

Municipality of South Bruce

Economic Development Strategy

2014 – 2019

DRAFT FINAL REPORT

October 03, 2014





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1 Executive Summary

In a changing Canadian economy, that some economists identify as positioned to continue modest growth into 2015 at 2.7%, although currently marred by weaker performance in business investment and employment,¹ indicators of post-recession recovery is underway. Ontario is forecast to continue this trend, albeit at a slower pace than the nation with growth only expected at 1.5% and a forecasted real GDP increase of 2.4% in 2015, due to increased US export demand.²

Despite the recession, from 2008 – 2013 South Bruce gained over 125 firms (60 agricultural), with the majority of its employed labour force in agriculture, manufacturing, construction and retail trade. However, population declined by 6.2% from 2001 – 2011, and the municipality is struggling to retain and attract youth and new families as the community ages.

Under this context, the Municipality of South Bruce in undertaking its first Economic Development Strategy, in order to lay the foundations for future growth, and establish the necessary directions and actions to achieve success.

One of the key objectives of undertaking this project was to identify the most feasible, and suitable opportunities to stimulate increased growth and development in the municipality of South Bruce.

The strategic directions and resulting Action Plans and Recommended Initiatives are designed to cover a period related to the current state (ongoing actions to continue, or initiatives that require immediate attention) out to a three, and five year window.

They are meant to be realistic, and with the right level of commitment and resources, to be achievable in the assigned timeframes.

The selection of the Key Economic Development Opportunities and their corresponding Action Plans were assembled drawing from the various forms of research, stakeholder and community consultations including:

- § Detailed background review and reconnaissance of secondary literature, policies, and programs
- § Comprehensive demographic, labour, and economic analysis
- § Online survey distributed to local residents, businesses, and community groups
- § One-on-one telephone interviews with local business leaders, regional and provincial organizations

¹ TD Economics; QUARTERLY ECONOMIC FORECAST - CANADIAN OUTLOOK: RIDING AMERICA'S COATTAILS (September 25, 2014); http://www.td.com/document/PDF/economics/qef/qefsep2014_canada.pdf

² Conference Board of Canada; "Ontario Not on Track to Balance the Books", NEWS RELEASE 15-30 (Ottawa, September 25, 2014); http://www.conferenceboard.ca/press/newsrelease/14-09-25/ontario_not_on_track_to_balance_the_books.aspx



§ A SWOT analysis and competitive positioning exercise resulting in key economic development opportunities

Figure 1 below identifies South Bruce’s Strengths, Weaknesses, Opportunities, and Threats that were derived by aggregating all of the collective findings from the processes identified above.

FIGURE 1: SOUTH BRUCE SWOT ANALYSIS

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> § Robust Agricultural Industry and Farming Heritage § Geographic Location and Proximity to Bruce Power § Strong, Supportive Community Spirit and Values 	<ul style="list-style-type: none"> § Insufficient Commercial Amenities and Retail Leakage § Municipality is not “Investment Ready” § Depressed and Under-developed Downtowns § Lack of Well-defined Brand and Destination Experience
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> § Tourism Potential in Agriculture, Heritage and Environment § Support for Increased Residential Development § Encourage Senior’s/Assisted Living Facility § Downtown Revitalization and Spruce the Bruce Program § Leverage Agricultural Sector and Establish Farmer’s Market § Foster Value Added Food Processing Opportunities 	<ul style="list-style-type: none"> § Lack of Dedicated Economic Development Function § Population Decline, Aging, and Youth Out-migration § Community Apprehension to Change and Parochialism § Insufficient Small Business and Entrepreneurship Supports

They provide valuable insights into the potential contained in the community, and are instrumental in helping to frame the municipality’s competitive positioning.

Building off of the SWOT analysis, competitive advantages and disadvantages were identified and played an important role in framing the economic development opportunities and actions to be pursued. These are identified below:



FIGURE 2: SOUTH BRUCE COMPETITIVE ADVANTAGES / DISADVANTAGES

COMPETITIVE ADVANTAGES	COMPETITIVE DISADVANTAGES
<ul style="list-style-type: none"> • Significant level of wealth in farming community can be leveraged • Robust agricultural sector that can support value added processing • Strong agri-business co-operatives and mindset can be leveraged • Vibrant 'Tractor Culture' can be developed into destination experience • Highway 9 runs through Mildmay and is a main travel route for tourism • Lower cost of living and housing prices make the area compelling • No development charges and competitive tax rates • Local farmers/entrepreneurs starting developments to support growth 	<ul style="list-style-type: none"> • Lack of commercial base to prevent 'retail leakage' • Lack of commercial accommodations to support longer visitor stays • No Municipal "Brand" that differentiates South Bruce from others • Municipality is not "Investment Ready" and land is not shovel-ready • Disconnected tourism offerings and lack of destination experience • The Bruce Trail does not run directly through South Bruce • Underdeveloped and depressed Downtowns • Neighbouring municipal business park developed, shovel ready • Aging and youth out-migration negatively impact employment base



1.1 Next Steps

The table to the right (Figure 3) contains the eight key economic development opportunities that were identified for South Bruce. These are based on the unique assets and strengths of the municipality, and also are designed to assist it in overcoming existing weaknesses, threats, and competitive disadvantages that currently inhibit growth and development.

Given that this is the first Economic Development Strategy for the municipality, care has been taken to ensure that a strong foundation is laid to support efforts that are taken.

It should be noted, that in order for sustainable success to be achieved, it is critical that the foundational blocks to economic development as identified in the first set of Recommended Initiatives are undertaken and implemented, as many of the other initiatives and actions are inter-dependent on these.

Ultimately, this strategy is meant to be a living document, one that can, and should continually be referenced, reviewed, and adjusted over its lifetime to ensure that as initiatives are accomplished and implemented, priorities are reassigned. Further, when targets are not met, they can be reassigned and reassessed.

FIGURE 3: HIGHEST PRIORITY RECOMMENDED INITIATIVES BY ACTION PLAN





Municipality of South Bruce - At a Glance

Population Growth

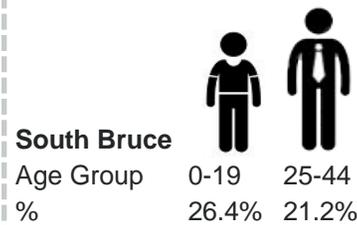


From 2001-2011, South Bruce had a 6.2% decrease in population while Bruce County had a 3.5% increase.

Age Profile

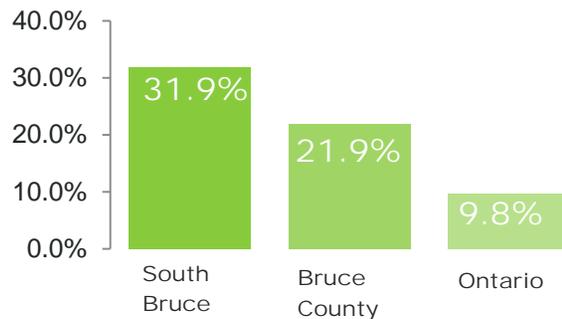
41.5
YEARS

In 2011 South Bruce (41.5 years) had a slightly higher median age than the Province (40.4 years)



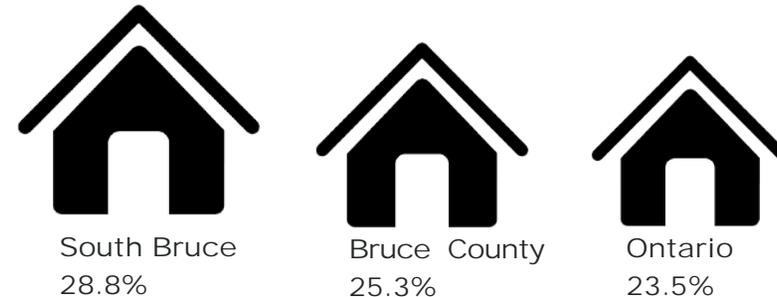
In 2011 South Bruce (26.4%) had a larger portion of people between the ages of 0-19 than the province (23.7%). However South Bruce (21.2%) had a lower portion of young workers (ages 25-44) than the province (26.3%).

Household Income Growth



From 2006-2011, South Bruce (31.9%) experienced the largest growth rate in median household income compared to Bruce County (21.9%) and Ontario (9.8%). In 2011 South Bruce had a slightly higher median household income compared to the county and province.

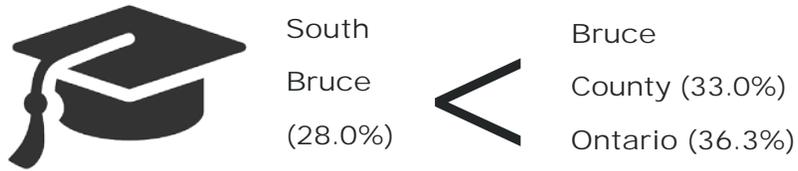
Dwelling Value Growth



South Bruce (28.8%) had the largest growth rate for average value of dwelling at 28.8% when compared to Bruce County (25.3%) and Ontario (23.5%) from 2006 to 2011. In 2011 South Bruce had a lower dwelling value compared to the province and comparable value compared to the county.



College and University Education



In 2011 South Bruce (28.0%) had a lower portion of the labour force with a College or University Education when compared to Bruce County (33.0%) and Ontario (36.3%).

Apprenticeship and Trades Education



In 2011 South Bruce (35.7%) had a lower portion of the population with an apprenticeship or trades education compared to the County (41.0%) and Province (41.3%).

Employed Labour Force by Industry

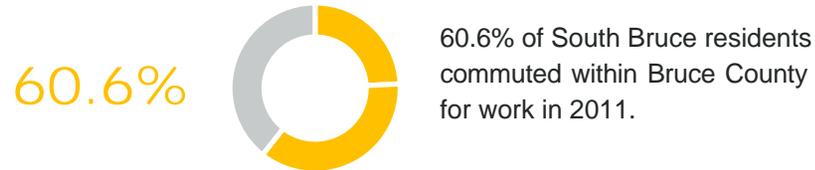
Rank	Industry	% of Labour Force in South Bruce (2011)
1	Agriculture, Forestry, Fishing and Hunting	18.4%
2	Manufacturing	18.1%
3	Construction	8.7%
3	Retail Trade	8.7%
4	Health Care and Social Assistance	7.5%

Employed Labour Force Growth by Industry

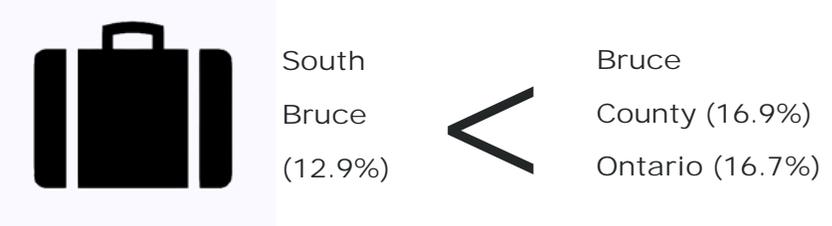
Rank	Industry	Increase of Labour Force in South Bruce (2006-2011)
1	Manufacturing	380
2	Construction	190
2	Health Care and Social Assistance	190
3	Retail Trade	170
4	Public Administration	105



Commuting Patterns



Migrants (New Residents)



In 2011 South Bruce (12.9%) had a lower rate of migrants, or new people moving to the municipality over the last five years compared to the County (16.9%) and Province (16.9%).

Businesses by Industry (Total)

Rank	Industry	% of Businesses in South Bruce (2013)
1	Agriculture, Forestry, Fishing and Hunting	49.1%
2	Construction	10.8%
3	Other Services (except Public Administration)	7.1%
4	Retail trade	5.6%
5	Real Estate and Rental and Leasing	4.6%

Business Growth by Industry (Subtotal)

Rank	Industry	% Increase of Businesses in South Bruce (2008-2013)
1	Retail Trade	87.5%
2	Other Services (except Public Administration)	66.7%
3	Agriculture, Forestry, Fishing and Hunting	25.3%
4	Construction	16.0%

Note: Table shows businesses with employees and industries with more than 15 firms as a base in 2008.



2 Methodology

2.1 Phased Approach

The diagram to the right (Figure 4) outlines the various phases of the project methodology and approach used in this report.

Phase 1 identified client goals and objectives and desired outcomes of an economic development strategy through a project launch meeting. Outreach methods to the community, barriers, and potential obstacles were identified, a communications plan was developed, and a comprehensive workplan was established.

In Phase 2, the project team undertook an in-depth review of available background literature, policies, and an environmental scan of the various economic development programs and organizations in the area. A comprehensive analysis of the local demographic, economic, and labour force trends was conducted, juxtaposed with Bruce County and the province of Ontario to afford a comparative understanding of South Bruce's positioning.

An online survey was distributed to local residents, businesses, and community leaders, industry associations, and non-profit organizations in order to get an understanding of the most important economic development priorities, local assets, and obstacles to growth.

The project team also conducted a series of personal telephone interviews with key local

FIGURE 4: PROJECT METHODOLOGY





business leaders, developers, farmers, community groups, industry stakeholders, and economic development actors both within, and outside of the municipality that have a direct or indirect influence on growth and prosperity in the municipality.

Phase 3 involved the operationalization of the findings from the research and consultation process above into a detailed SWOT Analysis that identified the Strengths, Weaknesses, Opportunities, and Threats facing South Bruce, and informed the local competitive advantages and disadvantages. All of the findings were assessed and an overview of the most feasible economic development opportunities for South Bruce were selected and explored in depth. This process ensured that the strategic directions established through the Recommended Initiatives and Action Plans were grounded in a clear understanding of the municipalities needs, strengths, and designed to assist in overcoming obstacles to taking action.

Phase 4 involved laying the necessary foundation for economic development going forward for the municipality leading in to the development of detailed Action Plans based on the most feasible economic development opportunities outline in Phase 3. Each Action Plan included Recommended Initiatives (some with supporting comments or subordinate actions), was assigned a Priority Level, and timeframe of immediate to between 3 – 5 years for accomplishment. Current and ongoing initiatives were incorporated where appropriate and assigned. An Implementation Plan was used to consolidate all of the Action Plans and their recommended initiatives in to a format that can be easily visualized and used to plan for the allocation of resources and next steps on a timeline.

Upon submission of the Draft Final Report to the Municipality of South Bruce Steering Committee, there will be a period of review. Once comments are received, a meeting will be established with the Committee to finalize the opportunities, actions, and strategic directions in order to conclude Phase 4.

Millier Dickinson Blais will the proceed to Phase 5, and incorporate any recommendations and submit the *Municipality of South Bruce Economic Development Strategy 2014 – 2019 Final Report* to the Committee in advance of a project presentation to the newly elected South Bruce Council.

2.2 Report Structure

This report has been structured to address all of the key project components. The research and investigative process began with a detailed review of strategic planning documents, policies and reports that were local, regional, and inter-regional in scope, as well as a review of the area's economic development programs and services that impact South Bruce. This was undertaken not only to inform, but also to ensure that the Economic Development Strategy was developed in a manner that could benefit strategically from existing initiatives. Care was also taken to ensure that the Report also aligns with the newly adopted *Municipality of South Bruce Corporate Strategic Plan 2014 – 2019* and the



strategic goals and objectives contained therein. Actions that overlap have been adopted wholesale in order to increase ease of implementation, reduce redundancy, and resource burden.

In order to streamline the upper section of the Strategy, the Background Review, as well as the complete quantitative and qualitative thematic analysis of the Online Survey, and the Business and Stakeholder Interviews has been moved into the Appendices.

The report is structured as follows:

Section 3: Where Are We Now?	<ul style="list-style-type: none">• contextualizes South Bruce's economic position comparatively within the greater context of Bruce County and the province of Ontario• offers a comprehensive statistical analysis of the demographic, economic, and labour force, identifying key industry, growth, and decline trends
Section 4: Community and Stakeholder Engagement	<ul style="list-style-type: none">• provides a detailed examination of key themes and findings in the Online Survey and Business and Stakeholder Interviews• Summary findings include approach and methodology and are segmented into categories by cohort and major themes
Section 5: Where Do We Want To Go?	<ul style="list-style-type: none">• assesses South Bruce's Strengths, Weaknesses, Opportunities and Threats• examines the municipalities competitive advantages and disadvantages from an industry, community, and geographic perspective• formulates strategic arguments for Key Economic Development Opportunities
Section 6: Taking Action	<ul style="list-style-type: none">• identifies necessary economic development foundation based on overarching needs and enablers• outlines model for interpreting Action Plans and Priority Levels• establishes Action Plans, Recommended Initiatives and outcome measures• condensed implementation Plan (Gantt Chart)
Section 7: Appendices	<ul style="list-style-type: none">• background review• online survey results - complete analysis• business and stakeholder interviews - complete analysis



3 Where Are We Now?

The following section provides a detailed statistical analysis of the Municipality of South Bruce in the form of a Community Profile that includes demographic characteristics, occupational profile, a business patterns assessment, and key sector profiles. This section is used to uncover trends in the municipality, its economy, and labour force from a data perspective, and comparatively within the greater context of Bruce County and the province of Ontario. Demographically it is examined over the last two Census Periods (2001 – 2011) and business data is examined from 2008 – 2013.

3.1 Demographic Characteristics

This section of the report examines the following South Bruce characteristics in comparison to Bruce County and the Province of Ontario:

- § Population growth
- § Age structure
- § Household Size
- § Household Income
- § Educational Attainment.

This profile includes Statistics Canada data from 2001, 2006, 2011 and data from the Labour Force Survey.

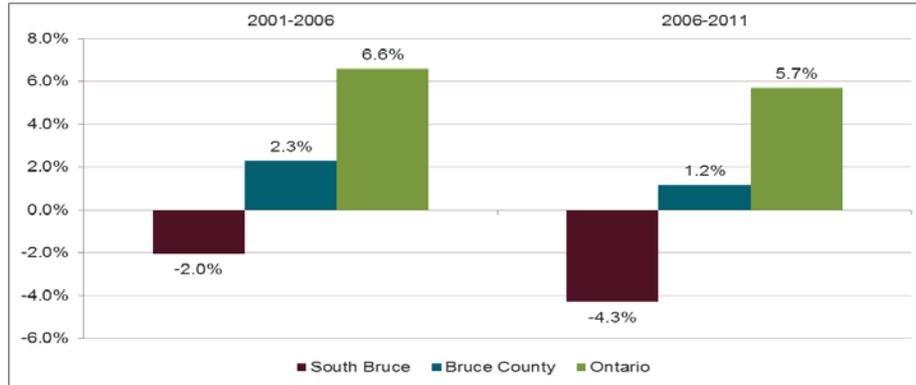
3.1.1 Population and Population Growth

As of the 2011 National Household Survey, South Bruce had a population of 5,639 residents, and has experienced a steady population decline since 2001. In the 2001 to 2006 Census period, the municipality's population decreased by 2% and from 2006 to 2011 the population contracted by more than double the rate at 4.3%. The decline in South Bruce represents a significant contrast to the population trends in Bruce County and Ontario, which have both seen population increases from 2001 to 2011, albeit to a lesser extent in Bruce County than by the province.

Over the last two Census periods, Bruce County's population has grown at a slower rate than Ontario. From 2001 to 2006, Bruce County experienced a growth rate of 2.3% while the province averaged 6.6%, and from the 2006-2011 periods, the County lagged behind the province at a rate of 1.2%, while Ontario experienced 5.7% growth.



FIGURE 5: POPULATION GROWTH



Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles.

According to Ontario Ministry of Finance projections, it is expected that in 2021 the population in Bruce County will reach 68,480. This is reflected through a forecasted increase of 980 residents from 2012 to 2021³. According to the 2009 Bruce County Census Update, in 2021 the population of Bruce County is expected to reach 69,130, while South Bruce's population is expected to decrease to 5,479.⁴ The report predicts that in 2021, communities along the shoreline and on the peninsula are expected to grow while inland agricultural communities such as South Bruce are projected to decline. The population increases for the communities in the peninsula and shoreline may be attributed to its locations, such as waterfront access, makes these communities an attractive destination for cottagers and retirees.

3.1.2 Population by Age Structure

The demographic structure in South Bruce and Ontario displayed signs of an aging population. South Bruce has a slightly older population than Ontario; in 2011 the municipality's median age was 41.5 years, while the median in Ontario was 40.4 years.

³ Ontario Ministry of Finance. Population by five-year age group, 2012-2036 - Reference scenario - Census divisions in Southwestern Ontario, 2012

⁴ SHS Consulting. Bruce County Census Update, 2009, page 81

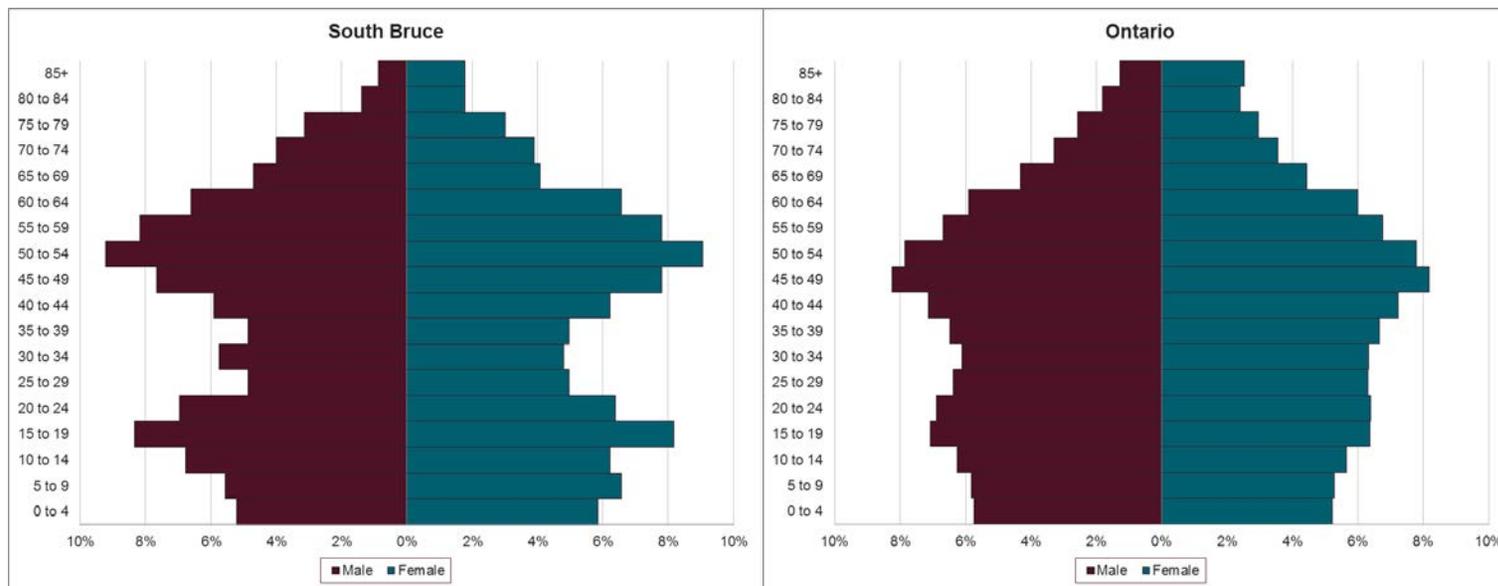


From 2006 – 2011 the median age in South Bruce increased from 38.2 years of age to 41.5 years, while in the province the median increased from 39.0 years to 40.4 years.

Although the median age in South Bruce is higher than the provincial average, the above population pyramid shows that the municipality has a larger portion of people between the ages of 5-19 than the province. The pyramid also reveals that South Bruce has a smaller portion of young workers (ages 25-44) compared to the province.

The data suggests that the municipality is having difficulty in attracting and retaining younger workers and young families. This could be a sign that younger cohorts may be moving to larger urban centres in search of employment, or, not choosing South Bruce as a destination to live, work and raise a family due to a restricted employment environment.

FIGURE 6: POPULATION PYRAMID FOR SOUTH BRUCE AND ONTARIO, 2011



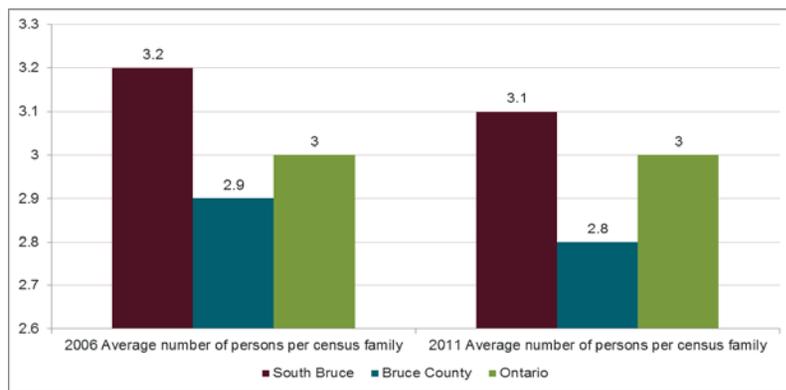
Source: Statistics Canada. 2011. National Household Survey. Community Profiles. Adapted by Millier Dickinson Blais Inc.



3.1.3 Household size

The household size data shows that South Bruce had larger families than Bruce County and Ontario from 2006 to 2011. The household size declined slightly in South Bruce from 3.2 to 3.1 persons while in the province the size remained stable at 3 persons from 2006 to 2011. The presence of larger families in South Bruce compared to Ontario may be due to the higher proportion of people between the ages of 5-19 that was reflected above in the population pyramid.

FIGURE 7: AVERAGE NUMBER OF PERSONS IN CENSUS FAMILY IN SOUTH BRUCE, BRUCE COUNTY AND ONTARIO, 2006-2011



Source: Statistics Canada. 2011 & 2006 Community Profiles.

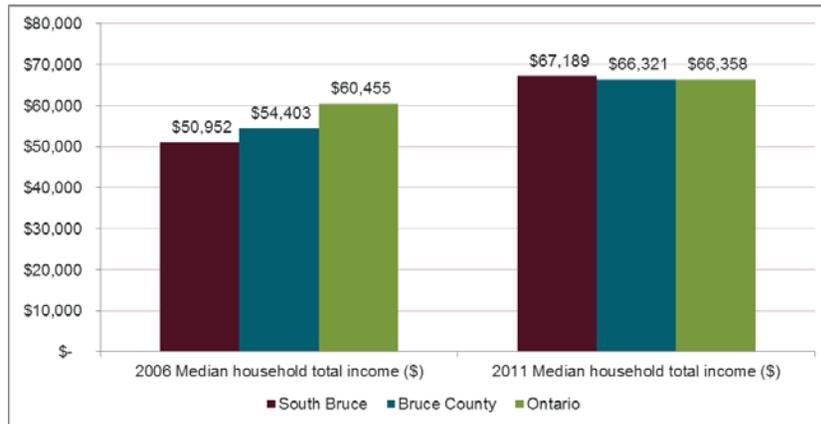
3.1.4 Household Income and Dwelling Value

South Bruce experienced the largest growth rate in median household income at 31.9% compared to Bruce County and Ontario which grew by 21.9% and 9.8% between the 2006 and 2011 Census periods.

In 2006 the median income in South Bruce was lower than Bruce County and Ontario; however, in 2011 South Bruce's median income edged slightly higher than both the County and the province.



FIGURE 8: MEDIAN HOUSEHOLD INCOME



Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles.

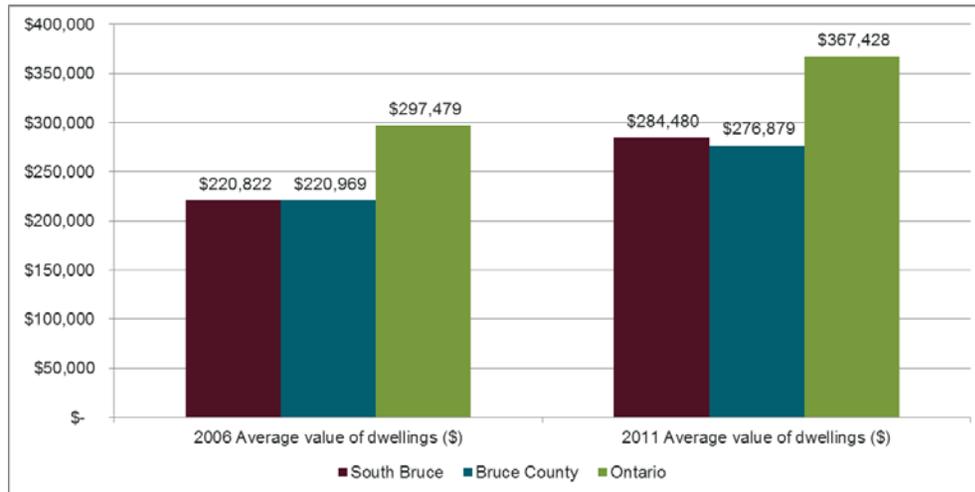
Along with median income, South Bruce also had the largest growth rate for average value of dwelling at 28.8% when compared to Bruce County (25.3%) and Ontario (23.5%) from 2006 to 2011.

In 2006, the dwelling values in South Bruce were comparable to Bruce County, yet lower than Ontario. In 2011 the dwelling values in South Bruce edged slightly higher than Bruce County, however, both remained significantly lower than Ontario.

The relatively higher median income and lower dwelling value in South Bruce compared to the province suggests that the cost of living in the municipality is relatively low which could be leveraged as a positive factor in attracting and retaining residents.



FIGURE 9: AVERAGE VALUE OF DWELLING



Source: Statistics Canada. 2011 National Household Survey. 2006 Community Profiles.

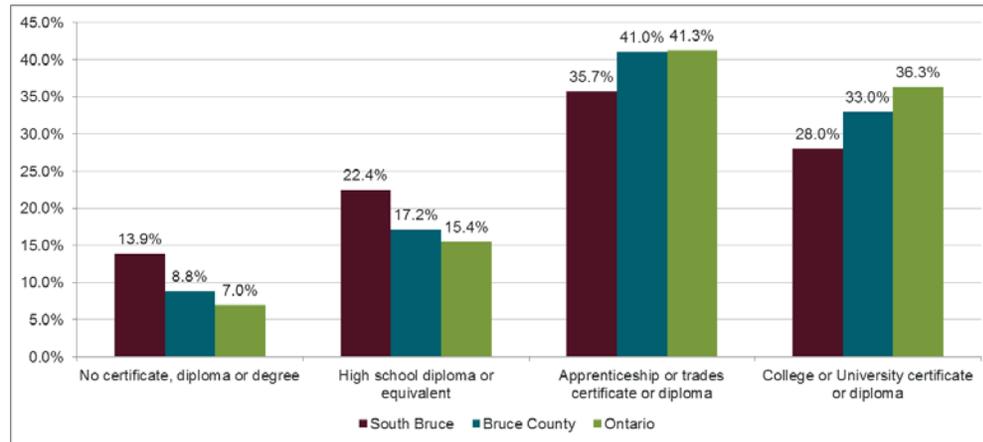
3.1.5 Educational profile

Educational profile is an important socio-economic indicator as it reveals the community's ability to staff new and existing businesses. In 2011 South Bruce had a lower portion of the labour force with a College or University Education (28%) when compared to Bruce County (33.0%) and Ontario (36.3%). The municipality also had a lower portion of the population with an apprenticeship or trades education compared to the County and Province.

Accordingly, the municipality had a higher portion of the population with no certificate, diploma or degree compared to the other two areas.



FIGURE 10: POPULATION BY EDUCATIONAL ATTAINMENT, AGED 25 TO 64, 2011



Source: Statistics Canada - 2011 National Household Survey.

The major field of study by age group was examined to determine if the fields the labour force studied in South Bruce differed from the County and Province.

The largest proportion of South Bruce’s work force had studied “Architecture, engineering, and related technologies” at 26.8% for the 25-44 age group and 33.6% for the 45-64 age cohort. There were a higher proportion of 25-44 age groups that studied this field in South Bruce compared to the province and the percentage was lower compared to that of Bruce County.

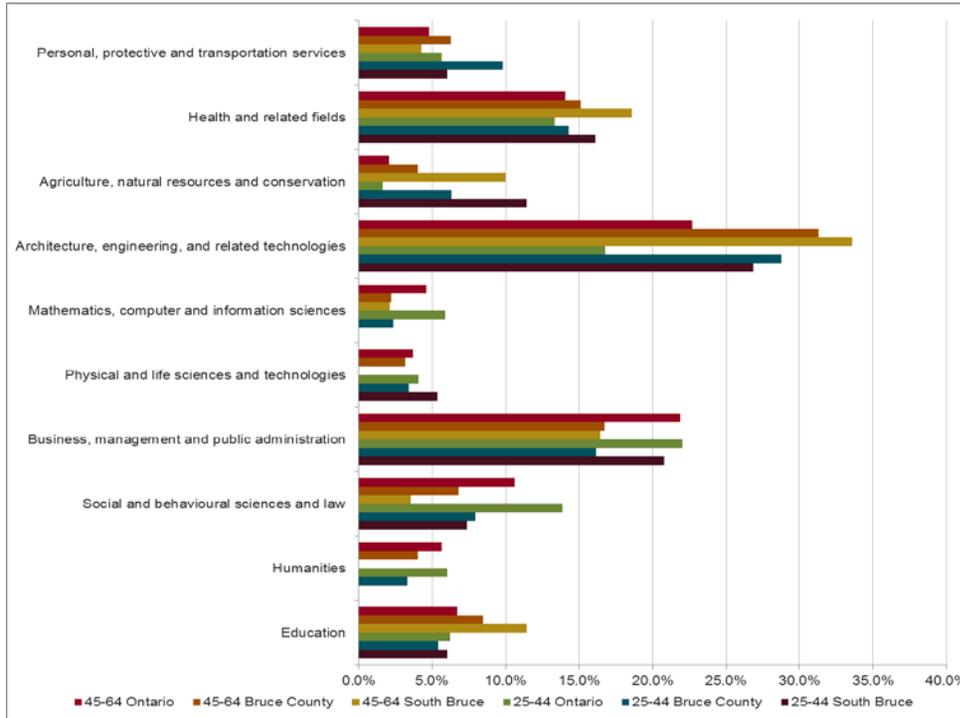
For the 45-64 years of age cohort, South Bruce had a higher proportion of its labour force that studied this field compared to both areas.

South Bruce also had a higher proportion of the labour force that studied “business, management and public administration” compared to Bruce County, while it has lower than Ontario for the 25-44 age cohort. For the 45-64 age groups, South Bruce had a lower proportion of people that studied this field compared to the County and Province.

Other notable fields where South Bruce had a higher proportion compared to Ontario and Bruce County were “health and related fields” and “agriculture, natural resources and conservation”, for both age groups. This is particularly evident in the 25-44 age groups for South Bruce in the latter fields, and could be related to the strong agricultural, aggregates and mineral resources industry presence in the municipality and county.



FIGURE 11: EDUCATION BY MAJOR FIELD OF STUDY AND AGE COHORT, 2011



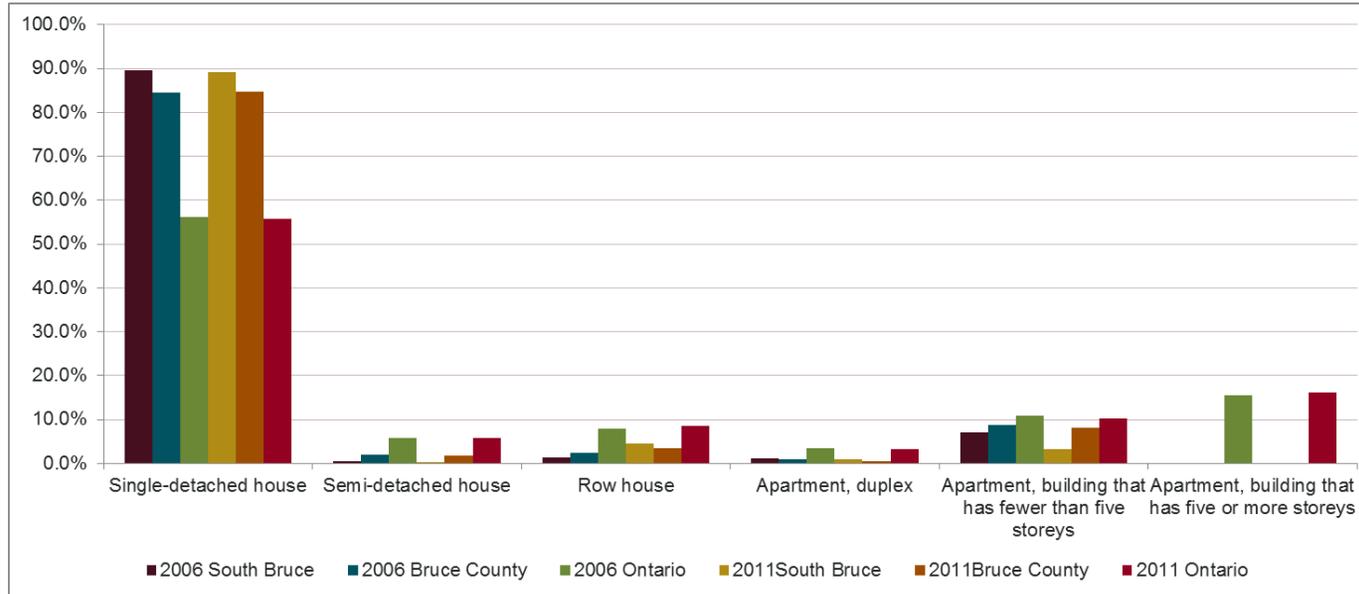
Source: Statistics Canada, 2011 National Household Survey, Statistics Canada Catalogue no. 99-012-X2011055.

3.1.6 Dwelling Characteristics

The figure below shows that South Bruce has a higher proportion of single detached homes compared to Bruce County and Ontario. In 2011, single detached homes made up 89.1% of the dwellings in South Bruce, but these dwellings only made up 55.6% in Ontario. The high rate of single detached homes in South Bruce suggests the municipality has a low population density which reduces the viability of public transportation networks while increasing the per unit cost of municipal services. It also highlights potential issues associated with the availability of affordable housing, particularly when compared to the Apartment, duplex, and ‘fewer than five storeys’ categories. In fact, the latter displays a significant reduction between census periods.



FIGURE 12 DWELLING TYPES IN SOUTH BRUCE, BRUCE COUNTY AND ONTARIO, 2006-2011



Source: Statistics Canada. 2011 and 2006 Census Profile

3.2 Occupational Profile

3.2.1 Trends in Local Occupations and Employment

South Bruce's total labour force in 2011 was 3,305, which represented a 7.8% decrease from 2006. The municipality's unemployment rate in 2011 was 5.0% which was lower than the County rate of 6.5% and below the provincial rate of 7.4% as of April 2014.

3.2.1.1 Labour Force by Sector Category

The labour force by sector category for all three geographic areas was examined to determine how the Municipality of South Bruce's workforce compared to Bruce County Ontario.



The leading sources of employment for the South Bruce labour force were in the “Agriculture, forestry, fishing and hunting” and “Manufacturing” sectors which employed 18.4% and 18.1% of the municipality’s work force respectively.

These two sectors also employed a significantly higher portion of the labour force in South Bruce compared to Bruce County and Ontario.

The relative strength of these two sectors in South Bruce resulted in many other sectors lagging behind provincial averages in terms labour force proportions.

Some of the notable sectors where South Bruce trails behind Ontario were:

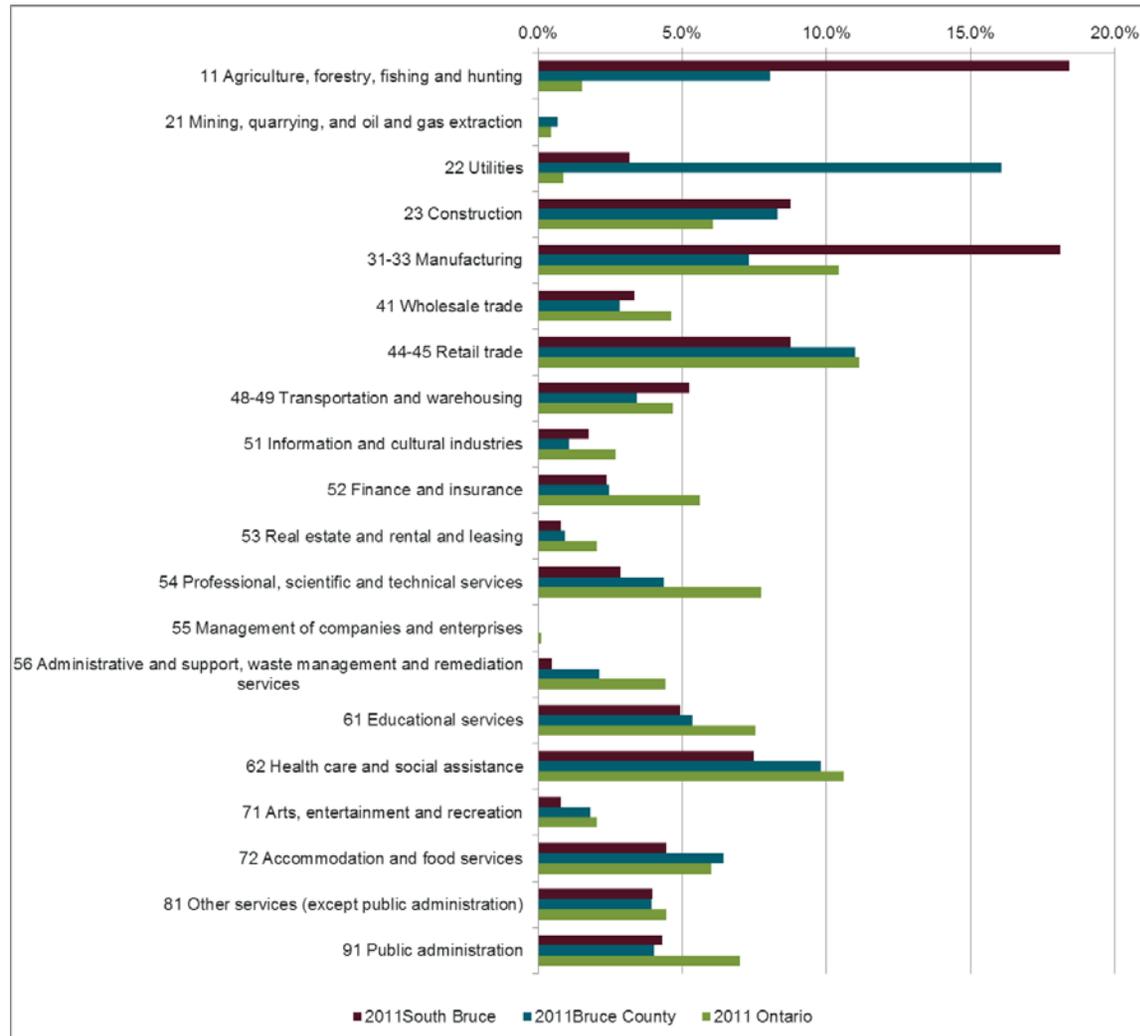
- § Professional, scientific and technical services (2.9%),
- § Administrative and support, waste management and remediation services (0.5%),
- § Public administration (4.3%) and,
- § Health care and social assistance (7.5%).

It should be noted that 16.1% of Bruce County’s labour force is employed in the utilities sector which is likely due to the presence of the Bruce Power nuclear plant which employs roughly 3,800 workers.⁵

⁵ Grey Bruce Economic Development. Leading employers, 2010. Available at: <http://www.investingreybruce.com/index.php/leading-employers>



FIGURE 13 CLASS OF WORKER BY SECTOR SOUTH BRUCE, BRUCE COUNTY AND ONTARIO BY PERCENTAGE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.



As shown in Figure 14 below, South Bruce's employed labour force has experienced growth in nearly every industrial subsector from 2006 to 2011, with the exception of Mining, quarrying and oil and gas extraction, as well as Management of companies and enterprises.

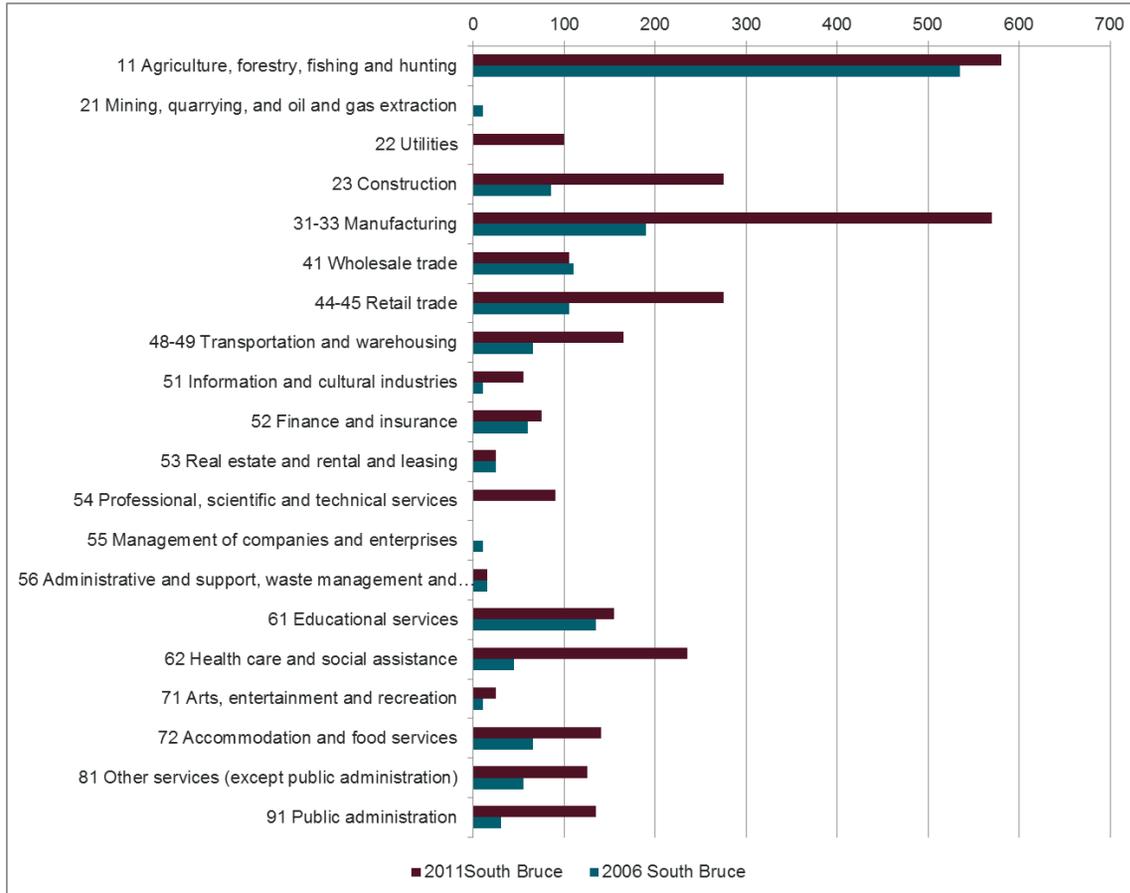
The sectors with the largest growth in workers were:

- § Manufacturing (380 workers)
- § Health care and social assistance (190 workers)
- § Construction (190 workers)
- § Retail Trade (170 workers)

The growth in the manufacturing and construction sectors is significant for the municipality as these industries were adversely affected by the recession and yet South Bruce has able to create jobs in these sectors.



FIGURE 14: CLASS OF WORKER BY INDUSTRY, SOUTH BRUCE BY EMPLOYED WORK FORCE AGE 15 AND OVER, 2011, 2006

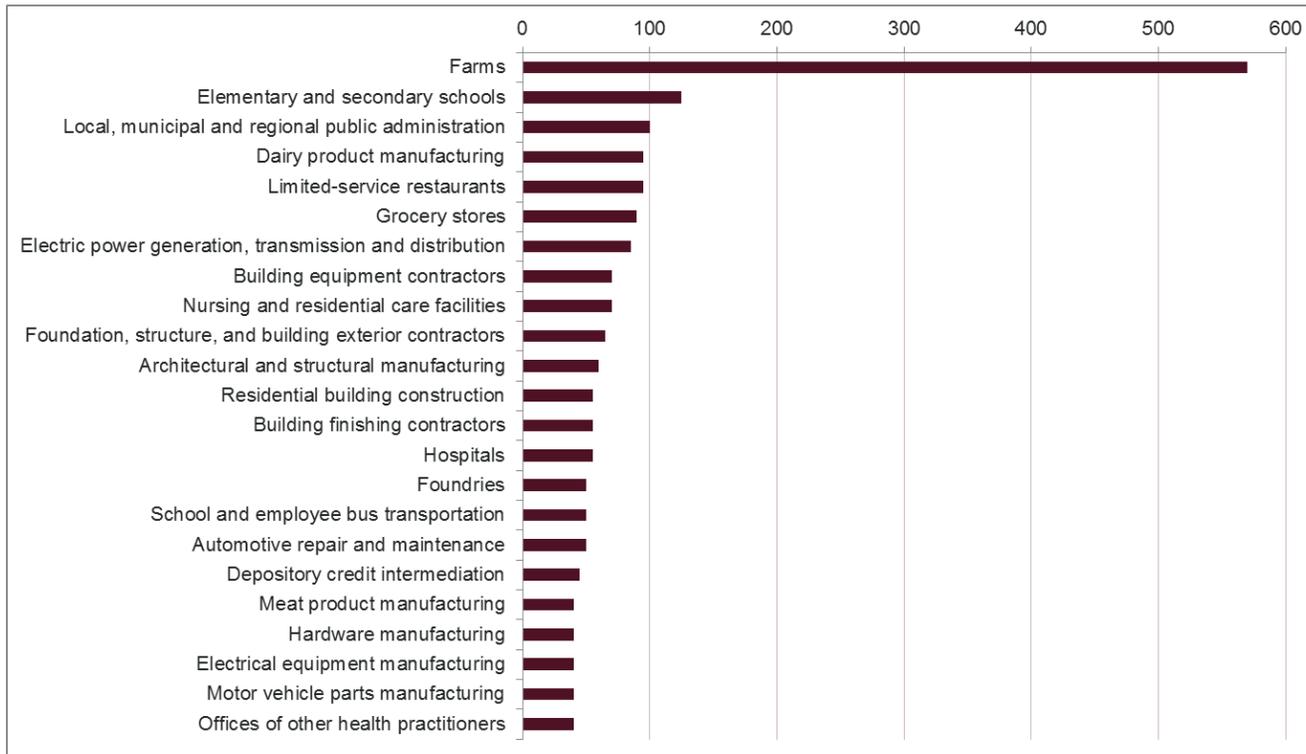


Statistics Canada, 2011 National Household Survey, Statistics Canada catalogue no. 99-012-X2011034 . 2006 Census of Population, Statistics Canada catalogue no. 97-561-XCB2006007

The figure below shows the top 23 sub-sectors for South Bruce in terms of total employment. As of 2011, Farms and Elementary and secondary schools represented the top two subsectors in terms of employment and were the only subsectors to employ more than 100 people. It should be noted that the majority of manufacturing subsectors shown in Figure 15 employed 40 workers.



FIGURE 15: TOP 18 CLASS OF WORKER BY INDUSTRY IN SOUTH BRUCE, 2011



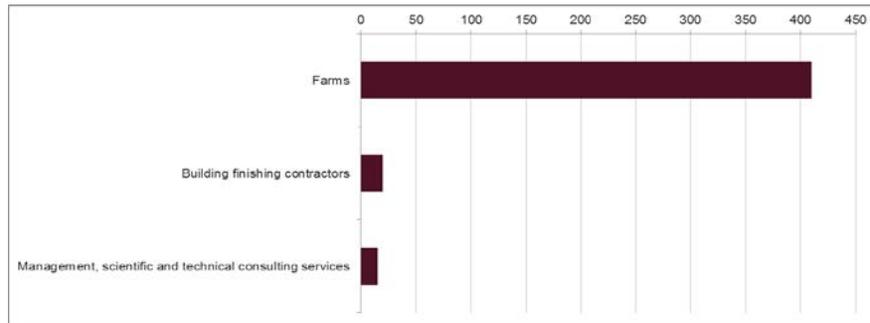
Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

Figure 16 shows the top three industrial sub-sectors for South Bruce in terms of self-employment. Only three subsectors were displayed as there were zero self-employed workers in the other subsectors.

Along with being the largest employer in terms of total employment, farms were also the largest self-employer within the municipality by a significant margin. The high number of workers employed in the farms subsector speaks to South Bruce's strength in the agricultural sector.



FIGURE 16 TOP 3 SELF EMPLOYED WORKER BY INDUSTRY IN SOUTH BRUCE, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011034.

The overall strength of South Bruce's agricultural and manufacturing sectors suggests that opportunities may exist to create partnerships between these two sectors which could result in jobs being created in food processing, for example.

These types of partnerships already have a presence in the municipality as the dairy product manufacturing subsector is fourth largest source for total employment in South Bruce as in Figure 15. One example of a dairy product manufacturing business that is currently operating in South Bruce is Gay Lea Foods⁶.

3.2.1.2 Labour Force by Occupational Classification

Examining a community's labour force by its occupational category is far more instructive than by industrial category. Figure 13 shows that the largest occupational category, as measured by workers over the age of 15, was in trades, transport and equipment operators and related occupations. This is followed by occupations in management.

From 2006 to 2011 in South Bruce, the majority of occupational categories declined. Natural resources, agriculture and related production occupations had the largest decrease at 57%.

The exceptions to this decrease were the following occupational categories that experienced growth:

- § Management occupations (41.7%),
- § Natural and applied sciences and related occupations (211.4%), and

⁶ Gay Leah. Contact Us, 2013. Available at: <http://www.gaylea.com/retail-contact-form>



§ Health occupations (35.2%).

Natural and applied sciences and related occupations had relatively large growth rates, as the labour force grew from 25 in 2006 to 140 in 2011.

FIGURE 17: SOUTH BRUCE EMPLOYED LABOUR FORCE BY OCCUPATIONAL CLASSIFICATION, 2011, 2006

Occupational Category by Major Unit	2006	2006 % of total	2011	2011 % of total	%change from 2006-2011
0 Management occupations	392	10.9%	555	17.0%	41.7%
1 Business, finance and administration occupations	329	9.2%	280	8.6%	-15.0%
2 Natural and applied sciences and related occupations	45	1.3%	140	4.3%	211.4%
3 Health occupations	155	4.3%	210	6.4%	35.2%
4 Occupations in education, law and social, community and government services	250	7.0%	225	6.9%	-10.0%
5 Occupations in art, culture, recreation and sport	45	1.3%	30	0.9%	-33.4%
6 Sales and service occupations	756	21.1%	505	15.4%	-33.2%
7 Trades, transport and equipment operators and related occupations	737	20.6%	730	22.3%	-0.9%
8 Natural resources, agriculture and related production occupations	430	12.0%	185	5.7%	-57.0%
9 Occupations in manufacturing and utilities	439	12.3%	410	12.5%	-6.6%
Total	3578	100.0%	3270	100.0%	-8.6%

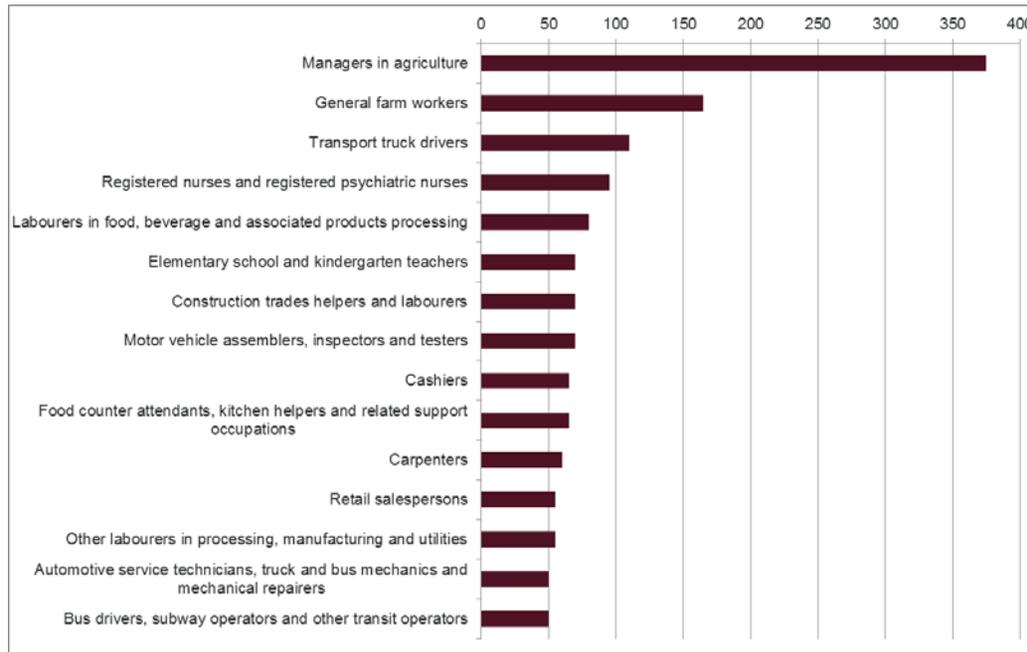
Source: Statistics Canada - 2011 National Household Survey, 2006 Census Profile.

The figure below provides a snapshot of the top 15 occupational sub-categories in South Bruce. The top occupational sub-categories reflect the municipality's strength in the agriculture and manufacturing sectors.

The top two occupations were manager in agriculture and general farm worker. In addition, three of the top 15 occupations were in manufacturing. It should also be noted five of the top 15 occupation sub-categories were in Trades, transport and equipment operators and related occupations which reflects the municipality's strength in this occupational category.



FIGURE 18: SOUTH BRUCE'S TOP 15 OCCUPATIONS, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011051.

3.2.1.3 Unemployment Rate by Educational Level

According to the National Household Survey, the municipality's 2011 estimated unemployment rate was 5.0%, which was lower than the County's rate of 6.5% and province's rate of 8.3%.

Annual unemployment statistics were examined to determine long term trends and the data was made available for economic regions from Statistics Canada's Labour Force Survey. An economic region is composed of several census divisions that are grouped with other regions that have similar economic characteristics.

For the purposes of this comparison, the economic region of Stratford-Bruce Peninsula was used as South Bruce lies within this region.

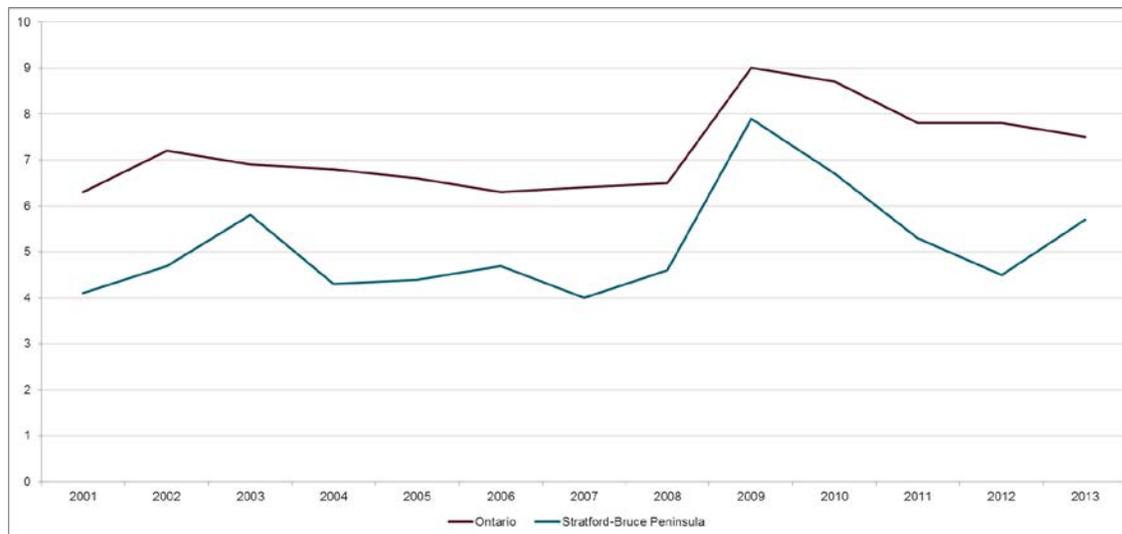


The figure below displays the annual unemployment rates for Stratford-Bruce Peninsula and Ontario from 2001 to 2013. The chart shows that from 2001 to 2013 the unemployment rate for the economic region paralleled the provincial trend; however, the rate for the region was consistently lower than the province.

The region's unemployment rate in 2008 was 4.6%; however, in 2009 which was in the midst of the global recession the rate increased to 7.9%. By 2012 the region's unemployment rate approached pre-recessionary levels at 4.5%.

The recovery in Stratford-Bruce Peninsula was short lived as the region's unemployment rate increased to 5.7% in 2013, which contrasted with the province where the rate decreased to 7.5%.

FIGURE 19: ANNUAL UNEMPLOYMENT RATE FOR STRATFORD-BRUCE PENINSULA AND ONTARIO, 2001 – 2013



Source: Statistics Canada. Table 282-0055 - Labour force survey estimates (LFS), by provinces, territories and economic regions based on 2006 Census boundaries, annual (persons unless otherwise noted), CANSIM (database).

3.2.2 Labour Flow Characteristics

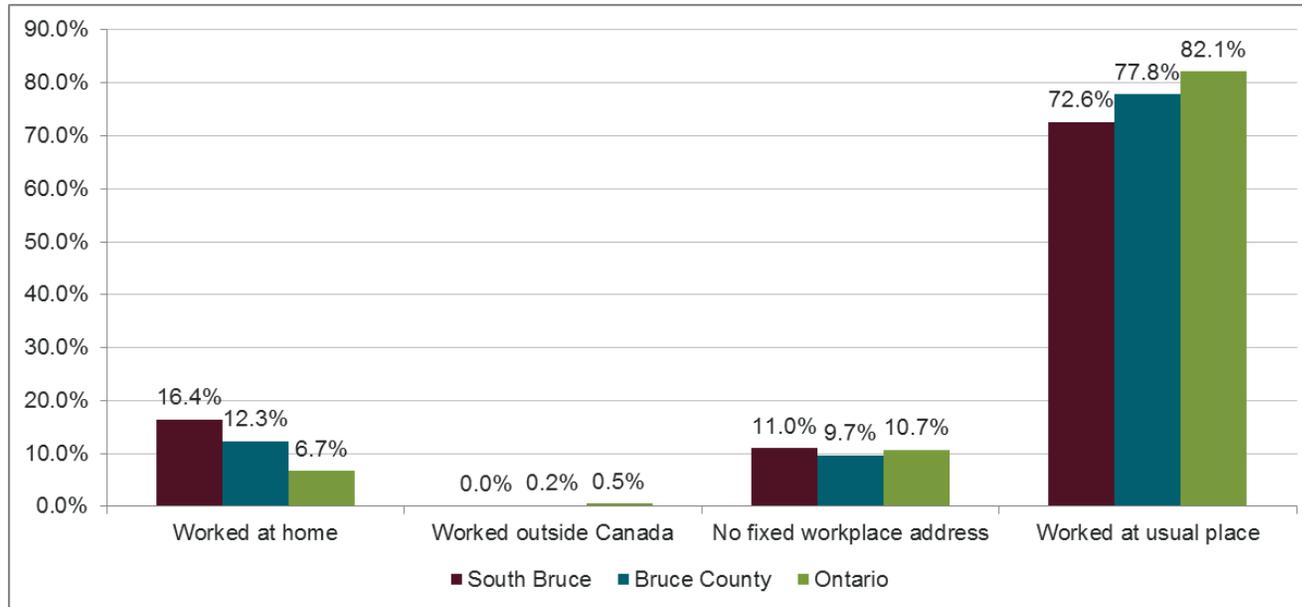
3.2.2.1 Place of Work Status

Figure 20 displays the proportion of the labour force by their place of work in 2011 for all three geographic areas. South Bruce (16.4%) has a higher portion of the work force that work at home compared to Bruce County (12.3%) and Ontario



(6.7%). The difference between the municipality and the province may be due to South Bruce's high rate of self-employed farmers. Conversely, South Bruce (72.6%) has a lower portion of its labour force that worked at usual place compared to the County (77.8%) and Province (82.1%).

FIGURE 20: PLACE OF WORK STATUS IN SOUTH BRUCE, BRUCE COUNTY AND ONTARIO, 2011



Source: Statistics Canada - 2011 National Household Survey.

3.2.2.2 Commuting Patterns

The following two figures display the commuting patterns for the workforce that reside in South Bruce and for the labour force that works in the municipality.

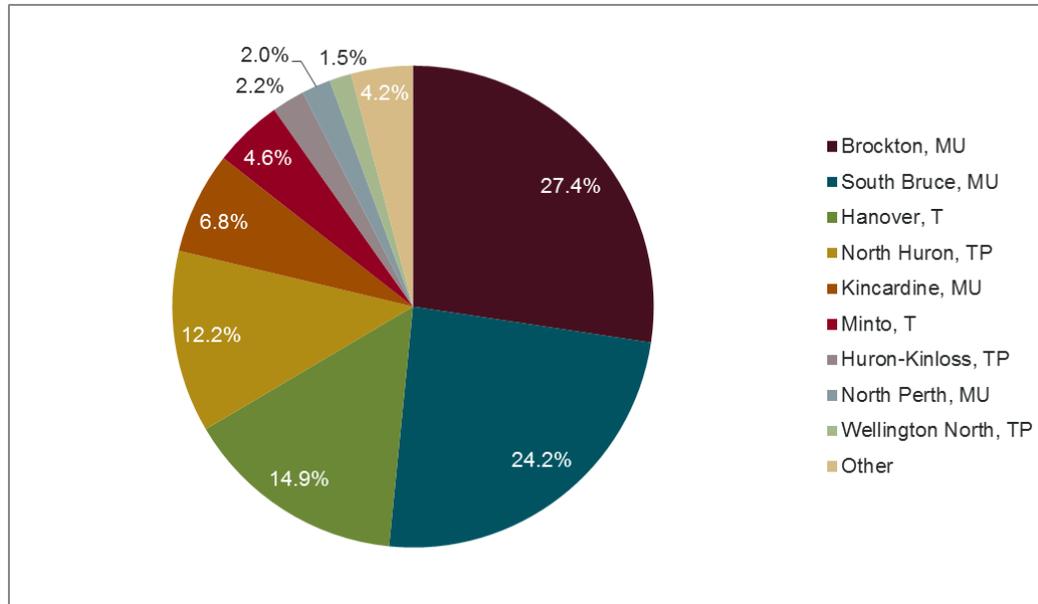
Figure 21 identifies the top ten locations where South Bruce residents commute for work. The largest proportion of residents commutes to Brockton (27.4%) for work, while South Bruce (24.2%) represents the second highest proportion.

In total, Bruce County made up 60.6% of the top ten locations that residents in South Bruce commute to for work.



Figure 22 shows where the municipality's work force is coming from. Just over 90% of the municipality's labour force originates from Bruce County and the remaining commute from the Municipality of West Grey in Grey County. For the workforce emanating from Bruce County, South Bruce contributes 63% of the labour force while Brockton adds 16%.

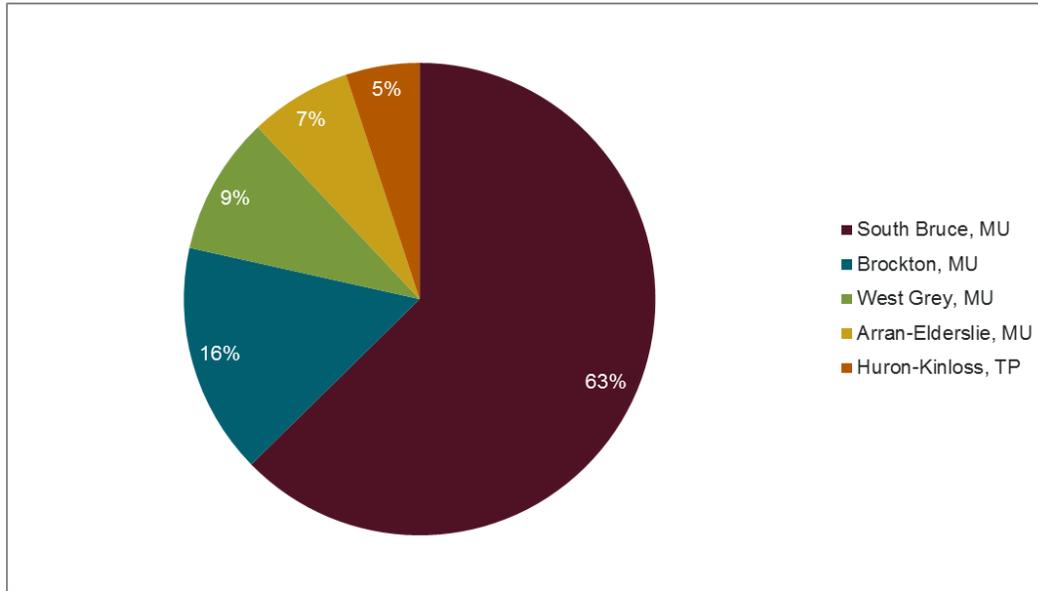
FIGURE 21: TOP 10 LOCATIONS RESIDENTS OF SOUTH BRUCE COMMUTE TO FOR THEIR USUAL PLACE OF WORK, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.



FIGURE 22: TOP 5 LOCATIONS WORKERS OF SOUTH BRUCE COMMUTE FROM FOR THEIR USUAL PLACE OF WORK, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011032.

3.2.2.3 Mobility Status

The mobility status over the last five years was examined in order to determine the level of new residents South Bruce was attracting in comparison to Bruce County and Ontario.

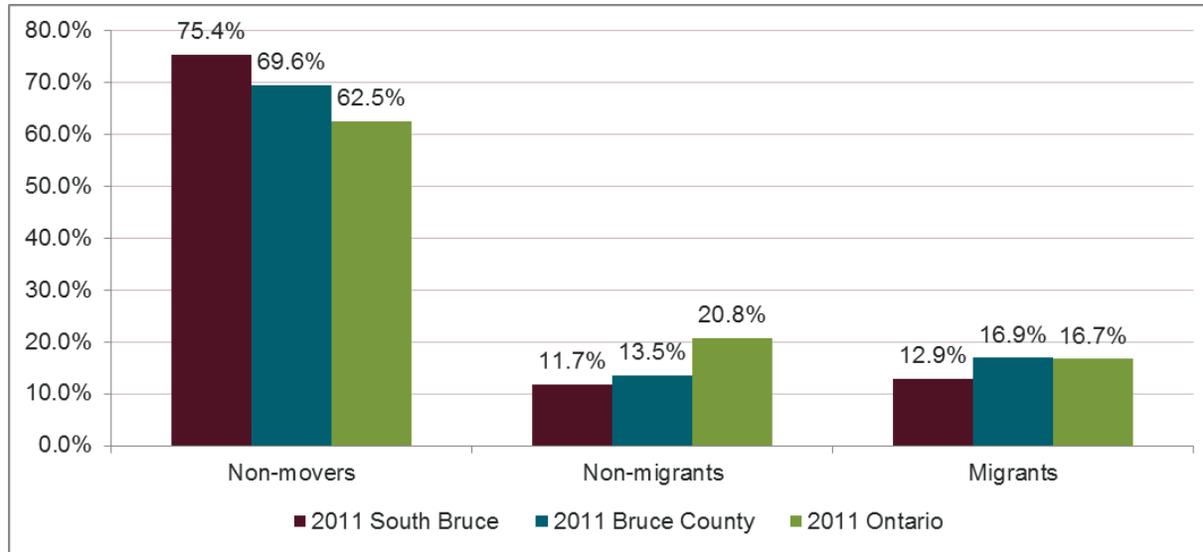
The below figure shows the proportion of non-movers who are people who have not moved over the past few years, non-migrants who are people that have moved but remained in the same municipality and migrants who have moved to a different municipality within Canada.

South Bruce (75.4%) had a higher proportion of non-movers compared to Bruce County (69.6%) and Ontario (62.5%). Conversely, South Bruce (12.9%) had a lower proportion of migrants compared to Bruce County (16.9%) and Ontario (16.7%).



Although the County was able to attract roughly the same level of migrants as the province, the municipality attracted a lower level. This may be explained due to the lower proportion of young workers (ages 25-44) within the municipality as this age cohort is more likely to move to a new town or city in order to find employment.

FIGURE 23: MOBILITY STATUS OVER THE LAST FIVE YEARS FOR SOUTH BRUCE, BRUCE COUNTY AND ONTARIO, 2011



Source: Statistics Canada - 2011 National Household Survey. Catalogue Number 99-012-X2011054.



3.3 Business Patterns Assessment

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 South Bruce 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 establishments 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 CRA as a primary resource in establishment counts; therefore, businesses without a business number or indicating annual sales less than \$30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.

3.3.1 Key Business Characteristics

3.3.1.1 Business Patterns Assessment

A detailed review of the business patterns data for the period between 2008 and 2013 for South Bruce 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 South Bruce.

Understanding the trends in business growth in the community provides valuable insight into the shape that future growth and investment in the county might take. It also provides an indication of where the priorities of the county should lie, especially with regards to program development and delivery, and strategic planning.

In terms of concentration, the following sectors (identified in Figure 24) exhibit the highest proportion of business establishments in South Bruce as of December 2013:

- § Agriculture, Forestry, Fishing and Hunting (299 businesses, 49.1% of total)
- § Construction (66 businesses, 10.8% of total)



§ Other Services (except Public Administration) (43 businesses, 7.1% of total)

§ Retail Trade (34 businesses, 5.6% of total)

Notably, when the indeterminate category (self-employed) is removed, the sectors with the highest business establishment proportions remain consistent with retail trade and other services exchanging ranks.

§ Agriculture, Forestry, Fishing and Hunting (51 businesses, 26.6% of total)

§ Construction (37 businesses, 19.3% of total)

§ Retail Trade (19 businesses, 9.9% of total)

§ Other Services (except Public Administration) (43 businesses, 7.1% of total)



FIGURE 24 SOUTH BRUCE BUSINESSES BY LOCATION AND SIZE, DECEMBER 2013

Industry (NAICS)	December 2013								
	Total	Indeterminate	Subtotal	1- 4	5- 9	10-19	20-49	50-99	100+
11 Agriculture, Forestry, Fishing and Hunting	299	248	51	38	7	3	2	0	1
21 Mining, Quarrying, and Oil and Gas Extraction	2	1	1	0	0	1	0	0	0
22 Utilities	0	0	0	0	0	0	0	0	0
23 Construction	66	29	37	23	8	5	1	0	0
31-33 Manufacturing	16	9	7	1	2	0	3	1	0
41 Wholesale Trade	20	7	13	4	2	5	2	0	0
44-45 Retail Trade	34	15	19	9	5	4	1	0	0
48-49 Transportation and Warehousing	25	18	7	4	2	0	0	0	1
51 Information and Cultural Industries	2	1	1	1	0	0	0	0	0
52 Finance and Insurance	17	8	9	1	2	1	5	0	0
53 Real Estate and Rental and Leasing	28	20	8	6	1	0	1	0	0
54 Professional, Scientific and Technical Services	21	12	9	6	2	1	0	0	0
55 Management of Companies and Enterprises	16	13	3	1	0	1	0	0	1
56 Administrative and Support, Waste Management and Remediation Services	9	7	2	2	0	0	0	0	0
61 Educational Services	1	1	0	0	0	0	0	0	0
62 Health Care and Social Assistance	3	1	2	2	0	0	0	0	0
71 Arts, Entertainment and Recreation	1	1	0	0	0	0	0	0	0
72 Accommodation and Food Services	4	1	3	1	1	0	1	0	0
81 Other Services (except Public Administration)	43	25	18	17	0	1	0	0	0
91 Public Administration	2	0	2	0	0	0	1	1	0
Total Economy	609	417	192	116	32	22	17	2	3

Source: Canadian Business Patterns December 2013

Overall, business establishments in South Bruce are overwhelmingly characterized by small companies and enterprises that employ less than 10 people.

In 2013, excluding the businesses consisting of the self-employed – which themselves are small enterprises – there were 116 businesses, or 60.4% of the subtotal, that employ 1-4 people. An additional 32 businesses, or 16.7% of the subtotal, employ 5-9 people.

The industries with the highest number of establishments employing fewer than 10 people were:

§ Agriculture, Forestry, Fishing and Hunting (45 businesses)



- § Construction (31 businesses)
- § Other Services (except Public Administration) (17 businesses)
- § Retail Trade (14 businesses)

It is also important to note the scarcity of medium and large firms in the county's economy. This is of interest because small, medium and large firms are generally believed to provide different economic functions within an economic region. Small firms are generally seen as the major source of new products and ideas, while large firms typically develop as products become more homogenous and firms begin to exploit economies of scale. The lack of mid-size and large business in South Bruce is concerning as these firms are typically more export oriented and generate higher operating surpluses.

It is also valuable to examine the growth in businesses by industry, so as to better understand areas of emerging opportunity and importance within South Bruce's economy.

The following figure provides an indication of the growth in business establishments by major industry classification from 2008 to 2013.

The sectors that have experienced the highest rate of growth (exclusive of the self-employed, and those industries with 15 or fewer establishments) include:

- § Retail Trade (87.5%)
- § Other Services (except Public Administration) (66.7%)
- § Agriculture, Forestry, Fishing and Hunting (25.3%)
- § Construction (16.0%)



FIGURE 25 SOUTH BRUCE BUSINESS ESTABLISHMENTS BY SECTOR, 2008 AND 2013

Industry (NAICS)	December 2008			December 2013			2008-2013	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	%Change Total	%Change Subtotal
11 Agriculture, Forestry, Fishing and Hunting	239	198	41	299	248	51	25.1%	25.3%
21 Mining, Quarrying, and Oil and Gas Extraction	1	0	1	2	1	1	100.0%	N/A
22 Utilities	1	0	1	0	0	0	-100.0%	N/A
23 Construction	55	25	30	66	29	37	20.0%	16.0%
31-33 Manufacturing	14	5	9	16	9	7	14.3%	80.0%
41 Wholesale Trade	21	10	11	20	7	13	-4.8%	-30.0%
44-45 Retail Trade	28	8	20	34	15	19	21.4%	87.5%
48-49 Transportation and Warehousing	29	18	11	25	18	7	-13.8%	0.0%
51 Information and Cultural Industries	1	0	1	2	1	1	100.0%	N/A
52 Finance and Insurance	12	5	7	17	8	9	41.7%	60.0%
53 Real Estate and Rental and Leasing	11	6	5	28	20	8	154.5%	233.3%
54 Professional, Scientific and Technical Service	16	12	4	21	12	9	31.3%	0.0%
55 Management of Companies and Enterprises	7	6	1	16	13	3	128.6%	116.7%
56 Administrative and Support, Waste Managem	6	4	2	9	7	2	50.0%	75.0%
61 Educational Services	0	0	0	1	1	0	N/A	N/A
62 Health Care and Social Assistance	1	0	1	3	1	2	200.0%	N/A
71 Arts, Entertainment and Recreation	1	1	0	1	1	0	0.0%	0.0%
72 Accommodation and Food Services	5	1	4	4	1	3	-20.0%	0.0%
81 Other Services (except Public Administration)	33	15	18	43	25	18	30.3%	66.7%
91 Public Administration	2	0	2	2	0	2	0.0%	0.0%
Total Economy	483	314	169	609	417	192	26.1%	32.8...

Source: Canadian Business Patterns December 2013, December 2008

Overall between 2008 and 2013, the municipality added over 125 firms. This alone is noteworthy as many communities across Ontario lost businesses in the period as a result of the global recession that began in 2008.

Seemingly insulated by macroeconomic trends affecting Ontario, South Bruce actually added 60 agricultural related firms, which speaks to the strength of this sector in the municipality.

3.3.1.2 Business Patterns Location Quotients

Business patterns data was analyzed using location quotient (LQ) to determine the municipality's local competitive advantages. An LQ measures the concentration of business activity in a local area (e.g. South Bruce) relative to an over-



arching area (e.g. Ontario). An LQ of over 1.25 suggests a local relative concentration of activity. In theory, this suggests the local sector is exceeding local demand, and exporting products/services to areas outside of the local community. A sector LQ of less than 0.75 suggests a gap area, where the local business community is theoretically falling short of local demand. From a business patterns perspective, LQs may offer insight into where local industrial clusters may exist.

Based on location quotients in 2013 the following three sectors showed a local concentration of businesses:

- § Agriculture, Forestry, Fishing and Hunting (LQ of 13.07)
- § Public Administration (LQ of 2.40)
- § Mining, Quarrying, and Oil and Gas Extraction (LQ of 1.83)

Out of these three sectors only mining and oil and gas saw an increase in local concentration of businesses from 2008 to 2013 while the other two saw declines during the same time period.

However the increase to mining and oil and gas in South Bruce can be attributed to the addition of one business in this industrial sector during this time period.

It should also be noted that public administration has a high local concentration; however there are only two businesses in this sector.

Although the agricultural sector saw declines during this time period, the sector still has a significantly high concentration of businesses compared to the province.



FIGURE 26: BUSINESS PATTERNS LQ BY INDUSTRY, SOUTH BRUCE VS ONTARIO, 2013

Industry (NAICS)	2008 South Bruce		2013 South Bruce	
	LQ	Classification	LQ	Classification
11 Agriculture, Forestry, Fishing and Hunting	13.07	High	12.49	High
91 Public Administration	2.94	High	2.40	High
21 Mining, Quarrying, and Oil and Gas Extraction	1.30	High	1.83	High
23 Construction	1.02	Average	0.97	Average
81 Other Services (except Public Administration)	0.82	Average	0.94	Average
41 Wholesale Trade	0.86	Average	0.81	Average
55 Management of Companies and Enterprises	0.32	Low	0.77	Average
31-33 Manufacturing	0.73	Low	0.76	Average
48-49 Transportation and Warehousing	1.11	Average	0.69	Low
44-45 Retail Trade	0.61	Low	0.63	Average
52 Finance and Insurance	0.41	Low	0.47	Low
53 Real Estate and Rental and Leasing	0.25	Low	0.40	Low
56 Administrative and Support, Waste Management and Remediation Services	0.28	Low	0.34	Low
54 Professional, Scientific and Technical Services	0.22	Low	0.23	Low
51 Information and Cultural Industries	0.13	Low	0.19	Low
72 Accommodation and Food Services	0.25	Low	0.17	Low
61 Educational Services	0.00	Low	0.15	Low
71 Arts, Entertainment and Recreation	0.13	Low	0.10	Low
62 Health Care and Social Assistance	0.05	Low	0.08	Low
22 Utilities	2.22	High	0.00	Low

Source: Canadian Business Patterns December 2013, December 2008

3.3.1.3 Business Patterns Subsector Assessment

Figure 27 below provides a snapshot of the largest business categories at the most detailed level of analysis.

From this figure, it is evident that farming related activities, including, Dairy cattle and milk production, Beef cattle ranching and farming, Other grain farming, and Animal combination farming account for a considerable number of businesses within the municipality.

Of the businesses with a large number of locations and employees, Dairy cattle and milk production was the only subsector with over 15 firms employing 1 to 4 people. It should be noted that none of the subsectors, except holding companies, employed more than 19 workers.



FIGURE 27 TOP LOCAL BUSINESSES BY TOTAL NUMBER AND EMPLOYMENT CATEGORY

Industry (NAICS)	Total	Ind	Subtotal	1 - 4	5 - 9	10 - 19	20-49	50-99	100-199	200-499	500 +
112120 - Dairy cattle and milk production	79	58	21	18	1	2	0	0	0	0	0
112110 - Beef cattle ranching and farming, including feedlots	60	60	0	0	0	0	0	0	0	0	0
111190 - Other grain farming	40	34	6	6	0	0	0	0	0	0	0
112991 - Animal combination farming	34	32	2	2	0	0	0	0	0	0	0
551113 - Holding companies	16	13	3	1	0	1	0	0	1	0	0
111999 - All other miscellaneous crop farming	13	12	1	1	0	0	0	0	0	0	0
236110 - Residential building construction	12	3	9	6	1	2	0	0	0	0	0
811111 - General automotive repair	11	8	3	3	0	0	0	0	0	0	0
111150 - Corn farming	10	9	1	1	0	0	0	0	0	0	0
112320 - Broiler and other meat-type chicken production	10	5	5	2	3	0	0	0	0	0	0
238220 - Plumbing, heating and air-conditioning contractors	10	6	4	3	1	0	0	0	0	0	0
484121 - General freight trucking, long distance, truck-load	10	7	3	2	1	0	0	0	0	0	0
531111 - Lessors of residential buildings and dwellings (except social housing projects)	9	9	0	0	0	0	0	0	0	0	0
111110 - Soybean farming	8	7	1	1	0	0	0	0	0	0	0
238350 - Finish carpentry contractors	8	2	6	4	1	1	0	0	0	0	0
531190 - Lessors of other real estate property	8	7	1	1	0	0	0	0	0	0	0
813110 - Religious organizations	8	0	8	8	0	0	0	0	0	0	0
111940 - Hay farming	6	5	1	0	0	1	0	0	0	0	0
112210 - Hog and pig farming	6	5	1	0	1	0	0	0	0	0	0
238210 - Electrical contractors and other wiring installation contractors	6	4	2	1	1	0	0	0	0	0	0
417110 - Farm, lawn and garden machinery and equipment merchant wholesalers	6	2	4	1	0	3	0	0	0	0	0
523910 - Miscellaneous intermediation	6	6	0	0	0	0	0	0	0	0	0

Source: Canadian Business Patterns December 2013

3.3.1.4 Summary of Business Patterns

The business patterns data has revealed that Agriculture, forestry, fishing and hunting (49.1%), and Construction (10.8%) sectors made up the highest proportion of businesses in South Bruce. Analyzing the business patterns data through location quotients revealed that there was a local concentration of businesses in Agriculture, forestry, fishing and hunting (LQ of 13.07), Public administration (LQ of 2.40), Mining, quarrying, and oil and gas extraction (LQ of 1.83).

This section has also shown the wealth of small businesses located within South Bruce. In 2013, excluding the businesses consisting of the self-employed, out of the 192 businesses that employed workers, 77.1% of firms employed fewer than 10 people. Among businesses that employed fewer than 10 people, the Agriculture, forestry, fishing and hunting (45 firms) and Construction (31) sectors made up the highest proportion of these firms.



Therefore, to support future growth and investment in the municipality, it is essential to understand and support the needs of these small businesses.

This is particularly relevant in light of existing research and trends which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there, and a significant amount of job creation and innovation is increasingly being driven by small to medium sized businesses.

3.4 Key Sector Profiles

The following key sector profiles provides a detailed perspective South Bruce's economy at a subsector level along with an understanding of local industry trends and concentrations. The following discussion further aligns the findings of the demographic, labour force characteristics, and business patterns assessment found above to examine, in depth, the sectors that are currently economic drivers for South Bruce and contain the potential to be further developed.

Sector specific business patterns data was analyzed to determine the proportion of businesses that existed in South Bruce compared to Bruce County. Based on the background literature review and input from the community consultations, the following subsectors were selected for further analysis:

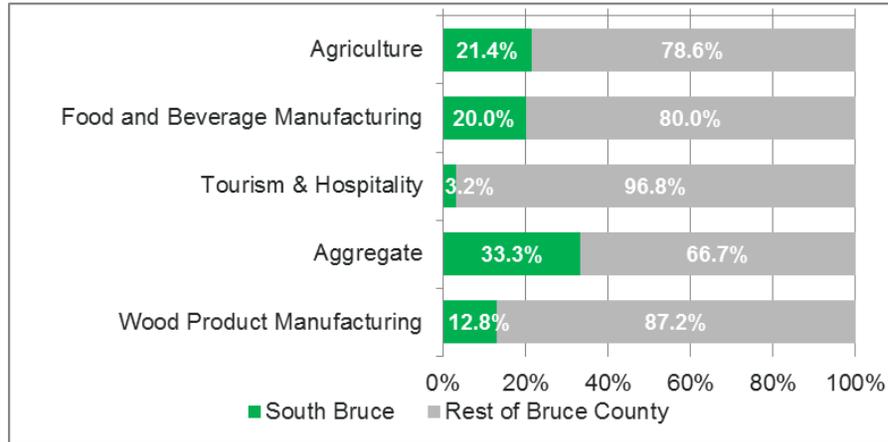
- § Agriculture
- § Food and Beverage Manufacturing
- § Tourism and Hospitality
- § Aggregate
- § Wood Product Manufacturing

In 2013 there were a total of 609 businesses (11.1%) in South Bruce while in the rest of Bruce County there were 4,861 businesses (88.9%). The Figure 28 shows the proportion of business, within the key sectors, in South Bruce (green bars) and in Bruce County (gray bars).

Figure 28 illustrates that in the agriculture (21.4%), food and beverage manufacturing (20.0%) and aggregate (33.3%) sectors there was a higher proportion of businesses in South Bruce compared to the total proportion of firms (11.1%) in the municipality. The tourism and hospitality sector (3.2%) had a lower proportion of firms while wood product manufacturing (12.8%) had a comparable proportion compared to the total percentage of firms.



FIGURE 28: BUSINESS PATTERNS BY KEY SECTOR, 2013



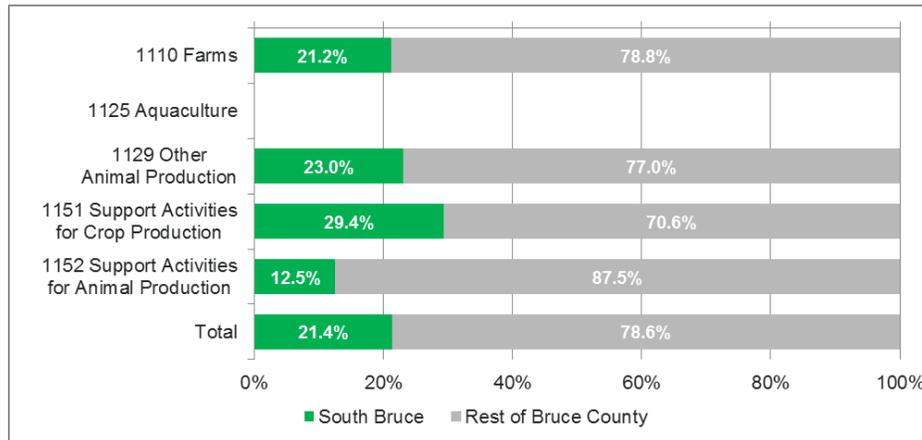
Source: Canadian Business Patterns December 2013

3.4.1 Agriculture

The figure below displays the relative concentrations of businesses in the agriculture sector that are located in South Bruce compared to the rest of Bruce County. Overall, 21.4% of businesses in the agriculture sector in Bruce County were located in South Bruce. Out of the four subsectors that have businesses in Bruce County, only support activities for animal production (12.5%) had a comparable percentage of businesses to the total proportion of firms in South Bruce (11.1%), while the rest of the subsectors were above this average. It should be noted that for this subsector there were only two firms that were located in South Bruce.



FIGURE 29: BUSINESS PATTERNS FOR AGRICULTURE SECTOR, 2013



Source: Canadian Business Patterns December 2013

3.4.2 Census of Agriculture

In addition to looking at business patterns data for the agricultural sector, statistics from the Census of Agriculture were analyzed to gain a further understanding on this sector. Changes to the following characteristics were examined for South Bruce, Bruce County, and Ontario between 2006 and 2011:

- § Total acreage farmed
- § Gross farm receipts
- § Total number of operators and farms
- § Total number of operators
- § Farmer operators categorized by their age group

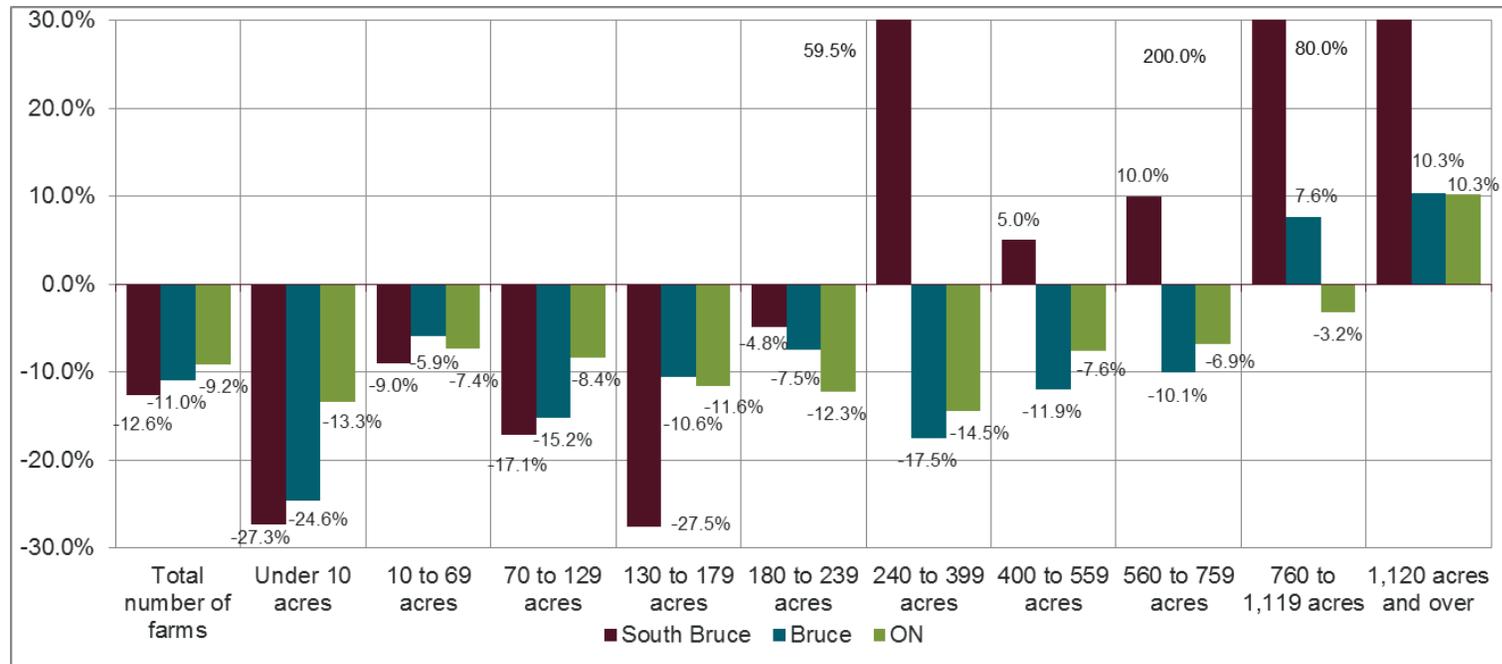
The figures below show the change in the number of farms by their acreage in South Bruce, Bruce County and Ontario from 2006-2011. The chart shows that the total number of farms had been decreasing in all three geographic areas. In general smaller farms had been decreasing while the number of large farms had been increasing.



All three geographic areas experienced a decrease in the number of farms that were smaller than 760 acres, except for South Bruce which saw an increase in farms between 240-759 acres. For farms that were 760 acres and larger, all three areas had an increase in the number of farms, except in Ontario for farms between 760-1,119 acres which experienced a decrease. It should be noted that the 200% increase in farms between 760-1,119 acres in South Bruce was due to the low number (4) of farms of that size in 2006.

The findings from the census substantiate the findings from the community consultations for South Bruce's Corporate Strategic Plan where participants noted operating small farms was becoming more difficult, resulting in fewer farms, with those remaining becoming larger operations.

FIGURE 30: CHANGES IN FARMS CLASSIFIED BY FARM AREA, 2006-2011



Source: Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE

The figures below highlights the changes to the number of farms categorized by their gross farm receipts from 2006-2011. The total gross farm receipts showed that from 2006-2011, South Bruce had the largest rate of growth (19.6%), followed by Ontario (15.0%) and Bruce County (3.6%).



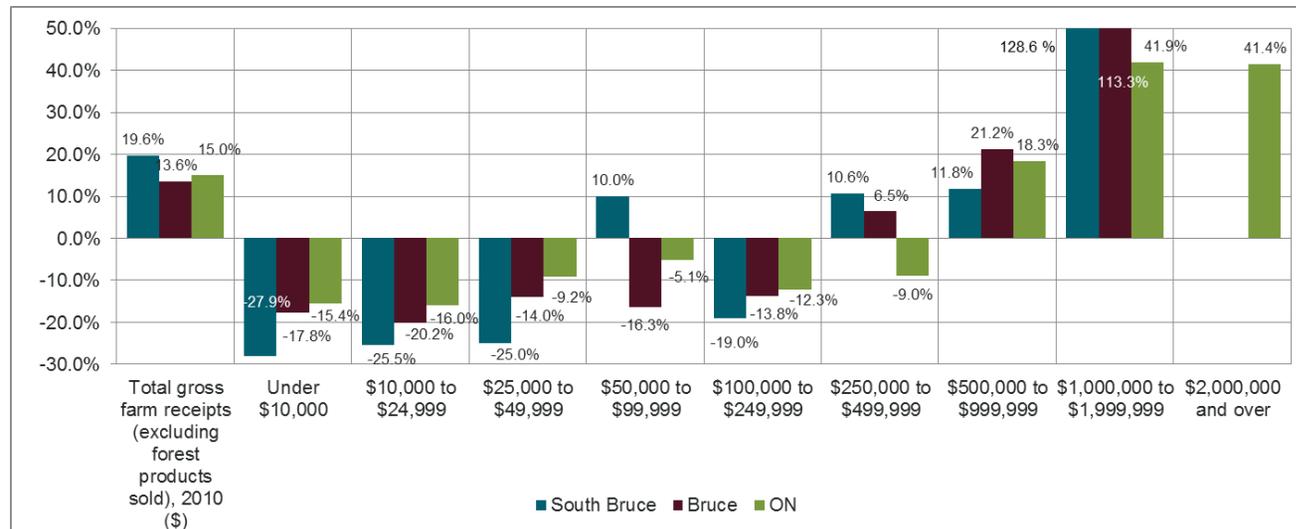
For all three geographic areas, the number of farms that reported a farm receipt less than \$250,000 had decreased, except in South Bruce where the number of farms with gross receipts of \$50,000 - \$99,999 increased (10.0%).

The number of farms that had a receipt greater than \$250,000 increased for all three areas, except for farms with gross receipts between \$250,000 - \$499,999, where there was a decrease in Ontario (-9.0%). It should be noted that the large increase (128.6%) in the number of farms with a receipt of \$1,000,000 - \$1,999,999 in South Bruce was due to the low number of farms in 2006.

In addition the number of farms with a receipt greater than \$2,000,000 did not change for South Bruce and Bruce County.

The trends observed in the number of farms by receipt paralleled the changes to the number of farms by area. In general, as the number of large farms increased, the number of farms with large farm receipts increased as well. The number of small farms decreased, which could be attributed to an increased difficulty in operations due to an inability to generate the necessary level of revenue to support sustainability. This may be correlated with the increase in larger farms, with greater revenue generation capability, which in turn provides them with the ability to purchase smaller operations.

FIGURE 31: CHANGES IN FARMS CLASSIFIED BY TOTAL GROSS FARMS RECEIPTS, 2006-2011



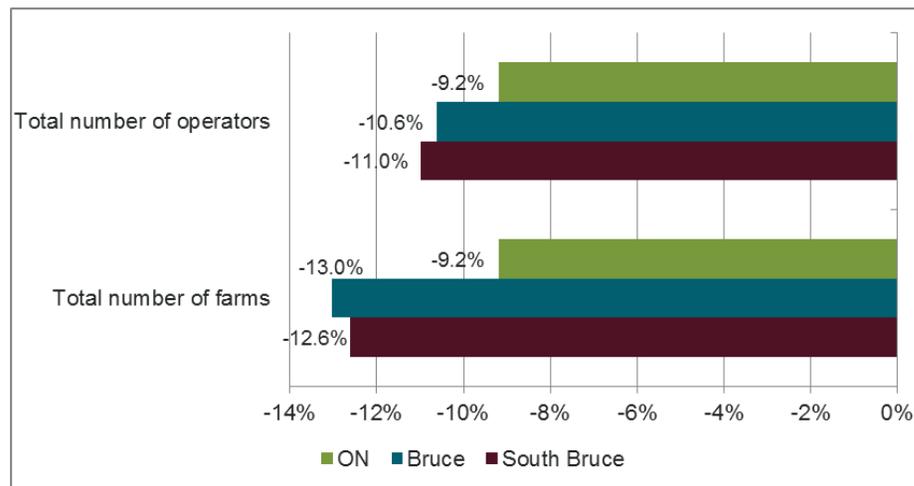
Source: Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE and 2006 Census of Agriculture, Farm Data and Farm Operator Data, catalogue no. 95-629-XWE.



The figure below displays the changes to the number of farm operators and farms from 2006-2011. For all three geographic areas there was a decrease in the number of farm operators and farms.

It should be noted that both the municipality and county had a larger decrease in both categories than the province; South Bruce had the largest decrease in farm operators (-11.0%) while Bruce County had the largest decrease in farms (-13.0%). This data reinforces the idea that current trends indicate that smaller farms are disappearing.

FIGURE 32: CHANGES IN TOTAL NUMBER OF OPERATORS AND FARMS



Source: Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.

The figure below highlights the changes in the number of farm operators by age group from 2006-2011.

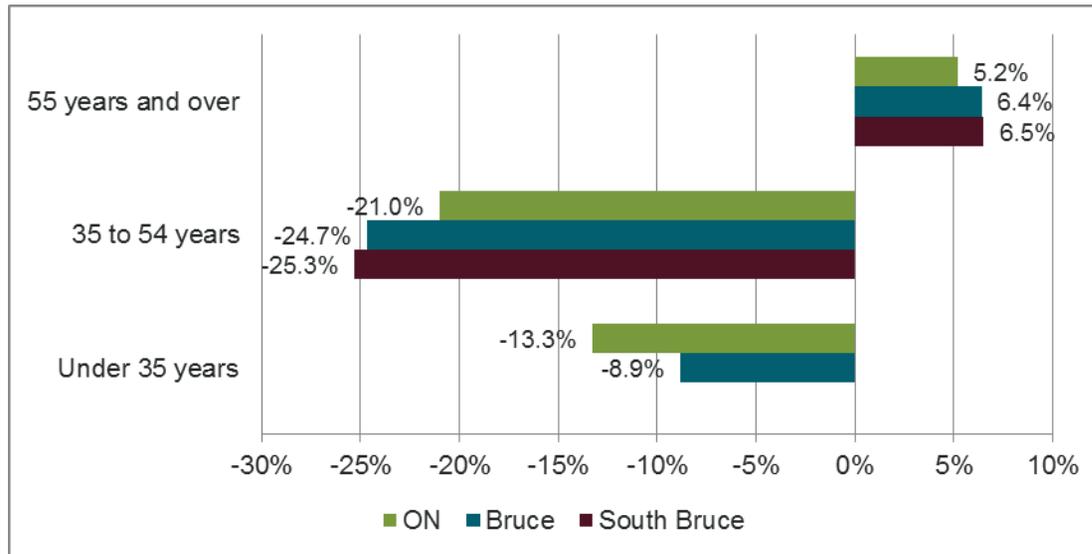
In all three geographic areas there was a decrease in the number of farm operators under the age of 55, except in South Bruce in the Under 35 age group, where there was no change.

The number of operators 55 years and older experienced an increase in all three areas, with the municipality (6.5%) and county (6.4%) having larger increases than the province (5.2%).

These age groups trends indicate that the decrease in the number of small farms will be a continuing trend into the future as farm operators become older, and there may not be a younger group of farmers necessarily, that could replace them. It is possible that these smaller farms could be sold and consolidated into larger farm operations.



FIGURE 33: CHANGES IN NUMBER OF FARM OPERATORS BY AGE GROUP, 2006-2011



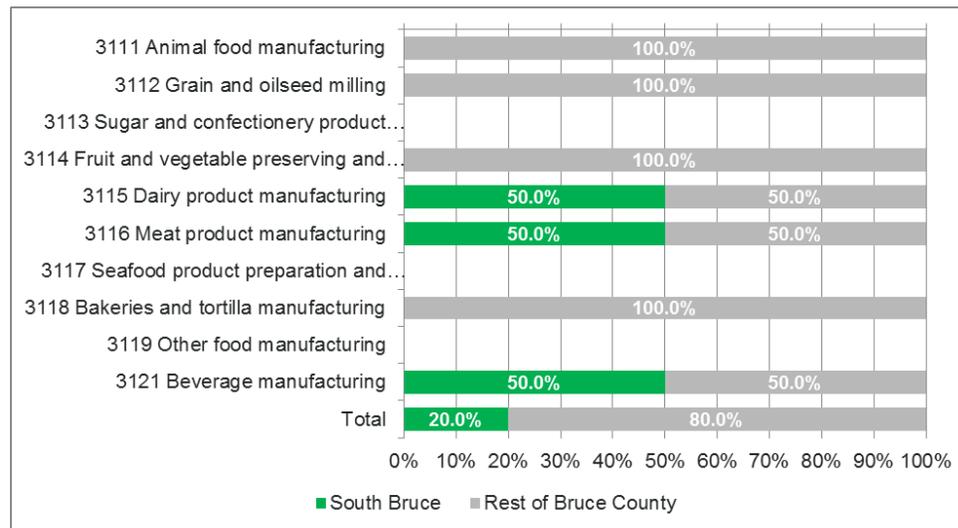
Source: Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE.



3.4.3 Food and Beverage Manufacturing

Businesses located in South Bruce for the food and beverage manufacturing sector made up 20% of the firms in Bruce County. Although there were three subsectors for South Bruce that made up 50% of establishments in the County, the high proportions were due to the low number of businesses in Bruce County: dairy product manufacturing (2 firms), meat product manufacturing (2 firms) and beverage manufacturing (2 firms).

FIGURE 34: BUSINESS PATTERNS FOR FOOD AND BEVERAGE MANUFACTURING SECTOR, 2013



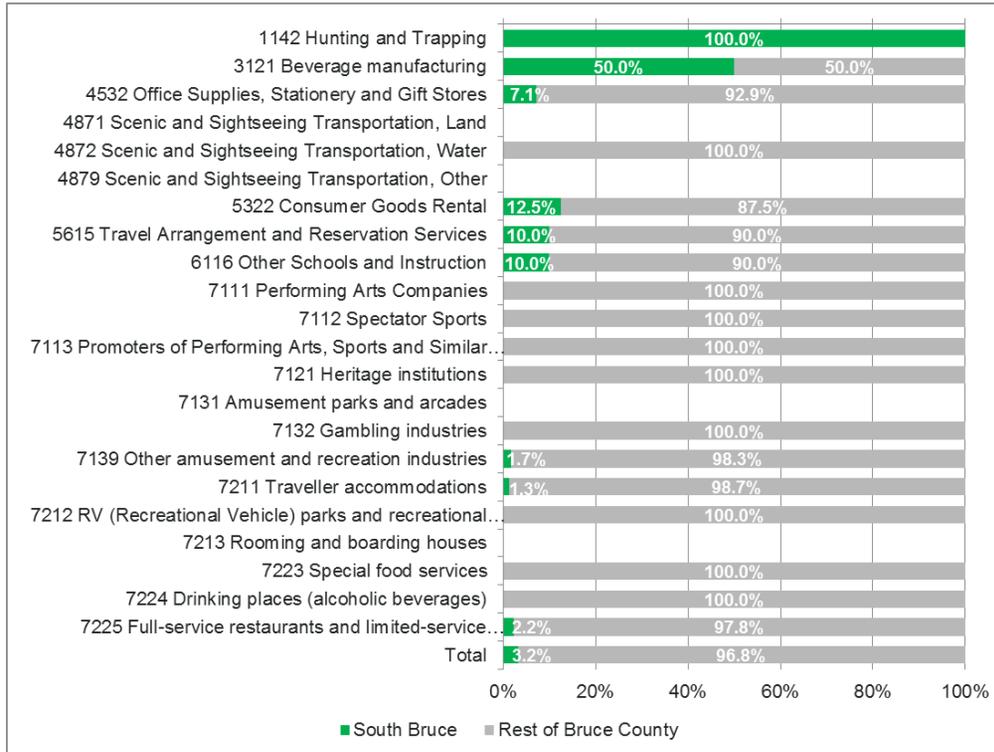
Source: Canadian Business Patterns December 2013

3.4.4 Tourism and Hospitality

In South Bruce, there were a total of 13 firms (3.2%) in the tourism and hospitality sector while in Bruce County there were 407. Although a 100% of firms in the hunting and trapping and 50% of businesses in the beverage manufacturing subsectors were located in South Bruce, there was only one establishment in hunting and trapping and two in beverage manufacturing for the municipality. Among the other subsectors that had a presence in South Bruce, they each had one establishment except for office supplies, stationery and gift stores which had two, and full service restaurants and limited service eating places which had three.



FIGURE 35: BUSINESS PATTERNS FOR TOURISM AND HOSPITALITY SECTOR, 2013



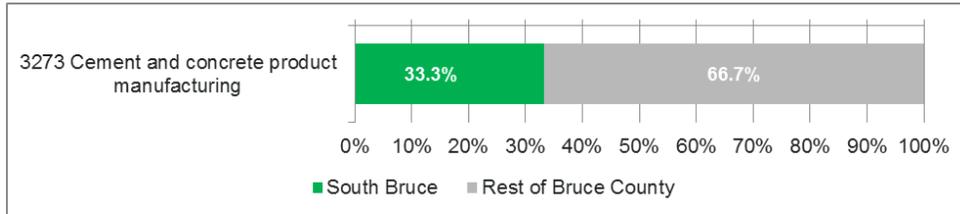
Source: Canadian Business Patterns December 2013

3.4.5 Aggregate Sector

Although 33.3% of the businesses in cement and concrete product manufacturing were located in South Bruce, there was only one firm located in the municipality.



FIGURE 36: BUSINESS PATTERNS FOR AGGREGATE SECTOR, 2013

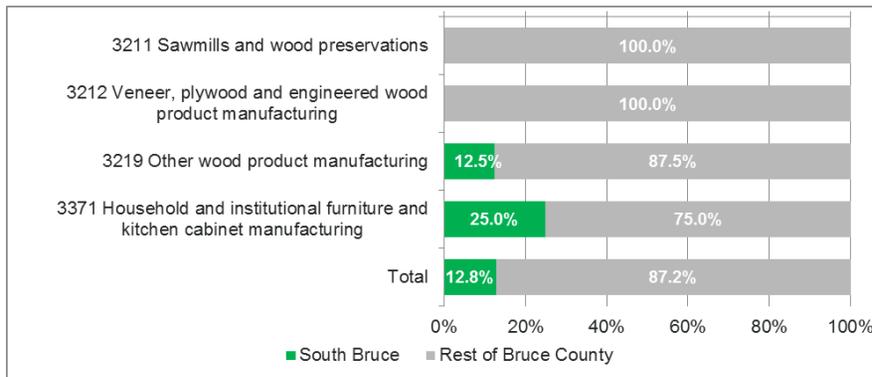


Source: Canadian Business Patterns December 2013

3.4.6 Wood Product Manufacturing

Overall, 12.8% of businesses in the wood product manufacturing sector in Bruce County were located in South Bruce which was comparable to the total proportion of businesses that were located in the municipality. Although 25.0% of firms in the household and institution furniture and kitchen cabinet manufacturing subsector were located in South Bruce, there were only three firms in the municipality.

FIGURE 37: BUSINESS PATTERNS FOR WOOD PRODUCT MANUFACTURING SECTOR, 2013



The key sector profile analyzed business patterns data by using location quotient (LQ) to determine the Region's local competitive advantages. The LQ was calculated to measure the concentration of businesses in the Bay of Quinte relative to the Province. The profile for each key sector involved a LQ analysis of each sub-category at the 4-digit NAICS level and the performance of overall key sector.



4 Community and Stakeholder Engagement

In order to gain a deeper understanding of the local economic environment, needs, trends, opportunities, and obstacles to growth and prosperity a comprehensive consultation of local businesses, residents, and community stakeholders was undertaken. As it is often just as important, if not more so, to know what the outside perception of your community is, and what the potential strengths, weaknesses, and opportunities are to others.

To accommodate this notion, the scope of the interview process was expanded to include regional and provincial economic development actors and partners from the public and private sectors who have a direct or indirect influence on economic development in South Bruce.

The public engagement activities aforementioned included:

§ **Community Survey** – an online survey was completed by 53 members of the community. The survey is important part of engagement as it reaches a wide cross section of the community and allows for a variety of opinions to be gathered. The findings from the online survey are summarized in the section 4.1 below. The complete quantitative analysis is available in Appendix 2: Online Survey Results.

§ **Stakeholder Interviews** – A total of 28 telephone interviews were completed with municipal and provincial staff, and representatives from a wide variety of businesses, local developers, farmers, local and regional politicians, community groups, industry associations, regional organizations, and other economic development actors.

Interviews with stakeholders are an important part of the engagement process as it unlocks information about the community that is more nuanced, and may not be identified in the Survey and quantitative analysis. Emerging from these interviews is a series of major themes that are summarized in section 4.2 below. The complete qualitative analysis is available in Appendix 3: Business and Stakeholder Interviews.

Ultimately, the outcomes and findings of the engagement process are utilized below and aggregated into the SWOT Analysis, in order to ground truth and verify the suitability and feasibility of the economic development opportunities, recommended initiatives and actions outlined in the plan. This is to ensure that the directions established in this report reflect the interests, ideas, goals, and recommendations of the community, its businesses, and stakeholders.



4.1 Online Survey Findings

This section of the report summarizes the results of a broad based community survey that was distributed online. The purpose of the survey was to gain insights on South Bruce's economic opportunities and challenges from local residents, businesses, and community groups. The survey was targeted to a broad audience to gather a wide range of quantifiable data. Notice of the survey was advertised in local media and posted on the Municipality's website in order to secure uptake from as large group of participants as possible.

4.1.1 Data Analysis and Methodology

The online survey had the participation of 53 community members in South Bruce and the surrounding area. Participants to the survey were given the opportunity to answer questions online between May 2014 and August 2014.

The survey was structured to identify issues from the following stakeholders:

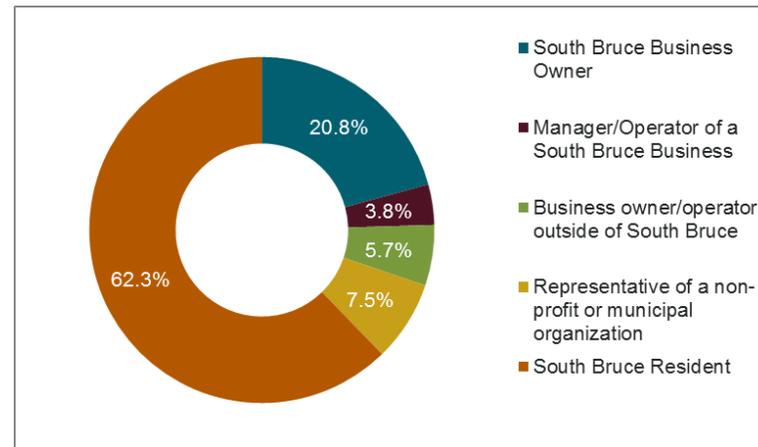
- § Residents
- § Business Owner/Operator
- § Community Organization/Stakeholder

A total of 46 detailed questions were asked, however these questions were divided among the different stakeholder groups. The survey tools used for data collection and analysis were Survey Monkey and Microsoft Excel.

The survey was designed to be an easy-to-use template that would facilitate data entry, as well as data analysis. A combination of qualitative and quantitative questions was asked to gather insight on the community from survey participants.

The majority of stakeholders identified themselves as South Bruce residents (62.3% or 33), while the next highest responses were business owners (20.8% or 11) and representatives of non-profit or municipal organization (7.5% or four).

FIGURE 38: ARE YOU RESPONDING AS A:





4.1.2 Summary of Key Findings

The following bulleted points serve to highlight the most central findings in the resident survey:

Resident Portion

- § The largest portion of survey respondents was between the ages of 46-55 (25.0% or five), 56-65 (25.0% or five) and 26-35 (20.0% or four)
- § When participants were asked how they felt about South Bruce as a place to live the most common characteristics were: great place to live and raise family, small community, good efforts made to turn South Bruce into tourist destination and youth retention problems
- § Respondents were asked to identify three distinct assets or advantages that South Bruce had to build a strong economy and the following advantages emerged: access to municipal services, strong community that supports local business, products and produce, agricultural sector and recreational assets
- § When asked to rank the quality of numerous goods and services in South Bruce, participants were most satisfied with Public library (3.53), Healthcare (3.13), Waste management (3.00) and Education (3.00)
- § The majority of respondents (73.3% or 11) strongly and somewhat agreed that South Bruce was a good place for businesses to locate
- § 93.3% of participants (14) strongly or somewhat agreed that South Bruce needed to pursue commercial (retail)/industrial growth
- § The large majority of participants (86.7% or 13) strongly and somewhat agreed that South Bruce needed to actively pursue residential growth
- § The majority of respondents (60% or nine) strongly and somewhat agreed that South Bruce is welcoming to newcomers
- § When asked to rank the importance of 13 factors that would impact the future growth of South Bruce, the most important factors were: Supporting small business (3.80), Senior's facilities and services (3.79) and Downtown revitalization (3.75)
- § Participants were asked to identify any other important factors to future growth in South Bruce that were previously addressed and the most commonly cited factors were: building upon existing strengths and assets, development of the downtown through private sector investment and diversifying the economy



Business Portion

- § All nine participants stated that they lived in the municipality
- § The survey results captured a wide range business types, with two (28.6%) each identified as business services or 'other'; within the 'other' category, participants identified that their business was in real estate and landscaping.
- § The largest portion of respondents (44.4% or four) indicated that they had been operating their business for Longer than 10 years while the next highest response was Less than two years (33.3% or three)
- § A small majority of participants (five or 55.6%) indicated that they were self-employed while the remaining four respondents stated they were small businesses that employed 1 – 49 employees (44.4%)
- § 62.5% of participants (five) somewhat agreed that South Bruce was a good place for businesses to locate, while the remaining strongly or somewhat disagreed
- § When asked if South Bruce is welcoming of newcomers the majority (62.5% or five) strongly or somewhat agreed
- § Participants were primarily concerned with the local economy when asked for their vision of the municipality. Respondents wanted to see further development of the tourism sector, improved main streets, and an increase in the number of businesses and availability of jobs. Despite the strength of the agricultural sector there were concerns that commercial farming represented a long term threat to small farmers in the area.
- § Respondents were asked to identify three distinct assets or advantage that South Bruce had on which to build a strong economy and the most commonly cited advantages were: friendly and supportive community, low land and building costs, and large availability of downtown retail space
- § When asked to rank the importance of 11 factors that would ensure the growth of their business, the highest ranking factors were: Availability and quality of high-speed telecom (9.75), Efficient development environment (8.50) and Affordable energy costs (8.50)
- § Respondents were also asked to rank their satisfaction of 11 factors related to South Bruce as a place to operate their business. The factors participants were most satisfied with were: Availability of land or buildings (8.00), Availability and quality of high-speed telecom (7.88) and Availability of a semi-skilled workforce (7.86)
- § Participants were also asked to note any other important factors to growing and operating their business in South Bruce that were not previously discussed. The most commonly cited factors were: taxes and energy costs, access to good jobs as their business depends on a local client base, and support for local businesses to work together
- § When asked for the primary reason for locating their business in South Bruce, the majority of participants stated that they, or a family member, were already a resident of the community
- § Respondents were asked to identify the three most important barriers to economic growth and success they would like to see the Municipality of South Bruce address. The most important barriers were: downtown revitalization, support for local organizations and businesses, municipal services, and strategic direction



- § Participants were asked to rank the importance of 19 factors that would impact their future prosperity and growth of South Bruce and the most important factors were: Commercial/retail development (4.71), Support for small businesses (4.57) and Attracting more working age families (4.57)
- § In follow up to the question above, respondents were also asked to provide further detail on why these factors were important. The most common themes were: creating an attractive place to live in for young families and retirees, downtown revitalization through residential and commercial development, and ensuring enough land was available for development to fill market demand
- § When participants who identified any of the factors above as unimportant were asked to provide further detail, their responses were that the market would take care of their issues, and that the lack of support for businesses located downtown was the suspected cause of business closures
- § A small majority of participants (57.1% or four) indicated that they were aware of the Spruce the Bruce downtown revitalization program
- § When asked to indicate how their company would perform in the next two years the majority of participants (71.4% or five) stated that their company's performance would be somewhat stronger
- § Participants were asked if they had plans to upgrade or expand their business, and 71.4% responded 'yes'. When asked to elaborate on their plans, respondents identified building improvements, investment in equipment and expansion of their client base as reasons for their renovation/expansion.
- § Respondents were asked if there were barriers to business expansion, and the majority (71.4% or five) indicated that barriers did exist in the municipality. When asked for further detail, participants cited the development process, declining population, and lack of small business support as barriers to growth
- § Participants were asked to identify any opportunities the municipality could consider to support economic development and the most common factors were: agricultural sector development, residential growth and increased business supports, including partnering with the South Bruce Business Association to hire a business developer

Community Organization Portion

- § Participants were asked how long their organization had been operating in South Bruce and both respondents indicated that they had been operating in the municipality longer than 10 years
- § When asked if they service any other areas beyond South Bruce, two respondents identified Bruce County while one indicated Grey County
- § Participants were asked to provide further detail on how their group plays a role in supporting economic development in South Bruce. One respondent stated that their organization hired local people, encouraged local people to pursue



careers which could lead them to return to the area, and conducted activities to convince working professionals to move back home. The other participant specified that they supported business development and regional economic development initiatives.

- § When asked what key words they would use to promote South Bruce to potential investors, participants mentioned the following: high-speed internet, low real estate costs, strong work ethic, proximity to major centres, agricultural sector
- § Participants were asked to rank the importance of 11 factors for supporting business growth and prosperity in South Bruce. The most important factors were: Access to financing (9.00), Availability and quality of high-speed telecom (9.00), Availability of a skilled workforce (9.00) and Access to post-secondary education and skills training (8.50)
- § Participants were asked to identify the three distinct assets or advantages South Bruce had on which to build a strong economy and among the two respondents the following advantages emerged: strong work ethic, low business costs, high speed internet, and commercial and niche farming
- § When asked to identify the three most important challenges and barriers to growth respondents would like to see the Municipality of South Bruce address in the next five years. According to the two participants the most important barriers were: business support, commercial development, and a declining population
- § Respondents were asked to rank the importance of 19 factors that would impact their future success and growth of South Bruce. The most important factors were: Developing niche tourism opportunities (5.00) and Collaboration with others (5.00). The next important factors were Industrial land development (4.50), Support for small businesses (4.50), More young professionals (4.50), and Downtown revitalization (4.50)
- § When asked if there were any assets that were missing which would make South Bruce more attractive to investors participants cited: high speed internet/telecom, skilled labour force, business friendly development process and entrepreneurship
- § Participants were asked to identify any opportunities the municipality should consider to support economic development. The most commonly cited opportunities were: business support position and support for the agricultural industry

All Stakeholders Portion

- § Participants were asked if they had any additional comments and the most common themes were: diversifying municipal funding sources, improved streetscapes, a need to differentiate South Bruce from other small communities, and incentives for downtown businesses and landowners



4.2 Business and Stakeholder Interview Findings

A total of 28 telephone interviews with key stakeholders were undertaken to gain a deeper understanding of the community's need which would assist in the preparation of the South Bruce Economic Development Strategy.

4.2.1 Data Analysis and Methodology

One on one phone interviews with key stakeholders was undertaken to uncover local knowledge about the community that was not identified in the quantitative analysis completed earlier. A wide variety of stakeholders were interviewed that ranged from municipal staff, businesses, industry associations, community groups, regional organizations, and other economic development actors. Key target audiences and contacts were provided by the Municipality, and the interview list developed in collaboration with Millier Dickinson Blais to support key stakeholder identification.

As discussed above, outside perspectives, as well as those internal to South Bruce were sought in order to provide a more fulsome reflection of the current state and future prospects of the municipality. Outside eyes can often identify opportunities and threats that may be overlooked, or understated by those closest and more accustomed to them.

A series of written questions regarding economic development were prepared ahead of the interviews which were used to guide the conversations with each of the stakeholders. Responses to each of the questions were recorded by the interviewer which was then grouped by similarity which was used to find the emerging major themes. The findings from the interviews were used to inform the SWOT analysis which can be found in Section 5.1.

4.2.2 Summary of Key Findings

The following major themes emerged from the stakeholder interviews:

Agricultural Development

The agricultural sector was recognized as being one of the most important sectors in the local economy and was seen as a key driver for future growth. Respondents envision many economic spinoff opportunities from agriculture that help to support local businesses, produce and products. Due to the presence of many farms that sell their own products, stakeholders saw the potential for agri-tourism/agri-business for the community. Stakeholders also suggested that local crops being grown in the community could be leveraged to create a farmers' market, farms tours, and additional food stands which would encourage residents and visitors to purchase local products further supporting South Bruce's



agricultural sector. Stakeholders also recognized the potential to attract a food manufacturer/processor to the community due to the strong agricultural sector.

Tourism Development

The development of the tourism sector in South Bruce was recognized by many participants as key opportunity for future economic growth. The community had a variety of natural assets, such as natural springs and back roads/trails that could be developed to create unique experiences. The strong agricultural presence in South Bruce could also be leveraged to create a culinary experience such as a local food trail. The development of these local assets could be used to attract visitors to the community and capture some of the drive through traffic in the region. Finally participants suggested the need to promote the different communities as a whole to build upon the area's collective strengths and a branding exercise to develop a unique position from the surrounding communities.

Local Business Support and Downtown Redevelopment

Participants wanted to see a strong and growing downtown core through the development of local businesses. The high proportion of vacant buildings was seen as a long term threat to the viability of a strong downtown. Stakeholders suggested that incentives for new businesses and promotion of available properties could be tools used by the municipality to attract businesses to occupy the vacant buildings. Participants also wanted to see action taken and a business plan to support the revitalization of the downtown core.

In addition participants stated the need for programs to support development and growth of small businesses in the community. Greater promotion of the Spruce the Bruce program and easier application process was suggested as ways to improve the utilization of the program. In order to differentiate South Bruce from the surrounding communities, stakeholders suggested that the municipality could promote local artisans and small businesses that create unique local products.

Finally participants stated that the municipality should develop a second business location/expansion program to attract new businesses and aid businesses with succession planning as many owners were close to retirement age.

Industrial Land and Infrastructure Development

Participants stated that the lack of available industrial lands for development was a major barrier in attracting new businesses. In order to offset this barrier the municipality should promote industrial lands that are available to increase



development. The current state of infrastructure in South Bruce was raised as concern by participants. The lack of high speed internet coverage in rural communities, distance from major transportation corridors, and lack of downtown parking were cited as challenges to the economic growth of the area. Stakeholders stated that the new sewer system that was installed in South Bruce could be used to attract new development projects to the community. In addition expanded high speed internet coverage was cited by many participants as a key infrastructure upgrade that was needed to stimulate economic development in the municipality.

Workforce Development

Although South Bruce has the presence of skilled workers in the area, there were concerns voiced by stakeholders regarding the future of the labour force. Like many small communities in Ontario, South Bruce encounters difficulty in attracting and retaining skilled, young adult workers. In addition, businesses found it difficult to invest in training for their workers as there was a risk that younger, more mobile staff would leave for greater prospects. However, participants identified the potential that close proximity to Bruce Power represented, and the opportunity to leverage this and the relatively lower housing costs in South Bruce as a means to attract younger skilled workers and professionals. It was also identified that South Bruce would need to ensure that it has the necessary lifestyle and commercial amenities available to become a place where young people would want to live.

Residential Growth/Development

The small residential population in South Bruce was recognized as key factor in limiting the tax base and services that the municipality could provide. In order to increase service levels, many participants stated that they would like to see further residential development. Stakeholders suggested that future housing demand in South Bruce would consist of single detach homes, single story rental units, and townhouses. Targeting and attracting affluent retirees, active seniors, young families and professionals leveraging Bruce Power and other regional employers, and the lower cost and quality of 'country' life advantage was cited as key. It was also suggested that there would be increased demand for housing due to the refurbishment at Bruce Power.

The greatest potential for stimulating growth was identified as coming from local developers. It was stressed that the municipality needed to improve its development process and conduct its services in a way that educated, guided and supported local developers. In addition, the need for seniors housing due to an aging population in the region was voiced, however responses were mixed on the type of senior housing that should be built. Residential growth was also indicated as critical to supporting sustainability and expansion of local small businesses.



5 Where Do We Want to Go?

5.1 SWOT (Strengths, Weaknesses, Opportunities, Threats)

The following section of this report presents aggregated findings into common themes from the various forms of community and stakeholder consultations performed, including the detailed demographic and socio-economic analysis results, as well as a comprehensive background review of relevant programs, initiatives and policies into a SWOT (strengths, Weaknesses, Opportunities, and Threats) Analysis.

An important element to any strategic plan, a SWOT analysis is a valuable tool that supports decision making through the identification of internal and external factors that directly impact on the viability of an organization's projects or plans.

Strengths are generally attributed to local assets and resources the municipality can leverage, or build on to support local growth and prosperity. Weaknesses are current disadvantages internal to the community that hinder, or impeded successful outcomes. These factors may require improvement, strengthening, or mitigation in order to encourage and support the organizations ability to capitalize on opportunities.

Opportunities are specific elements that the municipality can exploit, or leverage to its advantage in order to overcome challenges and effect positive change. Threats are generally associated with factors that may jeopardize a community's success and represent barriers, or obstacles that may prevent the municipality's ability to implement its strategy.

The purpose of this section is to utilize the SWOT Analysis in order to inform the overarching goals and objectives and the necessary recommended actions outlined further below in the Action Plans section of South Bruce's Economic Development Strategy.

5.1.1 Strengths

Robust Agricultural Industry and Farming Heritage

South Bruce prides itself on a robust and well developed agricultural sector that is rooted in pastoralism and farming heritage. It also includes significant cash crops that have recently come into production more recently, and a strong co-operative approach to farming and production, seen most visibly in the Gay Lea Creamery Co-operative. The area is well known for beef and dairy production and the presence of a Mennonite community, as well as an environment supportive of locally grown foods home-made products. The farming heritage extends to a strong "tractor" culture, which is



evidenced by the Father's Day Vintage Tractor Tour, now in its 15th year. A supportive supply chain also exists in the area and a strong agricultural workforce that is coupled with above average level of accumulated wealth among the farm ownership – some of which has allowed diversification into various other business pursuits, including local development.

Geographic Location and Proximity to Bruce Power

South Bruce benefits from its position as the 'Gateway to Bruce County', with two regional Highways, 9 and 4, travelling directly through the municipality. It has also benefited from its relative proximity to Bruce Power, where numerous local residents commute to daily for work in a variety of well-paying and high skilled positions. A rural and high quality of life environment, low housing prices, and affordable cost of living position the municipality well to attract early and able retirees, as well as young families and mobile professionals looking to relocate outside of major urban areas.

Strong, Supportive Community Spirit and Values

It was clearly indicated that South Bruce is a friendly and supportive rural community that is an excellent place to live and raise a family. It has a high proportion of small, family run businesses, and artisans that produce unique products and goods. There is a firm sense of community, displayed through the various community groups and volunteerism, a supportive nature for local businesses in general, and a strong work ethic. There are many local sports teams and recreational facilities, with various local and culturally driven events throughout the year.

5.1.2 Weaknesses

Insufficient Commercial Amenities and Retail Leakage

A lack of shopping opportunities or the necessary level of desired commercial retail amenities in South Bruce was identified as a weakness. This issue is further exacerbated by the level of commuters who travel outside of the community to work and do the majority of their shopping in neighbouring communities that offer the desired products and services (often big box or major retailers). This results in retail leakage and places increased strain on local retailers that have difficulty competing for limited local spending power. This commercial gap also frustrates the ability to attract more residential development, as builders may be less inclined to invest in an area that does not have a commercial plan to increase amenities, and lessens interest of buyers looking for new areas to relocate and live.

Municipality is not "Investment Ready"

A common theme observed through multiple forms of outreach was the lack of shovel ready land in South Bruce needed for attracting industrial and commercial development. Not only was this identified as a significant barrier preventing



growth, it was also cited as an opportunity to be capitalized on, in order to increase the competitiveness of the municipality. Investment readiness also includes a municipality's ability to respond effectively to investment inquiries (from within and outside of the community). It is critical that South Bruce work to ensure that staff and internal processes are aligned in a manner that facilitates and guides local businesses and prospective investors in a proactive and solution oriented manner when responding to local expansion and new development inquiries.

Depressed and Under-developed Downtowns

A significant level of interest was indicated for increasing the level of support and municipal focus on revitalizing the Downtown areas. Although it was indicated by some that Downtown Mildmay fared better than the other main streets as it has been able to retain, and even support some growth in boutique and unique retail offerings, overall, there was a sense that room for improvement was needed. Lack of attention to vacant properties and a generally depressed area was seen as preventing increased business opportunities. The need for better access to the Spruce the Bruce program offered through Bruce County was identified as a priority, as well improving the signage and visibility of store fronts. This was coupled with a desire to see a Tourism Plan that would encourage more travellers and through traffic to stop and visit the various shops and provide a compelling reason to draw more attention to the Downtown.

Lack of Well-defined Community Brand and Destination Experience

There is a strong need for South Bruce to establish a community Brand that will help define and promote the municipality to the outside world. This must be developed in a manner that accentuates the unique elements that differentiate the municipality from its competitors, and celebrates its assets and strengths. As the Gateway to Bruce County, the municipality is positioned to receive significant inflows of tourist traffic seasonally throughout the year. However, an ongoing concern with businesses, stakeholders and residents alike is the relative inability of the communities to benefit from prolonged visitor stays, or economic spin-off as travellers often continue through the municipality without stopping. Although creating a unique brand for South Bruce did not rank as high as other factors impacting the future prosperity of the municipality when asked, it was clearly identified as a priority to focus on within the next 18-24 months.

5.1.3 Opportunities

Tourism Potential Contained in Local Agriculture, Heritage and Environment

An area of significant potential was identified as tourism, particularly culinary and agri-tourism, which in turn is closely related to building off of the growing momentum associated with the societal trend to better understand where our food comes from, how it is grown or raised, and the fundamental role local producer's play in our lives. Well established local



events such as the Vintage Tractor Tour, Mildmay-Carrick Fall Fair, Teeswater Fall Fair, Formosa Farm Toy Show, and Belmore Maple Syrup Festival can be leveraged along with creative farm gate stands, and unique food and beverages producers such as the Cheese Haus and Hoity Toity Cellars into packaged and cooperatively marketed destination experiences for visitors travelling into Bruce County. Positioned as the 'Gateway to the Bruce', the municipality can leverage well established adventure tourism campaigns such as the Explore the Bruce initiative to increase traffic, visitation, and stimulate increased local commerce.

Support for Increased Residential Development

New residential development was indicated as an opportunity and specific need in the community in order to encourage new families and increase the population over time. The creation of a retirement village, and affordable, medium density homes in order to support new retirees and an active elderly population, as well as retaining and attracting young professionals and families was cited as a key factor in growing the community and encouraging more local spending. Increased residential development will also provide an uptick in tax revenues to support municipal services and programming and increase the local workforce, thereby making the community more attractive to prospective employers. Further, if planned correctly, it will also stimulate increased commercial development and demand for more institutional services such as schools, which in turn result in economic benefits through increased local construction activity as the community grows.

Encourage Senior's/Assisted Living Facility

Supporting an aging population through the attraction of an assisted living facility presents an opportunity in the area. Although a facility of this nature may require some form of public and private partnership, and need to meet the necessary levels of certification and regulatory approvals, it would stimulate increased employment of medical and support professionals and have positive benefits associated during the construction period.

Downtown Revitalization and Spruce the Bruce Program

Improved access to the Spruce the Bruce Program and encouraging streetscaping and facade improvements were seen as key opportunities to supporting downtown redevelopment. Further, the need to develop a business plan specific to revitalizing the downtown areas was identified, as well as the notion of creating incentives to encourage new businesses to establish downtown. A need to develop destination retail opportunities that would drive increased foot traffic and positively impact on other businesses collocated in the core was also identified.



Leverage Agricultural Sector and Establish Farmer's Market

An opportunity exists to consider the establishment of a Farmer's Market in South Bruce. Various feedback during the consultation phase indicated that local farmers and producers of local foods and country goods either rely on farm gate sales, or travel outside of the municipality to nearby markets, or may travel as far as St. Jacob's to move their goods. There is strong desire to eat and promote local foods, and the River Village Co-op in downtown Teeswater, although recently closed, illustrates the potential for a local venue as it operated for roughly seven years serving the community. Co-locating in one of the downtowns could also increase additional retail activity if planned and implemented effectively.

Potential to Foster Value Added Food Processing Opportunities

A strong and well developed beef cattle and dairy industry exists in South Bruce that could be leveraged to support additional economic opportunities along the agricultural value chain. Cattle that are currently shipped to larger urban centres, such as Guelph, could be processed locally if an abattoir and meat packing facility were established. Further, cash crops that are produced locally also contain the potential for encouraging vertical integration if the appropriate levels of capital investment can be secured. Local agricultural associations and co-ops would need to be supported and effectively leveraged in order to support marketing and access to larger markets for local farmers.

5.1.4 Threats

Lack of Dedicated Economic Development Function

The lack of a dedicated economic development and business support function at the Municipality was identified as a significant threat to investment attraction and expansion. The need for a staff member who can lead and spearhead initiatives, as well as act as a liaison to potential investors, stakeholders and businesses in order to support growth and increased opportunity was prevalent in the engagement process. There is strong competition from surrounding municipalities to attract new industry, skilled labour, residents and development opportunities. A lack of resources to promote and maximize South Bruce's competitive advantages and foster growth may result in lost opportunities to other municipalities.

Population Decline, Aging, and Youth Leaving the Community

South Bruce is facing a difficult combination of population decline, a slowly aging population and youth who are leaving the community for a number of reasons including higher education and increased employment opportunities elsewhere. This represents a significant threat to the municipality as it impedes local employer's ability to hire young people,



increasing the risks associated with investing in training, and raises concerns related to future workforce availability. It also has longer term implications related to municipal revenue generation, program delivery, and is a barrier to attracting more employers and commercial development. Youth retention, the attraction of young families and able/early retirees were identified as critical for sustaining a balanced community and South Bruce's long term prosperity.

Community Apprehension to Change and Parochialism

An undercurrent in the stakeholder and community consultations was the issue related to inter-community rivalry and a perceived apprehension among some cohorts within the municipality that were apprehensive to change. This was identified as being present in various levels of leadership, as well as within the community at large. A strong need for collective unity, and the different communities to work together as one municipality was identified. Further, the idea that the municipality was somewhat insular or inward focused was also identified, and that the municipality should actively look for opportunities to collaborate with the neighbouring communities and the County in order to increase the likelihood of social and economic opportunity and long term success.

Insufficient Supports for Small Business and Entrepreneurship

A weak relationship between Council and local businesses was identified in the consultation process. Further, it was clearly indicated that a significant need exists for increased support programs and incentives to encourage new small business development and growth of existing companies. Succession planning, as well as other small business advice services, and access to financial supports are required. Although the municipality is serviced by a number of commercial banks, stakeholders indicated difficulty accessing the different programming available through the Community Futures Development Corporations due to different internal jurisdictions. A need for better coordinated services through the municipality and its service delivery partners was identified.

5.2 Competitive Positioning: Advantages and Disadvantages

The SWOT Analysis completed in the section above is a valuable exercise and important step to identifying the best options for economic improvement in the municipality, and the barriers that exist. However, in order to better understand South Bruce's ability to facilitate future business retention and development, and to harness new investment attraction opportunities it is necessary to dig deeper to determine the Municipality's competitive advantages and disadvantages.

In contrast to strengths and weaknesses, which may be commonly experienced by South Bruce as well as its competitors and neighbouring areas, competitive advantages and disadvantages, will often differentiate an area from its competitors. There is a greater likelihood of continued success if the municipality can effectively focus its economic development



activities in a targeted manner that will support the local industries, and new businesses that can capitalize on the competitive advantages, rather than suffering from the disadvantages. In turn, the municipality should fully understand the competitive disadvantages, and determine if, and how they will address these factors in order to foster change, and the potential impact they have on achieving the community’s goals and objectives.

§ Competitive advantages form the centre of an areas unique value proposition. They represent the “wow” factor that can inspire and motivate prospective investors to take interest in the municipality. They are also positive elements that can be leveraged in order to effect positive change and stimulate growth and opportunity from the ground up.

§ Competitive disadvantages are problematic elements that the community needs to address in order to encourage more business investment and local prosperity. They are factors that place it at risk of losing potential interest from investors in favour of other areas, or, represent obstacles to be overcome in order to prepare the community to be able to capitalize on new opportunities and proactively pursue initiatives that effect positive economic change.

FIGURE 39: SOUTH BRUCE COMPETITIVE ADVANTAGES AND DISADVANTAGES

COMPETITIVE ADVANTAGES	COMPETITIVE DISADVANTAGES
<ul style="list-style-type: none"> • Significant level of wealth in farming community can be leveraged to support investment in local developments • Robust agricultural sector that can support value added processing and the potential for cluster development • Strong agri-business co-operatives and mindset that can be leveraged to support new business development • Vibrant ‘Farm Heritage’ and ‘Tractor Culture’ can be developed into a local attraction/destination experience • Highway 9 runs directly through Mildmay and is a main travel route for tourism destinations along Lake Huron • Lower cost of living and housing prices make the area compelling for relocation from larger urban centres • No development charges and competitive tax rates • Local farmers and entrepreneurs beginning to establish new residential developments to support population growth and aging population needs 	<ul style="list-style-type: none"> • Lack of commercial base to prevent ‘retail leakage’ • Lack of commercial accommodations to support longer visitor stays (no local Hotel or well defined and marketed Bed & Breakfast offerings) • No Municipal “Brand” that differentiates South Bruce from neighbouring areas and highlights unique offerings • Municipality is not “Investment Ready” and employment land is not shovel-ready to attract new development • Unarticulated tourism-based business offerings and lack of defined destination experience to compel tourism • The Bruce Trail does not run directly through South Bruce limiting its value as a tourism lever • Underdeveloped and depressed Downtowns • Neighbouring municipal business park developed, shovel ready and competitively priced • Aging population and youth out-migration negatively impact on the employment base and future availability



5.3 Overview of Key Economic Development Opportunities

5.3.1 Stimulate Downtown Revitalization by Leveraging Spruce the Bruce

One of the key economic development opportunities that emerged from the consultative and research process was the importance of revitalizing the downtown areas in South Bruce. Currently, the majority of commercial retail activity in the municipality is contained in these areas, and they are the main centres of social congregation outside of festivals, sports events, and faith based activities. Downtown areas play an important role, not only in providing basic and unique shopping experiences, but offer dining, employment, tourism and recreational opportunities to a community as well.

Concerns were raised by community members and business owners that not enough attention was paid to redeveloping and revitalizing these areas and that improved access to funding mechanisms and supports for local shop owners to improve the appeal of store fronts, fill vacancies, and increase visitor traffic and spending was required.

The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) defines the approach to successful Downtown Revitalization as including more than the physical infrastructure, and extends to include local demographics, the impression that a community leaves on its visitors, and how appealing it is to investors.⁷ Further, effective revitalization efforts require a four pronged approach that is both strategic, and tactical, including:

- § Economic Development – targeting new consumers/markets and businesses to fill gaps and increase commerce
- § Leadership and Management – ensuring stakeholder engagement, unified vision, and effective implementation
- § Marketing and Promotion – communicating a compelling brand identity and activities that enhance the downtown
- § Physical Improvements – improving streetscaping, store fronts, parking, accessibility, and walkable environments⁸

The Spruce the Bruce Downtown Improvement Program available through Bruce County is an important tool that can be leveraged to help support these efforts. Since its implementation it has gained swift momentum and seen some significant success, both in financial program leverage, positive collaboration from business, and recognition (including collaboration with the recent Benjamin Moore ‘Main Street Matters’ campaign). In the spring of 2014, Bruce County received two provincial grants totalling \$345,000 through the Rural Economic Development fund to support projects in Kincardine, Port Elgin, Southampton, Sauble Beach, Wiarton, Lion’s Head, and Tobermory.⁹ Further, \$172,500 of these resources Bruce

⁷ Ontario Ministry of Agriculture and Rural Affairs, Official Website: *Downtown Revitalization – What is Downtown Revitalization?* (last modified Nov. 13, 2013) <http://www.omafra.gov.on.ca/english/rural/edr/dr/> (accessed on 2014-09-26).

⁸ Ibid.

⁹ Bruce County – Spruce the Bruce Media, *County of Bruce Receives \$172,500 in provincial funding through the Rural Economic Development Program (RED)*; <http://www.brucecounty.on.ca/business/spruce-the-bruce/media.php> (accessed on 2014-09-26).



County is directing toward its “Destination Downtown: Brand Redevelopment Project” as well as the “Rural Business Recruitment Enhancement Strategy”, which are focused on supporting individual community brand development and their incorporation in to larger, regional scale tourism initiatives, as targeted investment attraction and the creation of marketing collaterals.¹⁰

The Spruce the Bruce Program offers six different grants for the following: Gateways and Public Signage, Streetscape Beautification, Collaborative Marketing, Perpendicular Signage/Awnings, Façade Improvement, and Destination Improvement. In 2014, over 40 grant applications were awarded across various municipalities and their respective townships in Bruce County.¹¹ None of these were awarded in South Bruce. That said, in 2013 Teeswater did receive six grants and Mildmay received two according to the program website. However, compared to neighbouring areas, this indicates a low to moderate uptake.

Further, the Spruce the Bruce program offers more than grants for physical improvements in the various downtowns. The County staff have developed a comprehensive Community Toolkit based on an adopted Main Street USA Four Point Approach to revitalization, with a significant emphasis on assisting the municipality in defining and establishing a brand identity and destination development.¹²

It includes an assessment of the community’s organizational state and readiness to engage in revitalization, a downtown diagnostic exercise, consumer and trade analysis support through OMAFRA, and brand development. Although based on an established framework, each municipality’s toolkit is customized and illustrates its uniqueness. It is also advantageous in that Bruce County planning staff is directly involved as this supports strategic policy alignment and facilitates technical implementation. When examining participation in this valuable support, Mildmay and Teeswater were the only communities that did not have a toolkit completed.

It is imperative that the Municipality of South Bruce take the necessary steps to actively engage and capitalize on the Spruce the Bruce program and leverage the supports available through Bruce County. Background research indicates that a draft Community Improvement Plan through the municipality is in place for Mildmay and Teeswater (March 24th 2013 DRAFT)¹³ and that draft designated program areas have been assigned.¹⁴ This indicates that a policy framework is

¹⁰ Ibid.

¹¹ <http://www.brucecounty.on.ca/business/spruce-the-bruce.php>

¹² Spruce the Bruce, Wiarton Community Toolkit <http://www.brucecounty.on.ca/assets/departments/planning/files/STB%20Documents/STB-Wiarton-Toolkit2013LR.pdf>

¹³ The Corporation of the Municipality of South Bruce, *COMMUNITY IMPROVEMENT PLAN Municipality of South Bruce (Mildmay and Teeswater) May 24th 2013 DRAFT*

¹⁴ The Corporation of the Municipality of South Bruce, *SCHEDULE 'A-1' Municipality of South Bruce Community Improvement Plan Project Area Mildmay; SCHEDULE 'A-2' Municipality of South Bruce Community Improvement Plan Project Area Teeswater*; Spruce the Bruce Downtown Improvement Program – Policies and Maps, <http://www.brucecounty.on.ca/business/spruce-the-bruce/policies-and-maps.php>



in place to support access to the necessary programming. However, this alone is not enough to spearhead a downtown revitalization effort. Strong organizational capacity, stakeholder collaboration, and community leadership is needed to build the necessary trust, consensus and cooperation to move the initiative forward.

An appropriate first step in this evolution would be the establishment of a Downtown Business Improvement Association, or Downtown Revitalization Committee comprised of vested business owners and operators, stakeholders, municipal staff, Council, and community members. This could also take the form of a sub-committee of the South Bruce Community & Business Association, or local Community Economic Development Committee. However, the end goal of a BIA allows the municipality and the downtown stakeholders' greater access to provincial funding and support through the creation of an established organization with dedicated staff, a volunteer Board, and the ability deliver programs.¹⁵ They also act as an organizational representative of downtown businesses and advocate for public policy that meets the needs of their members and the best interests of the Downtown areas.

It will also require that South Bruce develop a formal Downtown Revitalization Strategy that formalizes the vision and direction the community has for its downtown areas, and lays the foundation for implementing and leveraging the findings and outcomes available through the Community Toolkit.

There is great potential contained in strategically aligning the opportunities above related to establishing a Farmers' Market, Culinary and Local Food Experience, as well as leveraging the Tractor Farm Culture. The Downtowns of Teeswater and Mildmay could be positioned as dynamic centres of planning and activity that integrate hosting and launching of local celebrations and events, as well as being an ideal location for establishing a Farmers' Market.

As indicated in the sections above, a local Market can act as a local promotional hub and starting point for culinary, cycling, and cultural tours, and an additional draw to the downtown as a destination point, which in turn will increase visitor traffic and stimulate commerce for merchants en route and in close proximity.

5.3.2 Establish a Farmer's Market, Culinary and Local Food Experience

All of the right conditions exist in South Bruce for the potential to develop a strong, place based local food initiative that incorporates a number of agricultural, culinary, heritage, and agri-business elements together. Community and stakeholder consultations clearly identified the need for the municipality to develop a local food and agri-tourism strategy. There are a number of existing elements that could be pulled together in an organized manner to create a more robust and compelling agri-tourism experience that celebrates farming culture and local foods produced in South Bruce.

¹⁵ Ontario, Ministry of Municipal Affairs and Housing - Business Improvement Handbook - 2010 <http://www.mah.gov.on.ca/Asset7396.aspx>



For example, the local farming community already has well established and appealing farm gate stands that are known to some repeat visitors (and locals alike). Travellers who are coming from larger urban centres have a tendency to look for new experiences that take them along back roads for more scenic routes, which also provides the opportunity to reconnect with how their food is grown. Conversely, major roads and time restraints may influence travellers to take more direct routes in the absence of marketing campaigns or promotional efforts that offer compelling reasons not to.

Unique local “country entertainment” that have become annual traditions in the area, such as straw bale mazes and haunted houses (e.g., the Spook Haus), can be leveraged as unique selling factors for the area and developed into more complete tourism products in collaboration with farm gate stands and larger local festivals such as the Vintage Tractor Tour, Mildmay-Carrick Fall Fair, Teeswater Fall Fair, Formosa Farm Toy Show, and Belmore Maple Syrup Festival.

That said, it was also identified that local farmers and producers were forced to travel outside of the community to get their products to market, some travelling as far as St. Jacobs, as well as neighbouring Kincardine, and Goderich among others. A central venue such as a local Farmers’ Market could be leveraged as a hub for promoting on-site farm experiences, as well as providing a stable location for vendors to sell their wares. Further, it can act as a knowledge and information centre for coordinating local culinary tours through the various downtown areas and cross-promotion of winery and brewery tours of locations such as Hoity Toity Cellars and Formosa Springs Brewery. With the recent legislative changes allowing Ontario VQA wines to be made available at more than 100 Farmers’ Markets, this presents another opportunity to be explored as a combined product offering (e.g., Walkerton Farmers’ Market and Coffin Ridge Vineyard).¹⁶

The growing numbers of customers who purchase craft beer are similar to those who buy fresh produce at Farmers’ Markets. They tend to want to know more about where the ingredients have come from, the brewing process that was involved, the freshness of the beer, and the quality of the product; very similar to customers wanting to know more about their food and where it has come from. The operation of a craft brewery in the vicinity of a local Farmers’ Market, like Formosa Springs could provide the opportunity for collaboration with local farmers in promoting the importance of local economies, using local ingredients and eating local food.

For example, earlier this year OMAF and MRA announced that the Gananoque Brewing Company would receive \$110,000 from the Local Food Fund to debut The Harvest Festival. This month long festival held from August 22 to September 21 will feature brewery, winery and farm tours, hop picking, mill visits, and a country market. The festival is designed to attract visitors and boost tourism in the region and strengthen the market for local food and beverages. Bucephalus Stables will also receive \$120,000 from the Ontario Local Food Fund to help a small craft brewery in Toronto, Indie Alehouse, develop a new series of barrel-aged beers using fresh, all natural local fruits and local Niagara wine

¹⁶ Ontario Newsroom; Ontario VQA Wines Available at More Than 100 Farmers’ Markets (August 15, 2014 6:00 A.M.) <http://news.ontario.ca/omafra/en/2014/08/ontario-vqa-wines-available-at-more-than-100-farmers-markets.html>



barrels. The potential development of experiential tourism in Formosa, with a focus on local food and craft beer, already has a history of success in Ontario and is part of a larger and growing trend of destination tourism in Ontario.

The Ontario Municipal Knowledge Network produced a report in 2013, *Best Practices in Local Food: A Guide for Municipalities*, in response to Bill 36, the *Local Food Act 2013*, and the provincial Local Food Strategy, in order to aid Ontario municipalities in further developing local food initiatives in their communities. South Bruce matches the criteria for a small rural municipality with low levels of resources, a rich agricultural base, active agri-food sector, and proximity to a larger urban centre (defined as within 100 KMs) of which the following food strategies were identified as most feasible:

- § Farmers' Markets
- § Supportive Planning Policies and Zoning By-laws
- § Local Point of Contact (i.e., local Economic Development or Health Unit Liaison)
- § Regional Food Hub¹⁷

Recognizing the challenges municipalities face regarding resource restraints, the report also developed a model of value to relative cost output in order to various local food related initiatives to guide decision making. Farmer's Markets was among the highest ranking for 'highest value relative to cost'.¹⁸

According to the provincial industry association Farmers' Markets Ontario, Market sales across the province total over \$600 million, with an economic impact of approximately \$1.9 billion, and an employment impact of 27,000 directly involved in the preparation and sale of market products.¹⁹ Further, roughly 60-70% of visitors to markets shop at surrounding vendors and businesses either en route, or surrounding the location.²⁰

The River Village Co-operative Market was mentioned frequently during community and stakeholder conversations as well as the need for a local grocery store that offered products there were in demand and of good value. Although the local residents had banded together to establish the co-op in 2007 in response to the closure of the previous grocer in Teeswater in 2006,²¹ it shuttered its operations in May of 2014.²²

¹⁷ The Ontario Municipal Knowledge Network, *Best Practices in Local Food: A Guide For Municipalities*, Report Prepared by Deloitte LLP and Affiliates (2013), pp 35-39.

¹⁸ Ibid, p. 38.

¹⁹ Farmers' Markets Ontario Market Customer Profile and Impact Study 2009 Report

²⁰ Farmer's Market Ontario <http://www.farmersmarketontario.com/AboutUs.cfm>

²¹ Newfoundland and Labrador Economic Development Corporation, Case Study - *Business Succession in Rural Communities: River Village Co-operative Market – Teeswater, Ontario*

²² River Village Co-op Market – Official Facebook Page, post May 28, 2014; <https://www.facebook.com/RiverVillageCoOpMarket>



The co-op operated for seven years, and stakeholder interviews had mixed perspectives on reasons for closure, ranging from a lack of local support, issues associated with the membership structure, to difficulties that business and property ownership by the same organization presented. Further, it was identified that the existing facility could require physical attention or upgrading. This was not seen as a difficult issue, if the ownership of the building was different than that of the business, allowing the business to focus on operations, with property management the responsibility of the owner. The location could hold the potential to establish a Farmer's Market, as there is also considerable outdoor space for parking and the potential for temporary open-air stands, as well as its location at the end of the Downtown strip in Teeswater.

Ultimately, the municipality will need to determine where the most suitable location for a prospective Framers' Market would be, although it is highly recommended that it be positioned in one of the three town centres of Mildmay, Teeswater, or Formosa. Farmers' Markets Ontario provides support to farmers, municipalities, non-profit organizations and community groups looking to develop public, community based Farmers' Markets with the purpose of serving local growers and consumers. They also offer collaborative solutions, including a Certified Farmers' Market program, and provide extensive strategic planning, operational, development, and marketing advice.²³

The Municipality of South Bruce will need to develop a comprehensive Agri-Tourism Strategy that clearly identifies all of the different and currently disconnected agri-business, farming culture, and unique community based activities, and features, into one coherent and interconnected package, or suite of offerings. It will also require the development of a community brand, which clearly defines and differentiates the South Bruce experience. The current application to the Ontario Tourism Development Fund by South Bruce in collaboration with Bruce County for an interactive tour of nine local food operators to increase the participant's food literacy, consumer awareness of local food, and knowledge of where they can purchase it, is a positive step in the right direction.

Understanding the competition, and more importantly, the complimentary products and experiences provided by the neighbouring communities is critical, as South Bruce needs to leverage these in a manner that positions itself as a valuable part of a larger product offering in Bruce County – even extending so far as adopting a unique position within the broader 'GreyBruce' identity. Foodlink GreyBruce is only one of many inter-regional organizations (including the Regional Tourism Organization (RTO 7) that can be utilized to expand the marketing reach of South Bruce to drive increased interest and commerce in the municipality. There is great potential contained in the moniker "Gateway to the Bruce", if it can be capitalized on effectively.

²³ Farmer's Market Ontario <http://www.farmersmarketontario.com/Services.cfm> and; Farmer's Market Ontario, *Are You Ready to Start A Farmers' Market ?- Checklist*, <http://www.farmersmarketontario.com/Upload/Files/Pre-Readiness.pdf>



5.3.3 Leverage the Tractor Culture to Create a Unique Place-based Attraction

As indicated in the SWOT Analysis and the section immediately above, South Bruce has a vibrant and robust farm heritage and culture. This is in great part due to its strong sense of community and agricultural roots, and is manifest in numerous annual events like the Teeswater Fall Fair, sponsored by Gay Lea Co-op and Teeswater Concrete, which includes various equestrian and cattle related activities, a Farm Gate to Your Plate awareness stand, Big Truck Drags, a Talent Show and naturally, an Antique Tractor Pull!

It is also strongly embodied in what could otherwise be described as a “Tractor Culture” that is well established and provides an experience that is unique to South Bruce, and a significant competitive advantage it leveraged effectively to differentiate the municipality from its surrounding area.

For example, the Father’s Day Vintage Tractor Fair is now in its 15th year and the community of Teeswater boasts the nationally recognized Team Farmall square dancing tractors performance.²⁴ Team Farmall has been performing at various agricultural events and fairs since its inaugural launch at the International Plowing Match (IPM) 2008 that was hosted in Teeswater, and has garnered excellent national media attention, being featured by CBC on The Rick Mercer Report at the 2010 IPM in St. Thomas, Ontario.²⁵

The potential exists to further develop the “Tractor Culture” into a unique placed based experience that could incorporate the other local events and activities that occur in the area which celebrate farming culture in South Bruce. In order to anchor the idea as a grounded initiative that could generate economic spin-off and overcome the limitations associated with different and conflicting schedules of various events, the municipality could consider the potential for developing a theme park around the Tractor Culture concept.

This is not unprecedented, as examples exist in the United Kingdom, such as Devon’s Crealy Great Adventure Park, an award winning family attraction located in the Devon countryside and featuring Kids Tractor Rides. Further, an even more relevant example is the Diggerland Adventure Park, originally established in Kent, United Kingdom in 2000. Founder, Hugh Edeleanu, the Chairman of one of the largest heavy machinery suppliers in the UK wanted to provide families, and children especially, with an environment where they could ride, play and operate the types of vehicles they could only

²⁴ Team Farmall Teeswater, official website:
http://teamfarmall.com/shop/page/2?sessid=5PEIKnp0RNjCsx3NzOCfWyneMuCbw0c8jY1wzZWbrxBQNxhquyEROESIFofGVL6W&shop_param=

²⁵ http://teamfarmall.com/shop/page/privacy?sessid=5PEIKnp0RNjCsx3NzOCfWyneMuCbw0c8jY1wzZWbrxBQNxhquyEROESIFofGVL6W&shop_param=



dream of being in.²⁶ This year, Diggerland expanded into the United States to opened its first North American operation in a Joint Venture with a local water park on 14 acres of land and 23 on-site attractions.²⁷

Although, this may not be the scale of an attraction that South Bruce would look to capitalize on, it does illustrate that unique and industry based attractions are not unmarketable concepts. In discussions with economic development stakeholders and tourism development professionals, it was not believed that this type of cultural concept had been capitalized on in Ontario at this point in time. In addition, the municipality of South Bruce is currently in the early stages of exploring these ideas further in collaboration with regional and provincial officials from an investment attraction perspective.

In order to effectively develop this idea into a prospective reality, it will be necessary for the municipality to undertake the necessary planning and research steps in creating an Experience Development and Feasibility Study. This will assist the municipality in understanding the market potential, economic benefit, costs, and resources associated with undertaking such an initiative. Ultimately, a business case would need to be made, and an interested investor engaged that has the experience and reputation to successfully execute on the project. Further, a project of this nature would require strong relationship building and collaboration with Bruce County Tourism, RTO 7, and the Ontario Ministry of Tourism, Culture and Sport. Various funding programs are available through the RTO support rural communities with tourism business planning, experience development, community branding, and marketing.

As with the section above, this opportunity also holds the potential to play a strong role in the development of a unique and differentiating community brand for South Bruce – one that could establish the municipality as a destination, as well as an important and vibrant experience in a broader regional tourism offering.

5.3.4 Prepare and Market the South Bruce Business Park

One of the areas a municipality wrestles with is how to effectively balance the tax base and assessment spread between residential and non-residential levies. Increasing the level of industrial and commercial land and facilities is one way to move toward this goal. Municipalities that own tracts of land zoned for employment purposes are often in a more advantageous position than those where land inventories are predominantly privately owned.

This allows a municipality to compete for new investment by offering land costs at highly competitive prices, and affords for greater flexibility in negotiating development costs and fees into the sale price of land. This is because the motivation

²⁶ Diggerland USA, Official Website: <http://diggerlandusa.com/about/>

²⁷ <http://diggerlandusa.com/news/diggerland-usa-opens-june-14th/>



is not driven purely by profit, but counter-balanced with the municipality's desire to create jobs and increase community well-being. As non-residential assessment levels increase, strain is reduced on the residential tax base, and monetary coverage of municipal operations and services is more effectively balanced.

The availability of industrial land is also important in supporting the expansion of local companies. One of the key themes identified in the community and stakeholder engagements was that the municipality was not investment ready. Further, that South Bruce needed to ensure that what industrial or employment lands it has are prepared and a process is in place to ensure that it is business ready and can act on opportunities.

It was also noted that 85-90% of development will likely occur with local developers and businesses looking to expand, and these groups are not as familiar with navigating complex regulatory processes, that a development liaison or facilitator was required to ease and expedite the development process.

In order to better understand South Bruce's competitive positioning, a brief situational analysis was performed with the surrounding areas. The Municipality identified a 9.98 acre parcel of land which is designated to be potentially developed into the South Bruce Business Park, located at the outskirts of Teeswater along Bruce Road 4/Clinton Street. Internal studies have been preliminarily conducted and determine that the plot, if developed, could allow for 8 acres total serviced area.

The map below in Figure 40 illustrates the various municipally and privately owned business parks, industrial, and development land in relative proximity to South Bruce from a competitive positioning perspective.

Geographically, South Bruce is most likely to compete with Brockton, Minto, Goderich, Kincardine, Southgate, and to a certain extent Owen Sound. South Bruce Peninsula is of less competitive threat for industrial or export oriented prospects, as the land is zoned for commercial development and given the extended relative distance from major markets and transportation networks.

Brockton is the greatest competitor within less than 20 KM distance from South Bruce.



FIGURE 40: AVAILABLE INDUSTRIAL LANDS FOR DEVELOPMENT



Municipally Owned:

- ▣ South Bruce
- 1. Minto - Palmerston & Harriston Industrial Parks
- 2. Orangeville - Northwest Corner C Line and Centennial Road
- 3. Owen Sound - Industrial Park
- 4. Southgate – Eco Industrial Park
- 5. Brockton - East Ridge Business Park

Privately Owned:

(Properties held by private owners)

- A. South Bruce Peninsula
- B. Goderich
- C. Wellington North
- D. Centre Wellington
- E. Shelburne
- F. Orangeville
- G. Kincardine

Source: Various Municipal Websites and ICX; Adapted by Millier Dickinson Blais.2014



When examining the properties from a cost outlook, as illustrated in Figure 41 and Figure 42 below, from a direct municipal ownership perspective, the most competitively priced land is in Minto, Brockton, Owen Sound, and Southgate.

From a cost and servicing perspective, the Brockton East Ridge Business Park is the most likely competitor for South Bruce. This represents a potential threat due to the lack of shovel ready lands in the municipality for companies looking to expand or considering area relocation. From a total land availability perspective, Owen Sound has the greatest offering.

FIGURE 41: MUNICIPALLY OWNED BUSINESS PARKS AND INDUSTRIAL LAND

County	Municipality	Park Name	Ownership Type	Available Acreage	\$/Acre
Bruce	South Bruce	N/A	Municipality	8	---
Wellington	Minto	Palmerston Industrial Park	Municipality	4	\$ 25,000
Wellington	Minto	Palmerston Industrial Park	Municipality	41.5	\$ 15,000
Wellington	Minto	Harriston Industrial Park	Municipality	66	\$ 15,000
Dufferin	Orangeville	Northwest Corner C Line and Centennial Road	Municipality	5.2	\$ 215,000
Grey	Owen Sound	Industrial Park	Municipality	600	\$ 30,000
Grey	Southgate	Eco Park	Municipality	80	\$ 35,000
Bruce	Brockton	East Ridge Business Park	Municipality	55.2	\$ 27,500
Bruce	Brockton	East Ridge Business Park	Municipality	8.2	\$ 38,500
Bruce	Brockton	East Ridge Business Park	Municipality	1.9	\$ 49,600
Bruce	Brockton	East Ridge Business Park	Municipality	2	\$ 75,000

Source: Various Municipal Websites and ICX; Adapted by Millier Dickinson Blais. 2014

Figure 42 below highlights the greatest competition from a cost perspective for privately owned industrial lands would be in Wellington North. That said, as Wellington North is positioned geographically along Highway 6 and in closer proximity to the major markets and larger urban centres of Guelph and Kitchener, there is a greater likelihood that companies



looking to expand out of these markets would consider Wellington North before looking further north toward South Bruce.

FIGURE 42: AREA PRIVATELY OWNED BUSINESS PARKS AND INDUSTRIAL LAND

County	Municipality	Park Name	Ownership Type	Available Acreage	\$/Acre
Bruce	South Bruce Peninsula	N/A	Private	7.1	\$ 198,300
Huron	Goderich	N/A	Private	3.0	\$ 199,667
Huron	Goderich	N/A	Private	0.7	\$ 358,774
Huron	Goderich	N/A	Private	1.0	\$ 514,708
Wellington	Wellington North	N/A	Private	72.0	\$ 17,986
Wellington	Centre Wellington	N/A	Private	4.7	\$ 91,295
Dufferin	Shelburne	Luxton Way in Shelburne Industrial Park Land	Private	11.7	\$ 100,000
Dufferin	Shelburne	Prentice Drive in Shelburne Industrial Park Land	Private	51.2	\$ 69,990
Dufferin	Orangeville	40 Centennial Road	Private	1	\$ 190,000
Dufferin	Orangeville	39 Commerce Road	Private	1	\$ 159,000
Bruce	Kincardine	Tiverton Bruce Energy Centre Industrial Park	Private	8.03	\$ 560,399

Source: Various Municipal Websites and ICX; Adapted by Millier Dickinson Blais. 2014

In assessing the various industrial and employment land offering through this exercise, the importance of South Bruce preparing its industrial land offering was apparent.



Further, stakeholder consultations stressed the importance of the municipality taking a proactive role in this, and indicated the need was equally as important from an investment attraction perspective, as it is for providing local land offerings in order to ensure that local companies have expansion opportunities.

The situational analysis above was not meant to be comprehensive, but illustrative of the need to put internal plans in place to ready the South Bruce Business Park, as the competition from surrounding areas is present, and in some cases, very strong.

Brockton presents a potentially viable option for local companies to expand into that would not disrupt access to the existing labour force, and offers shovel ready land with infrastructure in place for new development.

Once the South Bruce industrial lands are designated and the necessary plans are underway for servicing and preparation, it is important that a Strategic Marketing Plan is developed which will outline the necessary steps to effectively promote them.

This will require the creation of marketing materials (hardcopy and web-based), as well as ensuring that promotional efforts are implemented to heighten awareness of these lands and the advantage they offer to local expansion and new companies considering South Bruce and Bruce County.

These efforts should include leveraging the existing investment marketing tools and networks that are available locally at regional, inter-regional, and provincial levels, and in collaboration with local Realtors and the private sector.

5.3.5 Foster Value-added Agriculture and Food Processing

An area emphasized frequently by stakeholders and businesses during the engagement process was the potential contained in leveraging the strength of the local agricultural sector. According to the Business Patterns assessment and economic research conducted on South Bruce, in December of 2013 the municipality contained 299 businesses in Agriculture, Forestry, Fishing and Hunting, representing 49.1% of all registered businesses in South Bruce. Further, this was representative of 248 self-employed – indicating high levels of entrepreneurial farmers and smaller family operated farm enterprises, and 51 employers. Of these, 45 agricultural related firms hired fewer than 10 employees.²⁸

Overall between 2008 and 2013, the municipality added over 125 firms in total. This alone is noteworthy as many communities across Ontario lost businesses in the period as a result of the global recession that began in 2008.

²⁸ Statistics Canada; Canadian Business Patterns, South Bruce, Bruce County: December 2013



Seemingly insulated by macroeconomic trends affecting Ontario, South Bruce actually added 60 agricultural related firms, which speaks to the strength of this sector in the municipality.

According to the 2011 Census of Agriculture, in 2010 total gross farm receipts in South Bruce indicated a 19.6% increase over the last Census period, significantly higher than the provincial average of 15%, and an increase of 13.6% in Bruce County.²⁹ Overall, 21.4% of businesses in the agriculture sector in Bruce County were located in South Bruce. This is a positive indication of growth for the local agricultural sector as a whole, as it could indicate a higher level of productivity in the sector as compared to the surrounding areas.

Out of the four predominant agricultural subsectors that have businesses in Bruce County, South Bruce Farms represent 21.2% of the County total, 23% of Other Animal Production, 29.4% of total Support activities for Crop Production, and 12.5% of Support Activities for Animal Production in the County.

Businesses located in South Bruce for the Food and Beverage Manufacturing sector made up 20% of the firms in Bruce County. Although there were three subsectors for South Bruce that made up 50% of establishments in the County, the high proportions were due to the limited number of businesses in Bruce County: Dairy Product Manufacturing (2 firms), Meat Product Manufacturing (2 firms) and Beverage Manufacturing (2 firms).³⁰ It is no surprise, given that the Gay Lea Creamery Co-op is one of the municipality's largest employers and oldest creameries still in operation in Ontario.

Lastly, when assessing the top local businesses by total number of companies and employment category, Dairy Cattle and Milk Production (78 firms), Beef Cattle Ranching and Farming, and Feedlots (60 firms), Other Grain Farming (40 firms), Animal Combination Farming (34 firms), and All Other Miscellaneous Crop Farming (13 firms) taken together illustrate the potential for encouraging value-added agricultural and food processing opportunities building off of the high concentrations contained in South Bruce.³¹

Through stakeholder consultations it was suggested that the sector could support vertical integration in the value chain through the establishment of a meat packing, or processing facility. Although an endeavour of this nature would require an interested party willing to navigate through the highly stringent regulatory, health and safety requirements (on a regular basis), it was identified as an opportunity given the high levels of cattle that are exported out of the municipality to larger urban centres for processing (e.g., Guelph).

²⁹ Statistics Canada, 2011 Census of Agriculture, Farm and Farm Operator Data, catalogue no. 95-640-XWE and 2006 Census of Agriculture, Farm Data and Farm Operator Data, catalogue no. 95-629-XWE

³⁰ Statistics Canada; Canadian Business Patterns, South Bruce, Bruce County: December 2013, Adapted by Millier Dickinson Blais 2014

³¹ Ibid.



Further, it was indicated that potential existed to support value-added processing of the ever increasing levels of commercial cash crop production (corn, soy beans etc.) ranging in size from projects such as a grain elevator to the size of a small ethanol plant. Projects would require capital investment and financing; however, it was suggested that there were high levels of accumulated wealth in the farming community that could be encouraged to invest locally in initiatives that were properly planned and well-conceived.

Ultimately, it was recommended that the municipality look to build and leverage relationships with the farming community and the co-operative associations to find ways to support opportunities for growth and development, building off of the agricultural sector. There is a strong Co-op culture in South Bruce that is connected to a variety of larger associations that can support marketing and partnership in order to allow local farmers and smaller operations to access larger markets.

5.3.6 Planned Incremental Residential Development

The Municipality of South Bruce is facing a serious issue related to population decline. As identified in the Demographic Characteristics section above, the municipality has experienced steady decline over the last two Census periods. Between 2001 and 2006 the population decreased by 2% and from 2006 to 2011 the population contracted by more than double the rate at 4.3%. In contrast, the populations of Bruce County and Ontario have increased, albeit to a lesser extent in Bruce County, which slowed in growth between 2006 and 2011.

Ordinarily, residential growth is not prominently featured in economic development strategies, particularly in more urbanized areas, as communities can often rely on organic growth over time, larger employment bases, and increased job prospects through stable and new business growth to attract in-migration. However, given the rural nature of the municipality, the strategic importance of attracting new residents to the area, and the role it will play in the long term stability and economic prosperity of South Bruce; it requires attention and careful planning.

In communications with the community and stakeholders, a number of businesses indicated that their ability to survive, as well as expand hinged on increased population growth. Increased residential development supports local construction companies and trades, landscapers have more opportunity for services and property maintenance, retailers, banks, restaurants and stores in the main streets and professional services also benefit from increased local needs.

One of the greatest potentials for supporting residential development is contained in the local development community. There is a great deal of wealth that has been generated over time from successful agriculturally related business and some are turning to reinvest in the community through property development. Controlled and phased development of 5 – 10 units of low and medium density that are targeted to medium to medium-high income earners was identified by stakeholders as feasible and reflective of projects currently under planning approval consideration.



Further, a phased approach would allow for local companies to successfully bid on contracts and expand operations gradually to meet demand. It was indicated by various stakeholders that marketing should be focused on relocating affluent retirees and active seniors from larger urban centres such as Guelph, and professional families that are looking to benefit from the low cost advantage of housing at half the price. These represent some of the buyer demographics cited.

There is a positive cycle of wealth generation and economic benefit that can be stimulated through residential development for South Bruce. As the area is steadily populated through phased development, it will begin to indicate a critical mass of purchasing power locally that can be used to attract commercial development of amenities that are not currently meeting local demand and help correct retail leakage. This can also have positive economic spin-off for the existing retailers who provide in demand products and services through increased traffic and local commerce.

It can also be leveraged to attract more young professionals and new families to the area who may work in surrounding communities (e.g., Bruce Nuclear), as well as stimulate new employment potential locally. Naturally, there are also the positive implications for increased revenue generation potential for the Municipality, which in turn can be reinvested in operations, program and service delivery, asset maintenance and new development, as well as fiscal stability.

It is in the best interest of the municipality to develop and implement a Residential Growth Plan that assess the immediate, medium, and long term demands for housing, based on a clear articulation of how the community plans to grow and increase its population over a 10 to 20 year period. It is important that this plan would align with the South Bruce Corporate Strategic Plan 2014 – 2019 and presents an ideal opportunity to update the Municipality of South Bruce Official Plan 2005, a process that is ordinarily required by municipalities to undertake every five years.

It is important that a South Bruce Residential Growth Plan align with the County of Bruce Official Plan 2010, particularly as the County is responsible for currently providing Planning Services to the municipality, and the Bruce County Asset Management Plan 2013. Increasing residential growth in a planned and incremental manner will have broader implications related to increased servicing and infrastructure demands as well as the wear, depreciation, and maintenance implications on public assets over time. Further, alignment with the Bruce County Long Term Housing Strategy 2013 – 2023 will also be important in supporting South Bruce's aims to increase affordable housing and elderly/assisted living developments.

5.3.7 NWMO Adaptive Phased Management Project

The Nuclear Waste Management Organization (NWMO), established in 2002 under Federal mandate, is the body responsible for implementing the Adaptive Phased Management (APM) process to effectively and safely store Canada's



used nuclear fuel through long-term management.³² The Municipality of South Bruce expressed official interest in early 2012 to learn more about the NWMO site selection process (launched in 2010) to identify a willing host community for Canada's proposed Deep Geologic Repository to store used nuclear fuel.

This triggered the first step in a multi-stage process to evaluate the potential suitability of the municipality through an initial screening against five, site related key criteria (availability of land - both above and below ground; available location outside of protected areas and parkland; no known groundwater resources at repository depths; sites not containing exploitable natural resources; and no known geological and hydrogeological aspects that would prevent long term safety considerations). An initial screening report conducted by AECOM in 2012 was provided to South Bruce indicating that there were no "obvious conditions" to exclude the municipality from proceeding with further investigation.³³ Currently, South Bruce is one of three municipalities in Bruce County having indicated interest to the NWMO and that have not been eliminated due to environmental or safety considerations, including Brockton and Huron-Kinloss.³⁴

The number of direct jobs in the local community hosting the repository and in the surrounding area will depend in part on the location of the repository, and the capacity of the community, region and province to support the project. Investments can be made in such areas as labour training, supporting infrastructure, business incubation, strategic hiring and procurement that can alter the amount of economic benefits captured in the area. In addition to direct jobs, there will be a number of indirect and induced jobs also associated with the project. Depending on the host region, construction and operations will also create wealth in the form of business profits and personal income through the region potentially amounting to hundreds of millions of dollars.³⁵

The project itself represents significant potential economic development opportunity and benefit to the host community, including economic spin-off, wealth generation and job creation benefits to surrounding communities and the region. However, it must be understood that in communications with NWMO staff it was made clear that the primary mandate for the site selection process is to ensure that safety (geological feasibility) is always the number one priority, followed by establishing that the project can be implemented in a manner that ensures that it will contribute to the wellbeing of the community (socially and economically) now and into the future for generations to come. In order to achieve this, strong relationship building, partnership and phased decision making are central tenets to the NWMO dialogue based approach

³² Canadian Nuclear Safety Commission, *High-Level Radioactive Waste: Long Term Management of Used Nuclear Fuel (2014-02-03)*; <http://www.nuclearsafety.gc.ca/eng/waste/high-level-waste/index.cfm>; (Accessed on 2014-09-11)

³³ Summary Report: Initial Screening for Siting a Deep Geological Repository for Canada's Used Nuclear Fuel. Prepared by AECOM for The Corporation of The Municipality of South Bruce (August 2012).

³⁴ The Toronto Star, "No nuclear waste for two Bruce County communities", Thursday January, 16, 2014

³⁵ Description of Canada's Repository for Used Nuclear Fuel and Centre of Expertise, section 6. http://www.nwmo.ca/uploads_managed/MediaFiles/2011_projectdescriptionbrochure-english.pdf



with interested municipalities, regions, and aboriginal communities. South Bruce is currently in Step 3 of the investigative process, which is a non-committal, non-risk, and non-cost learning exercise which runs between three to five years, within a greater timeline of between 12 – 15 years for the Site Selection and Regulatory Approvals Phase.³⁶

From an economic impact perspective, there are three principle components to the APM project: a Deep Geological Repository facility, a specialized Transportation System, and a locally based Centre of Expertise. In sum, the project represents an estimated capital expenditure and investment of between \$16 – 24 billion over the course of a 165 year timeline. With the greatest expenditures occurring over the Construction (10 years) and Operation (40 years) project phases at \$3.8 and \$12.8 billion respectively. The job creation impact is estimated by the NWMO to be in the ranges of 400 – 1,200 during these periods, with sustained direct employment opportunities of highly skilled and technical staff in the community and surrounding areas to support operations, including a packaging plant and processing stations in addition to the underground facilities.³⁷

The potential also exists for the host municipality, or surrounding communities to benefit from the establishment of a specialized container manufacturing and testing facility, which would lead to increased area employment (through construction and operation), as well as prospective supply and value chain opportunities to the local and area industrial base. Further, the establishment of a Centre of Expertise could be leveraged to support increased tourism, travel and visitation to the community with the associated economic spin-off for local commercial, retail and hospitality businesses, as it holds the potential to become an “International Hub” for global knowledge exchange among experts, scientists and energy organizations.³⁸

A project of this scale, should South Bruce’s residents choose to clearly indicate their willingness and collective interest to proceed in a clear and compelling manner, and should the municipality ultimately meet the necessary safety, regulatory and environmental requirements to be selected as the host community, could be leveraged to successfully ensure increased population growth, highly skilled employment, sustained economic and business potential, new infrastructure development, wealth generation, and elevated municipal revenue for generations to come.

³⁶ Nuclear Waste Management Organization (NWMO), “Description of Canada’s Facility for Long-Term Management of Used Nuclear Fuel”, NWMO Project Presentation (April 2014)

³⁷ Ibid, NWMO Project Presentation (April 2014).

³⁸ Ibid.



6 Taking Action

At the heart of setting the context for action is the vision for the municipality of South Bruce. This community based vision (referenced below) represents the desired future state of the municipality, and was created through comprehensive consultation and engagement from residents, businesses, community organizations, municipal staff and members of Council and was endorsed and approved by Municipal Council on May 26th, 2014.

“South Bruce is a growing, dynamic, agriculturally-rooted community that provides accessible and affordable amenities for residents and businesses, creating an environment supportive of growth, vibrant downtowns that foster small business, and a unique, year-round destination experience”.

Reflecting on the Municipality's vision, and considering all of the research, stakeholder and community engagement, outcomes and findings of the processes conducted above, the following action plans have been designed to provide the necessary structure to allow South Bruce to execute on its first Economic Development Strategic Plan.

As this Plan has been developed in tandem with the Municipality of South Bruce's first *Corporate Strategic Plan (2014 – 2019)* care has been taken to ensure that overlapping actions are contained in the Action Plans below to ensure policy alignment and lack of duplication.

6.1 Overarching Economic Development Needs and Enablers

One of the most important elements of ensuring that a municipality is prepared to execute on an economic development plan is to ensure that it has the necessary building blocks in place. Economic Development itself is broad in scope, multi-disciplinary and multi-faceted, and requires that various organizations and stakeholders in a community all work towards common goals while maximizing their individual strengths and contributions.

A key element to success is in identifying where gaps exist that act as critical enablers and that action is taken to address the missing elements. At a base level, the 'elements' below represent “essential economic development needs”, or foundational pillars that South Bruce will need to have in place in order to be able to effectively execute on its Economic Development Plan, and create an environment that will foster opportunity and sustainable economic development.



6.1.1 Internal Corporate Climate Supportive of Business Growth

The *Municipality of South Bruce Corporate Strategic Plan 2014 – 2019*, established its number one goal as creating a strong corporate culture that supports local business growth and sustainability. It includes the strategic objective of: establishing a supportive corporate culture that strengthens business retention, expansion and attraction, entrepreneurial activity, and new industry investment (including Adaptive Phased Management considerations). The municipality's Economic Development Plan 2014 – 2019 is no different, and in fact, requires that South Bruce work to ensure that the various departments and staff of all levels approach and perform their duties in a manner that is proactive and solution oriented in supporting new and local business growth and development. That customer service is principled on assisting and guiding businesses, prospective investors and interested parties through complex regulatory processes, and adopting a business friendly manner that is focused on providing options and what is possible, as opposed to what is not.

6.1.2 Strong Collaborative and Partnership Based Approach

Ultimately, economic development, particularly in small, rural municipalities and agricultural areas, requires a community based approach. With limited resources and ongoing pressure on various forms of service delivery, it is essential to the long term success of South Bruce that it adopts a strong culture of collaboration and partnership with the various public and private sector actors and organizations that drive and enable economic growth and prosperity. This includes fostering strong relationships with local businesses, the South Bruce Community and Business Association, as well as the various industry and agricultural associations and co-ops in South Bruce and surrounding areas. It will require building alliances and leveraging support from Bruce County, the Community Futures Development Corporations, Four County Labour Market Planning Board, as well as the Regional Tourism Organization 7 and various provincial Ministries engaged in economic development. Strong relationships should also be fostered with area Chambers of Commerce, and Real Estate Associations, to provide inroads with prospective investors, developers, and entrepreneurs looking for opportunities.

6.1.3 Permanent Community Economic Development Committee

In order to provide an ongoing level of strategic guidance, advice, direction, and local support for establishing and implementing the various economic development services and programs needed to foster growth and prosperity, South Bruce must re-establish their local Community Economic Development Committee. This should be instituted as a permanent, grass roots organizational entity that will assist in providing the necessary validation for the various steps the municipality will take in implementing the Economic Development Strategy. It will also act as an important organizational mechanism for establishing and distributing roles and responsibilities of various stakeholders involved in executing the



plan and fostering collaboration. It also affords the necessary organizational structure to establish sub-committees for addressing specific aspects of the plan, for example a Farmers' Market and Local Food Initiative, or Downtown Revitalization. This allows for interconnectivity of ideas and capitalizing on leveraging opportunities.

6.1.4 Dedicated Economic Development Coordinator – Business Liaison

A vital element in being able to successfully implement the Recommended Initiatives outlined below for the South Bruce Economic Development Plan is to ensure that the necessary resources are in place from a corporate perspective. This includes positioning the economic development function within the corporate structure of the municipality and providing a dedicated Economic Development Coordinator – Business Liaison role. This individual can act as a facilitator for local development inquiries and provide assistance to local companies and small businesses through a formal Business Retention and Expansion program. It would also provide a central point of contact for site selection and investment related interests, and act as the face of the municipality in promoting and attracting new employment opportunities. An economic development coordinator can take a strong role in facilitating Downtown revitalization, spearheading local initiatives (e.g., Farmers' Market) and sit as the municipal liaison on Boards, Committees, Associations, and Working Groups. It provides an internal organizational function, which can support alignment of various departments and staff around common goals and objectives, and provide the fabric for maintaining positive collaborations with external stakeholders and project partners. The position is both strategic and tactical as a project manager, and can act as an enabler for securing and leveraging capital to support local initiatives through various public sector grants and funds.

6.1.5 Workforce Attraction and Retention Strategy

A critical focus needs to be placed on stemming the tide of skilled workers leaving the area and understanding the labour force gaps that exist for local companies. Issues were raised by stakeholders and local businesses that there is a reluctance to train young workers due to flight risk; however, it is critical that employers are investing in workplace training and mentorship in order to retain staff and attract higher caliber workers. Given limited resources, South Bruce should collaborate with the Four County Labour Market Planning Board and local Community Futures Development Corporations to develop a local recruitment and retention strategy. Through the recommended Business Retention and Expansion Program, a Workforce Needs Assessment should be incorporated into the Annual Business Survey and Visitation Initiative in order to get a real sense from the local companies on what their labour demands are. Further, it is important that South Bruce work with local and regional partners to heighten awareness of local employment opportunities, and



develop ways to support local companies in accessing training credits, incentives and supports to stimulate local employment (especially for youth).

6.2 Interpreting the Action Plans

The following section provides a series of action plans that reflect the cumulative understanding of the sections above and present them as Recommended Initiatives. They are outlined in a logical manner according to level of potential contained in each opportunity, the need for action, level of complexity, ease of implementation, and cumulative effect.

Each Recommended Initiative in the tables below is accompanied by a Priority Level and set of recommended community Partners. The level of priority was established based on the following criteria:

- § Sense of urgency and level of immediacy indicated by the consultations and research
- § Level of economic development potential and gain for South Bruce
- § Feasibility and suitability based on local assets and SWOT analysis
- § Resources required and value for output
- § Logical sequence of actions

Priority levels are identified as the following:

- | | |
|--|-----------------------------|
| § Ongoing = Current Action or Once Established | § High = Within One Year |
| § Highest = Immediate | § Moderate = Within 3 Years |
| | § Low = Between 3 – 5 Years |

Each Action Plan is accompanied by a set of performance measures or, 'Key Action Outcomes' which allow the Municipality to track the success of the initiative over time, and its effective implementation.

Following the Action Plans section is an Implementation Plan that outlines a timeframe for each of the Recommended Initiatives by their Action Plan headings in a Gantt chart format in order to visualize where actions and initiatives overlap in order to more effectively plan for resource allocation.



6.2.1 South Bruce Foundations of Economic Development

Recommended Initiative	Priority Level	Partnerships
<p>Internal Corporate Climate Supportive of Business Growth</p> <ul style="list-style-type: none"> § Undertake an internal review aimed at simplifying the planning and approvals process, removing barriers to expansion and development and creating a business friendly environment. § Ensure that staff in all departments approaches customer service in a proactive and solution oriented manner with a focus on what is possible and how they can assist business. § Establish a benchmark for Customer Service Excellence and incorporate this into performance management systems and a recognition program for staff. 	<p>Priority: Highest</p>	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office and support of Municipal Council



Recommended Initiative	Priority Level	Partnerships
<p>Strong Collaborative and Partnership Based Approach</p> <p>§ Develop and maintain positive, ongoing relationships with key community/economic development actors in private and public sectors to leverage and foster investment opportunities.</p>	<p>Priority: Highest</p>	<ul style="list-style-type: none"> § Local business and industry § Local developers § South Bruce Community and Business Association § Bruce County Planning, Economic Development and Tourism § South Bruce Tourism § Regional Tourism Organization (RTO) 7 § Bruce Community Futures and Saugeen Economic Development Corporation § Four County Labour Market Planning Board § Provincial Ministries § Local Real Estate Associations § Area Chambers of Commerce



Recommended Initiative	Priority Level	Partnerships
<p>Establish a Permanent Community Economic Development Committee (CEDC)</p> <ul style="list-style-type: none"> § Engage previous Community Economic Development Committee (CEDC) members and actively recruit new local prospects based on clear understanding of value and expertise, and contribution candidates can bring to the group. § Ensure an open and transparent communications and recruitment process and that the CEDC has effective representation from industry, small business, and local developers, as well as key staff, political representatives, and residents. § Formally establish the Committee with an organizational structure, Charter, rules of conduct and order, and rotating terms of office to ensure vibrancy, new ideas, and a diverse composition from various stakeholders and community members. 	<p>Priority: Highest</p>	<ul style="list-style-type: none"> § Local area businesses § Downtown businesses § South Bruce Community and Business Association § South Bruce Tourism § Farming co-ops and agricultural sector § Local developers § Municipal Council § Residents
<p>Dedicated Economic Development Coordinator – Business Liaison (EDC)</p> <ul style="list-style-type: none"> § Position the economic development function within the corporate structure of the municipality. § Ensure appropriate budget allocations are in place to support economic development activities and a full-time coordinator role. § Create a full-time, dedicated Economic Development Coordinator position and fill the role § Direct EDC to explore ways to improve local access to small business support programming available through partner organizations (CFDCs) and examine feasibility of a satellite office. § Establish a formal Business Retention and Expansion (BR&E) program operated by the EDC § Implement an Annual Business Survey and Site Visitation Initiative 	<p>Priority: High</p>	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office and support of Municipal Council



Recommended Initiative	Priority Level	Partnerships
<p>Workforce Attraction and Retention Strategy</p> <ul style="list-style-type: none"> § Develop Local Labour Market Recruitment and Retention Strategy in collaboration with area partners for South Bruce § Incorporate Workforce Needs Assessment in the annual business surveys delivered through the Business Retention and Expansion program to collect local data § Develop means through organizational partners to support local companies in providing training and programs to local businesses § Increase local company awareness of training credits, incentives and supports available for increasing local employment opportunities § Explore feasibility of establishing a collaborative Bruce County Job Board to heighten awareness of local employment opportunities (in South Bruce) 	<p>Priority: High</p>	<ul style="list-style-type: none"> § Local area businesses § South Bruce Community and Business Association § South Bruce Community Economic Development Committee § Four County Labour Market Planning Board § Bruce Community Futures and Saugeen Economic Development Corporation § Bruce County Economic Development & Planning

6.2.1.1 Key Action Outcomes

- § Internal review conducted and more business friendly policy environment created
- § Collaborative partnership based approach adopted by staff and relationships established with economic stakeholders
- § Customer Service Excellence Benchmark and Recognition Program implemented
- § Economic Development a permanent and budgeted function in municipal service delivery
- § Permanent Community Economic Development Committee established and operational
- § Full-time Economic Development Coordinator – Business Liaison hired
- § Improved access to small business support programming underway for local companies
- § Formal Business Retention and Expansion (BR&E) program implemented
- § Local Labour Market Recruitment and Retention Strategy created and implemented
- § Increased company uptake of training credits and incentives stimulating local employment
- § Annual Business Survey and Site Visitation initiative underway



6.2.2 Stimulate Downtown Revitalization (by Leveraging Spruce the Bruce)

Recommended Initiative	Priority Level	Partnerships
<p>Establish a Downtown Revitalization Sub-Committee (of the CEDC)</p> <p>§ It is recommended that this be a temporary committee with the sole purpose of establishing a South Bruce Downtown Business Improvement Association and spearheading and directing initiatives in the interim.</p>	<p>Priority: Highest</p>	<p>§ Downtown businesses</p> <p>§ South Bruce Community and Business Association</p> <p>§ South Bruce Tourism</p> <p>§ Bruce County Tourism and Spruce the Bruce Staff</p> <p>§ Local developers</p> <p>§ Local Realtors</p> <p>§ Municipal Council</p> <p>§ Residents</p>
<p>Engage Bruce County Spruce the Bruce program staff and initiate a Community Toolkit process</p> <p>§ Toolkits should be developed for Mildmay and Teeswater</p> <p>§ Brand development exercises need to focus on a South Bruce Brand that leverages the community characteristics and uniqueness of each area</p> <p>§ Community toolkits must incorporate broader municipal initiatives of establishing a Farmers' Market, Culinary, and Local Food Experience</p> <p>§ Coordinate a Downtown Gateway and Signage initiative to broader Agri-Tourism Strategy and Way finding/ signage initiative</p>	<p>Priority: Highest</p>	<p>§ Bruce County Spruce the Bruce - Planning Staff</p> <p>§ Downtown Revitalization Sub-Committee</p>
<p>Develop a formal Downtown Revitalization Strategy based on the outcomes of the Community Toolkits</p>	<p>Priority: Moderate</p>	<p>§ Bruce County Spruce the Bruce - Planning Staff</p> <p>§ Downtown Revitalization Sub-Committee</p>



Recommended Initiative	Priority Level	Partnerships
<p>Encourage more local business downtown to apply for Spruce the Bruce Façade Improvement Grants</p>	<p>Priority: Moderate</p>	<ul style="list-style-type: none"> § Downtown Businesses § Downtown Revitalization Sub-Committee
<p>Explore opportunities to host well established annual events in the Downtowns</p> <ul style="list-style-type: none"> § Certain activities of events such as initial launches, talent pageants, 	<p>Priority: High</p>	<ul style="list-style-type: none"> § Local area businesses § Farming co-ops and agricultural sector § Downtown Revitalization Sub-Committee § Municipal Council § South Bruce Tourism
<p>Investigate suitability of establishing a Farmers' Market Downtown</p> <ul style="list-style-type: none"> § Identify properties/locations and conduct an internal Feasibility Study § Ensure this activity is aligned with the Agri-Tourism Strategy and Farmers' Market Initiative 	<p>Priority: High</p>	<ul style="list-style-type: none"> § Downtown Revitalization Sub-Committee § Farming co-ops and agricultural sector
<p>Institute an annual Downtown Business Survey and Site Visitation Initiative</p> <ul style="list-style-type: none"> § This is a target audience component of the overarching annual Business Survey and Site Visitation Initiative included in the Business Retention and Expansion program 	<p>Priority: High</p>	<ul style="list-style-type: none"> § Downtown Revitalization Sub-Committee
<p>Establish a South Bruce Downtown Business Improvement Association (BIA)</p>	<p>Priority: Moderate</p>	<ul style="list-style-type: none"> § Downtown Revitalization Sub-Committee

6.2.2.1 Key Action Outcomes

- § Downtown Revitalization Sub-Committee (of CEDC) established (while BIA in progress)
- § Spruce the Bruce (County) staff engaged and Community Toolkits developed



- § Branding exercises underway with community/business owner collaboration
- § South Bruce Downtown Revitalization Strategy created and implemented
- § Measured increase in Spruce the Bruce Grant uptake by local businesses (especially façade improvement)
- § Collaborative hosting of specific activities in traditional annual festivals and events Downtown
- § Downtown business survey and visitation program in place
- § Downtown Business Improvement Association formally established and operating



6.2.3 Establish a Farmers’ Market, Culinary, and Local Food Experience

Recommended Initiative	Priority Level	Partnerships
<p>Create a comprehensive South Bruce Agri-Tourism Strategy</p> <ul style="list-style-type: none"> § Inventory all agricultural, culinary, agri-business, local food, events, festivals, and cultural/traditional assets that celebrate Farm and Food Culture § Create a system for coordinating all of the various offerings of Tourism based initiatives under one umbrella and into a series of collective, unique experience packages § Create a culinary and local food trail that supports food and beverage producers and farm gate stands § Undertake a comprehensive Branding exercise that incorporates the “Gateway to Bruce” moniker § Ensure that the South Bruce offering/value proposition is part of the greater Bruce County and GreyBruce tourism product offering § Leverage collective marketing opportunities and exposure through Explore the Bruce, Foodlink GreyBruce and other regional, inter-regional, provincial and national channels § Ensure interconnectivity with the Downtown Revitalization Strategy and leverage the Community Toolkits and Spruce the Bruce programming for downtown initiatives 	Priority: Moderate	<ul style="list-style-type: none"> § Local area businesses § Downtown Revitalization Sub-Committee § Farming co-ops and agricultural sector § South Bruce Community and Business Association § Bruce County Planning, Economic Development and Tourism § South Bruce Tourism § Regional Tourism Organization (RTO) 7 § Foodlink GreyBruce § Ontario Ministry of Tourism, Culture and Sport § Ontario Ministry of Agriculture, Food and Rural Affairs
<p>Develop a Communications Plan for establishing strategic relationships with various agri-business associations, farmers, businesses, cooperatives, local stakeholders and community members to garner support and advice for establishing a local Farmers’ Market</p>	Priority: Highest	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO’s Office



Recommended Initiative	Priority Level	Partnerships
<p>Explore and engage various public resources and information to support the establishment of a Farmers' Market, Culinary and Local Food Experience:</p> <ul style="list-style-type: none"> § E.g., Farmers' Markets Ontario, Food Link GreyBruce, RTO 7, Bruce County Tourism, Ontario Ministry of Agriculture, Food, and Rural Affairs, Ontario Ministry of Tourism, Culture and Sport 	Priority: High	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office
<p>Conduct a Farmer's Market Feasibility Study for South Bruce</p> <ul style="list-style-type: none"> § Survey local agricultural producers of food and cultural products to gauge demand, interest and needs § Undertake a comprehensive Competitive and Situation Analysis to determine value proposition, unique offerings, differentiation and fit for South Bruce in broader landscape § Develop a business plan and marketing strategy § Ensure alignment with the Downtown Revitalization Strategy and Community Toolkits 	Priority: High	<ul style="list-style-type: none"> § Agri-business Advisory Sub-Committee § Downtown Revitalization Sub-Committee
<p>Assess current value and condition of the River Village Co-operative Market property:</p> <ul style="list-style-type: none"> § Engage existing ownership regarding current/future plans § Conduct property condition assessment and Feasibility Study § Determine suitability for prospective Farmers' Market (Value Assessment and Pro Forma) 	Priority: High	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office
<p>Pursue pending pilot project funding through the Ontario Tourism Development Fund and initiate the South Bruce interactive tour of nine local food operators</p>	Priority: Ongoing	<ul style="list-style-type: none"> § Ontario Ministry of Tourism, Culture and Sport

6.2.3.1 Key Action Outcomes

- § South Bruce Agri-Tourism Strategy created and implemented
- § Communications Plan and Strategic Partnerships in place to establish Farmers' Market



- § Resources explored, engaged, and identified for establishing a Farmers' Market
- § South Bruce Farmers' Market Feasibility Study completed
- § Late River Village Co-operative Market Assessment completed
- § Ontario Tourism Development Fund grant secured
- § South Bruce Local Food Interactive Tour pilot project initiated
- § Plans underway to establish a Farmers' Market, Culinary, and Local Food Initiative

6.2.4 Leverage the Tractor Culture to Create a Unique Place Based Attraction

Recommended Initiative	Priority Level	Partnerships
<p>Formulate a Strategic Approach and Business Proposal that identifies the viability and feasibility of establishing a Tractor Culture themed attraction</p> <p>§ Program funding (and guidance) is available through the RTO 7 and Ontario Ministry of Tourism, Culture and Sport to support tourism based business plan/proposal development</p>	Priority: High	<p>§ South Bruce Tourism</p> <p>§ Bruce County Tourism</p> <p>§ Ontario Ministry of Tourism, Culture and Sport</p> <p>§ Regional Tourism Organization (RTO) 7</p>
<p>Open dialogue with Team Farmall to explore synergies and gauge interest in collaboration</p>	Priority: High	<p>§ Inter-departmental with leadership from the CAO's Office</p>
<p>Continue discussions with Ontario Ministry of Tourism, Culture and Sport (leveraging Bruce County Tourism support) to determine approach, municipal readiness, identifying and attracting the most suitable investment partners and strategic alliances</p>	Priority: Ongoing	<p>§ South Bruce Tourism</p> <p>§ Bruce County Tourism</p> <p>§ Ontario Ministry of Tourism, Culture and Sport</p>
<p>Ensure alignment and inclusion in the South Bruce Agri-Tourism Strategy</p>	Priority: Moderate	<p>§ Inter-departmental with leadership from the CAO's Office</p>



6.2.4.1 Key Action Outcomes

- § Business Proposal and Strategic Approach developed for a Tractor Culture themed attraction
- § Team Farmall engaged, buy-in achieved, and synergies being explored
- § Deepening discussions with Ontario MTCS and strategic partner/investor being actively explored
- § Ongoing Bruce County Tourism collaboration and project support secured
- § The initiative is effectively incorporated in the South Bruce Agri-Tourism Strategy

6.2.5 Prepare and Market the South Bruce Business Park

Recommended Initiative	Priority Level	Partnerships
<p>Perform a Feasibility Study and Cost Analysis for the South Bruce Business Park</p> <ul style="list-style-type: none"> § Ensure necessary planning and zoning is in place to support development § Determine servicing and infrastructure requirements and estimated capital costs associated § Establish an estimated range of acceptable price per acre based on cost recovery, market value, and competitiveness 	<p>Priority: Highest</p>	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office and support of Municipal Council
<p>Ensure that the appropriate budget allocations are in place to support readiness</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office and support of Municipal Council
<p>Develop the South Bruce Business Park into a "Shovel Ready" state</p>	<p>Priority: Moderate</p>	<ul style="list-style-type: none"> § Inter-departmental with leadership from the CAO's Office



Recommended Initiative	Priority Level	Partnerships
<p>Initiate a cross-departmental effort to ensure that the internal development process is streamlined and business friendly</p>	<p>Priority: High</p>	<p>§ Inter-departmental with leadership from the CAO's Office and support of Municipal Council</p>
<p>Perform a detailed Situational Analysis of the South Bruce lands in relation to competitor areas in order to establish competitiveness and inform value proposition</p>	<p>Priority: High</p>	<p>§ Inter-departmental with leadership from the CAO's Office</p>
<p>Develop a South Bruce Business Park Strategic Marketing Plan</p>	<p>Priority: Moderate</p>	<p>§ Invest GreyBruce § Bruce County Planning, Economic Development § South Bruce Community and Business Association</p>
<p>Business Park marketing and promotional materials are posted on the South Bruce website and updated regularly</p>	<p>Priority: Ongoing</p>	<p>§ Inter-departmental with leadership from the CAO's Office</p>
<p>Actively market the Business Park through economic development partner organizations</p> <p>§ E.g., Invest Grey-Bruce, Bruce County, Realtors Association of Grey Bruce Owen Sound</p>	<p>Priority: Ongoing</p>	<p>§ Invest GreyBruce § Bruce County Planning, Economic Development § Local developers § Realtors Association of Grey Bruce Owen Sound</p>
<p>Ensure local business awareness of expansion land through Business Retention and Expansion program</p>	<p>Priority: High</p>	<p>§ Local developers § Realtors Association of Grey Bruce Owen Sound</p>



6.2.5.1 Key Action Outcomes

- § Feasibility Study and Cost Analysis performed and price per acre established
- § Business Park in a Shovel Ready state for development to proceed
- § Cross-departmental effort underway to improve investment readiness
- § Marketing Plan in place and promotional efforts maintained
- § Local businesses aware of expansion lands

6.2.6 Foster Value-Added Agriculture and Food Processing

Recommended Initiative	Priority Level	Partnerships
<p>Establish an Agri-business Advisory Sub-Committee (of the CEDC)</p>	<p>Priority: Highest</p>	<ul style="list-style-type: none"> § Local agri-businesses and value chain § South Bruce Community and Business Association § Farming co-ops and agricultural sector § South Bruce Community and Business Association § Bruce County Planning, Economic Development and Tourism § Foodlink GreyBruce § Ontario Ministry of Agriculture, Food and Rural Affairs



Recommended Initiative	Priority Level	Partnerships
<p>Network with local agricultural sector, farmers' associations and cooperatives to understand greatest benefit potential for value-added opportunities and what the municipality can do to support and stimulate their creation/development</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Local agri-businesses and value chain § Farming co-ops and agricultural sector § Agri-business Advisory Sub-Committee
<p>Facilitate OMAFRA Exploring Value Added Opportunities Workshops in South Bruce and other farm business planning needs as identified by farming community</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Ontario Ministry of Agriculture, Food and Rural Affairs § Agri-business Advisory Sub-Committee
<p>Institute an annual Farm and Agri-Business Survey and Site Visitation Initiative</p> <p>§ As a target audience component of the Annual Business Survey and Site Visitation Initiative and Business Retention and Expansion program this will provide a personal connection to the agri-business sector, strengthen municipal relations, and improve service delivery</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Agri-business Advisory Sub-Committee
<p>Conduct a Local Agriculture and Agri-business Asset Inventory and Sector Analysis</p> <p>§ This should be part of the Business Retention and Expansion program and will provide deeper insight to the specific companies, farmers, the agriculture value chain locally, import and export flows, and identify gaps and opportunities</p>	<p>Priority: Moderate</p>	<ul style="list-style-type: none"> § Ontario Ministry of Agriculture, Food and Rural Affairs § Agri-business Advisory Sub-Committee



Recommended Initiative	Priority Level	Partnerships
<p>Develop an Agri-business Investment and Expansion Initiative in collaboration with the local agricultural sector, agri-business, and cooperative community that clearly identifies a select number of key opportunities to pursue in cooperation with local business.</p>	<p>Priority: Moderate</p>	<ul style="list-style-type: none"> § Local agri-businesses and value chain § Farming co-ops and agricultural sector § Agri-business Advisory Sub-Committee § Ontario Ministry of Agriculture, Food and Rural Affairs
<p>Identify and leverage various forms of capital financing (local wealth, private investors, government grants/loans) and resources to support local companies in planning and executing on value-added opportunities</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Agri-business Advisory Sub-Committee § Ontario Ministry of Agriculture, Food and Rural Affairs § Farm Credit Canada § Private Capital and Lenders

6.2.6.1 Key Action Outcomes

- § Agri-business Advisory Sub-Committee established and operational
- § Strong relationships established and maintained with agricultural sector and cooperatives
- § OMAFRA Exploring Value Added Opportunities workshops delivered and ongoing
- § Local Agriculture and Agri-business Asset Inventory and Sector Analysis completed
- § Annual Farm and Agri-Business Survey and Site Visitation Initiative implemented
- § Agri-business Investment and Expansion Initiative underway and opportunities being explored
- § Various forms of capital financing and investment leveraged to support projects



6.2.7 Planned Incremental Residential Development

Recommended Initiative	Priority Level	Partnerships
<p>Open a dialogue with Bruce County to explore residential growth considerations</p>	<p>Priority: Moderate</p>	<p>§ Inter-departmental with leadership from the CAO's Office and support of Municipal Council</p>
<p>Negotiate opportunities for partnership and collaboration with local and area developers interested in residential development and explore cost-sharing</p>	<p>Priority: Moderate</p>	<p>§ Local developers § Local Realtors § Realtors Association of Grey Bruce Owen Sound</p>
<p>Undertake a comprehensive Residential Growth Plan (including commercial/industrial) to inform and advise future capital infrastructure needs in order to support development objectives</p>	<p>Priority: Low</p>	<p>§ Inter-departmental with leadership from the CAO's Office and support of Municipal Council</p>
<p>Implement a South Bruce Official Plan update in tandem with the creation of the Residential Growth Plan.</p>	<p>Priority: Low</p>	<p>§ Inter-departmental with leadership from the CAO's Office and support of Municipal Council</p>
<p>Develop an Attraction/Retention Strategy and Marketing Plan aimed at attracting new residents, young families, active elders, retirees and professionals; and retaining young adults and senior populations</p> <p>§ Identifies key target markets by geography, demography, and socio-economics § Actively market residential land development opportunities through local and external real estate and development channels</p>	<p>Priority: Low</p>	<p>§ Bruce County Planning, Economic Development and Tourism § Local Realtors § Realtors Association of Grey Bruce Owen Sound</p>



Recommended Initiative	Priority Level	Partnerships
<p>Strike a multi-disciplinary Steering Committee of staff, Council, residents, businesses, local developers, and stakeholders (including Bruce County) to advise/inform strategic approach for the establishment of an assisted living/long-term care facility for seniors.</p>	<p>Priority: High</p>	<ul style="list-style-type: none"> § Municipal & County Council § Local area businesses § Local developers § South Bruce Community and Business Association § Four County Labour Market Planning Board § Bruce County Economic Development & Planning § Bruce County Social Services, Housing, and Long Term Care § Realtors Association of Grey Bruce Owen Sound § Residents

6.2.7.1 Key Action Outcomes

- § Dialogue opened with Bruce County regarding residential growth considerations in South Bruce
- § Opportunities for partnership with local developers explored
- § Minor levels of incremental residential development in progress
- § South Bruce Residential Growth Plan under development
- § South Bruce Official Plan Update underway
- § Attraction/Retention Strategy to increase population implemented
- § New Senior's Assisted Living Facility opportunity under consideration



6.2.8 NWMO Adaptive Phased Management Project

Recommended Initiative	Priority Level	Partnerships
Continue to maintain open lines of communications with the NWMO project contacts: § Ensure ongoing interest in learning more is recognized and continued. § Share the new <i>Corporate Strategic Plan 2014 - 2019</i> and <i>Economic Development Strategy</i> to support NWMO finalization of current preliminary community wellbeing assessment.	Priority: Highest	§ Co – leadership from the CAO’s Office and Municipal Council § NWMO Representatives § Residents
Establish conversations with neighbouring municipalities still under project consideration to gauge interest in potential synergies and collaboration.	Priority: High	§ Municipal Council leadership and support from CAO’s Office § NWMO Representatives § Residents
Continue to engage the local residents and community in education and awareness initiatives	Priority: Ongoing	§ Co – leadership from the CAO’s Office and Municipal Council § NWMO Representatives § Residents
Continue to host and support the South Bruce Community Liaison Committee	Priority: Ongoing	§ Co – leadership from the CAO’s Office and Municipal Council § Residents

6.2.8.1 Key Action Outcomes

§ South Bruce continues through the learning stages in an open dialogue based approach with NWMO



6.3 Implementation Plan

Actions by Action Plan Heading	Ongoing	Highest	High	Medium	Low
	Once Initiated or Current Action	Immediately	Within One Year	Within 3 Years	Three to Five Years
South Bruce Foundations of Economic Development					
Internal Corporate Climate Supportive of Business Growth					
Strong Collaborative and Partnership Based Approach					
Establish a Permanent Community Economic Development Committee (CEDC)					
Dedicated Economic Development Coordinator – Business Liaison (EDC)					
Workforce Attraction and Retention Strategy					
Stimulate Downtown Revitalization (by Leveraging Spruce the Bruce)					
Establish a Downtown Revitalization Sub-Committee (of the CEDC)					
Engage Bruce County Spruce the Bruce program staff and initiate a Community Toolkit process					
Develop a formal Downtown Revitalization Strategy					
Encourage more local uptake of Spruce the Bruce Façade Improvement Grants					
Explore opportunities to host well established annual events in the DOWNTOWNS					
Investigate suitability of establishing a Farmers' Market Downtown					
Institute an annual Downtown Business Survey and Site Visitation Initiative					
Establish a South Bruce Downtown Business Improvement Association (BIA)					
Establish a Farmers' Market, Culinary, and Local Food Experience					
Create a comprehensive South Bruce Agri-Tourism Strategy					
Develop a Communications Plan for establishing strategic relationships to support initiatives					
Explore and engage various public resources and information to support initiatives					
Conduct a Farmer's Market Feasibility Study for South Bruce					
Assess current value and condition of the River Village Co-operative Market property					



Actions by Action Plan Heading	Ongoing	Highest	High	Medium	Low
	Once Initiated or Current Action	Immediately	Within One Year	Within 3 Years	Three to Five Years
Pursue pending local food pilot project funding from the Ontario Tourism Development Fund					
Leverage the Tractor Culture to Create a Unique Place Based Attraction					
Formulate a Strategic Approach and Business Proposal					
Open dialogue with Team Farmall to explore synergies and gauge interest in collaboration					
Continue discussions with Ontario Ministry of Tourism, Culture and Sport (leveraging Bruce County Tourism support) to identify potential investor/strategic alliance and local readiness					
Ensure alignment and inclusion in the South Bruce Agri-Tourism Strategy					
Prepare and Market the South Bruce Business Park					
Perform a Feasibility Study and Cost Analysis for the South Bruce Business Park					
Ensure that the appropriate budget allocations are in place to support readiness					
Develop the South Bruce Business Park into a "Shovel Ready" state					
Initiate cross-departmental effort to streamline and improve internal development process					
Perform a detailed Situational Analysis of the South Bruce lands					
Develop a South Bruce Business Park Strategic Marketing Plan					
Business Park marketing and promotional materials are posted on the South Bruce website					
Actively market the Business Park through economic development partner organizations					
Ensure local business awareness of expansion land					
Foster Value-Added Agriculture and Food Processing					
Establish an Agri-business Advisory Sub-Committee (of the CEDC)					
Network with local agricultural sector to determine greatest benefit potential for value-added opportunities and how to support and stimulate their creation/development					
Facilitate OMAFRA Exploring Value Added Opportunities Workshops					
Institute an annual Farm and Agri-Business Survey and Site Visitation Initiative					
Conduct a Local Agriculture and Agri-business Asset Inventory and Sector Analysis					
Develop an Agri-business Investment and Expansion Initiative in collaboration with agricultural sector					



Actions by Action Plan Heading	Ongoing	Highest	High	Medium	Low
	Once Initiated or Current Action	Immediately	Within One Year	Within 3 Years	Three to Five Years
Identify and leverage various forms of capital financing to support value-added opportunities					
Planned Incremental Residential Development					
Open a dialogue with Bruce County to explore residential growth considerations					
Negotiate opportunities for partnership and collaboration with local and area developers					
Undertake a comprehensive Residential Growth Plan					
Implement a South Bruce Official Plan update					
Develop an Attraction/Retention Strategy and Marketing Plan					
Strike a multi-disciplinary Steering Committee regarding assisted living/long-term care facility					
NWMO Adaptive Phased Management Project					
Continue to maintain open lines of communications with the NWMO project contacts					
Explore synergies and collaboration opportunities with neighbouring candidate hosts					
Continued education and awareness initiatives for local residents and community					
Continue to host and support the South Bruce Community Liaison Committee					



Part 2: Technical Report

7 Appendices

7.1 Appendix 1: Background Review

7.1.1 Understanding the Skills Gap in Bruce, Grey, Huron and Perth counties, 2014

The primary purpose of the study was to examine the existing labour force in Bruce, Grey, Huron and Perth Counties from three perspectives:

- § Current labour force as seen by employees;
- § Future labour force requirements as seen by employers and key informants
- § Future labour force skills and plans as seen by high school students.

The study recommends the following policies and programs for employers, educators and community partners to implement:

- § Recommendations for Employers
 - Develop work force by providing and investing in workplace training and mentoring programs for employees
 - Collaborate with other employers to provide joint training to reduce costs
 - Increase exposure to local job opportunities to create a pool of employees to fill future demand
 - Attract work force by participating in spousal employment programs
- § Recommendations for Educators
 - Work with employers and community partners to inform youth on current local labour market trends and diversity of job opportunities, including apprenticeships
 - Collaborate with community providers such as CFDCs and parents to develop soft skills in youth that are required by employers



- Offer more flexibility in training programs to allow for continuous learning
- Collaborate with employers to build attraction strategy for students who leave for post-secondary education and create career programs that connect student with companies in community
- Create and maintain database the tracks high school graduates that enter post-secondary education and those who enter the workplace directly

§ Recommendations for Community Partners (Workforce Planning Board, Employment and Training Service Providers, Adult Learning Centres, Community Futures Development Corporations, County/Municipal Economic Development Services, Small Business Enterprise Centres, etc.)

- Four County Labour Market Planning Board inform education and employment partners about existing and projected skills gaps and collaborate with them to enhance job seeker's skills
- Employment services work with schools to promote summer employment and offer their expertise in job development and career coaching
- CFDCs engage with youth to offer employment readiness programs and promote entrepreneurship opportunities
- SBECs and CFDCs promote their training opportunities and programs to local businesses
- Community partners create strategy to attract local workforce and former residents, and
- County and municipal economic development departments work with employers to develop workforce attraction strategy
- Community partners develop strategic plan for local recruitment and retention
- Community partners study rural transportation issues to improve accessibility to and from workplace

Due to the rapid changes to the regional job market, it will be important for employers, educators and community partners to implement these recommendations to ensure that South Bruce remains economically competitive.

7.1.2 South Bruce CFC Economic Development Strategic Plan 1992-1996

South Bruce CFC has established an Economic Development Strategic plan whose vision reflects the values and resources of the communities in the area. The vision for local economic development is the following:

§ Support existing business and industry in South Bruce

§ Attract new investment to South Bruce



- § Increase competitiveness and productivity
- § Encourage and support partnerships of agencies and organizations involved in economic development
- § Promote and market the advantages of South Bruce.

In order to support the vision the plans has identified several goals, and recommendations that should be adopted by the South Bruce CFC to support these goals:

§ Goal: Support and encourage existing business and industry in South Bruce

- Provide local training programs to meet local needs of businesses
- Make affordable capital available for business investment and expansion
- Educate investors on investment opportunities in South Bruce
- Identify business opportunities for economic expansion and diversification

§ Goal: Attract/develop new investment in South Bruce

- Support development of Bruce Energy Centre
- Develop infrastructure in South Bruce to support future economic development
- Make affordable capital available for business investment and expansion
- Educate investors on investment opportunities in South Bruce
- Identify business opportunities for economic expansion and diversification

§ Goal: Establish and maintain partnerships for economic development planning in South Bruce

- Build on improved inter-municipal relationships using Impact Advisory Committee as model for co-operation
- Ensure timely communications and information sharing between communities
- Review Official Plans and planning controls every five years to ensure local resources/policies support economic development
- Provide education and training to local politicians on role of Municipal Government in economic development
- Improve coordination between tourist associations



- Integrate and coordinate services to reduce costs and increase efficiencies
- Support and encourage opportunities for communities working with each other on areas of mutual concern
- Develop marketing programme for local goods and services

§ Goal: Increase competitiveness and productivity of business, industry and communities in South Bruce

- Develop training programs based on local economic priorities
- Develop infrastructure in South Bruce to support future economic development
- Research and develop new technology applications in target sectors
- Leverage social assistance programs to encourage skills retraining for work force
- Ensure prompt planning approvals which support future economic development
- Determine employer`s education/training requirements

7.1.3 South Bruce Community & Business Association SWOT Analysis Meeting Report, July 2013

The South Bruce Community and Business Association (SBCBA) conducted a SWOT Analysis in the first half of 2013 in order to establish a strategy that would support efforts to both expand existing businesses in South Bruce, and attract new ones to the community.

The Spruce the Bruce downtown improvement program available through Bruce County was specifically referenced, as well as the idea of branding Teeswater as a Tractor Town for agri-tourism purposes.

The findings from the SWOT analysis were used to create a list of actions items that would be implemented to help support the growth and attraction of businesses in South Bruce.

The following is a list of the action items that were generated:

- § Better understand what local businesses provide and strengthen business to business opportunities
- § Look for joint bidding, procurement and supply opportunities for local companies
- § Attract satellite services to the community



- § Increase marketing efforts of South Bruce and the communities
- § Tell a better story about South Bruce and its industries; consider branding the idea of “From Earth to You Home”
- § Seek business synergies locally, domestically, and globally
- § Work in cooperation with other groups and associations
- § Actively participate in the development of South Bruce’s corporate strategic plan
- § Support the application to OMAFRA for a retail business study
- § Prioritize working with various political levels to support efforts
- § Access Economic Development support from South Bruce, Bruce County and Grey County
- § Hire an internal resource, or contractor to assist with business development and execution of the goals and objectives of SBCBA

7.1.4 Explore the Bruce

Explore the Bruce is the brand image created by Bruce County Tourism to promote and identify year round activities located in the County. As part of this brand, Bruce County Tourism has created a tourism website that is used to promote and develop the County’s tourism sector.

The website has a listing of all the outdoor and indoor activities that visitors can access such as the beaches, Bruce Trail, Farmer’s Markets and etc. There is also a list of local event and festivals, cultural facilities, accommodations, and places to eat and shop.

The website is also promoting the Adventure Passport which awards visitor prizes if they have visited a minimum of seven of the 12 designated adventure stops in the County. In 2013 the program had the participation of 7,279 visitors and the resulted in an overall economic impact of \$3 million.³⁹

7.1.5 Foodlink Grey Bruce Network

Foodlink is a marketing program created by Bruce and Grey Counties that is used to promote the local food that is produced and processed in the Grey Bruce Region. The goal of the program is to increase the viability of small farms and micro-food processors by promoting direct sales of local food. In order to support this goal, the program has created the

³⁹ Shoreline Beacon. 2014. Explore the Bruce has high hopes for 2014



Grey Bruce Agriculture and Culinary Map that lists 131 local food businesses. The map also contains information on what the businesses sell, their location, and when they are open. Visitors can obtain a copy of the map from the tourist information booths and brochures racks that are located across the region.

In addition to the map, the Foodlink program has a dedicated website that lists 365 local businesses, 90 business profiles and local events. The website also lists local events, restaurants. The website has categorized the businesses as local restaurants, producers, processors, retailer or farmer's markets, making it easy for web users to find the type of business they are looking.

As part of the Foodlink program, Bruce County has set the following objectives to develop the local food market:

- § Improve access to local food at retail locations in Bruce County by assisting in distribution and year round storage
- § Improve the amount and diversity of local food in institutions in Bruce County.
- § Provide assistance to long-term-care homes and day care centres in increasing local foods use
- § Improve the success of Bruce County Farmers' Markets by increasing the diversity of vendors/products, assisting with Spruce the Bruce grants, and assisting with workshops and training needs for local vendors
- § Increase in house efforts to promote farms, local products and brand, and identify and promote top local food businesses
- § Increase exposure to existing training and educational opportunities related to agriculture and provide business planning support
- § Provide ongoing staff support to non-profit partners with local food projects

7.1.6 Bruce County Premier-ranked Tourist Destination Report

The Premier-ranked Tourism Destination program is the highest order approach to tourism planning and development in Ontario. A study was undertaken on Bruce County's tourism sector using this program.

The first phase of the study involved contacting more than 800 businesses to complete a two part survey. The next phase of the project was to analyze the survey data, and conduct focus groups, interviews and on-line surveys to gather further information on the tourism sector. The results of the study were used to create a 10 year strategic plan.

Key themes that emerged from the consultations were as follows:

- § Continue to be a strong nature-based destination choice for a wide range of visitors' interests
- § Pursue an eco-friendly or green image by become a green destination of choice for visitors



- § Broaden the product offerings to include more cultural and heritage products and attractions, and expand niche markets
- § Increase service standards and provide training and educational opportunities to the tourism sector
- § Develop more co-operative and collaborative opportunities by increasing tourism and supporting industry communications
- § Ensure that product development and marketing is solidly based on research
- § Take on the leadership role for overseeing an annual tourism strategic planning cycle by the County and Bruce County Tourism
- § Continue to be competitive, and ensure future marketing continue to be regionally oriented

Several recommendations were proposed as part of the strategic plan that was developed from the results of the study. Some of the key recommendations in the plan were:

- § Bruce County develops as an adaptable and competitive destination in harmony with its natural and cultural resources
- § The Bruce County Tourism Community will plan and operate responsibly for environmental, social, and economic sustainability
- § Tourism in Bruce County will grow based on outdoor and indoor attractions and activities
- § Tourism in Bruce County will be professional, and the management and marketing of the sector will be de-politicized
- § The Bruce County Tourism Industry will support regional marketing strategies that increase the number of visitors seeking niche experiences
- § Bruce County will undertake a review of their tourism brand to ensure that product offerings and experiences are in harmony or consistent with the brand

In addition to these recommendations, the strategic plan also has a vision for the tourism sector in Bruce County which is as follows:

“Tourism in Bruce County will grow based on building community capacity for sustainable, environmentally responsible and enriched experiences for visitors and residents.

These experiences will be available for a wider spectrum of visitors and their interests, over a longer tourism season.



Authentic experiences based on Bruce County's wealth of natural and cultural resources will be enhanced by the augmented knowledge and hospitality of all communities."

It will be important for South Bruce to work collaboration with the County in developing their tourism industry to ensure that the municipality is taking advantage of all the programs and services that the County is implementing.

7.1.7 Invest in Grey Bruce

Invest in Grey Bruce is a website that was created in partnership with Bruce Community Futures Development Corporation, Saugeen Economic Development Corporation and Grey County Economic Development. The primary objective of the website is to attract investment to Bruce and Grey Counties.

The website contains a demographic and work force overview, and lists the competitive advantages and key investment opportunities in the two counties. The website also has a list of local amenities; key target sectors and has several links to www.icx.com that shows the available real estate for sale.

In addition the website hosts several YouTube clips profiling successful business in the region.

7.1.8 Spruce the Bruce

Spruce the Bruce is a downtown improvement program created and operated by Bruce County that gives grants to the local community. The focus of the program is to assist the downtown core through improvements that make the main streets more attractive, pedestrian friendly and distinctive.

Grants can be used for various improvement projects that are located in the downtowns. Some of the improvements that funds can be used are on facade, signage, awning, collaborative marketing, streetscape beautification, destination infrastructure.

In order to be eligible for the program the applicant must be either a private business owner, local chamber, BIA, municipality or local community organization. Grant receipts must provide matching funds that are up to 50% of the project costs.

Although the program has helped in improving downtowns in the County, communities in South Bruce do not seem to be taking advantage of the programs as South Bruce recipients only made of 8% of the grants that were awarded in 2013.



7.1.9 Saugeen Economic Development Corporation

7.1.9.1 Economic Competitive Analysis Project

The Economic Competitive Analysis Project (ECAP) was completed to assist the communities within the counties of Bruce, Grey, Dufferin, Simcoe, Wellington, and the Region of Waterloo to achieve their full potential for attracting investment. As part of this project several reports were prepared for different coverage areas by Community Futures Development Corporations (CFDCs).

The ECAP report for the Saugeen CFDC region, which includes South Bruce, was an assessment of the key industry sectors that had a competitive advantage or appeared to be an emerging strength in the region. The report identified the following key sectors that are of interest to South Bruce:

- § Tourism
- § Food and Beverage Manufacturing

The study identified several specialized subsectors at the 4 digit NAICS level were identified as being part of the tourism industry. These subsectors were:

- § Traveller Accommodation
- § Recreational Vehicle Parks and Recreational Camps
- § Heritage Institutions
- § Other Amusement and Recreation Industries

Consultations with local businesses revealed that they supported the strategy of marketing the broader geographic regions; however, there was concern that the uniqueness of the individual communities could be lost.

Although the Saugeen region has some strong tourist areas, it lacks the appeal of water access that neighbouring regions can provide. Employers also revealed that they faced difficulties in finding skilled labour to fill their job vacancies.

Numerous specialized subsectors at the 4 digit NAICS level were identified as being part of the food and beverage manufacturing sector in the region. These specialized subsectors were:

- § Meat Product Manufacturing
- § Dairy Product Manufacturing
- § Beverage Manufacturing



Consultations with employers in this sector revealed that several manufacturers have their own retail outlets on site. For these manufacturers, sales from tourists made up a strong proportion of overall sales. One of the key challenges that small to medium businesses were facing, was the lack of funding programs to upgrade their facilities. Businesses indicated that small business training programs offered by the government were helpful; however, they would like to see more support/information to help grow their markets.

In addition to the report for the Saugeen CFDC region, the Economic Competitive Analysis Project produced a report for the region covered by the South Central Community Development Corporation (SCCDC). The SCCDC region includes seven sub-regions that are each represented by the following Community Futures Development Corporations:

- § Bruce CFDC
- § Centre for Business and Economic Development
- § North Simcoe CFDC
- § Nottawasaga CFDC
- § Orillia Area Community Development Corporation
- § Saugeen Economic Development Corporation
- § Wellington Waterloo CFDC

The results of the interviews with key stakeholders and consultations with the steering committee highlighted the following recommendations to be carried out by the SCCDC:

§ Broadband Internet

- Improve availability of high speed internet within the entire region

§ Tourism

- Maintain the uniqueness of the communities and do not homogenize the region
- Create cultural assets inventory and circle tours that encourage tourist to travel in loop instead of straight line

§ Job Creation



- Identify green job opportunities for low skill workers, educate workforce that green jobs exist, compile information and resources on green jobs opportunities

§ Transportation

- Encourage employers to look at doing business in new ways, develop a pilot project to identify strategic actions for alternative transportation, support a transportation needs analysis

§ Education/Training/Attracting Knowledge and Skills

- Host roundtables with colleges and universities to discuss how more effective linkages can be forged between municipality, educators and businesses
- Identify online and distance learning opportunities to train workforce
- Host workshops to further student understanding of emerging employment sectors, especially green jobs

§ Agriculture

- Build capacity for growers, processors and consumers
- Promote and support shared interest group exchanges among producers, educators, and agricultural organizations
- Encourage investment and development in agri-business and life sciences
- Promote coordinated agri-food initiatives such as training/education and projects in the food and beverage sector

7.1.9.2 SEDC Strategic Community Action Plan 2009

In 2008, the Saugeen Economic Development Corporation (SEDC) underwent a study to create a new action plan for 2009. Meetings and interviews were conducted with residents of the region to gather their input on the actions that should be implemented by the SEDC during the next 5 years. The following is a list of key recommendations that make up the action plan:

§ Marketing and Communications

- Update and maintain web site



- Explore and implement social media
- Publish quarterly newsletter, annual community report
- Set up group specific email list
- Design and implement radio advertising
- Update SEDC brochures
- Complete community profile updates

§ Business Support

- Collect and communicate support information to clients and community partners
- Complete sector projects such as economic competitive analysis, workforce development, business training
- Create SEDC investment portfolio
- Assist businesses to achieve bankability
- Provide technical support for business
- Develop business resource such as resource library, business start-up package

§ Liaison

- Meet with politicians, business organizations
- Meet with managers in government ministries, at regional, provincial and federal level
- Meet with regional and provincial CFDCs

§ Partnerships

- Develop partnerships as way of doing business to harness resources in region
- Increase access to people, expertise, information and funding
- Increase co-operative regionalism by including appropriate partners in projects

§ Action Planning



- Monitor, review and make changes to Action Plan on bi-annual basis

7.1.9.3 Bruce Grey Skills Inventory: Present and Future

The purpose of this study was to understand the existing skills level in Bruce and Grey counties. The project consisted of a labour market profile, high school survey, employee survey and employer survey. The results from this study were used to generate several key recommendations which are as follows:

- § Incorporate gender as a variable in skills training
- § Establish management training programs which will be created by employers
- § Increase communication between school boards and employers on the range of jobs available in the area
- § Prepare work force for job opportunities in utility sector
- § Increase dialogue between local business organizations and school districts to support co-op placements
- § Increase efforts to raise computer skill levels for students and workforce through outreach/programs from educators
- § Increase investment in adult education from all three levels of government
- § Harmonize regional economic development efforts between economic development organizations and government agencies to increase efficiencies
- § Increase partnerships between training boards and businesses to target occupations that most frequently need upgrading in education and training

7.1.10 Bruce County Long Term Housing Strategy Update: 2013 – 2023

In 2013, Bruce County underwent a review of their 2010 long term housing strategy to create a new 10 year housing plan for 2013-2023. The new plan expanded the focus from the previous plan to understand the needs of people who are in need of affordable and special needs housing. This was accomplished by conducting surveys, focus groups, and interviews with these people and other key stakeholders. As part of the review the plan has identified the following outcomes that have been completed since 2010:

- § Distributed and promoted the long term housing strategy among local municipalities, private sector, and other key stakeholders to inform and build support for affordable housing
- § Established “Yes in my Backyard Team” (YIMBY), to promote affordable housing in Bruce County
- § Created 122 new affordable housing units, 11 second stage housing units



- § Assisted 93 households to purchase a home through the Home Ownership Program
- § Assisted 26 home owners with home repairs and renovations through the Bruce County Home Repair Program
- § Added 25 new rent supplement units
- § Encourage housing partners to adopt a common definition of affordable housing
- § Encourage local municipalities to update policies to recognize need for the development of affordable housing, secondary suites

Although many of these outcomes have help to address some key housing issues, there are still housing needs that remain unmet. The new plan aims to create a community based approach to meet the housing choice, affordability and stability needs over the next 10 years.

Through this community focused approach, stakeholders were asked for their input to create a new community vision for housing in Bruce County which is as follows:

- § Appropriate, affordable, diverse and supportive housing choices for all Bruce County residents

In order to support this vision, the plan has adopted the following housing targets for the County:

- § Create 445 affordable housing units in the next ten years (2013 to 2023)
- § 30% of all new supply meet the County definition of affordable housing

Based on the feedback from the community and key stakeholders the housing plan has adopted the following strategic actions to ensure that community's vision is achieved:

- § Educate Partners

- Engage community, local government and private sector on the need and benefits of affordable housing in order to broaden community support

- § Cultivate Strong Partnerships and Coordinate Efforts

- Forge strong community partnerships in the development of affordable and special needs housing by working in collaboration, coordinating efforts and sharing resources



§ Enhance Financial and Program Supports for Housing and Services

- Expand financial supports for affordable and special needs housing from all three levels of governments

§ Make Planning Rules more Flexible

- Encourage local municipalities to revise planning policies and regulations to support the development and maintenance of affordable and special needs housing

§ Maintain Existing Housing Stock

- Sustain the current again housing stock to maintain an adequate supply of affordable housing

7.1.11 Regional Tourism Organization 7

Regional Tourism Organization (RTO) 7 is a non-profit corporation, funded by the province, to lead in the planning, marketing and development of the tourism sector in Bruce, Grey and Simcoe counties. RTO7's vision for the region is to establish the BruceGreySimcoe area as Ontario's four season destination of choice.

The mission for the organization is to work collaboratively with tourism partners and stakeholder to enrich BruceGreySimcoe's diverse tourism experiences and to build, sustain and grow visitation, investment and visitor spending.

In order to achieve their vision, the organisation has created BruceGreySimcoe brand image that is used to market and promote the region. RTO7 has also introduced a new \$1 million partnership funding program to work on joint project with the region's tourism businesses and organizations.

7.1.12 South Bruce Application for Ontario Tourism Development Fund

The objective of the Ontario Tourism Development Fund is a program that supports the development of the tourism sector by providing funding to projects that:

§ Create or revitalize tourism attractions, sites and experiences



- § Develop innovative products in emerging sectors
- § Enhance the quality of tourism services, businesses and practices through training
- § Assist with tourism planning and capacity support
- § Assist communities with investment readiness, investor relations, investment attraction and communications

The Municipality of South Bruce in collaboration with Bruce County has submitted an application to this funding program. The municipality is requesting funding for a local food project in Mildmay, a community in South Bruce, which will be an interactive tour of nine local food operators.

Participants will be able to access an audio narration through their smart phones at each stop on the tour. The narration would describe what is occurring at each location and offer anecdotes about the local history.

The objective of the project is to increase the participant's food literacy, consumer awareness of local food and knowledge about where they can purchase local food.



7.2 Appendix 2: Online Survey Results

This section of the report summarizes the results of a broad based community survey that was distributed online. The purpose of the survey was to gain insights on South Bruce's economic opportunities and challenges from local residents, businesses and community groups. The survey was targeted to a broad audience to gather a wide range of quantifiable data. Notice of the survey was advertised in local media and posted on the municipality's website, in order to get responses from as large group of participants as possible.

7.2.1 Data Analysis and Methodology

The online survey had the participation of 53 community members in South Bruce and the surrounding area. Participants to the survey were given the opportunity to answer questions online between May 2014 and August 2014.

The survey was structured to identify issues from the following stakeholders:

- § Residents
- § Business Owner/Operator
- § Community Organization/Stakeholder

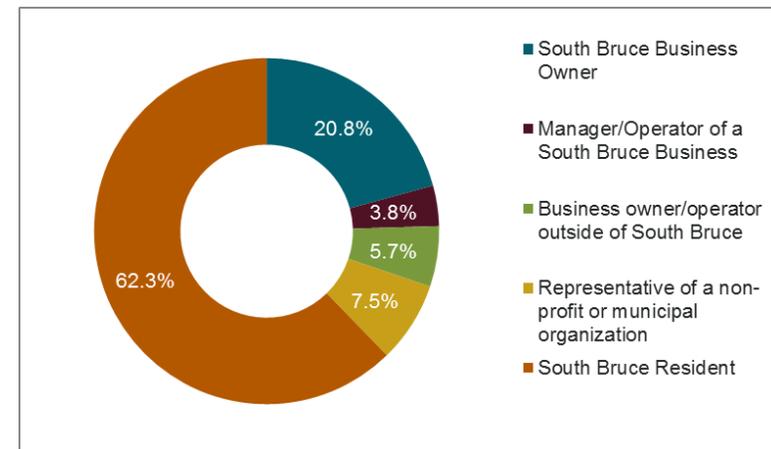
A total of 46 detailed questions were asked, however these questions were divided among the different stakeholder groups. The survey tools used for data collection and analysis were Survey Monkey and Microsoft Excel.

The survey tool was designed by the Steering Committee's consulting team to be an easy-to-use template that would facilitate data entry, as well as data analysis. A combination of qualitative and quantitative questions was asked to gather insight on the community from survey participants.

7.2.1.1 Survey Participant Profile

When asked to classify themselves, the majority of stakeholders identified themselves as South Bruce residents (62.3% or 33), while the next highest responses were Business owners (20.8% or 11) and Representative of non-profit or municipal organization (7.5% or four).

FIGURE 43: ARE YOU RESPONDING AS A:

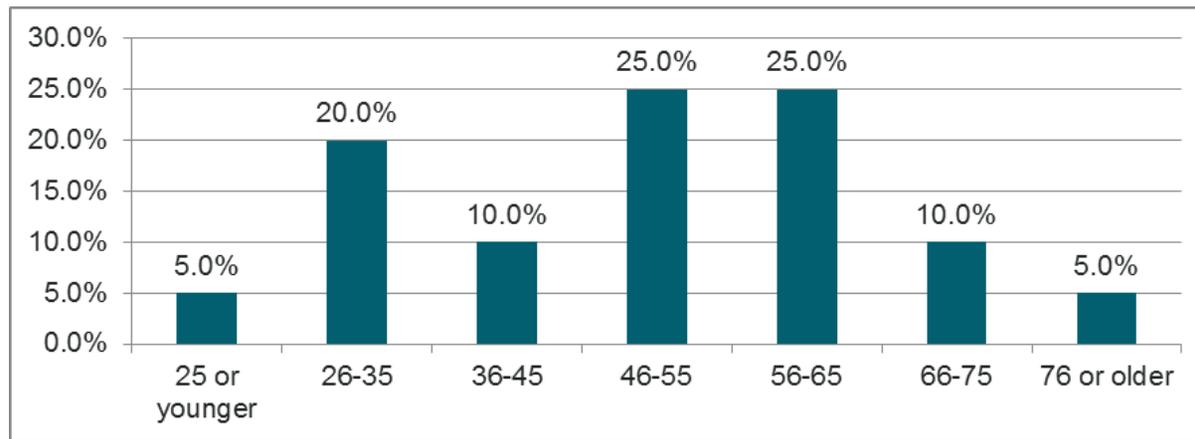




7.2.2 Resident Profile

This subsection presents responses to questions asked in the “Resident Profile” portion of the survey. Out of the 20 respondents, the largest portion of survey respondents was between the ages of 46-55 (25.0% or five), 56-65 (25.0% or five) and 26-35 (20.0% or four). The age group with the lowest portion of responses were between the ages of 25 or younger (5.0% or one) and 76 or older (5.0% or one).

FIGURE 44: AGE RANGE OF SURVEY PARTICIPANTS



Participants were then asked how they felt about South Bruce in general as a place to live. The list below contains the most frequently mentioned characteristics.

- § Great place to live with a high standard of living
- § Small community with a rural setting that is a great place to raise a family
- § Good effort by the municipality and businesses to turn South Bruce into a tourist destination
- § Youth retention is a problem due to a lack of services and jobs for youth
- § Lack of retail options and recreation in the municipality
- § Need better supports for small businesses and reduce the red tape for people that want to start a business
- § Municipally owned buildings are vacant



When asked what three distinct assets, or advantages, that South Bruce has to build a strong economy from, the following themes emerged:

- § Access to municipal services such as water, sewage and electricity
- § Strong community that supports local businesses, produce and products
- § Agricultural industry
- § Both indoor and outdoor recreational facilities
- § Events throughout the year
- § Room for development
- § Proximity to Bruce Power
- § Young families who want to invest in their community

Participants were asked to rank the quality of numerous goods and services in South Bruce on a scale from one to five, where one is least satisfied and five represents the most satisfaction. Figure 45 below displays the goods and services in South Bruce ordered by their rank.

Of the 13 goods and services residents could choose from, only Public library (3.53) received a score higher than 3.5. The next highest ranking of services was Healthcare (3.13), followed by Waste management (3.00), and Education (3.00). The lowest ranking goods and services categories were Employment services (2.20) and Retail shopping (2.13).



It should be noted that nine of the 13 categories received a score lower than three which may speak to a general dissatisfaction among residents with the availability of goods and services in South Bruce.

FIGURE 45: QUALITY OF GOODS AND SERVICES IN SOUTH BRUCE

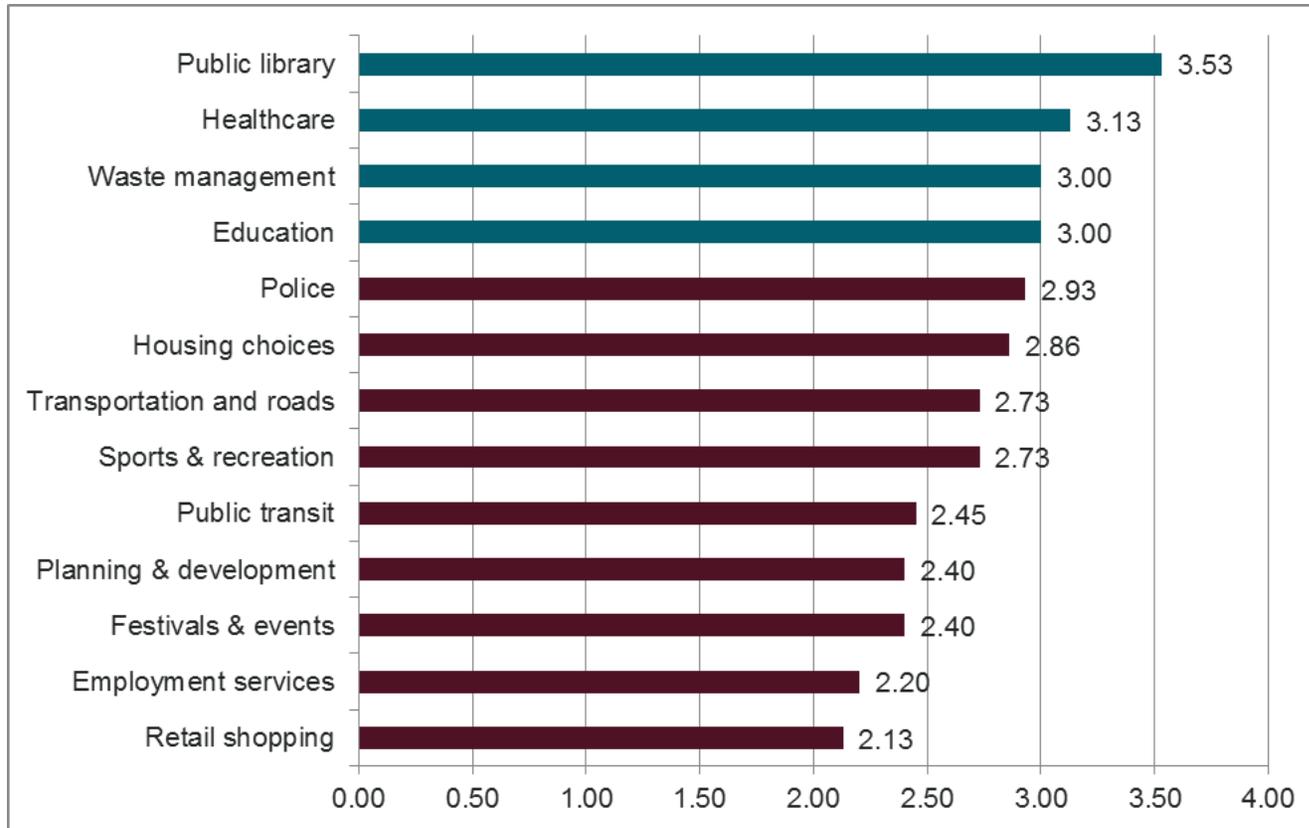
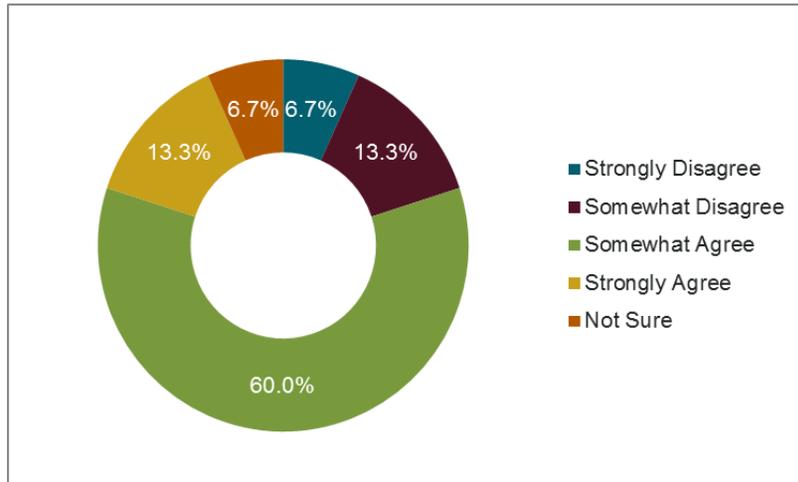


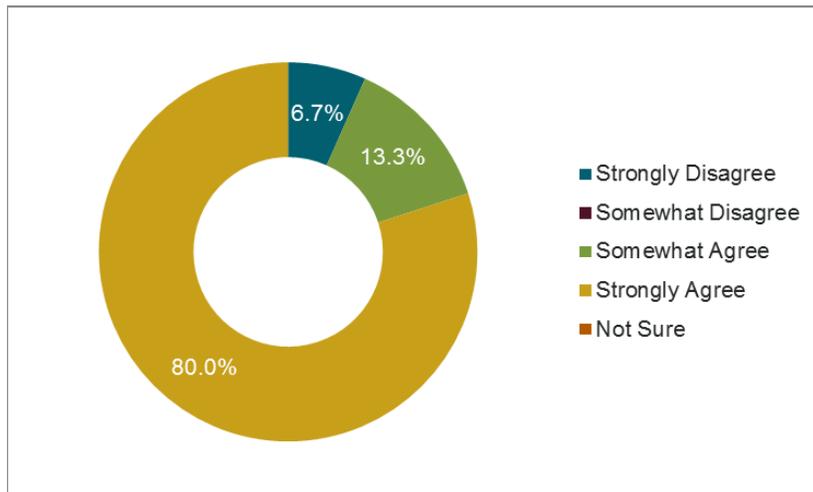


FIGURE 46: SOUTH BRUCE IS A GOOD LOCATION FOR A BUSINESS TO LOCATE



When asked if South Bruce is a good location for a business to locate, 11 respondents (73.3%) somewhat and strongly agreed, while three participants (20.0%) somewhat and strongly disagreed. It should be noted that one participant (6.7%) was not sure.

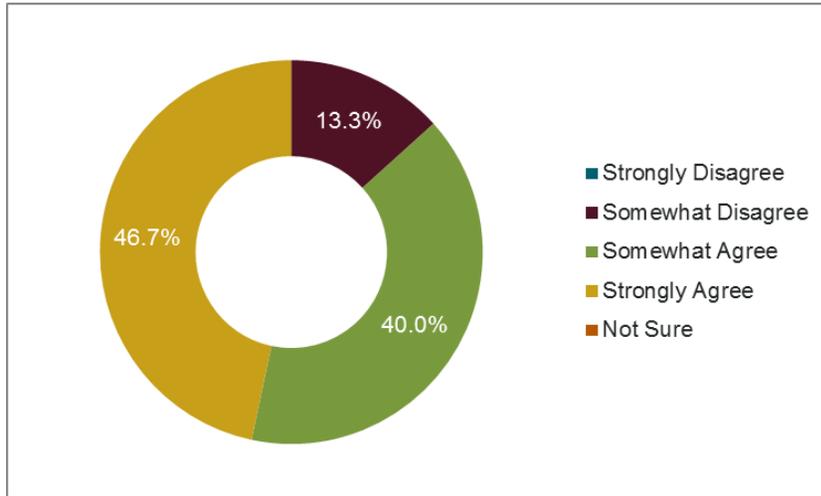
FIGURE 47: SOUTH BRUCE NEEDS TO ACTIVELY PURSUE MORE COMMERCIAL/INDUSTRIAL GROWTH



Of the 15 responses, 12 participants (80.0%) strongly agreed that South Bruce needed to actively pursue commercial (retail)/industrial growth. Two participants (13.3%) somewhat agreed with this statement while only one respondent (6.7%) strongly disagreed.

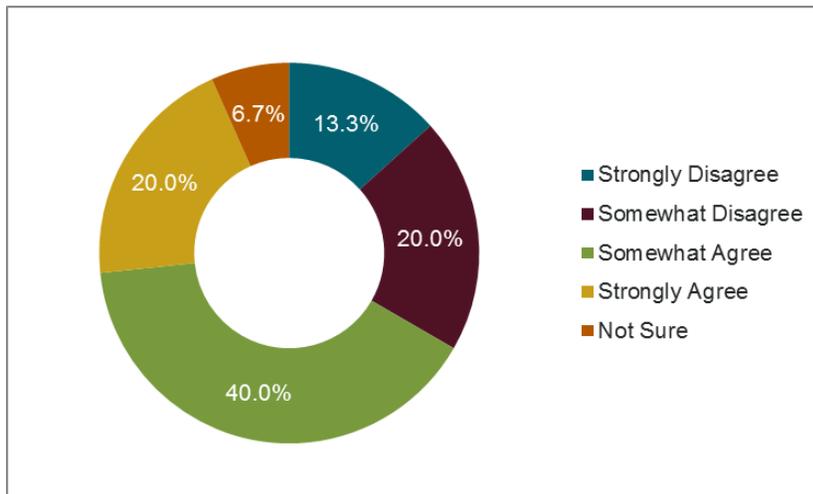


FIGURE 48: SOUTH BRUCE NEEDS TO ACTIVELY PURSUE RESIDENTIAL GROWTH



The large majority of participants (13 or 86.7%) strongly and somewhat agreed that South Bruce needed to actively pursue residential growth while a small number of participants (two or 13.3%) somewhat disagreed with this statement. It should be noted that zero participants strongly disagreed with this statement.

FIGURE 49: SOUTH BRUCE IS WELCOMING OF NEWCOMERS



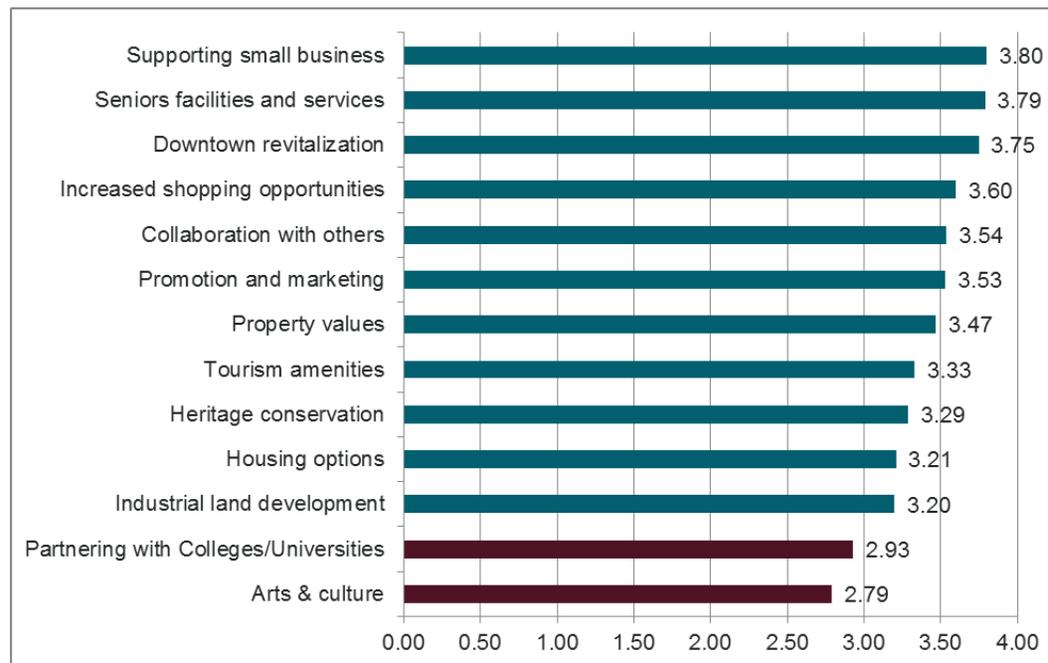
Out of the 15 responses, the majority of respondents (nine or 60%) strongly and somewhat agreed that South Bruce is welcoming to newcomers while remaining participants (five or 33.3%) strongly or somewhat disagreed. The remaining respondent answered that they were not sure.



Participants were asked to rank the importance of 13 factors that would impact the future growth of South Bruce on a scale from one to five, with one representing the least satisfaction, and five the most satisfaction. The most important factors, as indicated by respondents, were Supporting small business (3.80), Senior's facilities and services (3.79) and Downtown revitalization (3.75).

Respondents indicated that the least important factors were Partnering with colleges/universities (2.93) and Arts & culture (2.79) as they were the only factors to receive a score lower than three.

FIGURE 50: FACTORS IMPACTING THE FUTURE GROWTH OF SOUTH BRUCE.



As a follow up to this section of the survey, participants were asked to identify any other important factors to future growth in South Bruce that were not listed above. The most commonly cited factors were:

- § Building upon existing strengths and assets
- § Utilize the private sector to aid in the growth and redevelopment of the downtown
- § Diversify the economy as the local economy relies too much on the agricultural sector



§ Partner with surrounding communities to initiate and complete projects

7.2.3 Business Owner or Operator Profile

This subsection presents responses to questions asked in the “Business Owner or Operator” portion of the survey. When asked if they live in South Bruce all nine participants stated that they lived in the municipality.

Out of the seven responses, the survey results captured wide range business types, with two (28.6%) each identified as Business services or ‘Other’. Within the ‘Other’ category, participants identified that their business was in real estate and landscaping.

The remaining categories each received one response (14.3%). It should be noted that for this question, respondents were able to pick more than one category which resulted in a response rate greater than 100%.

FIGURE 51: TYPE OF BUSINESS

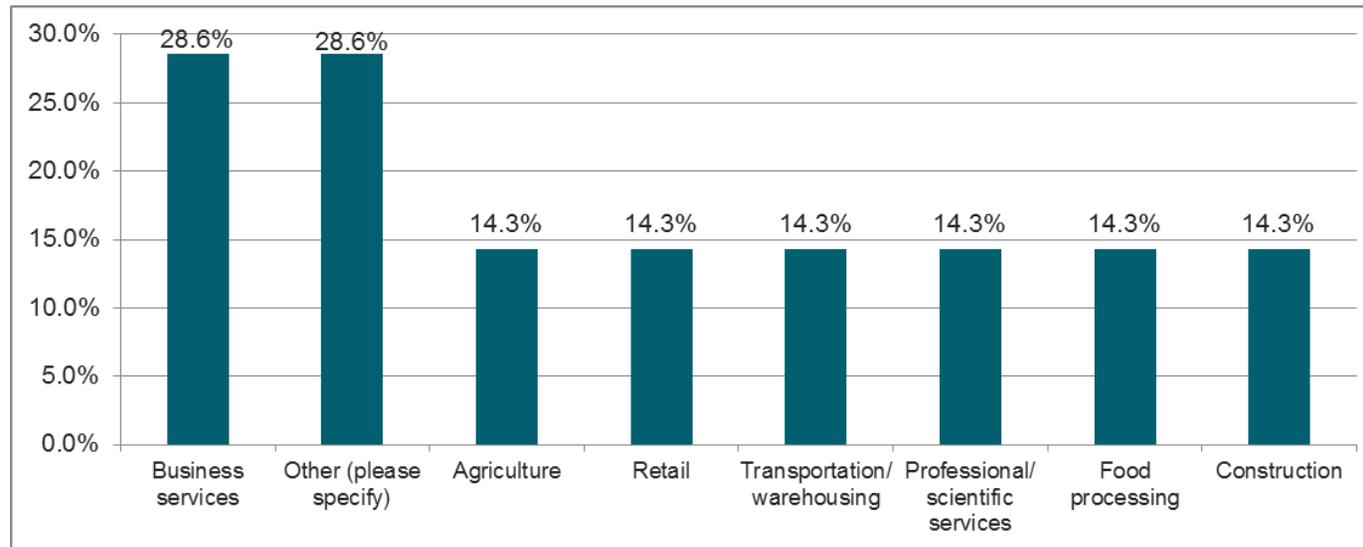
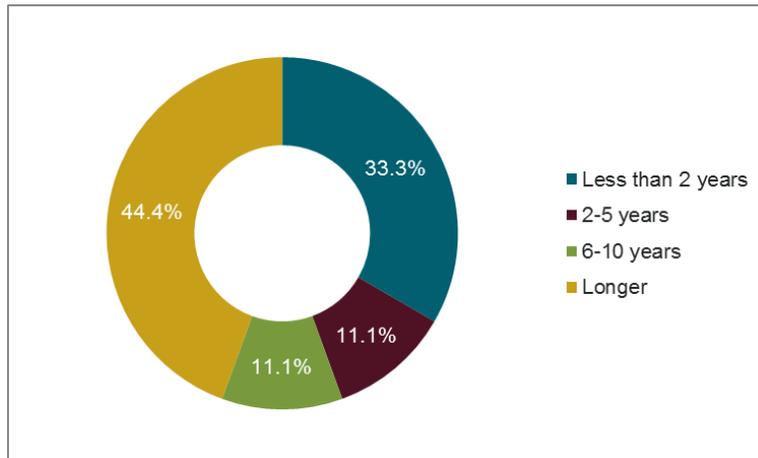




FIGURE 52: HOW LONG HAS YOUR BUSINESS OPERATED IN SOUTH BRUCE?



As a follow up question, participants were asked to identify how long their business has been operating.

Out of the nine responses, the highest responses rate was Longer than 10 years (four or 44.4%) and Less than two years (three or 33.3%), while the 2-5 years and 6-10 years each received 1 response or 11.1%.

In order to determine the size of the business, respondents were asked to identify how many people they employed. A small majority of participants (five or 55.6%) indicated that they were self-employed while remaining four respondents stated they were small businesses that employed 1 – 49 employees (44.4%).

FIGURE 53: NUMER OF EMPLOYEES AT BUSINESS

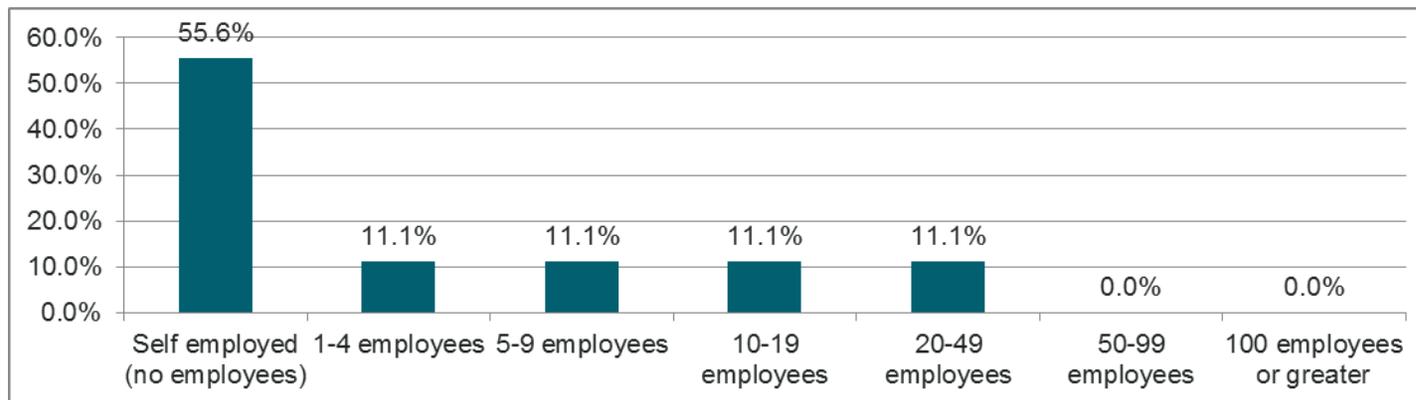
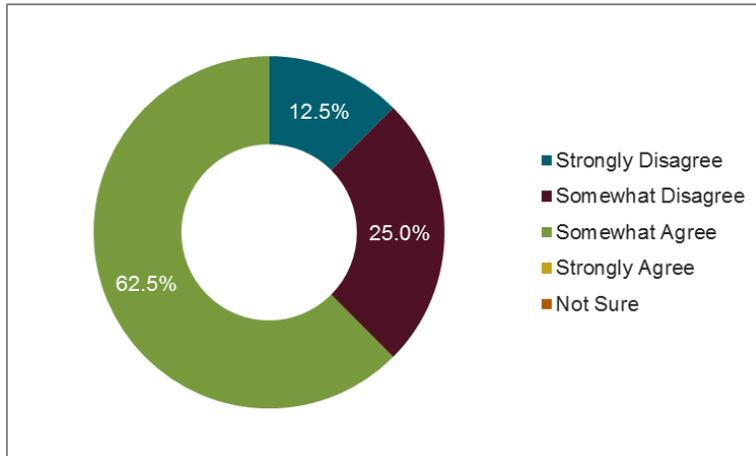




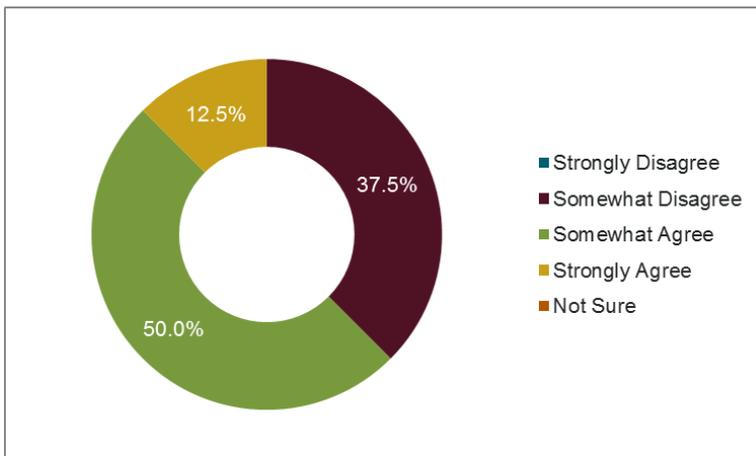
FIGURE 54: SOUTH BRUCE IS A GOOD LOCATION FOR A BUSINESS TO LOCATE



Participants were asked if South Bruce was a good location for a business to locate. The majority of respondents (five or 62.5%) somewhat agreed while the remaining three participants (37.5%) strongly or somewhat disagreed.

It should be noted that none of the participants strongly agreed with this statement.

FIGURE 55: SOUTH BRUCE IS WELCOMING OF NEWCOMERS



When asked if South Bruce is welcoming of newcomers, out of the eight responses, the majority strongly or somewhat agreed (five or 62.5%) while the remaining somewhat disagreed (three or 37.5%).



When asked the question, “*What is your vision for South Bruce over the next 5 years?*” participants were primarily concerned with the local economy.

Respondents wanted to see:

- § Further development of the tourism sector
- § Improved main streets
- § An increase in the number of businesses
- § Increased availability of jobs

Despite the strength of the agricultural sector there were concerns that commercial farming represented a long term threat to small farmers in the area.

Participants also mentioned that they would like to see more young people and families moving into the community by creating jobs for them.

It was also mentioned that certain services should be amalgamated with surrounding municipalities to provide better services, particularly to the senior population.

The need to work collaboratively to build a better community was also identified, and the example of the River Village Co-op closure was used to illustrate that the community is not focused on supporting its own assets or businesses as well as it could.

Participants were then asked to identify *three distinct assets or advantages* that South Bruce had on which to build a strong economy.

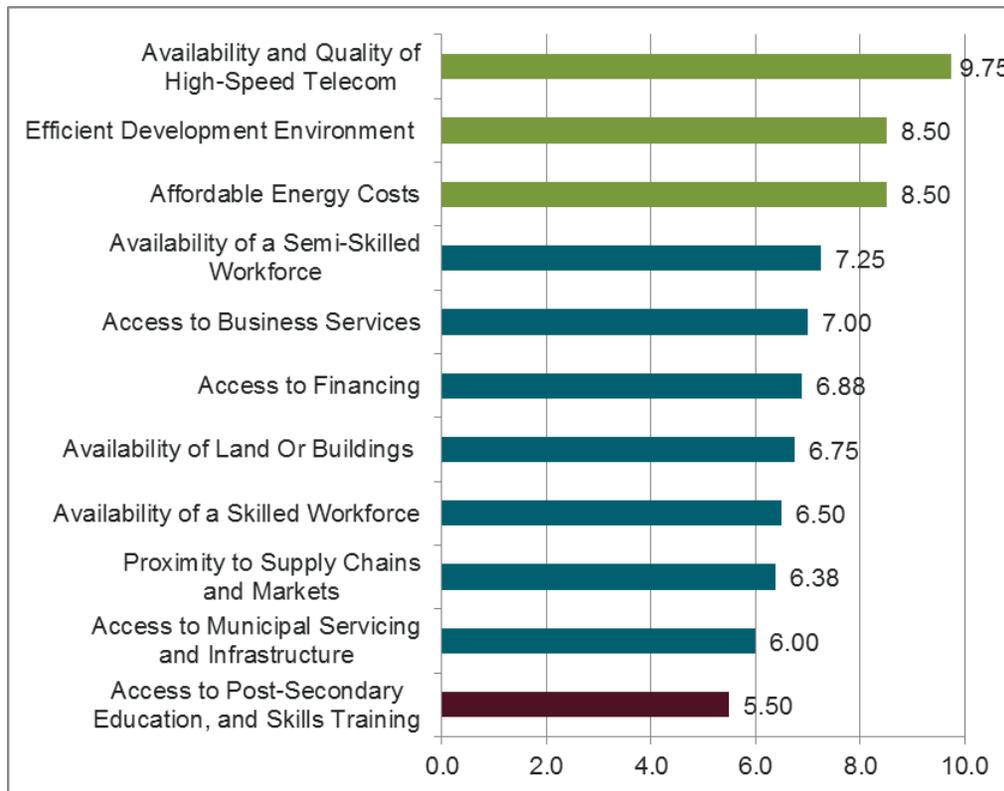
Below are the most frequently mentioned advantages:

- § Friendly and supportive community that works together and is loyal to local businesses
- § Active service groups
- § Fair property prices and low land and building costs
- § Attractive downtown with large availability of retail space
- § Availability of recreation facilities and open space
- § Agriculture industry and natural resources such as natural gas
- § Access to municipality services such as health and infrastructure



Participants were asked to rank the importance of 11 factors that would ensure the growth of their business, on a scale from one to ten, where ten indicated most important, and one represented least importance.

FIGURE 56: FACTOR ENSURING THE GROWTH OF BUSINESSES



The most important factors, as indicated by respondents, were Availability and quality of high-speed telecom (9.75), Efficient development environment (8.50) and Affordable energy costs (8.50).

The least important factor was Access to post-secondary education, and skills training (5.50) as it was the only factor to receive a score less than six.

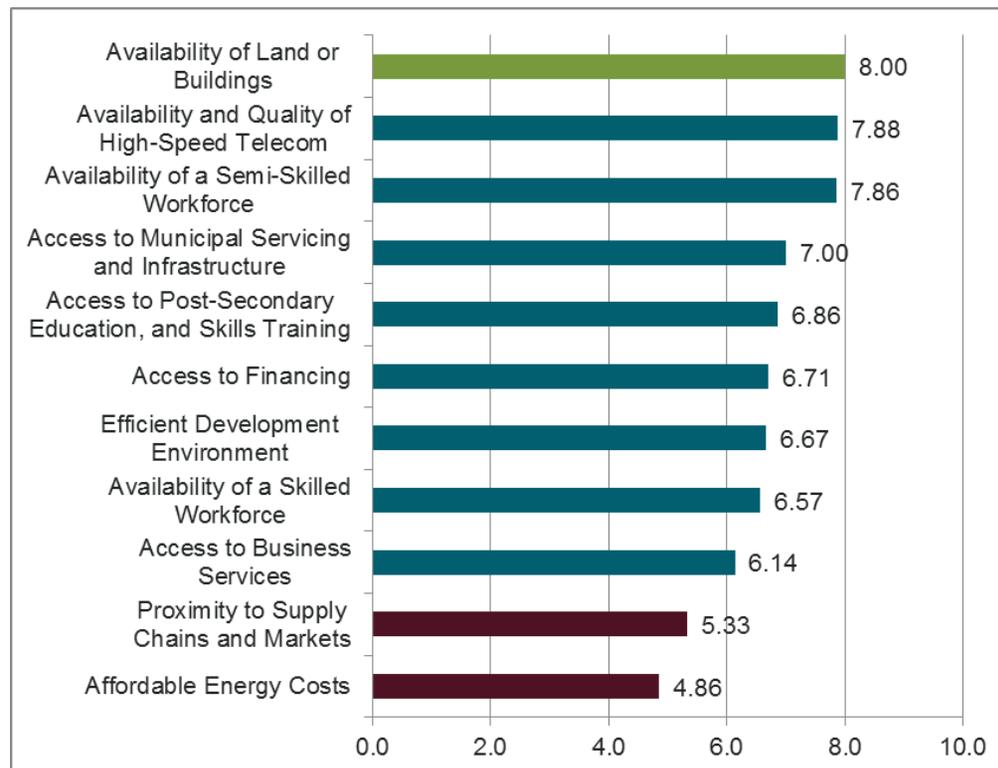


Respondents were also asked to rank their satisfaction with 11 factors related to South Bruce as a place to operate their business, on a scale from one to ten, where ten is most satisfied and one represents least satisfied.

According to their answers, participants were most satisfied with Availability of land or buildings (8.00), Availability and quality of high-speed telecom (7.88) and Availability of a semi-skilled workforce (7.86).

Respondents indicated that they were least satisfied with Proximity to supply chains and markets (5.33) and affordable energy costs (4.86), which each received a score less than six.

FIGURE 57: FACTORS IMPACTING THE OPERATIONS OF BUSINESSES





Participants were also asked to note any other important factors to growing and operating their business in South Bruce that were not captured in the question above.

The most frequently mentioned factors are listed below:

- § Taxes and energy costs
- § Access to good jobs as their business depend on a local client base
- § Support for local businesses to work together

When asked for the “*Primary reason for locating their business in South Bruce*”, the majority of participants stated that they, or family member, were already a resident of the community and knew the people of the municipality.

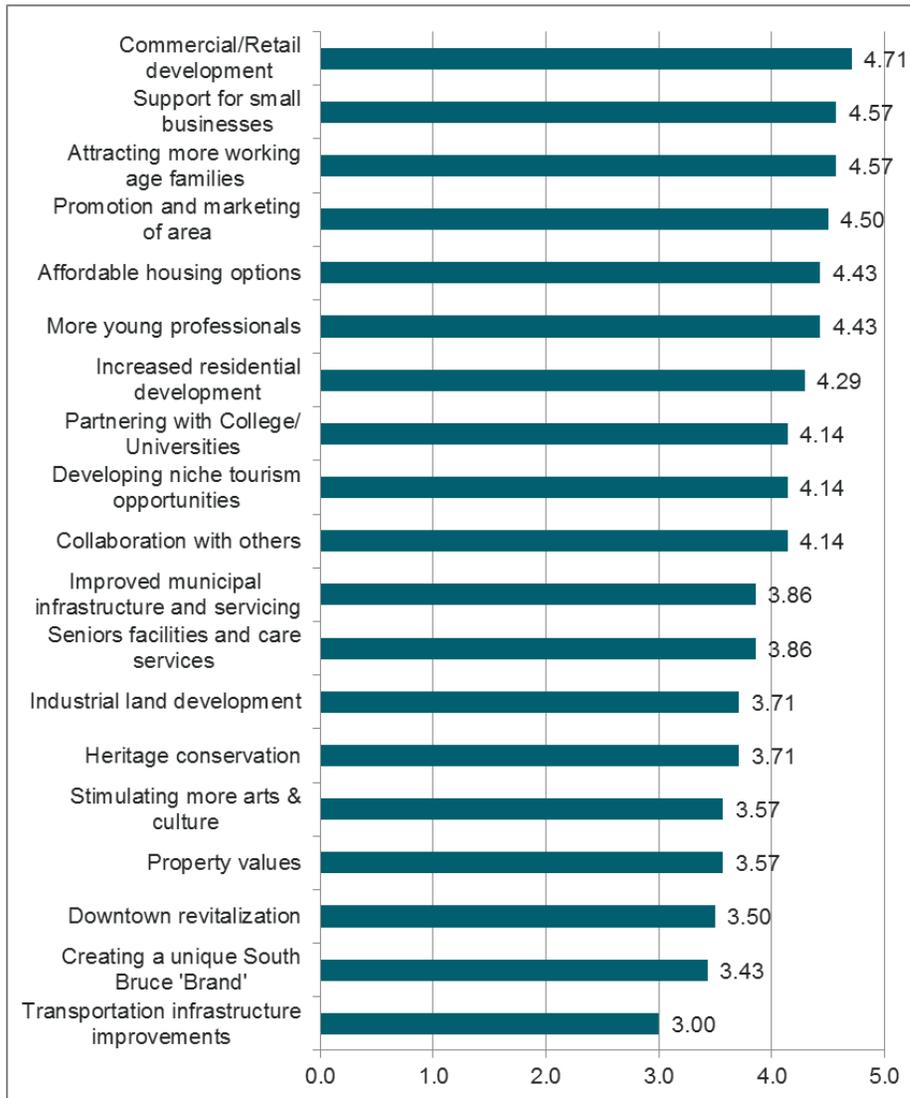
In order to further understand the challenges that the community faces, participants were asked to identify the three most important barriers to economic growth and success that they would like to see the Municipality of South Bruce address in the next five years.

Below is a list of the most commonly cited barriers:

- § **Downtown:**
Respondents stressed the need for business growth in the downtown area by providing programs/incentives for businesses to move to the area and encouraging landowners to fill their vacancies.
- § **Local Organizations:**
Respondents stated that there were too many local organizations and that volunteers were beginning to feel burnt out. Municipal support for local organizations was needed, especially in terms of creating partnerships between organizations to work collaboratively.
- § **Business Support:**
Access to customers with disposable income and wholesalers was a major concern. Participants suggested that they needed help in overcoming barriers to growth.
- § **Municipal Services:**
Participants recognized that the declining population would result in lower levels of funding for services and suggested that South Bruce consider partnering with the surrounding municipalities to more efficiently and effectively deliver some municipal services.
- § **Strategic Direction:**
A lack of vision for growth from the municipality and residents was cited as a major barrier. The municipality should focus on connecting the residents of the different communities in South Bruce to create a common vision.



FIGURE 58: FACTORS IMPACTING THE FUTURE PROSPERITY AND GROWTH OF SOUTH BRUCE



In addition to the question above related to specific factors on business operations and growth, participants were also asked to rank the importance of 19 factors that would impact the future prosperity and growth of South Bruce, on a scale of one to five, where one represents least important, and five indicates most important.

Figure 58 displays these factors ordered by rank. According to the feedback from participants, the most important factors to future growth and prosperity were:

- § Commercial/retail development (4.71)
- § Support for small businesses (4.57)
- § Attracting more working age families (4.57).

The least important factors, as indicated by respondents, were:

- § Creating a unique South Bruce 'brand' (3.43)
- § Transportation infrastructure improvement (3.00)



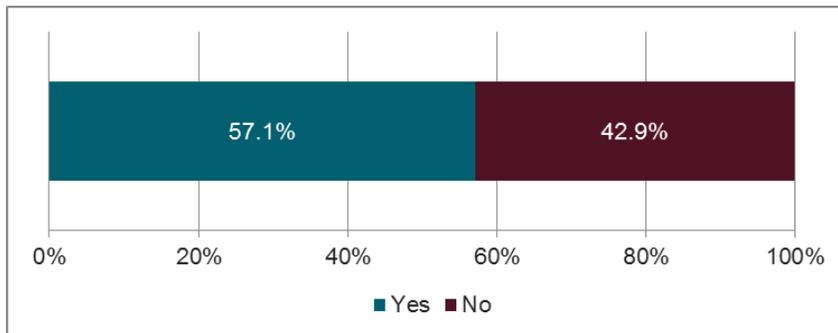
As a follow up to the question above, respondents were asked to provide further detail on why these factors were important for the growth of South Bruce.

The list below highlights the most common themes that emerged:

- § Create a more attractive place for young families and retirees to move or live in the area by providing affordable housing, facilities for seniors and growing the arts and culture sector
- § Revitalization of the downtown through residential and commercial development, and support and grants for small businesses; especially for those started by retirees
- § Attract residential, commercial and industrial development by ensuring enough land is available to fill market demand

If participants identified any of the factors above as not important, they were asked to provide further details. Respondents provided a variety of answers including that the market would take care of their issues, and that the lack of support for businesses located downtown was the suspected cause of businesses closing and declining property values.

FIGURE 59: SPRUCE THE BRUCE PROGRAM AWARENESS



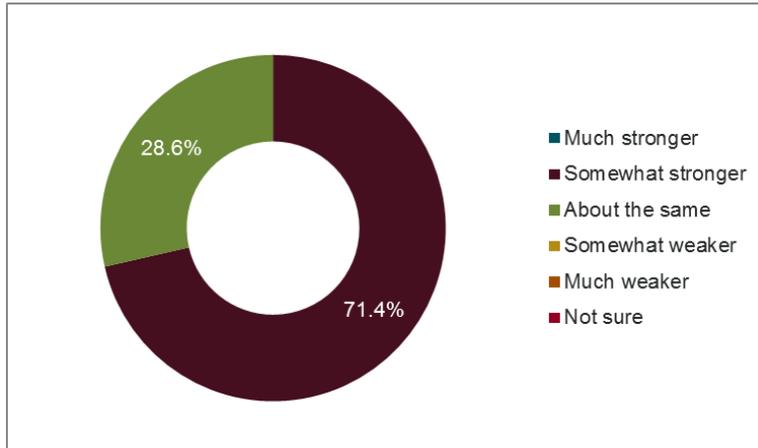
Respondents were asked to identify their level of awareness of the Spruce the Bruce downtown revitalization program available through Bruce County.

Out of a total of nine responses, a small majority of participants (four or 57.1%) indicated that they were aware of the Spruce the Bruce downtown revitalization program.

Of those that did not know about the program, only two respondents indicated that they would like to know more about Spruce the Bruce.



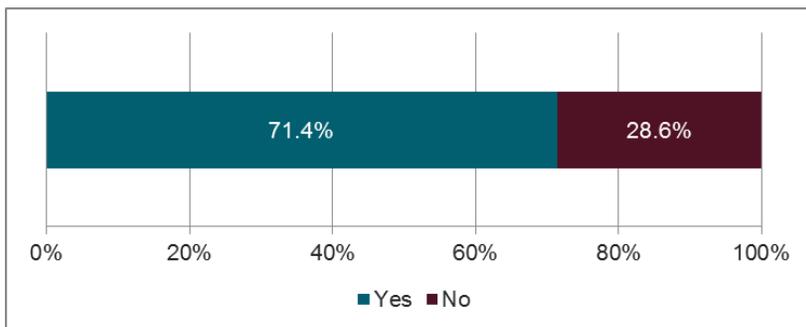
FIGURE 60: BUSINESS PERFORMANCE WITHIN NEXT TWO YEARS



When asked to indicate how their company would perform in the next two years compared to the previous two, out of the seven responses, the majority of participants (five or 71.4%) stated that their company's performance would be somewhat stronger.

The remaining respondents (two or 28.6%) specified it would be about the same.

FIGURE 61: DO YOU HAVE PLANS TO UPGRADE OR EXPAND YOUR BUSINESS



Participants were asked if they had plans to upgrade or expand their business, and out of the seven total responses, five or 71.4% responded 'Yes'.

When asked to elaborate on their plans, respondents identified:

- § Building improvements
- § Investment in equipment
- § Expansion of their client base

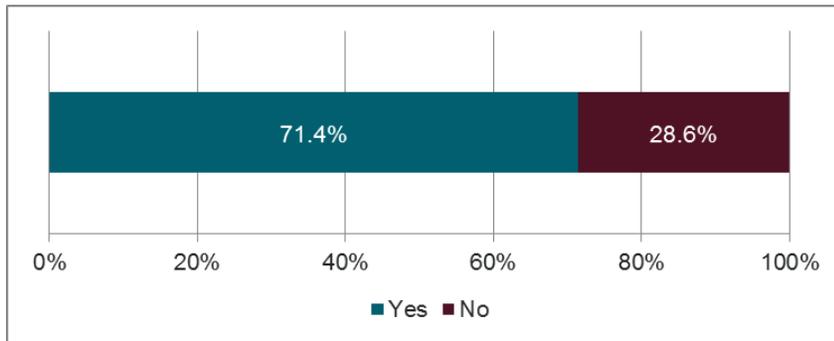
as reasons for their renovation/expansion.



In order to understand what may prevent businesses from expanding in South Bruce, participants were asked if there were any barriers.

Out of the seven answers, the majority (five or 71.4%) indicated that barriers existed in the municipality.

FIGURE 62: BARRIERS FOR BUSINESS EXPANSION IN SOUTH BRUCE



When asked for further detail, participants cited:

- § The development process
- § Declining population
- § Lack of small business support

as barriers to growth.

Participants were then asked for their opinion on any opportunities the municipality should consider to support economic development.

The list below identifies the most commonly cited factors:

- § Develop agricultural sector by providing business support services to farmers that would allow them to expand their market reach
- § Attract new residents, particularly retirees and young families, by marketing the area which will result in increased investment
- § Increase support for businesses by partnering with the South Bruce Business Association in order to create a full-time position for business development



7.2.4 Community Organization Profile

This subsection presents responses to questions asked in the “Community Organization/Stakeholder” portion of the survey.

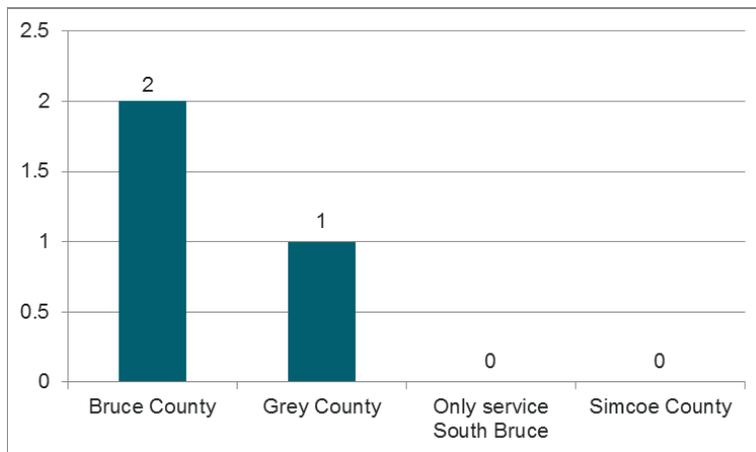
When asked where their organization was located, out of the two responses, one participant stated Wingham and the other Walkerton.

Participants were also asked how long their organization had been operating in South Bruce. Both respondents indicated that they had been operating in the municipality longer than 10 years.

When asked if they serviced any other areas beyond South Bruce, both respondents identified Bruce County, while one indicated Grey County.

For this question, participants could choose more than one area, which led to a response rate greater than 100%.

FIGURE 63: ORGANIZATION SERVICE AREA



In order to gain a deeper understanding of their organization, participants were asked to provide further detail on how their group plays a role in supporting economic development in South Bruce.

One respondent stated that their organization hired local people, encouraged local people to pursue careers which could lead them to return to the area, and conducted activities to convince working professional to move back home.

The other participant specified that they supported business development and regional economic development initiatives.



When asked what key words they would use to promote South Bruce to potential investors, participants identified the following assets or community attributes:

- § High-speed internet
- § Low real estate costs
- § Strong work ethic of personnel
- § Reasonable taxes
- § Close proximity to urban areas
- § Tractor Town
- § Rural Values
- § Cooperative
- § Farm Fresh
- § Agriculture

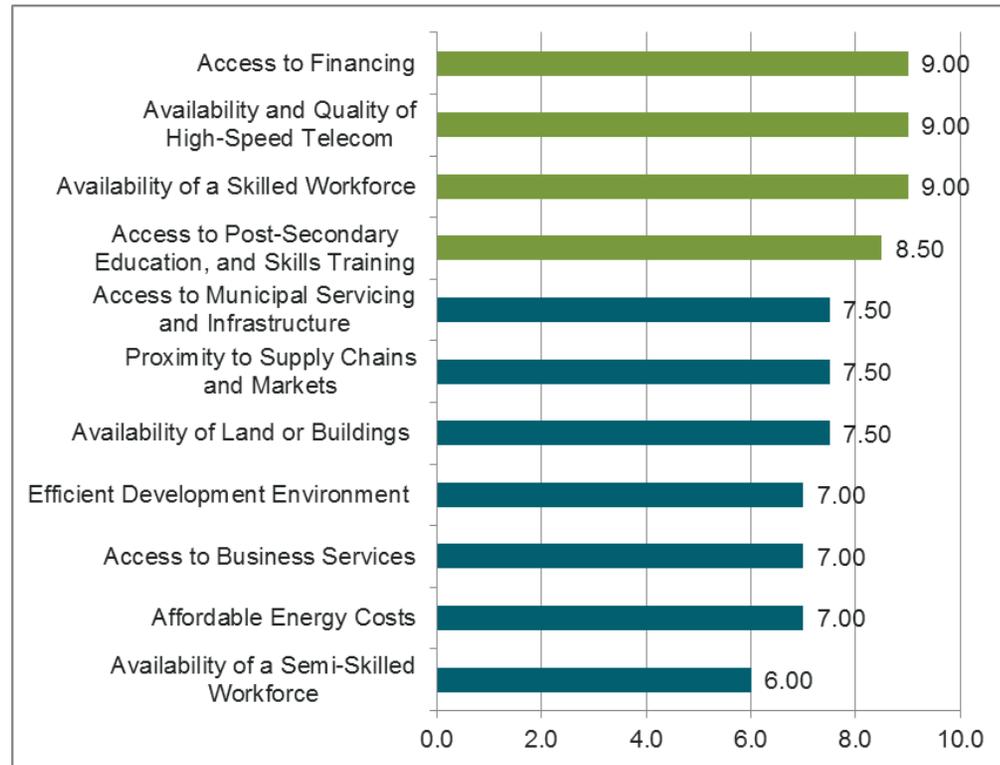
The participants were then asked to rank the importance of 11 factors impacting business growth and prosperity in South Bruce, on a scale from one to ten, where ten is most important, and one least important..

According to their responses, highlighted in Figure 64 the most important factors were:

- § Access to financing (9.00)
- § Availability and quality of high-speed telecom (9.00)
- § Availability of a skilled workforce (9.00)
- § Access to post-secondary education and skills training (8.50).

The least important factor was availability of a semi-skilled workforce (6.00), as it was the only factor to receive a score of six or lower.

FIGURE 64: FACTORS IMPACTING BUSINESS GROWTH AND PROSPERITY





Participants were asked to identify the three distinct assets or advantages South Bruce had on which to build a strong economy. Among the two respondents that answered this question the following key themes emerged:

- § Strong work ethic
- § Low business costs
- § High-speed internet
- § Commercial and niche farming
- § Proximity to major urban centres

Participants were also asked to identify the three most important challenges and barriers to growth respondents would like to see the Municipality of South Bruce address in the next five years.

The most important barriers as identified by two respondents were:

- § Business support
- § Commercial development
- § Ability to connect employers with employees
- § Declining population



In addition, to the feedback provided in the questions above related to advantages and barriers, participants were asked to rank the importance of 19 factors that would impact the future success and growth of South Bruce.

Responses were scored on a scale from one to five, where five indicates the highest level of importance, and one the least. Figure 65 displays these factors ranked according to their score.

According to the responses from the participants the most important factors were:

- § Developing niche tourism opportunities (5.00)
- § Collaboration with others (5.00)
- § Industrial land development (4.50)
- § Support for small businesses (4.50)
- § More young professionals (4.50)
- § Downtown revitalization (4.50)

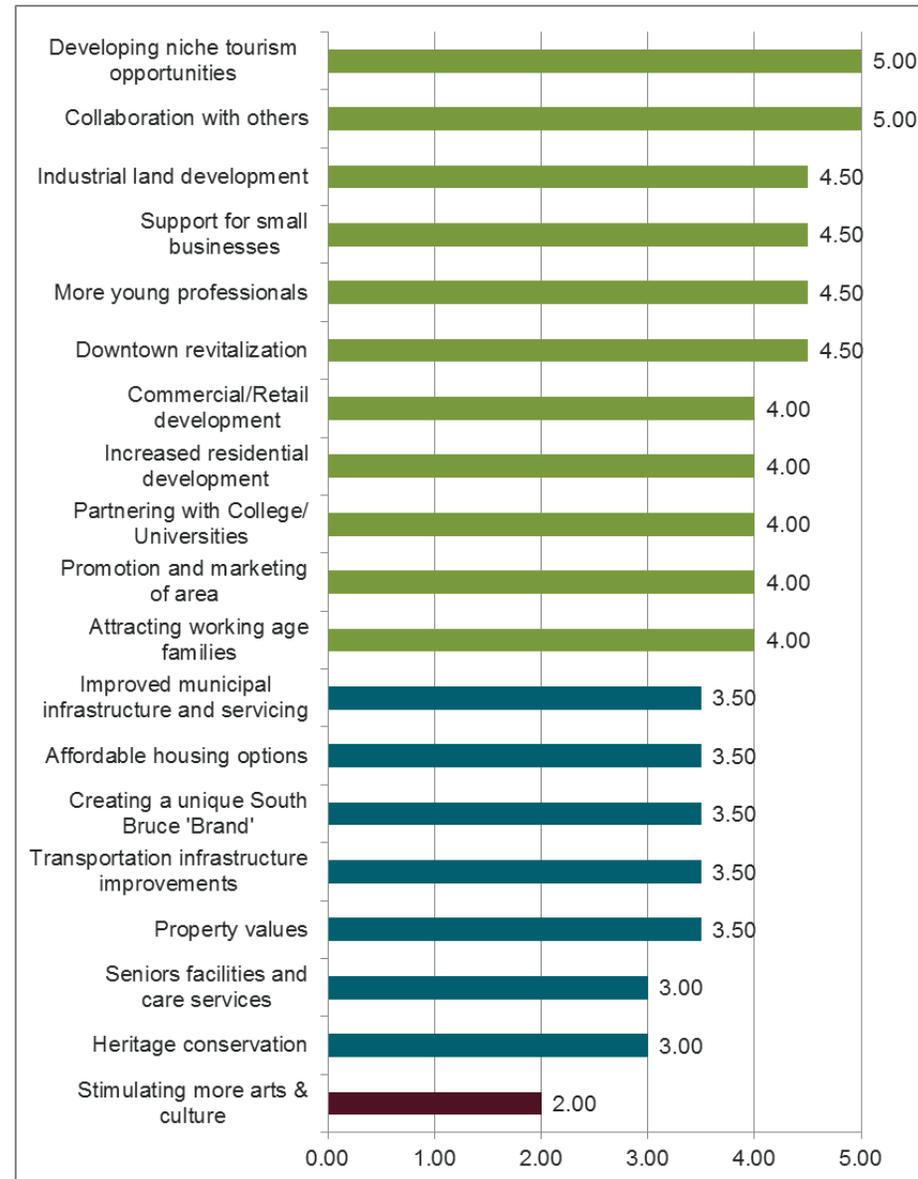
The least important factors as indicated by respondents were:

- § Senior's facilities and care services (3.00)
- § Heritage conservation (3.00)
- § Stimulating more arts & culture (2.00).

At this point, it is important to remember that this category is comprised of two respondents, and that they are from Community/Stakeholder organizations outside of South Bruce itself.

This is likely why Senior's Facilities may not have registered as a higher priority, as these services exist at higher levels in neighbouring communities, and from a regional perspective, may be perceived to meet regional needs.

FIGURE 65: FACTORS IMPACTING THE FUTURE SUCCESS AND GROWTH OF SOUTH BRUCE

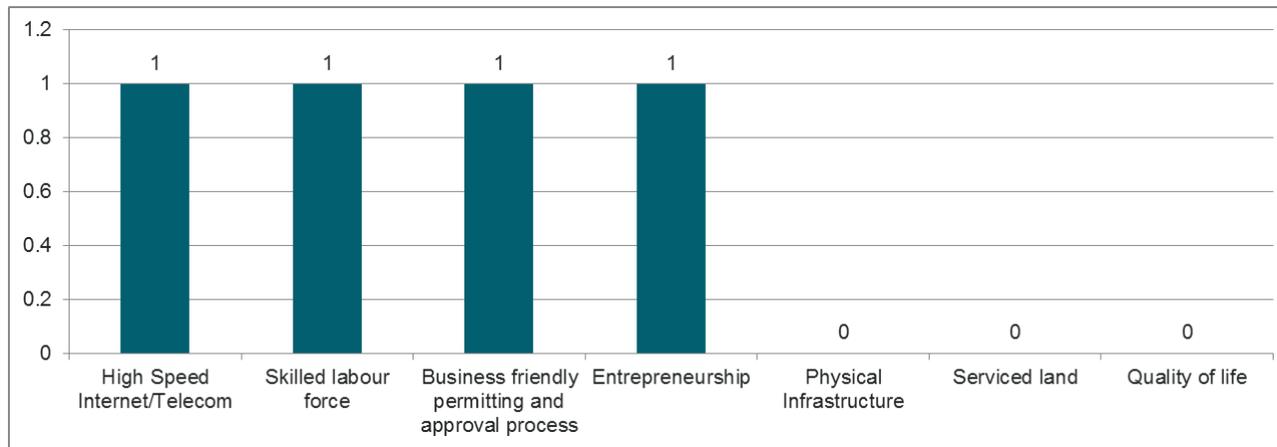




When asked if there were any assets that were missing which would make South Bruce more attractive to potential investors, the following areas for improvement were identified:

- § High speed internet/telecom
- § Skilled labour force
- § Business friendly development process
- § Entrepreneurship

FIGURE 66: ASSETS TO MAKE SOUTH BRUCE MORE ATTRACTIVE TO INVESTORS



Participants were asked to identify any opportunities the municipality should consider to support economic development.

The most commonly cited opportunities were:

- § Business support office to assist with site identification, navigating government funding programs and connecting employees with employers
- § Increase support for the agricultural industry by encouraging innovation and entrepreneurship in this sector

When asked if they participated in or supported any economic development activities in South Bruce, one participant responded 'yes' while the other responded 'No'.



7.2.5 All Stakeholders

Participants were asked if they had any additional comments and among the six responses the most common themes were:

- § Identify additional funding sources as a small population limits revenue generation from property taxes
- § Improve streetscape to heighten visibility of businesses as visitors overlook shops when they drive downtown
- § South Bruce should differentiate itself from other small rural municipalities and leverage that difference
- § Provide incentives for business to move downtown and landowners to fill their vacancies
- § The municipality could consider encouraging home-based businesses to move downtown

7.2.6 Summary of Key Findings

The following bulleted points serve to highlight the most central findings in the resident survey:

- § The majority of stakeholders identified themselves as South Bruce residents (62.3% or 33), while the next highest responses were business owners (20.8% or 11) and representatives of non-profit or municipal organization (7.5% or four).

Resident Portion

- § The largest portion of survey respondents was between the ages of 46-55 (25.0% or five), 56-65 (25.0% or five) and 26-35 (20.0% or four)
- § When participants were asked how they felt about South Bruce as a place to live the most common characteristics were: great place to live and raise family, small community, good efforts made to turn South Bruce into tourist destination and youth retention problems
- § Respondents were asked to identify three distinct assets or advantages that South Bruce had to build a strong economy and the following advantages emerged: access to municipal services, strong community that supports local business, products and produce, agricultural sector and recreational assets
- § When asked to rank the quality of numerous goods and services in South Bruce, participants were most satisfied with Public library (3.53), Healthcare (3.13), Waste management (3.00) and Education (3.00)
- § The majority of respondents (73.3% or 11) strongly and somewhat agreed that South Bruce was a good place for businesses to locate



- § 93.3% of participants (14) strongly or somewhat agreed that South Bruce needed to pursue commercial (retail)/industrial growth
- § The large majority of participants (86.7% or 13) strongly and somewhat agreed that South Bruce needed to actively pursue residential growth
- § The majority of respondents (60% or nine) strongly and somewhat agreed that South Bruce is welcoming to newcomers
- § When asked to rank the importance of 13 factors that would impact the future growth of South Bruce, the most important factors were: Supporting small business (3.80), Senior's facilities and services (3.79) and Downtown revitalization (3.75)
- § Participants were asked to identify any other important factors to future growth in South Bruce that were previously addressed and the most commonly cited factors were: building upon existing strengths and assets, development of the downtown through private sector investment and diversifying the economy

Business Portion

- § All nine participants stated that they lived in the municipality
- § The survey results captured a wide range business types, with two (28.6%) each identified as business services or 'other'; within the 'other' category, participants identified that their business was in real estate and landscaping.
- § The largest portion of respondents (44.4% or four) indicated that they had been operating their business for Longer than 10 years while the next highest response was Less than two years (33.3% or three)
- § A small majority of participants (five or 55.6%) indicated that they were self-employed while the remaining four respondents stated they were small businesses that employed 1 – 49 employees (44.4%)
- § 62.5% of participants (five) somewhat agreed that South Bruce was a good place for businesses to locate, while the remaining strongly or somewhat disagreed
- § When asked if South Bruce is welcoming of newcomers the majority (62.5% or five) strongly or somewhat agreed
- § Participants were primarily concerned with the local economy when asked for their vision of the municipality. Respondents wanted to see further development of the tourism sector, improved main streets, and an increase in the number of businesses and availability of jobs. Despite the strength of the agricultural sector there were concerns that commercial farming represented a long term threat to small farmers in the area.
- § Respondents were asked to identify three distinct assets or advantage that South Bruce had on which to build a strong economy and the most commonly cited advantages were: friendly and supportive community, low land and building costs, and large availability of downtown retail space



- § When asked to rank the importance of 11 factors that would ensure the growth of their business, the highest ranking factors were: Availability and quality of high-speed telecom (9.75), Efficient development environment (8.50) and Affordable energy costs (8.50)
- § Respondents were also asked to rank their satisfaction of 11 factors related to South Bruce as a place to operate their business. The factors participants were most satisfied with were: Availability of land or buildings (8.00), Availability and quality of high-speed telecom (7.88) and Availability of a semi-skilled workforce (7.86)
- § Participants were also asked to note any other important factors to growing and operating their business in South Bruce that were not previously discussed. The most commonly cited factors were: taxes and energy costs, access to good jobs as their business depends on a local client base, and support for local businesses to work together
- § When asked for the primary reason for locating their business in South Bruce, the majority of participants stated that they, or a family member, were already a resident of the community
- § Respondents were asked to identify the three most important barriers to economic growth and success they would like to see the Municipality of South Bruce address. The most important barriers were: downtown revitalization, support for local organizations and businesses, municipal services, and strategic direction
- § Participants were asked to rank the importance of 19 factor that would impact their future prosperity and growth of South Bruce and the most important factors were: Commercial/retail development (4.71), Support for small businesses (4.57) and Attracting more working age families (4.57)
- § In follow up to the question above, respondents were also asked to provide further detail on why these factors were important. The most common themes were: creating an attractive place to live in for young families and retirees, downtown revitalization through residential and commercial development, and ensuring enough land was available for development to fill market demand
- § When participants who identified any of the factors above as unimportant were asked to provide further detail, their responses were that the market would take care of their issues, and that the lack of support for businesses located downtown was the suspected cause of business closures
- § A small majority of participants (57.1% or four) indicated that they were aware of the Spruce the Bruce downtown revitalization program
- § When asked to indicate how their company would perform in the next two years the majority of participants (71.4% or five) stated that their company's performance would be somewhat stronger
- § Participants were asked if they had plans to upgrade or expand their business, and 71.4% responded 'yes'. When asked to elaborate on their plans, respondents identified building improvements, investment in equipment and expansion of their client base as reasons for their renovation/expansion.



- § Respondents were asked if there were barriers to business expansion, and the majority (71.4% or five) indicated that barriers did exist in the municipality. When asked for further detail, participants cited the development process, declining population, and lack of small business support as barriers to growth
- § Participants were asked to identify any opportunities the municipality could consider to support economic development and the most common factors were: agricultural sector development, residential growth and increased business supports, including partnering with the South Bruce Business Association to hire a business developer

Community Organization Portion

- § Participants were asked how long their organization had been operating in South Bruce and both respondents indicated that they had been operating in the municipality longer than 10 years
- § When asked if they service any other areas beyond South Bruce, two respondents identified Bruce County while one indicated Grey County
- § Participants were asked to provide further detail on how their group plays a role in supporting economic development in South Bruce. One respondent stated that their organization hired local people, encouraged local people to pursue careers which could lead them to return to the area, and conducted activities to convince working professionals to move back home. The other participant specified that they supported business development and regional economic development initiatives.
- § When asked what key words they would use to promote South Bruce to potential investors, participants mentioned the following: high-speed internet, low real estate costs, strong work ethic, proximity to major centres, agricultural sector
- § Participants were asked to rank the importance of 11 factors for supporting business growth and prosperity in South Bruce. The most important factors were: Access to financing (9.00), Availability and quality of high-speed telecom (9.00), Availability of a skilled workforce (9.00) and Access to post-secondary education and skills training (8.50)
- § Participants were asked to identify the three distinct assets or advantages South Bruce had on which to build a strong economy and among the two respondents the following advantages emerged: strong work ethic, low business costs, high speed internet, and commercial and niche farming
- § When asked to identify the three most important challenges and barriers to growth respondents would like to see the Municipality of South Bruce address in the next five years. According to the two participants the most important barriers were: business support, commercial development, and a declining population
- § Respondents were asked to rank the importance of 19 factors that would impact their future success and growth of South Bruce. The most important factors were: Developing niche tourism opportunities (5.00) and Collaboration with



others (5.00). The next important factors were Industrial land development (4.50), Support for small businesses (4.50), More young professionals (4.50), and Downtown revitalization (4.50)

§ When asked if there were any assets that were missing which would make South Bruce more attractive to investors participants cited: high speed internet/telecom, skilled labour force, business friendly development process and entrepreneurship

§ Participants were asked to identify any opportunities the municipality should consider to support economic development. The most commonly cited opportunities were: business support position and support for the agricultural industry

All Stakeholders Portion

§ Participants were asked if they had any additional comments and the most common themes were: diversifying municipal funding sources, improved streetscapes, a need to differentiate South Bruce from other small communities, and incentives for downtown businesses and landowners

7.3 Appendix 3: Business and Stakeholder Interviews

A series of stakeholder interviews were undertaken in the preparation of South Bruce Economic Development Strategy. This process was useful to inform the direction of economic development efforts, the current capacity for economic growth and investment, as well as, the challenges and opportunities facing the broader business community.

The consultation process included one-on-one interviews with key economic development partners and representatives of the business community in South Bruce.

Please describe how your organization/association/business supports economic development (including tourism as a key sector) in South Bruce.

Three distinct roles can be observed from the stakeholder responses:

Economic Development

§ Work force development

§ Labour market information

§ Investment attraction

§ Downtown revitalization programs



§ Online business directory

§ Regional branding

Tourism

§ Product development

§ Marketing of tourism products

§ Funding for festivals and events

§ Organizing the involvement of service clubs for the fair

§ Tractor tour

Local Businesses

§ Hardware

§ Food and beverage

§ Farms and winery

§ Gift shop

§ Manufacturing

§ Shipping and processing

What is it you see/want South Bruce will be known for 10 years from now?

Tourism – Many participants wanted to see further development of the tourism sector and had various suggestions on how to grow this sector. The community has numerous natural assets which could be used to create outdoor experiences. There was a need expressed for creating a unique attraction that could capture drive-through traffic in region. There was also an opportunity identified for promoting the area as a culinary destination by leveraging the Formosa Brewery. Finally it was suggested that the area could benefit from rebranding as many people did not know of South Bruce.

Agriculture – Respondents envisioned a strong agricultural sector through the support for local businesses, produce and products. The Teeswater Co-op was noted for being an important asset for the community which could be used to further sustain and grow the agricultural industry. Respondents also wanted to see the municipality take advantage of its strength in agriculture through the development of businesses related to this sector.



Downtown Revitalization – Respondents wanted to see a strong and growing downtown core that preserved its heritage and increased the number of businesses that were located downtown.

Business Growth – Many of the businesses located in the community sold the same products and a diversification of the types of stores was desired by participants. The presence of heritage buildings and lack of a grocery store were cited as potential opportunities. Participants noted the need for business supports to help them in their expansion/growth efforts.

Residential Growth – Respondents wanted to see the development of a retirement village and residential development. The retention and attraction of young adults was cited as a key factor in the continued growth of the community.

What do you think are South Bruce's greatest assets (strengths)?

Four distinct themes emerged from the stakeholder's responses:

Agriculture

- § The potential for agri-tourism/agri-business; many farms have businesses that sell products such as cheese and maple syrup and have attractions such as a maze to draw tourists in
- § Potential to diversify the crops grown in the area
- § Local food can be leveraged to create a farmers market
- § A potential for food manufacturing due to strong agriculture sector
- § Great agriculture lands

Tourism

- § Strong culinary group that could be used to build a culinary experience for visitors such as a local food trail
- § Natural assets that could be leveraged to attract visitors, such as cycling trails
- § Explore the Bruce program
- §

Local Businesses

- § Retail shops for tourists
- § Heritage businesses
- § Small family run businesses



- § Artisans that produce unique products

Infrastructure

- § Leverage proximity to two main highways
- § New sewer system that could create opportunities for development
- § Good access to natural gas and roads

Costs

- § Cheap real estate costs compare to urban centres
- § Lower cost of production and living

Are these assets being effectively leveraged?

The majority of respondents felt that more could be done to leverage the assets in the area. Participants offered a variety of suggestions on how these assets could be used, and the following themes were observed:

Business Support

- § Improve use of the Spruce the Bruce program
- § Promote local Mennonite community and their businesses
- § Develop venue space that could be used to hold weddings and other events, or health and beauty facility that takes advantage of rural setting
- § Promote local artisans and small businesses that create unique products
- § Promote availability of commercial and industrial land for development
- § Support for small businesses involved in non-agricultural activities

Agriculture

- § Utilize local food by building a farmer's market that sells products in-demand by locals and develop food stands or retail shops on farms
- § Develop farm tour that would encourage people to purchase local products

Tourism



- § Develop local food map/trails to take advantage of visitors that drive along back roads
- § Work with other municipalities to create a package of experiences for tourists by leveraging collective assets of the region as a whole

Can you describe the specific reasons why South Bruce is (or isn't) a successful place from which to operate a business?

Four distinct themes were observed from the stakeholder responses:

Local Business

- § Downtown Mildmay has a strong downtown with retail shops that sell unique products
- § Employment base is not large enough to sustain local business
- § Large percentage of small businesses present unique opportunities and challenges
- § Large presence of empty store fronts will require incentives for new businesses to move in
- § Need for small businesses programs to improve signage, store fronts, etc.
- § Reduce visibility of store fronts due to large flower planters
- § Lack of responsiveness from council on the issues faced by small businesses

Tourism

- § Natural assets such as waterfall and spring waters in Formosa is an asset that could be leveraged
- § Seasonality of tourism sector is a challenge for businesses
- § Opportunity to market all the different communities as a whole to build on collective strengths
- § Difficult to get tourist driving through area to stop along main streets and visit retail shops as there is nothing to draw them
- § Lack of information centre or information signage for guests

Location

- § Located too far from cities to attract manufacturers
- § Difficult to compete with larger towns in region when trying to attract large businesses



Community

- § Strong group of people and service organisations that support the community
- § Support needed from all communities as a divide exists between them

What do you think are barriers to economic growth and development that South Bruce will face in the coming 3 - 5 years?

Three distinct themes were observed from the stakeholder responses:

Business Support and Development

- § Weak relationship between council and local businesses
- § Surrounding municipalities offer more business friendly environment that makes it difficult for South Bruce to attract new businesses
- § Lack of Economic Development Officer (EDO), or staff member to make the area more investment ready and growing the local economy
- § Lack of industrial lands available for development
- § Need more jobs in the area in order to attract residents
- § Need stronger support for small businesses
- § Lack of incentives to open businesses downtown

Community

- § Lack of local skilled labour in the future
- § Lack of young working professionals and young families creating brain drain in community and leading to the closure of local facilities
- § Need to create environment to attract young adults
- § Need to determine and identify unique differentiating factors in South Bruce compared to region
- § Local food is supported more by tourist than local residents
- § Small residential population limits tax base and services the municipality can provide
- § Need for different communities to work together as area is divided



Infrastructure

- § Distance from major transportation corridors and major markets
- § Lack of high-speed internet in rural communities
- § Lack of parking downtown

What do you see as the best opportunities for South Bruce to stimulate job creation, economic growth and business investment in the next 3 - 5 years?

Three distinct themes were observed from the stakeholder responses:

Business Support and Development

- § Increase availability of serviced lands for development
- § Support the presence of many small businesses in the area \ through BR&E program
- § Create a strategy on how to grow the local economy and types of jobs the area should be attracting
- § Spin off potential from strong agricultural sector exists which could lead to the development agri-tourism and businesses related to agriculture
- § Encourage diversification of crops or growth of niche crops cultivated in area
- § Develop second business location program
- § Participate in economic development training programs offered by the County
- § Provide incentives to attract industry to area, Hanover is a good example
- § Improve application process for Spruce the Bruce program as businesses find it difficult to get funding
- § Leverage local artisans and artist by providing a form where they can work and sell their products together
- § Nearby large employers, such as Bruce Power, provides to opportunity to promote area as a place where people can live and have a short commute to work as housing costs are low in area
- § Need to develop strong downtown and Main Street

Tourism

- § Develop cycling and motor cycling tour routes
- § Encourage development of accommodation facilities to increase overnight guest stays



- § Develop attraction that will get travellers to stop in South Bruce while driving through community
- § Scenic country side along back roads could be an attraction for visitors
- § Theme festivals, such as a strawberry picking festival
- § Encourage bus tours to make stops in the area

Infrastructure and Facilities

- § Develop assisted living units for aging population
- § Expand high-speed internet coverage
- § Potential for casino in area

Are there any gaps in the workforce or physical infrastructure of the Municipality that are preventing growth? How might these be addressed?

Two distinct themes were observed from the stakeholder responses:

Infrastructure

- § Lack of high-speed internet coverage in rural communities
- § Improve wheel chair accessibility
- § Replace bridges in area
- § Lack of land available for commercial and industrial development
- § Lack of high-speed internet coverage in rural communities
- § Improve wheel chair accessibility
- § Replace bridges in area
- § Lack of land available for commercial and industrial development

Workforce

- § Retain and attract educated young adult workers with skills to area
- § Improve snow clearance of roads
- § Lack of skills training program for young workers



- § Difficult to invest in training for workers as there is a risk that their young staff will leave
- § Difficult to find people with experience in retail and restaurants

What do you see as the most significant threats (external trends) that may compromise the ability of South Bruce to attract and support business operation/growth?

Three distinct themes were observed from the stakeholder responses:

Community

- § Aging population and lack of skilled workforce
- § Difficult for new business to be embraced by local community
- § Lack of cooperation between different stakeholders in the area
- § Lack of support for small retail shops in community from local residents as majority of customers are from neighbouring communities
- § Difficult for newcomers of different backgrounds to feel welcome by community

Municipality

- § Need to find a way to grow municipal revenue stream
- § Difficult to provide programs/incentives for business as budget is small and municipality has to concentrate on providing basic services
- § Need to develop long term strategies on how the municipality will grow and the types of industries it should be attracting
- § Strong competition for surrounding municipalities in attracting industry and people
- § Lack of incentives and support to businesses make it difficult to expand and attract new businesses
- § Need to leverage assets from surrounding communities

Infrastructure

- § Lack of shovel ready land for development
- § Lack of access to major highways and urban centres



What do you think the Municipality of South Bruce should focus resources on in the next 18-24 months?

Three distinct themes were observed from the stakeholder responses:

Business Support

- § Increase availability of shovel ready lands for commercial and industrial development
- § Create welcome wagon for new businesses
- § Engage farmers and small business owners to better understand their needs
- § Focus development on agri-businesses and agri-tourism
- § Increase understanding of local bylaws applicable to businesses as many owners are not fully aware
- § Create incentives for businesses to open downtown
- § Develop business plan to support the revitalization of downtown core
- § Need for succession planning among local businesses as many owners are close to retirement age

Role of Municipality

- § Need staff member and local committee dedicated to economic development
- § Implement BR&E program
- § Create economic strategy to determine what the municipality should focus on and implement the findings from report
- § Collaborate with other municipalities to share resources and assets
- § Continued support for agricultural sector and encourage development of businesses related to this sector
- § Promote local food
- § Retain and attract skilled workforce

Tourism

- § Initiate branding exercise to develop unique position in tourism sector from surrounding communities
- § Improve signage for tourist and local consumers
- § Need destination retail that will drive customers to other businesses located downtown