business and investment in its traditional and emerging sectors						
6.1. Examine and catalog existing programs and opportunities that currently support youth entrepreneurship in the London and Middlesex region, including efforts being undertaken the Workforce Planning and Development Board. Promote existing services.		✓		■ Support		■ Staff time
6.2. Develop a youth entrepreneurship committee to identify and advance support activities and training needs for students and youth considering starting a small business.		✓		■ Support		■ \$3000 contribution towards \$9,000 total cost ■ Staff time
Suggested Performance Metrics¹ <ul style="list-style-type: none"> ■ Total area of broadband capacity expansion ■ Increased availability of broadband to Middlesex County Business Parks ■ Number of entrepreneurs assisted through the economic development policies and programs ■ New business investment attracted – dollars and number of businesses ■ Total number of CIP related development projects and associated investment ■ Total number of CIP related agricultural based projects and associated investment ■ Total number of funding programs accessed by local businesses ■ Total number of business networking events ■ Total number of business mentors and businesses receiving coaching ■ New youth business start-ups as a percentage of all new businesses in the community 						

¹ A range of metrics are provided for consideration, some can be tracked internally by the County and other metrics may be the responsibility of other organizations, Metrics will need to be reviewed regularly to ensure availability and relevancy to current activities.



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
7. Promote the County's lead generation protocol for the management of investment attraction opportunities. The County should manage any County-developed investment leads and be the central point of contact for DFAIT, MEDT and OMAF/OMRA. (See Appendices).	✓			■ Lead	■ Area Municipalities, Real Estate Community	■ Staff time
8. Continue to maintain an inventory of available serviced and un-serviced commercial and industrial land, as well as vacant commercial and industrial buildings in the County and make the information available on the County's website (investinmiddlesex.ca). Include information considered relevant to a prospective business or investor. 8.1. Monitor the availability of serviced employment land in the County against longer term demand.	✓	✓	✓	■ Lead	■ Area Municipalities, Real Estate Community	■ \$2,000 annual contingency
9. Continue to upgrade the County's website (investinmiddlesex.ca) to include greater functionality and GIS capabilities.	✓	✓	✓	■ Lead	■ Area Municipalities, Chamber of Commerce, Middlesex CFDC, Tourism Middlesex	■ \$25,000 (2014) budget updated annually
9.1. Promote the elements and characteristics of the County (and local municipalities) and the larger region that would attract new residents to community including proximity to the City of London.	✓	✓	✓	■ Lead		■ \$7,000 (2014)



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
9.2. Continue to profile business success stories that illustrate the range of business investment and sector opportunities in the County's target sectors. Engage community stakeholders (Local Municipalities, Chamber of Commerce, CFDC etc.) in the identification of local success stories.	✓	✓	✓	■ Lead		■ \$7,000 (2014)
10. Focus marketing of serviced industrial lands on advanced manufacturing, agri-business, construction, professional and business services, and transportation and warehousing sectors.	✓	✓	✓	■ Lead and Partner	■ Area Municipalities, MEDTE, OMAFRA, SOMA, Real Estate Community	■ SOMA membership \$30,000
10.1. Consider the opportunity for marketing efforts that target larger footprint retail and commercial operations to the County.		✓	✓	■ Lead		■ \$3,000 promotional materials (2014)
11. Support industrial land marketing with a comprehensive package of employment and development-related data, which can be used for inquiries and incoming Requests for Information (RFI) from other levels of government and site selectors. 11.1. Target short-term marketing of shovel-ready and fully-serviced areas with the closest proximity to London and the closest proximity to the 400 series corridors.	✓	✓	✓	■ Lead	■ Area Municipalities, MEDTE, OMAFRA, SOMA, Real Estate Community	■ \$6,300 (2014)
11.2. Pursue opportunities to participate in EDCO's ² Certified Site Program as a way to advance the marketability of the County's industrial properties.	✓			■ Partner		■ TBD / shared cost

² Economic Developers Council of Ontario



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
12. Continue to pursue opportunities to cooperate more fully with the London Economic Development Corporation (LEDC), including greater collaboration around immigration opportunities, agri-business investment attraction and the hosting of federal and provincial international investment representatives as a means to attract both new domestic and foreign investment in the County.	✓	✓		<ul style="list-style-type: none"> Partner 	<ul style="list-style-type: none"> Workforce Planning and Development Board, LEDC 	<ul style="list-style-type: none"> \$10,000 for partnered project(s) Staff time
13. Tailor international marketing efforts on advanced manufacturing and agriculture/agri-business opportunities to gain better visibility with prospects and increase the number of investment leads considering the County.	✓	✓	✓	<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> SOMA, Ontario Food Cluster, DFAIT, MEDTE, OMAFRA, Department of Agriculture 	<ul style="list-style-type: none"> OFC membership \$5,000 (2014) to be reviewed annually
14. Continue to cultivate relationships with federal and provincial foreign investment intermediaries that support the investment attraction goals of the County.	✓	✓	✓	<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> MEDTE, OMAFRA, DFAIT, Department of Agriculture, Canadian Consulate Offices 	
14.1. Implement the recommendations of the County's FDI Strategy as it relates to leveraging regional and sector partnerships.	✓	✓	✓	<ul style="list-style-type: none"> Lead 		<ul style="list-style-type: none"> Staff time
14.2. Actively participate in the investment attraction efforts of the Ontario Food Cluster, including at least one trade mission a year.	✓	✓	✓	<ul style="list-style-type: none"> Partner 		<ul style="list-style-type: none"> \$7,000



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
<p>15. Develop an Agriculture/Agribusiness sector strategy that provides clear direction on matters related to the growth and sustainability of the agricultural economy in the County. The strategy should:</p> <p>15.1. Assess the impact of the agriculture/agribusiness sector in Middlesex County.</p> <p>15.2. Identify and prioritize opportunities related to local food, value-added agriculture and supply chain development.</p> <p>15.3. Identify opportunities to leverage the research capabilities of Western University and Fanshawe College.</p> <p>15.4. Support the “Engage Western” initiative as an opportunity for projects to connect students and departments with local business and the community.</p> <p>15.5. Build awareness of business and investment opportunities in specialized crops, value added food products and local food.</p> <p>15.6. Identify opportunities for workshops/seminars that highlight methods that producers and Agri-food suppliers can utilize to enhance their business capabilities.</p> <p>15.7. Address issues of succession planning and workforce development.</p> <p>15.8. Support the active marketing and promotion of investment opportunities in this sector</p>	<input checked="" type="checkbox"/>			<ul style="list-style-type: none"> ■ Lead 	<ul style="list-style-type: none"> ■ Area Municipalities, Agricultural Community, OMAFRA, Federation of Agriculture, Workforce Planning and Development Board 	<ul style="list-style-type: none"> ■ \$30,000 – \$35,000 ■ Staff time



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 2 – A Proactive and Targeted Approach to Business Attraction						
Objective: Implement an investment attraction program that is focused on sector opportunities with a history of competitiveness and export orientation or demonstrates potential for growth.						
Suggested Performance Metrics³						
<ul style="list-style-type: none"> ■ New business investment attracted – number of businesses, number of jobs, sector ■ Number of business inquiries by sector and type of investment ■ Vacancy rates for industrial and commercial employment land ■ Existing and available industrial space ■ Existing and available retail/commercial space ■ Changes in the vacancy rates for leased space ■ Traffic to County related websites ■ Building permit activity – commercial/residential/institutional/industrial ■ Population and employment – changes in numbers, changes per age categories, change by sector ■ Increased business engagement – number of businesses ■ Number of referrals and RFI requests, number of proposals delivered ■ Total number of new businesses in key sectors ■ Personal contacts with Influencers 						

³ A range of metrics are provided for consideration, some can be tracked internally by the County and other metrics may be the responsibility of other organizations, Metrics will need to be reviewed regularly to ensure availability and relevancy to current activities.



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
<p>16. Create a Middlesex Economic Development Partnership Forum that meets quarterly to explore and discuss issues and opportunities for economic development in the County.</p> <p>16.1. Participants should include representatives from local municipalities, business associations, support agencies and local economic development stakeholders.</p> <p>16.2. Sessions should provide opportunities to inform participants on local and regional economic development efforts, enable the sharing of information, investment opportunities, seek solutions to problems and connect people to available resources.</p>	✓	✓		<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> Area Municipalities, Business Associations, Middlesex CFDC, Workforce Planning and Development Board, Community Organizations 	<ul style="list-style-type: none"> Staff time
<p>16.3. Support the CFDC's development of a Centre for Non-Profit Collaboration aimed at strengthening the local non-profit sector.</p>			✓	<ul style="list-style-type: none"> Support 		
<p>16.4. Engage in the implementation of the 2013 "Middlesex County Impact of Socio-Economic Needs on Human Needs Report"</p>	✓			<ul style="list-style-type: none"> Support 		<ul style="list-style-type: none"> Staff time
<p>17. Implement a Business Retention + Expansion (BR+E) program that uses a standardized approach to implementation, interviews and surveys, database templates, etc.</p>	✓	✓	✓	<ul style="list-style-type: none"> Lead and Partner 	<ul style="list-style-type: none"> Area Municipalities, Business Community, OMAF 	



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
17.1. Work with local municipalities to develop/complete a visitation program in each of the County's target sectors (starting with manufacturing); have the County collect and report on the regional findings to better inform the area municipalities and County Council of the challenges facing the County.	✓	✓		Lead and Partner		<ul style="list-style-type: none"> ▪ \$20,000 with external assistance ▪ Staff time
17.2. In collaboration with the local municipalities identify the top 25 companies in the County that should be jointly visited (County and Municipality) on an annual or biannual basis. These should include companies that are on a significant growth trajectory, are major employers and contributors to the regional economy, have high value-added products, or likely export a high percentage of their products.		✓	✓	<ul style="list-style-type: none"> ▪ Lead and Partner 		<ul style="list-style-type: none"> ▪ Staff time
<p>18. Take an active role in the labour force planning efforts of the Elgin Middlesex Oxford Workforce Training and Development Board.</p> <p>18.1. Leverage the Employer One survey tool, Vicinity Jobs reporting , and sectoral reports to gather intelligence of the issues and challenges confronting local businesses</p> <p>18.2. Support the effective implementation of the local labour market plan.</p>	✓	✓	✓	<ul style="list-style-type: none"> ▪ Support 	<ul style="list-style-type: none"> ▪ Workforce Planning and Development Board 	<ul style="list-style-type: none"> ▪ Staff time
19. Cooperate with the Middlesex CFDC to implement a Main Street Program, as a means to attract business investment to the commercial cores of the County, create attractive public spaces, and support residential growth.		✓	✓	<ul style="list-style-type: none"> ▪ Support 	<ul style="list-style-type: none"> ▪ Middlesex CFDC, BIAs, Chamber of Commerce 	<ul style="list-style-type: none"> ▪ TBD ▪ Staff time



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
<p>20. Form a County Agriculture Advisory Committee to facilitate a shared knowledge exchange on the issues and opportunities for investment in the region’s agricultural sector including workforce development.</p> <p>20.1. Explore partnership opportunities between the County’s agriculture sector and the region’s post-secondary institutions.</p> <p>20.2. Assist with the implementation of the County’s Agricultural Sector Strategy</p>			✓	<ul style="list-style-type: none"> ■ Lead and Partner 	<ul style="list-style-type: none"> ■ Agricultural Community, London Chamber of Commerce, Workforce Planning and Development Board 	<ul style="list-style-type: none"> ■ Staff time
<p>20.3. Pursue opportunities to collaborate with the London Chamber of Commerce Agri-business Committee.</p>				<ul style="list-style-type: none"> ■ Partner 		<ul style="list-style-type: none"> ■ \$1,000 Chamber membership
<p>21. Form a County Tourism Advisory Committee and facilitate a shared knowledge exchange of the opportunities for investment and growth of the region’s tourism sector.</p>	✓	✓	✓	<ul style="list-style-type: none"> ■ Lead and Support 	<ul style="list-style-type: none"> ■ Tourism Middlesex, Middlesex CFDC, Area Municipalities, SWOTC 	<ul style="list-style-type: none"> ■ \$5,000 ■ Staff time
<p>21.1. Support the creation of a regional tourism strategy that focuses on agri-tourism and community based tourism opportunities. Strategy should include a vision and a priority setting exercise to better define tourism product offering, ways to determine and measure economic impact, and relevant performance metrics.</p>			✓	<ul style="list-style-type: none"> ■ Support 		<ul style="list-style-type: none"> ■ \$25,000 shared cost
<p>21.2. Build on the community asset mapping work in the Economic Development Strategic Plan with input from community stakeholders.</p>			✓	<ul style="list-style-type: none"> ■ Partner and Support 		<ul style="list-style-type: none"> ■ TBD



Action	Timing			Role of County	Partners	Resource Requirements
	S	M	L			
Goal 3 – A Commitment to Community Sustainability and Growth						
Objective: Build community capacity for economic growth and development through effective leadership and communication.						
21.3. Create an online, searchable tourism business directory. Host directory on Tourism Middlesex.	✓			Support		TBD
21.4. Expedite the implementation of the County's Signage strategy, including the opportunity of integrating agri-tourism signs into the strategy.	✓	✓	✓	Lead		\$62,000
21.5. Work with local partners to identify opportunities to bundle local tourism efforts to create a more unique/attractive product for consumers/visitors. Leverage the marketing and promotional efforts of the City of London, SWOTC and Tourism Middlesex.		✓		Support		\$600 membership in Tourism London
<p>Suggested Performance Metrics⁴</p> <ul style="list-style-type: none"> ■ Number of business survey (BR+E) projects ■ Number of businesses surveyed, numbers in target sectors ■ Number of business issues addressed ■ Jobs created (fulltime, part-time, contract, seasonal) ■ Changes in average wages or salaries ■ Amount of investment in the County's main streets ■ Economic impact of agricultural sector ■ Number of partnerships opportunities identified between the County's agriculture sector and post-secondary institutions ■ Number of tourists/visitors ■ Tourists/visitor total and average spending ■ Tourist/visitor length of stay ■ Number of businesses in the tourism sector ■ 						

⁴ A range of metrics are provided for consideration, some can be tracked internally by the County and other metrics may be the responsibility of other organizations, Metrics will need to be reviewed regularly to ensure availability and relevancy to current activities.

