

Appendix 3

Middlesex County Economic Development Strategy

Update 2021–2025

Middlesex County Economic Development Strategy Update 2021-2025



December 2020





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Executive Summary



Middlesex County is on a mission to make a genuine difference for its economic future. This document, an updated and redeveloped comprehensive Economic Development Strategy, provides direction, goals, and desired outcomes for a bold, innovative, intentional future. This Executive Summary outlines the report's key elements.

The first section of this report summarizes the project's methodology, a market analysis of Middlesex County's economy, and a discussion of common themes generated through a review of various background documents. Through the lens of standard economic development programming – Business Retention and Expansion, Investment Attraction, and Tourism – a series of business cases are developed. Excellent opportunities for economic growth exist in Agricultural Technology, Technology-based Manufacturing and Food Processing, Agri-Tourism and Rural Revitalization, and Creative Industries.

The project involved extensive engagement through telephone interviews with local entrepreneurs and community leaders. These people provided input on the assets, prospects, and hurdles to economic growth in the County. A group of sector-diverse stakeholders formed the Economic Development Strategic Plan Committee and met over video conference on multiple occasions to provide input and direction to the consulting team. Discussions included a long-term vision for the County's economy and internal and external partners' roles to ensure continued growth and success. Representatives of the County and its municipalities rounded out the feedback by focusing on accomplishments, who does what, and ambitions for the future. Consultations were distilled into themes, as well as a SOARR analysis of strengths, opportunities, aspirations, risks, and results.

What we heard was, in Middlesex County, lifestyle is a differentiator, and location spurs business growth and entrepreneurship. We also heard there is a desire to focus on agriculture and technology-based development, to explore the potential for remote workers, to enhance main streets and rural tourism, and to build on the cohesion and collaboration that is already alive and well in the community.

In the next section, aspirations were converted into concepts for actions. Value propositions were considered from several perspectives, such as the competitive advantages that Middlesex has already and the community's ability to influence increased prosperity. A discussion follows on the three programming elements to dig deeper into what needs to be done to move forward.

Based on the background review, feedback, and analysis, four Strategic Objectives were developed:



The Middlesex County Economic Development Strategy Update balances daring and pioneering ideas with those that are viable and relevant.



1. Invest in people and places via rural revitalization
2. Entice talented workers and entrepreneurs to relocate here by leveraging the pace of rural life and nearby urban amenities
3. Attract investment in tech-based manufacturing, food production, and ag-tech
4. Advocate for investment readiness and implement improvements in business development services

Each Strategic Objective has a series of over-arching action statements, with detailed steps under them. The rationale for these new directions is explained, and cost options are proposed. Case studies, timelines, policy considerations, partners, and sources of funding are reviewed. Actions include:

- Reducing barriers and increasing support to spur investment and employment in agri-tourism and rural enterprises
- Increasing financial support for public realm improvements and strategic amenities in towns and villages
- Boosting "buy local" campaigns to ensure residents and businesses double-down on local procurement
- Engaging the housing sector to review dwelling inventories to determine options for buyers and renters
- Collaborating with educational institutions, research partners, and businesses to define and promote the regional advantage
- Doubling down on results-oriented tactics to attract foreign direct investment-related to tech-based food production and ag-tech
- Cooperating to promote employment and new enterprise opportunities
- Implementing a robust political advocacy team to attract new sources of funding for infrastructure
- Spurring business development with focused community improvement plan incentives

Priority actions were carefully considered and timed for maximum results. Still, it should be noted that implementing the entirety of the strategy update is contingent on the hiring of additional staff resources. In their absence, the recommendations must be reprioritized and delayed.

The Middlesex County Economic Development Strategy Update balances daring and pioneering ideas with those that are viable and relevant. It is critical to ground planning efforts in concrete strategies while inspiring and supporting day-to-day tactics in every possible way. This comprehensive roadmap can guide and support growth and diversification over the coming five years and beyond. It can reflect the voice of the community, the priorities of your supporters and partners and set out exact steps to direct your efforts towards opportunities with the highest potential.



Methodology, Market Analysis & Common Themes



Methodology

Part 1 – Project Initiation

At the outset, the roles and responsibilities of the consulting team and County staff were confirmed. Critical stakeholders for engagement were identified. Dates were confirmed for deliverables, presentations, and meetings, and project objectives were also reaffirmed.

Part 3 – SOARR Assessment and Selection of Future Directions

A group workshop with stakeholders on the Economic Development Strategy Steering Committee drilled into economic strengths, opportunities, aspirations, risks, and results. The resulting SOARR Assessment was applied to the results of the research review and the engagement activities. Next, key findings were summarized and presented to the committee, including urgent, start/stop and long-haul actions coupled with examples of outcomes over the short, medium, and long terms. The intelligence gathered from committee members was used to prioritize the most compelling opportunities for economic growth.

Part 2 – Market Analysis and In-Community Engagement

A background studies review led to a comprehensive profile of economic conditions. Broader regional, provincial, and national market and policy forecasts and trends were examined, and a profile focusing on relevant socio-economic indicators was completed. Interviews were arranged with community and business leaders, including service providers and elected officials, providing a strong sense of the significant issues and opportunities. Interviews with representatives of Middlesex County and the eight local municipalities offered an updated perspective on goals and uncovering shared objectives.

Part 4 – Economic Development Strategic Plan & Action Plan

Work continued preparing the basis of the updated Economic Development Strategy, which includes the Business Retention and Expansion Plan, Investment Sector Analysis and Business Investment and Attraction Plan, and Tourism Strategy. A draft Five-year Strategy and Action Plan was compiled along with background reports. The draft report was presented to County Council, and based on feedback, a final Strategy was completed.



Background Review

A review of relevant initiatives and strategies reveals themes that are important to keep in mind when updating the economic development strategic plan. Figure 1 is a common threads matrix. A single checkmark (✓) indicates the document has some content relating to the theme, but it is not a primary focus. Two checkmarks (✓✓) indicate there is a primary focus on the theme.

Figure 1: Common Threads Matrix Based on Background Review, Middlesex County

Common Threads	Land Development	Business Retention and Expansion	Business Attraction	Info. Sharing	Community Data	Tourism	Infra structure	Capacity Building
2018 Agriculture Forum Summary Doc.				✓✓	✓✓			
2018 Resident Life Survey				✓✓	✓✓			
Middlesex County's Strategic Plan 2021-2024		✓	✓				✓	✓
Agriculture Strategy 2015	✓	✓✓					✓	✓
Economic Development Strategy 2014		✓✓	✓			✓✓		✓
EmployerOne Survey Middlesex 2020		✓✓			✓✓			
Impacts of COVID-19 2020				✓✓	✓✓			
Middlesex County Census of Agriculture				✓✓	✓✓			
Middlesex County Business Check-Up				✓✓	✓✓			
Middlesex County COVID-19 Economic Resilience Plan		✓✓						✓
Middlesex Tourism Signage Strategy						✓✓		
Middlesex County – COVID-19 Business Survey Analysis, Phase 1				✓✓	✓✓			
Middlesex County – COVID-19 Business Survey Analysis, Phase 2				✓✓	✓✓			
Resident Life Survey 2018				✓✓	✓✓			
Middlesex County, Target Industry Snapshot 2020			✓✓	✓✓	✓✓			
Visioning Future of Tourism in Middlesex County						✓✓		
Middlesex Agricultural Technologies Battlecard 2020			✓✓	✓				
Middlesex Automotive Battlecard 2020			✓✓	✓				
Middlesex Food Processing Battlecard 2020			✓✓	✓				
Middlesex Employment Land Needs Study	✓✓				✓		✓	



The insights that emerged were organized by three main areas of interest: Business Retention and Expansion (BR+E), Foreign Direct Investment (FDI), and Tourism. For each of the areas, a summary of the key elements that support the strategy was prepared.

Business Retention and Expansion

As one of the Economic Development Strategy focuses, an examination of business retention and expansion activities and efforts – previously undertaken or ongoing in Middlesex County – are essential to understanding business needs and gaps to address.

State of Businesses in Middlesex County

Using survey results from the **EmployerOne Survey** and the COVID-19 Business Survey Analysis (Phase 1 and 2), it was possible to identify local businesses' state before and after the pandemic.

- **Pre-pandemic:** The Employer One Survey was conducted in January 2020 to gain insight from employers on their workforce issues in Middlesex County. The Middlesex Workforce Development Partnership delivered the survey as part of a broader survey across Southwestern Ontario. Most respondents were in industry sectors such as manufacturing and agriculture, and most were small start-up companies. When the survey was open, businesses identified that retirements and dismissals due to low performance were the main reasons for employee separation during the previous year. Most of the respondents also experienced challenges retaining workers and found a lack of applicants when filling positions for operators and general labour. Nonetheless, companies were expected to keep hiring due to expansion in 2020.
- **Post-pandemic:** Three surveys were conducted to measure the impact of the COVID-19 pandemic in Middlesex County.





- The first survey was conducted between March 19 to April 5, 2020. For businesses, the impact of COVID-19 was significant and growing fast for most, with very few saying the impact was limited. Many businesses were shutting down in response, with the next most common action being layoffs and reductions in hours. 25% of businesses stating a need for immediate help, and another 45% soon expecting financial difficulty. 70% of businesses reported they would not be okay in six months.
- The second phase of this survey was conducted with 120 businesses between April 24 to May 1. The results were similar to Phase 1. Most businesses continued to record significant impacts and even temporarily shut down in response to the pandemic. 79 businesses spoke to the types of impact they are facing. The most common responses were: financial impacts (46%), temporarily pausing operations (22%), and shortage of employees (9%). This trying time pushed many to test different ways of operating or attracting customers. 67 businesses recorded the new methods of continuing operations: social media marketing (28%) and implementing take-out/curbside pick up and online sales (both 21%).
- The third survey was conducted from late September to early October, with 112 responses. Over 30% reported they were open, no changes; 21% reopened after temporary closure; 20% open, but hours changed; 19% open, changed services (e.g., takeout, delivery, contactless options). About 55% of respondents reported their year-to-date revenue was less than 75% of last year's revenue to date. 30% reported difficulty procuring products. 56% anticipated no change in hiring or laying off staff within the next three months, while 19% anticipated hiring and 13% anticipated laying off. 21% indicated they were struggling to fill existing positions. Of 81 businesses that responded to a question about business supports, 40% were using the Canada Emergency Response Benefit, 33% were using the Canada Emergency Wage Subsidy, and 10% were using Canada Emergency Commercial Rent Assistance. Asked which business support resource they currently require, the most common responses were nothing (35%), break on municipal charges and utilities (31%), financial grants/cash flow/emergency funds (25%), information – updates on business support initiatives (20%), and property tax assistance (18%). Asked how the COVID-19 outbreak has changed a company's outlook for 2021, 108 respondents said employee stress/health (19%), decreasing consumer confidence (13%), financial impacts on operations and/or liquidity and capital (13%), supply chain disruptions (12%), and lack of information for decision making (9%).

Middlesex County Plan for COVID-19 Economic Resiliency

The Plan for Economic Resiliency was developed by the Middlesex County Economic Resiliency Task Force. Led by the Director of Economic Development, Middlesex County is responsible for the implementation of the plan with support from and in partnership with Task Force members and leaders representing key sectors and business support organizations across the region. The plan is divided into three phases.

- Phase 1 of this plan included actions aimed to support businesses during the COVID crisis. These actions included creating and continually updating a repository of business support offered by all levels of government, promoting business support campaigns, surveying businesses, supporting workforce development, and identifying best practices.



- Phase 2, called "Reopening and Retention," focused on a watchful and staggered approach to Ontario, relaxing its emergency measures and reopening the economy. In this phase, public health and workplace safety remained a top priority while balancing the business community's needs. The critical business focus was stabilizing the local economy through retention, supporting local businesses as they reopened, and maintaining operations during this time.
- Phase 3, "Rebuilding," focuses on the recovery and long-term sustainability of the Middlesex County economy. Emphasis will shift from economic stabilization to implementation of the newly developed Middlesex Economic Development Strategic Plan to encourage investment, job creation, and enhanced economic sustainability through innovation and diversification.

BR+E in Middlesex County

The **2014-2019 Middlesex County Economic Development Strategic Plan** established broad BR+E programming efforts as part of County priorities and supported small businesses' sustainability. This strategy's first goal called for a supportive environment for business and investment by enhancing the County's competitive advantage in its traditional and emerging business sectors. Specific actions included determining the region's business parks' broadband capacity and incorporating broadband expansions into road construction projects where appropriate. The strategy also suggested county-level Community Improvement Plans (CIPs) would jump-start business development and investment and actively expand the resources for small businesses and start-ups. These resources include training, business counselling, and financial assistance to small business operators and entrepreneurs in Middlesex County. Goal three of this strategy called for implementing a business retention and expansion program by working with local municipalities to develop and complete a visitation program in each County's target sectors, starting with manufacturing.

Middlesex County's Strategic Plan 2021-2024 reinforces the importance of economic development by establishing a goal to encourage a diverse and robust economic base by creating an environment that enables the attraction and retention of businesses, talent, and investments.



Employment Land Needs in Middlesex County

The **2012 Middlesex County Employment Land Needs Study** calculated 703 ha (1,737 acres) of net vacant industrial lands that would be potentially available to accommodate long-term demand. Adjusted for land vacancy, the supply totalled 598 net ha (1,477 net acres). Approximately 44% of forecast total employment growth (2,065 jobs) for Middlesex County from 2011 to 2031 is anticipated to be accommodated on employment lands. Recommendations for the County and its local municipalities fell into three thematic areas: market choice and employment land protection, targeted marketing of employment areas, and longer-term planning and development.

Middlesex County's Strategic Plan 2021-2024 reinforces the importance of protecting, marketing, and developing employment lands by establishing goals to:

- Ensure communities are built on a sustainable foundation that is connected and thriving by committing to a sound asset management strategy to maintain and fund critical infrastructure, and
- Encourage a diverse and robust economic base throughout the county by creating an environment that enables the attraction and retention of businesses, talent, and investments.

Foreign Direct Investment (FDI)

Investment, especially FDI, is one of the main goals of communities worldwide. Middlesex has competitive advantages that make it realistic to invest in FDI attraction. It is not surprising that previous strategies identify it as a priority, and it is a priority of this update. The second goal of the County's **2014-2019 Economic Development Strategic Plan** is to cultivate relationships with federal and provincial foreign investment intermediaries and actively participating in the investment attraction efforts of the Ontario Food Cluster, including at least one trade mission a year.

In January 2020, the firm Research on Investment was retained to complete Target Industry Snapshots for Middlesex County. Current strengths in agri-food, automotive, and metal products provide several niche opportunities to link into provincial and North American growth trends. While the region also has workforce assets in civil engineering, construction, and machinery, nearby regions have a much higher concentration of businesses related to these clusters. This does not imply that industries beyond the target sectors should not be pursued. Rather the recommended targets are seen to yield a more likely return on business attraction efforts on an ongoing basis. Among the findings for each of the target sector, the following pages focus on the highlights.



Agricultural Technology

- The use of drones geared to agriculture has gained popularity in part because they can be used to gather comprehensive data about crop conditions more efficiently than ground-based inspections.
- Urban and vertical farming has helped address concerns about diminishing arable land and food security. Greenhouse farmers in the area are already embracing technology. According to the 2016 Middlesex County Agricultural Census, 42% (13 of 31) of greenhouses used automation. By incorporating technologies from sensors, algorithms, data analytics, and robotics, the sector is soon expected to overcome the yield and labour challenges of outdoor agriculture. Globally, vertical farming is valued at over \$2 billion and is expected to show an annual growth rate of over 20% in the next five years, with Asia-Pacific dominating the market (Allied Market Research, Grand View Research).
- Biotech developments, the non-food use of agriculture products, has been cited as a critical growth opportunity for Middlesex County in its **Agriculture Strategy Report (2015)**. With support from local research facilities such as the Western University Agriculture and Agri-food Canada London Research Station and its research focus on advanced materials, bio-processing projects could be a new driver for Middlesex County. These advances could lead to opportunities in biofuels or biomass for other non-food purposes such as cosmetics and cleaners, plastics, or other industrial biomaterials, including for the automotive sector.
- The area's strength in skilled trades, tooling, and metalworking combined with expertise in agriculture, advanced agricultural equipment parts, and automation align with trends impacting the farming community. According to the **2016 Agricultural Census**, over 800 farms in the region use some form of automation, from steering to feeding and environmental controls, at rates much higher than provincial or national averages.





Food Processing and Supply Chain

- Plant-based protein has reinvigorated already stable markets for wheat, soybeans, and peas, as well as spurring new-found potential in alternatives such as hemp. This subsector is expected to grow at an annual equivalent of over 7%. Also, new trends in insect-based protein for both general consumption as well as livestock and aquaculture have created a new cost-effective market for suppliers with newfound needs for expansion. In similar trends towards healthier alternative food sources for oils and milk have seen substantial growth. In contrast, "smart" foods such as functional foods and nutraceuticals have generated global revenues over US\$325 billion and are expected to grow at an annual equivalent of 8% from 2017 to 2022.
- A critical supply chain element of the food and beverage industry is the packaging sector. Global demand for flexible packaging, which includes flexible plastic packaging, is forecast to rise 5% per year through 2024, reaching a value of \$250 billion, according to a recent report by Global Market Insights. Rising demand from health care, personal care, and food and beverage industries are expected to be among the top drivers for flexible packaging sales.
- With increasing attention around the volume of food that is disposed of post-consumer, there is an increasing push to find ways to put food waste to use. This is causing a rise in the number of technologies being developed to find ways to repurpose this part of the value chain using other consumers or producers.
- Middlesex County's strengths in food production, and its central location to North America's largest food market, aligns well with growth in the food processing supply chain along the 400-series highway corridor. Several major food-producing counties are on Middlesex's doorstep, and it is situated between Ontario's two largest wine-producing regions: Pelee/Essex and Niagara. Coupled with research and development at leading universities in the region, as well as renewed consumed demand for locally sourced food, Middlesex County has many opportunities to pursue in this space.

Automotive

- The future global growth in the automotive sector is focused on electric and autonomous vehicles (EVs and AVs), especially with nearby Michigan as a hub for the Big Three American automotive companies and nearby Windsor/Detroit as the only cross-border AV testing ground in North America. Middlesex County is located near many EV and AV research centres, such as the McMaster Institute for Automotive Research and Technology in Hamilton, the Waterloo Centre for Automotive Research, and the Autonomous Vehicle Information Network pilot in Stratford. Institute for Automotive Research and Technology in Hamilton, the Waterloo Centre for Automotive Research, and the Autonomous Vehicle Information Network pilot in Stratford.



- Globally, over 2 million new electric vehicles were sold in 2018. With more stringent carbon emission standards being introduced across a range of jurisdictions, production is expected to jump to over 10 million by 2025. By that time, EV sales will still account for less than a fifth of all passenger vehicle sales, so the scope for growth is immense.
- The global market for autonomous vehicles is expected to experience a compound annual growth rate of almost 40% between 2019-2026. Regulatory hurdles are only slowing this increase. Users of commercial vehicles such as trucks and shuttles are expected to be the early adopters, with consumers likely to follow shortly after that. The industry is driving growth and expansion in a range of related sectors, such as RADAR, Light Detection and Ranging (LiDAR), Artificial Intelligence software, and communications technologies – critical systems for all autonomous vehicles.

Tourism

Tourism has been pivotal to Middlesex's economic development efforts, especially related to one of the County's strongest sectors, agriculture. Across the different documents reviewed, tourism-focused objectives were at the centre of agriculture development initiatives.

The **2014-2019 Middlesex County Economic Development Strategic Plan** recommended the development of community-based tourism as one of its main priorities. Part of the third goal of this strategic plan focused on forming a County Tourism Advisory Committee and facilitating a shared knowledge exchange of the opportunities for investment and growth of the region's tourism sector. Specific actions included supporting the creation of a regional tourism strategy that focuses on agri-tourism and community-based tourism, building on the community-asset mapping work in the Economic Development Strategic Plan, creating an online, searchable tourism business directory on the Tourism Middlesex website, expediting the implementation of the County's Signage strategy, integrating agri-tourism signs into the strategy, and pushing local tourism efforts to create a more unique and attractive product for visitors.





The **County of Middlesex Agriculture Strategy** developed in 2015 identified local food and agri-tourism as crucial opportunities in Middlesex, especially to serve London consumers. This strategy called for the development of a Community Improvement Plan related to agri-tourism and the agriculture sector. Other tourism-related actions included creating an agri-food asset map of resources, including agri-tourism and increasing promotional support and networking opportunities for agri-business and local food.

The **2018 Middlesex County Agriculture Forum** outlined the advantages and challenges that agri-tourism brings to the County. Among the discussions to support agri-tourism in the area, positive feedback was delivered regarding the local food map and the Grassroutes Signage Initiative. Participants at the forum expressed a desire for continued expansion of these programs and the implementation of a unified voice for tourism through a brand strategy.

Community Profile and Situational Analysis

One of the starting points for the Economic Development Strategic Plan was a comprehensive analysis of local and broader regional and provincial economies. This resulted in an economic base analysis detailing the County's most recent performance against a select range of demographic and economic indicators considered relevant to the development of the economic development strategic plan, combined with an analysis of current and emerging business and industry sector trends:



Demographics: In 2019, Middlesex was home to approximately 77,000 people. According to the County's planning department projections, the population is expected to grow by 7%. This growth will not occur equally across all lower-tier municipalities, with the most considerable growth occurring in Middlesex Centre and Lucan Biddulph. Middlesex also records the largest share of residents being aged 55 and over (34% of residents), which represents a challenge to retaining the workforce. This challenge becomes more pressing, as there is an evident lack of new and diverse housing to support any talent attraction initiative.



Education: Compared to London and Ontario as a whole, Middlesex has a larger share of people with apprenticeship or trades certificates/diplomas. This becomes relevant when attracting manufacturing industries looking for qualified skills. In terms of field of study, Middlesex recorded its largest share in architecture, engineering, and related technologies, followed by health and related fields. These were also the main field of study in broader areas, including London and Ontario.





Labour Force: 2019 estimates suggest that 40,538 people are part of the Middlesex County labour force, showing 2% growth since 2016. On the other hand, the City of London's labour force decreased by 2% during the same period. The most recent participation rate in Middlesex (64%) is 4% lower than in 2016. Nonetheless, the county has a higher participation rate than London and a similar rate as Ontario. The Elgin Middlesex Oxford Workforce Planning and Development Board revealed that the fall in the participation rate in the area might result from a mix of demographic factors, including the ageing population, gender-equal employment, and people spending more years in education. Furthermore, a stagnant economy impacted by repeated economic shocks (financial crisis in 2008, the oil slump in 2014, COVID-19 in 2020) has also impacted Canada's labour force. The positive outcome is that the London Economic Region had a slow positive economic growth overall. The loss in labour force participation has compensated for the gains in productivity due to technology.



Industry: Industry sectors that have the most employment in Middlesex County are healthcare and social assistance, manufacturing, and construction. Middlesex shows strength in the agriculture sector (8% of the labour force). Furthermore, farms (except greenhouses and aquaculture) appear to be the largest industry subsector. According to the latest Canadian Business Counts, agriculture again has the most businesses, with 2,604 (93% of which are farms). The County shows a notable concentration of businesses within the crop and animal production and aquaculture subsectors.



Economic Forecasts and Local Impacts of Market Trends

Middlesex County is primarily a rural economy with a strong labour force and industry strengths in construction, agriculture, retail trade, healthcare professional services, and manufacturing. The County's strengths in primary sectors and ongoing macro trends with a focus on technology present opportunities for growth and development. The unique characteristics of each of the County's small urban areas and hamlets also present opportunities for agriculture-based tourism, rural revitalization, and cultural economy. Remote working is an ongoing trend witnessed on a national scale as people move into small towns from urban cores, particularly in light of COVID-19. For Middlesex to capitalize on each of these opportunities requires targeted investment in infrastructure, services, and amenities. Also, it requires a strong understanding of international, national, and local policies and market trends that impact any given sector and its relation to the local context.

This section builds on the document review and economic baseline analysis insights and presents target sectors and opportunities areas for Middlesex County. The results presented here are also informed by the industry trends report developed by Research on Investment¹. Key opportunity sectors/areas for the County include:

- Agricultural Technology
- Technology-based Manufacturing & Food Production
- Agri-Tourism & Rural Revitalization
- Creative Industries

Agricultural Technology

Agriculture is one of the most concentrated sectors in the County, accounting for nearly \$8 billion in total farm capital market value in 2016. This is an increase of 65% compared to 2011. The County has understood the importance of the sector to the local economy and has taken targeted initiatives to build on existing strengths, including the 2015 County of Middlesex Agriculture Strategy. As identified in the 2020 Target Industry Snapshot, the presence of Class 1 and 2 agricultural lands has placed the County at an advantage with opportunities to grow the agribusiness sector and value-added industries. According to the Census of Agriculture (2016), 1,399 farms (64% of total farms) in Middlesex reported using computers/laptops for farm management. Beyond computers, farmers are incorporating a wide range of other technologies, including GPS (948), automated steering (472), GIS mapping (339), automated animal feeding (175), and automated environmental controls (164). The use of renewable energy, including solar panels and wind turbines, was recorded in Middlesex County on 245 farms (188 solar and 66 wind).

¹ Target Sector Snapshot. Invest in Middlesex County – January 2020



Figure 2 outlines the extent to which technology is adopted on-farm across Ontario and Canada. As can be seen, by percentage usage, Middlesex farmers are taking up technology at a brisker pace than those across Ontario and Canada.

The County's strengths in primary agriculture and agribusiness sectors present opportunities to enable innovations and to adopt precision agriculture principles. Precision agriculture is essential to optimizing production and gaining higher efficiencies. Technology adoption also improves the sustainability of the food supply while protecting the environment, thus providing critical answers to challenges related to food security and climate change. As identified in the 2015-2020 Agriculture Strategy, the County is already adopting technologies in farming practices, including precision farming, variable rate technology in crops, biotech enhanced crops, robotics, and automation.

Figure 2: Farms reporting technologies used on the operation in the year prior to the Census, 2016

Census of Agriculture, 2016	Number of Middlesex County Farms Using the Technology	Middlesex % of Farms	Ontario % of Farms	Canada % of Farms
Total farms	2,199			
Technologies				
Computers/Laptops for farm management	1,399	64%	56%	56%
Smartphone/Tablets for farm management	996	45%	39%	43%
Automated steering (auto-steer)	472	21%	14%	21%
GPS technology	948	43%	28%	30%
GPS mapping (e.g. soil mapping)	339	15%	11%	8%
Greenhouse automation	13	1%	1%	1%
Robotic milking	8	0%	1%	1%
Automated environmental controls	164	7%	7%	4%
Automated animal feeding	175	8%	6%	5%
Other technologies	7	0%	1%	1%

Source: Statistics Canada. Table 32-10-0446.

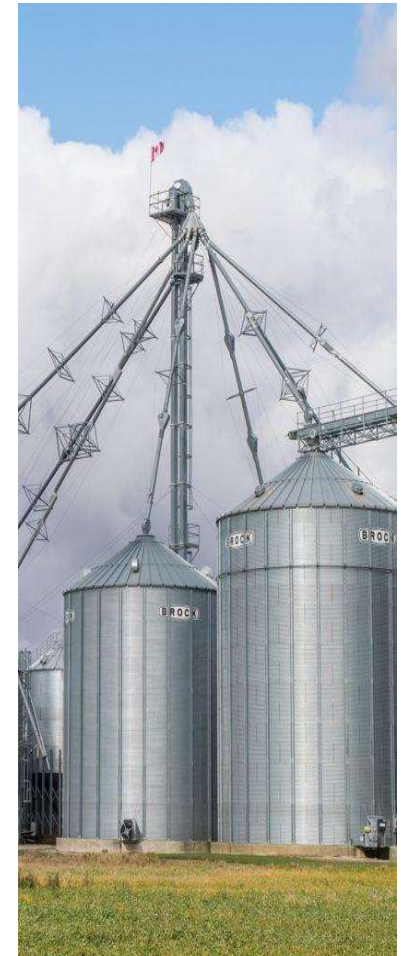


Opportunities exist to leverage Ontario's Local Food Strategy and strengthen partnerships with the Ontario Federation of Agriculture, City of London's Agricultural Advisory Committee, and Middlesex London Food Policy Council. Collaborations are possible with local research institutions, including Western University, Agriculture and Agri-food Canada's London Research Station, Fanshawe College's Centre for Applied Research and Innovation in Biotechnology, and the Canadian Centre for Product Validation. Research partners, including Dow-AgroSciences and Syngenta, are also critical in this regard.

Opportunities also exist to work with agencies that focus on public sector procurement of local food. As indicated in the 2015 Local Sustainable Food Procurement Toolkit², public sector and industry participation with networking groups, such as the Municipal Regional Food Policy Network hosted by Sustain Ontario, is a critical step to influence institutional leadership in local, sustainable food systems.

The 2020 Target Industry Snapshot identified vital opportunity areas for the County, including agriculture-focused drone technology, urban and vertical farming, and bioprocessing as it relates to biofuels or biomass. Cannabis is also a growing opportunity for the County, particularly given the recent legalization and corresponding sale of legal cannabis. Opportunities exist to capitalize on businesses that sell cannabidiol products, edibles, topicals, drinks, and other products. Industrial hemp and organically grown cannabis that sell directly to consumers are also opportunities. While investment in cannabis farming will result in job creation and income generation, the environmental impacts need to be considered. Research shows these cultivations require large amounts of water, degrade wetlands, and affect wildlife. Cross-pollination is also a concern between cannabis and hemp. Suitable zoning also needs to be in place to allow investments in cannabis, and this has been an issue in Middlesex where a debate has ensued between how much of the value chain (growing crops to prepping them for processing) can happen on agricultural land and what needs to be done in an industrial area. Light, odour, security, and by-law enforcement complaints also grow with the arrival of cannabis production facilities.

Despite the tremendous opportunity, enabling innovations and incubations in agriculture will require access to technology and broadband connectivity to accommodate the vast amounts of data the sector requires. In addition, land use principles should be considered to enable the protection of agricultural lands that border the urban areas.



² https://sustainontario.com/greenhouse/custom/uploads/2016/09/Toolkit_Final25-11.pdf



Technology-based Manufacturing and Food Production

Manufacturing has always been an important sector for the County. Within the 2014-2019 Economic Development Strategic Plan, the focus was to retain employment, diversify and expand into food processing, and develop new markets in Asia. These remain relevant as broader trends with a focus on technology present growth opportunities for the local economy.

The manufacturing sector is undergoing a rapid transformation with a focus on digitization and automation. The Fourth Industrial Revolution, also known as Industry 4.0, reflects the integration of smart digital technologies such as robotics, artificial intelligence, quantum computing, the Internet of Things, additive manufacturing, and advanced materials to make manufacturing more agile, flexible, and responsive to customers.

Middlesex's strengths in manufacturing ensure the community is well-positioned to capitalize and grow in sub-sectors, including fabricated metal product manufacturing, transportation equipment manufacturing, and machinery manufacturing. Despite challenges in Ontario's ability to retain automotive parts manufacturing, the County is still perfectly situated to grow high-tech manufacturing, particularly as it relates to supplying original equipment manufacturers. An emerging trend identified in the 2020 Target Industry Snapshot is a push towards electric and autonomous vehicles. This will lead to supply chain business opportunities, including batteries, modules for electric motors and transmission, air-conditioning units, brakes, and steering systems for the electric vehicle market.

Ongoing research efforts at Western University along with industry associations such as Canadian Manufacturers & Exporters (CME), Trillium Network for Advanced Manufacturing, and Excellence in Manufacturing Consortium support local manufacturers and promote the sector on a national and global scale.

Given the primary food breadbasket that exists in a 100 km radius around Middlesex, the County is a central hub for food processing with excellent access to transportation networks. As identified in the 2020 Target Industry Snapshot, food processing is a target sector for Middlesex County. Within food processing, sugar/confectionery products and fruits/vegetables/specialist foods are target FDI sectors for the Province of Ontario.





Changing consumer trends driven by preferences for more healthy and sustainable options have increased demand for wheat, soy, and peas and resulted in plant-based and insect-based protein manufacturing, alternative oils and milk, and "smart" foods such as functional foods and nutraceuticals. Also, opportunities in food and beverage manufacturing have created opportunities in the packaging sector. As per the 2020 Target Industry Snapshot, global demand for flexible packaging is forecasted to rise 5% per year through 2024, reaching a value of \$250 billion.

As with agricultural technology, any investment in technology-based manufacturing should account for its impact on the workforce and the digital maturity of local businesses. As indicated in the Brookfield Institute's Automation Across the Nation report, small cities and towns across Southern Ontario are highly prone to automation risk and have decreased ability to reabsorb displaced labour. This is an important consideration for Middlesex. The County should look at innovative workforce strategies to help workers and institutions adapt to the impact on employment. This includes developing programs that enable both businesses and employees to work effectively in the current environment. A regional approach to workforce development is also required as the City of London contributes to a large pool of machinists, metal fabricators, and skills needed in the automotive sector. In addition, the higher education completion rate in the Middlesex Census Division can provide a steady new supply of engineering talent, especially in mechanical and electronic/electric engineering technologies and civil engineering. Western University also has strong materials and automation/robotics program supporting the city's increased focus on Industry 4.0. Programs provided by Fanshawe College and Conestoga College could also be supportive here.

Businesses need to be aware of their current level of digital maturity, particularly as it relates to their current and future competitiveness. Technology adoption can be done incrementally – businesses can adopt technology on a small scale to build skills and digital maturity and realize the return on investment. To ensure that businesses and the economy benefits from technology adoption, local and senior levels of government need to develop policies and incentives that encourage investment and innovation in a way that helps businesses increase productivity, upscale their product offerings, and improve access to markets. A specific CIP instrument for value-added agricultural improvements could allow grants for installing and expanding new equipment and processes.



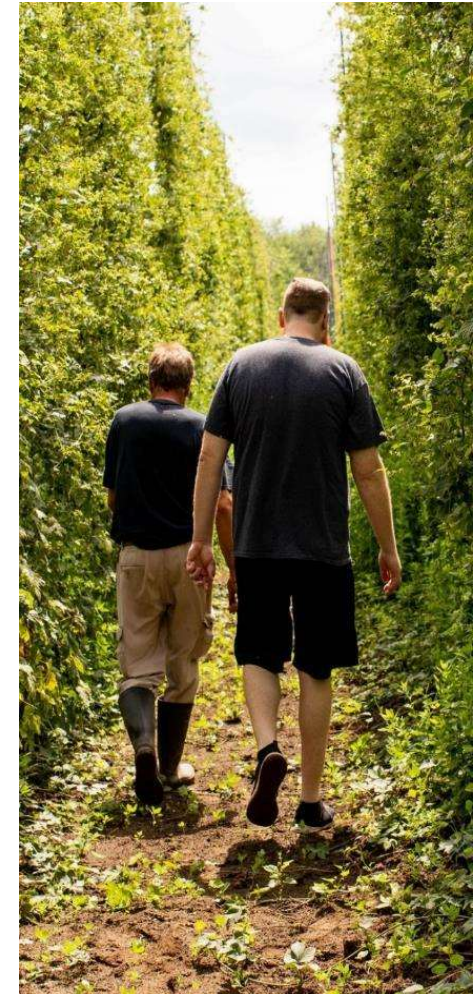
Agri-tourism and Rural Revitalization

The demand for value-added agricultural products such as artisan food, craft beer, and wine, and organic produce and products is growing. Niche markets such as these face challenges that include lack of capital, long lists of policy regulations and food safety guidelines, and lack of talents in commercializing and marketing products. Middlesex Tourism's webpage showcases at least a dozen assets as part of the County's agricultural tourism attraction efforts, including fruit, berry, tree, and animal farms that offer tourism-related experiences. Middlesex has also developed a signage program to direct travellers.

Exploring the possibility of more value-added businesses will enhance farms and tourism. Visitors are increasingly seeking authentic tourism experiences and, as a result, destination product development and marketing are critical in this regard. These could include the promotion of core community assets, unique rural markets, restaurants, entertainment, and destination retail. There is also a need for improved pedestrian and cycle-way linkages, visitor-friendly navigation options, and partnerships with high-profile regional attractions.

According to the Southwest Ontario Tourism Corporation, in 2016, the broader Southwest Ontario region recorded more than 13 million visitors and over \$1 billion in visitor spend. Nonetheless, the COVID-19 pandemic has posed challenges and uncertainty to this industry sector. A recent study developed by the same organization revealed that mitigating risk is essential to increase consumer confidence. Also, the familiarity and safety of destinations have become more important than price, quality, and experiences. The study suggests that consumers are choosing accommodations based on the level of risk. There is limited willingness to travel long distances. These trends will allow Middlesex to attract more visitors from London and Waterloo Region, but perhaps make it more challenging to attract visitors from Toronto and the Golden Horseshoe.

Tourism is also an essential tool for attracting potential new residents. Investments in rural businesses and main street retail and restaurants contribute to the strengthening of the value of rural life. An innovative Rural Community Improvement Plan (CIP) could stimulate investment activity in Middlesex by enabling investments and improvements to a specific program area. In addition to assisting with physical improvements to main street commercial developments, CIPs can also encourage market farming, value-added agriculture, and agri-tourism investments. The implementation of an agri-business or tourism CIP could encourage the redevelopment of underutilized farm outbuilding into small scale production, farm markets, or tourism spaces such as event venues or on-farm recreation.





Creative Industries

The creative industries refer to a range of industry and economic activities related to the generation or development of knowledge and information. Most of these businesses and professionals fall under two industry categories: information and cultural industries and professional, scientific, and professional services.

Currently, the size of these sectors in Middlesex is relatively small. Nonetheless, both sectors have shown growth in terms of the labour force. These highly skilled workers can typically take their trade with them to a community of their choice. The research shows that among the myriad of reasons this talent might locate somewhere, these professionals seek places that offer a quality of life and quality of place that appeals to them. There are also more utilitarian aspects of their decision making. They crave high-speed internet, and because they periodically need to travel to see clients, they like to be close to train stations, major highways, and international airports.

The macro trend of growth in these industries is expected to continue. Adding to the opportunities is the fact that the attributes outlined in the paragraph above are also appealing to remote workers who occupy an even broader range of business sectors. Remote working has gained traction over the last two decades but has taken off with the COVID-19 pandemic. As Ontario rolls out of COVID-19, the number of full-time remote workers will decrease, but the acceptance of the practice by employees and employers alike will ensure part-time remote working will become a common way of life.

Middlesex County could capitalize on this group of professionals. The area enjoys a charming rural environment within a short distance from a large urban centre. The main challenge for Middlesex is ensuring ongoing improvements to internet speeds and the availability of housing stock. For instance, the rental vacancy rate for a bachelor apartment is as low as 2.1%, and new housing start in the region shows that 70% of these projects are being developed in London.





Themes Arising from Engagement

As part of the strategy development, representatives of County and lower-tier municipalities, members of the Economic Development Strategic Plan Committee, and community and business leaders were engaged. These interactions included:

- **Advanced Reconnaissance Interviews:** As a first order of business, local entrepreneurs and community leaders were engaged through telephone interviews. They provided input on the strengths, opportunities, and challenges to economic growth in the County. The interviews helped to gain a business perspective, including an understanding of business needs and elements that are required for growth.
- **Group Workshop with Stakeholders:** The project consulting team met over videoconference with Economic Development Strategic Plan Committee. The 2-hour workshop focused on understanding Middlesex County's strengths, opportunities, and challenges to economic growth. Discussions also included a long-term vision for the County and the role of internal and external partners in ensuring continued growth and success.
- **Interviews with Representatives of County and Lower-Tier Municipalities:** As a follow-up to the group workshop, telephone interviews were conducted with municipal staff and elected officials. The interviewees provided input on the accomplishments and challenges of economic development initiatives, initiatives to build on and continue, partners for collaboration, and competitive advantages that can differentiate Middlesex County from its competitors.

Input gained through these processes was reviewed and grouped into the following high-level themes. The themes, in turn, informed the SOARR analysis and strategic objectives for strategy development.





Lifestyle is a key differentiator

Middlesex County is defined by the diversity and vibrancy of its local economies, ease of living, and natural spaces. With strong agricultural roots and history, the County's workforce is driven by a strong country work ethic and rural spirit. Also, the community is highly supportive of the existing local businesses in the area. The County is experiencing population growth, intrinsically linked to local economic strengths. It is witnessing an urban migration driven by the quality of life considerations, cheaper housing, and authentic, rural experiences. Accessibility to quality healthcare and major cities also position the County for growth.

Location spurs business growth and entrepreneurship

The strategic location of Middlesex County makes it advantageous for business growth and investment. The County is serviced by Highway 401 and 402, Canadian National and Canadian Pacific railways, and nearby London International Airport. This gives easy access to reach regional and international markets. In addition to location advantages, Middlesex County has various land-driven advantages, including lower commercial business rents and land values compared to City-regions. Stakeholders mentioned that local business parks, including certified sites in Glencoe and Thorndale, position the County for investment attraction.

Stakeholders also mentioned that the County provides a supportive business environment. The County is mentioned as being responsive to business needs, allows for easy development approvals, and reduces red tape. Also, two of Middlesex County's municipalities have Community Improvement Plans (CIPs), and three more are developing them, providing more incentives for businesses that want to invest in the region.

Broadband, transit, and infrastructure gaps limit growth

Existing gaps in infrastructure and competition with larger municipalities were identified as the significant challenges preventing Middlesex County from capitalizing on economic opportunities.

Infrastructure gaps identified include the lack of adequate broadband in some locations, a lack of serviced employment lands, and the lack of a robust public transportation system. Water and wastewater servicing are both limited and expensive, making it difficult for sectors with large operations such as the farming and food processing sectors. In addition, it is challenging for the County to secure financing for rural infrastructure systems compared to larger municipalities.

Middlesex County was mentioned as being at a competitive disadvantage compared to other municipalities and larger cities such as London in terms of funding and business support. As a rural region, it is more difficult for Middlesex County businesses to receive commercial financing.



Challenges of attracting and retaining talent

Stakeholders identified that the current workforce is qualified, but there is a limited supply. They mentioned difficulties in both attracting and retaining skilled workers to the County. The lack of a qualified robust local labour force means that local businesses must rely on attracting a regional labour force. This affects long-term viability and operations, placing undue pressure on businesses to remain in the County as they grow. The lack of a robust public transportation system is a challenge. Most concerning is the lack of diverse and affordable housing that will assist in recruiting workers from outside the region.

Lack of housing options to accommodate growth

Stakeholders mentioned that the current housing infrastructure, both in terms of the current housing stock and limited housing options, affects growth. Single-family, detached homes primarily characterize the County. Housing supply in the County should allow for ageing in place to accommodate a growing senior population. Attracting immigrants, young professionals, and families mean that the County focuses on developing higher-density and affordable development, including starter homes and rental options.

Focus on agriculture and technology-based development

The County benefits from being a prime agriculture growth region and continues to export produce and products to processors and consumers. Given the County's agricultural strength, food and beverage processing was identified as a viable growth sector. Capitalizing on this opportunity includes a need to expand the region's food processing industry, such as meatpacking operations. On a more local scale, there are opportunities for entrepreneurs to develop logistics solutions for more local affordable delivery services that will help residents support food and beverage businesses located in Middlesex County, London, and surrounding areas. There is great potential for the continued expansion and diversification of the manufacturing sector, particularly in automotive and metal fabrication, which continues to have advantages due to its proximity to several U.S. border cities. Growth and investment in



this sector need to focus on technology-based development. In addition to the above, the County is well-positioned to seek growth in warehousing and logistics, professional services, rural tourism, energy, and waste management services.

Potential for remote workers

Given the existing labour force gaps, a key opportunity area for the County is a targeted focus on workforce development. The COVID-19 pandemic has provided an opportunity for the County to tap into the remote working trend and attract young professionals and families with disposable income to live and work in the County. Any talent recruitment plan must emphasize the need to direct newcomers to areas with the best cell service and internet connectivity.

Targeted focus on main streets and rural tourism

The County is ready to invest in municipalities' main streets by engaging with local businesses and interested organizations to ensure that the local economies can respond to the needs and demands of its residents. Marketing strategies for the County's industrial lands and tourism sector have also been identified as areas of further untapped potential.

FDI should build on existing strengths

To varying degrees, stakeholders identified that a focus on Foreign Direct Investment is needed to ensure continued growth and investment. While Middlesex's proximity to the U.S.-Canadian border has been highlighted as a significant advantage, there are common sentiments around looking overseas to attract both European and Asian investment. Investment should be embedded within the more extensive network of supply chains, where investors can share resources and explore opportunities for tapping into each other's production inputs. FDI target sectors include food & beverage, logistics, and supply chain opportunities that build on the County's existing strengths in manufacturing and agriculture.





Focus on cohesion and collaboration

As Middlesex County continues to grow, stakeholders expressed their hope to see Middlesex as an ideal place to both live and work, with available jobs and the infrastructure to support such growth. The long-term vision for the County identifies that it will continue to witness population growth, in part because of affordability but also a hopeful increase in arts, culture, tourism, and recreational experiences. The County is seen as a regional provider of jobs and has a strong and active workforce who live and work in the community. It also emphasizes a commitment to preserving the farming culture, agricultural lands, and community spirit.

Cohesion and cooperation were identified as central to advance Middlesex County to the next level of economic development success. Middlesex has collaboration well in hand already, with the County and eight municipalities working well in the current economic development sandbox, despite having limited resources. The County can work in a 'facilitator role' to ensure continued success, building upon the many advancements that have already been accomplished. Opportunities for collaboration include:

- Research and data
- Downtown revitalization
- Workforce development
- Unified brand and marketing
- Regional tourism
- Regional partners

Some of the aspirations outlined for an Economic Development Strategy update include a more robust framework that effectively unites and engages all lower-tier municipalities in an actionable plan for growth. The framework will highlight and position the uniqueness of the local economies in the County for success, harnessing both its rural and urban characteristics and creating an environment for supported and sustainable growth. It will include actions for a supportive business environment that offers help and incentives as well as eliminating unnecessary red tape for investors who want to do business in Middlesex.

As identified above, partnerships are one of the critical factors for success. These include continued partnerships with the City of London, London Economic Development Corp., Tourism London, Elgin Middlesex Oxford Workforce Planning and Development Board, neighbouring Counties and regions, regional foreign-direct-investment-focus organizations, Southwestern Ontario Tourism Corp., Ontario Food Cluster, Community Futures Middlesex, and other business support agencies, Chambers of Commerce and BIAs, agriculture and community groups, sector groups, financial and educational institutions, and economic development associations.



Areas of importance

Members of the Economic Development Strategic Plan Committee were asked to vote on the factors that are most important to economic success. Growth of existing businesses and encouraging entrepreneurship were identified as most important. Results are illustrated in Figure 3 below.

Figure 3: How important are the following to your community's economic success? (n=10)





SOARR Assessment



A SOARR Assessment is a model for reflecting on strategic planning by studying identified Strengths, Opportunities, Aspirations, Risks, and Results (SOARR).

It is a forward-looking model, taking elements of what would traditionally be affiliated with a Strengths Weaknesses Opportunities and Threats (SWOT) analysis and using insights gained through stakeholder consultations to inform what is desired for the future and how to know when our aspirations have been met.

The key concepts underpinning the SOARR model are outlined in Figure 4. The SOARR Assessment is used in conjunction with the rest of the content of this Background Report.

In essence, it represents a summary of all the key learnings uncovered to date so that some preliminary directions can be explored for the Economic Development Strategy.

Figure 4: SOARR explained





STRENGTHS

What can we build on?

- What are we doing well?
- What key achievements are we most proud of?
- What positive aspects have individuals and enterprises commented on?

- **Well-established agriculture sector:** Middlesex County is an agriculture stronghold, with a very high concentration of farms. Farms are also the largest employer of the local labour force. The industry benefits from bountiful land and easy access to markets.
- **Participation rates:** Middlesex County recorded higher levels of labour force participation than urban areas like the City of London.
- **Access to 400-series highways:** Middlesex County has the 401 and 402 Highways within its borders and is just a two-hour drive from Toronto or Detroit.
- **Desirable place to live:** Middlesex County is a safe community with great quality of life, good school systems, and recreation options. Residents enjoy the perks of living in a rural area but are close to the amenities of a large urban centre.
- **Home to a strong food production industry:** This sector is characterized by its regional strength that has been proven to be resilient even during economic recessions.
- **Potential for investment/reinvestment:** Middlesex County has potential for homegrown businesses, including agricultural businesses, manufacturing, and small enterprises.
- **Interest from consumers:** There is interest in things that people associate with a rural community and that Middlesex County already offers (i.e., environment, climate).
- **Agriculture supply chain:** Middlesex County's agriculture sector also benefits from a robust network of suppliers.
- **People are relocating to rural communities:** People choose to live in rural communities and commute to urban centres (i.e., live in Middlesex County and work in London).
- **Economically diverse:** Middlesex County has a diverse business base and diverse business parks.
- **Supportive local government:** Authorities at the upper-tier and lower-tier municipal levels support new flexible developments and make things happen quickly.
- **Demonstrated ability to collaborate:** Five-plus years of successful cooperation and rapport-building, strong relationships, and successful economic development brand.



OPPORTUNITIES

What are our best possible future opportunities?

- What changes in demand do we expect to see in the future?
- What external forces or trends may positively affect development?
- What are the key areas of untapped potential?
- What weaknesses or threats can be converted into SMART improvements?

- **Agri-tech:** Considering the strength of the agricultural sector in Middlesex, further agri-tech developments could position the County at the forefront for investment.
- **Attracting young professionals:** Young professionals are the core of the workforce and have high skills and potential disposable income to spend in the community. Today, when more people have the opportunity to work remotely, the County can capitalize on this trend to stimulate more residential and business growth.
- **Opportunities for wholesale food production:** There is potential in industries involving flash-frozen products (e.g., vegetables, fruits). There is potential in connecting producers to the value-added supply chain companies in the County.
- **Innovation opportunity:** This area can become a food hub in the province; there is an opportunity for diversifying crops and value-added food products.
- **Mainstreet revitalization and development:** There is a recent interest in local source shopping. This kind of initiative increases support for niche businesses and allows high-quality small local businesses to grow.
- **Demand for services is increasing:** As a community grows, the demand for services increases. There are opportunities for small and medium enterprises to meet these needs. Nonetheless, the lack of space to rent or buy is an issue in some communities.
- **Tourism:** There is an opportunity for a County-wide strategy that connects lower-tier municipalities, embraces agri-tourism, and leverages rural and main street businesses.
- **Opportunity to attract investment from Europe and Asia:** Southwest Ontario is well-aligned culturally and economically, with many sectors engaged in global trade. The region resonates well with companies looking for a North American location.



A

ASPIRATIONS

What do we care deeply about achieving?

- What are we deeply passionate about?
- As a region, what difference do we hope to make (e.g. to residents, for institutions, to businesses)?
- What does our preferred future look like?

- **Attracting tech companies:** This is part of people's desire to diversify the economy and ensure it is sustainable through the next several decades.
- **Improve internet access:** Enhanced internet access is essential to being attractive to remote workers and entrepreneurs in nearly every sector. In addition, it will benefit people that are making use of online learning and online services.
- **Small urban growth:** Taking advantage of the trend created by COVID-19, there is a hope to attract people looking to relocate to rural communities.
- **Innovation:** Develop agri-tech industries and precision tech manufacturing in the County.
- **Post-secondary education programming:** There are opportunities to build partnerships with Western University in Middlesex Centre, where they own research lands, or in Strathroy-Caradoc, where combined college-high school programming is being explored.
- **Understanding COVID-19's long-term impacts:** Continue to make business owners aware of long-term impacts and opportunities for retail and commercial businesses.
- **Active workforce:** People want to live and work here, and the County is a net importer of talent with strong participation & unemployment rates.
- **Demographic shift:** Bringing younger people to the community is desired to support future growth and to stimulate development of community amenities.
- **Attainable housing options:** It is affordable to live and work in the same community, with more rental options.
- **Continue good relations between County and City of London:** Middlesex and London benefit from each other's prosperity. There is more to be gained by working together than is lost in small areas where competition exists.
- **Formal, streamlined tactics:** The County and local municipalities should share priorities and bring a cohesive focus to attracting investors. Information sharing should be formalized when responding jointly to site selector inquiries.



R

RISKS

How will we recognize and mitigate or eliminate potential risks?

- What challenges do we need to be aware of?
- What policy shifts could impact our aspirations?
- What contingencies should we have in place to address threats or unexpected consequences?

- **Lack of housing options:** While some municipalities in Middlesex County are experiencing higher volumes of new housing starts, there continues to be a shortage of diverse housing options with prices attainable for a wider spectrum of income brackets. This will significantly impact the ability to attract young professionals and families to the County.
- **Lack of public transportation:** Lack of a proven and reliable public transportation system has a direct impact on people reaching workplaces. This makes it more difficult to fill low-skill jobs.
- **CUSMA/CPTPP/CETA:** There is uncertainty on the impact that new trade agreements (Canada-United States-Mexico Agreement, Comprehensive and Progressive Agreement for Trans-Pacific Partnership, Comprehensive Economic and Trade Agreement) will have on regional and international supply chains.
- **Border shutdown:** Both short and long-term implications, this measure will affect decision making in the County.
- **E-commerce is growing:** As online retail is gaining more attention, main streets, retail districts, and brick and mortar stores generally see a negative impact. These businesses need to shift offerings to survive.
- **Employee/Employer dynamic is changing:** Employees are less attached to their jobs and look forward to certain benefits that employers may not meet if they are not in tune with employee needs.
- **Retaining companies:** Once a company has reached success within the area or reached its servicing limits, how can the County adapt its services or create an environment that will prevent the business from moving to another jurisdiction?
- **COVID-19 will speed up automation:** This will displace unskilled workers.



R

RESULTS

How will we know we are succeeding?

- What are the key goals we would like to accomplish in order to achieve these results?
- What meaningful measures will indicate that we are on track toward achieving our goals?
- What resources are needed to implement our most vital projects and initiatives?

Short-term

- **County and lower-tier communities lined-up with overall priorities:** Carrying a common vision and complementing message.
- **Updated Strategy:** A clear path ahead for delivering economic development services.
- **Increasing support from elected officials:** Including economic development service delivery budget.
- **COVID-19 recovery:** Implementation of a clear plan with the goal of reducing business and job loss.
- **Programs and tools to support lower-tier communities:** Not all Middlesex County communities have economic development staff.
- **Marketing focuses on the uniqueness of the region.**
- **Community collaboration:** Creating a new framework and establishing priorities for collaboration.
- **More immigrants and newcomers will commit to the region.**
- **Strengthen the manufacturing sector:** Middlesex County is known as a pro-manufacturing and technology-oriented community.

Long-term

- **Maintaining healthy residential growth.**
- **Having an active workforce who live and work in the County:** Ensure a strong participation rate.
- **Being a business-oriented community.**
- **Maintaining strong partnerships and communication across the County and the region.**
- **Strengthen the County's economic diversity:** Allowing for less economic disruption.



Future Directions



From Aspirations to Actions

The SOARR Analysis provided a framework upon which we can prioritize the aspirations and strengths of Middlesex on a timeline that maximizes opportunities and results. Understanding where to place economic development priorities must start with those areas that the County has the most ability to influence.

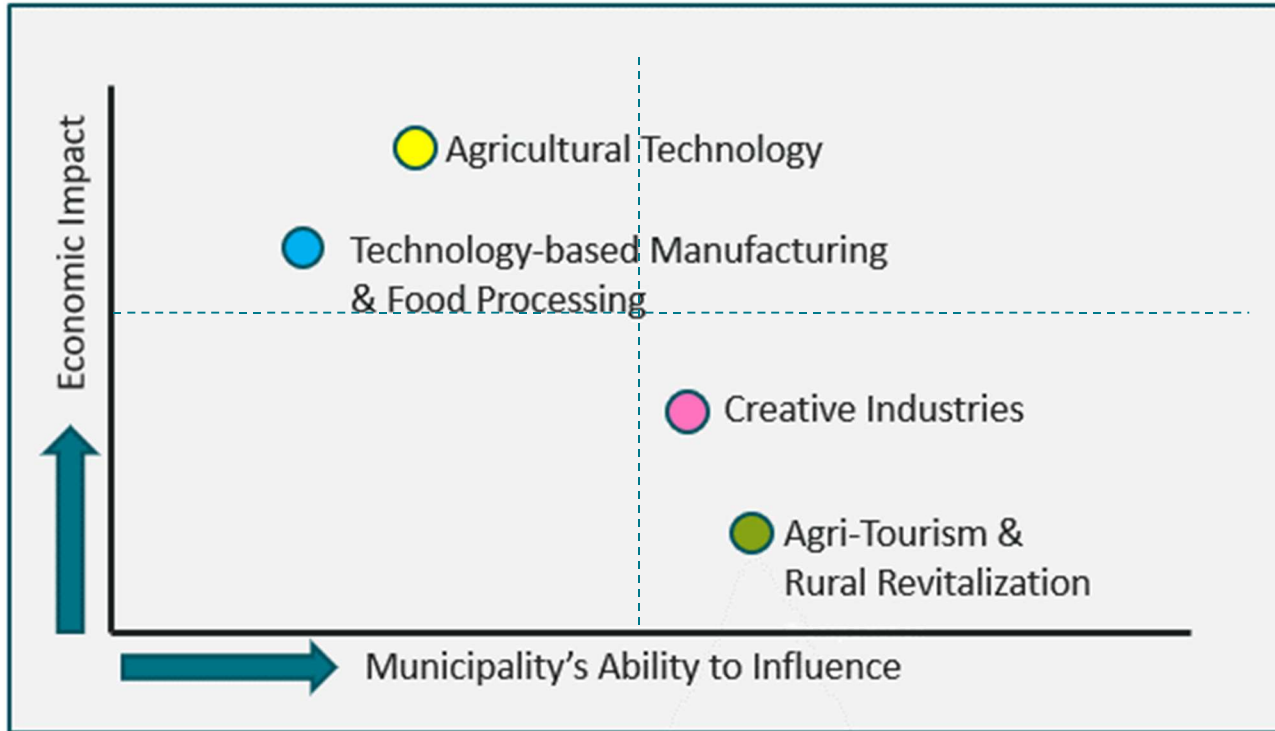
Figure 5 places the key economic drivers of Middlesex County on a matrix that shows the relationship between the economic impact a sector can have and the County's ability to influence that sector. Efforts should be placed on those sectors that fall in the top-right quadrant of this matrix – those that will have the highest economic impact (most jobs created, most new money brought into the local economy), and that the County can and the most influence over through direct action. As is often the case, there is no magic industry sector appearing in that space, so the challenge is to balance an economic development effort across diverse initiatives and attempt to find a sweet spot in the middle of the spectrum.

Technology-based Manufacturing places closest to the top left because when this economic driver is active, it can have the highest economic impact. However, this sector is dominated by automotive manufacturing and subject to external forces that are outside the County's control or jurisdiction. Playing in this realm is complicated and expensive; a burden and opportunity best shared with other partners.

Conversely, Agri-Tourism (and its associated impact on rural revitalization) places in the bottom right because this economic driver can be easily stimulated with support from the County. However, its direct economic impact is lower. That said, linking the terroir of the region to tourism development and placemaking may have an incredible indirect spinoff benefit and generate long-term resiliency. Results and deliverables happen more quickly than many years of targeting foreign-direct investment, which generally pleases impatient elected representatives and their constituents.



Figure 5: Anticipated Economic Impact/Ability to Influence Matrix



Middlesex County's economic development strategy should prioritize those sectors where the County can have the most influence with the best return on investment. A more detailed analysis is outlined in Figure 6.



Sector Value Proposition Matrix

Figure 6: Value Proposition Matrix for Middlesex County

Indicators	Agricultural Technology	Technology based Manufacturing & Food Processing	Agri Tourism & Rural Revitalization	Creative Industries
Estimated long-term growth	Strong	Strong	Moderate	Strong
Complements existing local economic base	Strong	Moderate	Strong	Moderate
Potentially significant impact on local economy	Moderate-Strong	Strong	Moderate-Strong	Strong
Aligns with County's priorities and previous plans	Strong – Agricultural Technology is one of the main sectors identified in the County's FDI research.	Moderate-Strong – Food processing is a strength and has been a long-term emphasis. Other sectors are more recently introduced.	Strong – Tourism is noted as an economic development priority in the County's 2014-2019 Economic Development Strategic Plan. Other studies support this.	Strong – The County's 2014-2019 Economic Development Strategic Plan identifies resident attraction and retention as one of the opportunities to pursue.
Current state of local sector	Moderate	Moderate	Moderate	Moderate



Indicators	Agricultural Technology	Technology based Manufacturing & Food Processing	Agri Tourism & Rural Revitalization	Creative Industries
Current ability to capitalize on sector	Strong – Middlesex’s farmers and entrepreneurs have shown they are eager to incorporate technology into their operations.	Moderate – Labour force aligns well. Lack of places to accommodate the sector is an issue to overcome.	Strong – The area can enhance its attractiveness for people in nearby urban centres looking for day escapes.	Strong – The housing market is a challenge, but these buyers are less price-conscious. Lack of a start-up culture, accelerator.
Capitalize on these competitive advantages	It is a massive local industry sector and Middlesex’s farmers are willing to incorporate technology. Middlesex is a vibrant farming region.	Middlesex is a traditional food hub within North America's largest food market and is close to traditional automotive clusters. A talented workforce will support these industries.	Farmers and rural landowners who are looking to diversify their businesses are assets. Leverage local agri-food tied to culinary experiences in attractive small urban areas and countryside. Pent-up tourism demand will explode post-pandemic.	Natural beauty, easy access to amenities in nearby urban areas including train station and airport. Close to Highways 401 and 402.
Beware of these competitive disadvantages	Technology may improve business viability but may have a net decrease in employment. Relationships in research segments may not currently be strong enough.	It is a competitive space, and a variety of serviced, shovel-ready land options need to be in place.	Tourism is volatile during the pandemic. The County's tourism brand and industry are overshadowed by other regional demand generators. Within the County, there are currently few destination businesses and little overnight accommodation.	Lack of diversity in housing stock, affordability, and low vacancy rates pose a challenge for resident attraction. Internet connectivity is also a necessity.



Business Retention and Expansion Action Plan

The basis for the County's current business retention and expansion (BR+E) initiative was the 2014-2019 Middlesex County Economic Development Strategic Plan, which identified the need to implement a program that used a standardized approach to implementation, interviews, and surveys, database templates, etc. The County was designated to lead and implement the program. At the time of strategy development, a Tourism BR+E study was being administered by the now-defunct Tourism Middlesex³ that engaged tourism operators and related businesses to examine ways to improve the local tourism environment.

The most current BR+E effort is through the Economic Resiliency Task Force, which was established by Middlesex Council to provide assistance, guidance, and recommendations to County staff and Council related to the impacts of COVID-19. The Task Force has developed a working document, the Plan for Economic Resiliency, to inform local businesses of supports in place, to identify gaps, and to plan for the future of business in the region. Implementation of the plan has been a high priority throughout 2020.

Looking Forward

The BR+E Plan proposed here is a formalized and intentional initiative that is complementary to the County's current economic situation. It builds on existing efforts while digging deeper into the perceptions and intentions of business owners. The approach aims to achieve the following outcomes:

- Identify businesses that are either in growth mode or in decline so that time is spent with business owners who would most benefit from the support of the County or a partner agency
- Identify improvements in the County's business environment that will do the most to increase overall business satisfaction

Consistently aspiring to these outcomes will ensure a supportive business environment in the region. The BR+E Action Plan is focused on a triage model that has been effectively utilized by municipalities across Canada. Using a platform that provides statistically significant information about the health of local businesses and the challenges and opportunities they are facing may allow Middlesex County to use its available resources (staff time and budget) in an efficient and effective manner. The following benefits differentiate a triage model from more traditional approaches.

³ Tourism Middlesex was the earlier Destination Marketing Organization (DMO). Currently, the County of Middlesex is the DMO for the County's tourism development and promotion. The face of tourism is *VisitMiddlesex*.



- The model utilizes a person-to-person approach rather than an impersonal online survey.
- Services in the community that drive re-investment and overall business satisfaction are clearly identified.
- Results provide strong measures/key performance indicators that can be measured against in the future.
- Businesses that are either in growth mode or in decline are specifically identified. This will help the County reach out to these businesses individually, understand their needs, and provide support and information.
- The County's strategic economic development priorities are supported, and programming decisions become more informed, allowing staff to pursue potential growth opportunities, and overcome business challenges.
- Because the model is dependent on a statistically reliable methodology, the survey can be conducted year-over-year. This will allow comparisons of business owner satisfaction and ensure the effectiveness of action planning and implementation.

Step 1 – Initial conversations – The BR+E project begins with telephone surveys of a pre-set number of businesses. The questionnaire focuses on business satisfaction, current state, and barriers to business growth, and expected plans of businesses.

Step 2 – Understanding how to improve business satisfaction – The questions root out the degree of importance that business owners place on specific issues and their thoughts on local performance. Derived Importance helps inform preliminary recommendations and actions to improve the business environment. It can also be used to leverage funding from provincial and federal agencies for projects that will do the most to improve business satisfaction.

Step 3 – In-person business visits – Once triaged businesses are identified through these structured conversations (typically 20-40% of all participating businesses), the economic development office immediately focuses on meeting personally with the business owners. This results in tremendously high customer service satisfaction rates and becomes a very effective and reportable performance measure.

Step 4 – Compilation of Analysis, Action Planning, and Evaluating Success – The survey analysis helps develop an action plan to vet the priority initiatives from the Derived Importance matrix. Actions may address the areas where coordinated and strategic activities over time can affect change on the performance and satisfaction of the business community as a whole.

Step 5 – CRM to Support BR+E – Customer Relationship Management software or cloud-based services can be effectively used to track relationships with owners/managers of existing businesses in this BR+E capacity. It will enable economic development offices to monitor and connect with customers and prepare the most effective follow-up possible.



Figure 7: Middlesex County (without City of London) Business Counts by Industry, 2020

Industry (NAICS)	Total	Businesses with Employees
Businesses by Industry (Sub-total, classified)	9,625	2,762
23 - Construction	1,223	555
11 - Agriculture, forestry, fishing, and hunting	2,604	421
44-45 - Retail trade	533	262
81 - Other services (except public administration)	584	227
62 - Health care and social assistance	457	217
54 - Professional, scientific, and technical services	590	176
31-33 - Manufacturing	276	150
56 - Administration and support, waste management and remediation services	332	136
48-49 - Transportation and warehousing	363	127
41 - Wholesale trade	218	107
52 - Finance and insurance	514	94
53 - Real estate and rental and leasing	1,408	94
72 - Accommodation and food services	132	93
71 - Arts, entertainment, and recreation	103	37
51 - Information and cultural industries	51	17
91 - Public administration	13	13
61 - Educational services	64	12
55 - Management of companies and enterprises	85	11
22 - Utilities	61	7
21 - Mining and oil and gas extraction	14	6

Source: Statistics Canada, Canadian Business Counts, June 2020



BR+E Action Plan

Canadian Business Counts (CBC) for June 2020 report that Middlesex County (without City of London) has 9,625 businesses (Figure7). Of these, 6,863 had no employees, while 2,762 businesses had employees.

- It is suggested that the priority industries for the County should be agriculture; professional, scientific, and technical services; finance and insurance; transportation and warehousing; manufacturing; accommodation and food services; arts, entertainment, and recreation; and information and cultural industries.
- Selection of the priority industries is based on a consideration of the current size of the sector, impact on the community, regional strengths and opportunities, and recent studies such as the Target Industry Snapshots.
- Priority sectors are primarily those businesses that bring investment into the regional economy through products and services that are likely sold outside of the region.
- Although the County has a lower proportion of arts, entertainment and recreation; and information and cultural industries, these industries are added as part of the BR+E focus since they form important components of professional services, tourism, rural revitalization, and creative and cultural industries.
- Given the nature of the sectors including real estate; construction; health care; retail trade; wholesale trade; administrative and waste management services, and education, they should be managed on a reactive basis instead of actively pursuing for BR+E purposes.
- Priority sectors together represent 4,633 businesses (48% of all businesses by industry), including 1,115 businesses with employees.
- The BR+E Action Plan proposed here focuses on the businesses with employees in each of the priority sectors. Note: Opportunities exist to include the indeterminate businesses (those without employees), especially in professional, scientific and technical services; finance and insurance; arts, entertainment and recreation; and information and cultural industries as there may be those trying to move to the next level or provide interesting details on conditions to commercialize opportunities.
- A random sample of at least 100 local business owners will identify issues facing businesses and priorities for business health based on a statistically accurate methodology.
- The BR+E Action Plan proposes two approaches, namely, (a): statistically reliable survey of the entire business community and (b): survey focused on specific sectors. Both approaches are detailed below.
- **Statistically reliable survey of the entire business community:** To understand derived importance priorities and triage face-to-face meetings, a statistically valid sample would be 10-20% of all priority sector businesses. This is about 112 to 223 interviews of the 1,115 businesses with employees. On average, 30-40% of businesses identify a red or green flag for follow-up. Using the average (i.e., 35% of



167) leads to 58 personal meetings, or 130 when considering set-up, preparation, travel, interviewing, and data recording, not including follow-up. Some meetings will be held by videoconference or telephone. If 1,900 hours is a typical work year, the effort accounts for 7% of total full-time equivalent employee effort.

- **Survey focused on specific sectors:** The sector-specific focus would focus on the following sectors, as illustrated in Figure 8.

Figure 8: BR+E Sector Focus

Triage BR+E Sector Focus	Industry NAICS	Total Businesses with Employees
Agriculture	11 - Agriculture, forestry, fishing, and hunting	421
Professional Services	54 - Professional, scientific and technical services	287
	52 - Finance and insurance	
	51 - Information and cultural industries ⁴	
Manufacturing	31-33 - Manufacturing	150
Tourism, Arts and Culture	72 - Accommodation and food services	130
	71 - Arts, entertainment, and recreation	127
Transportation and Logistics	48-49 - Transportation and warehousing	
Total Businesses by Priority Sectors		1,115

⁴ The sector could also be surveyed as part of the Tourism, Arts and Culture sector. The sector was identified as part of professional services given the impact of digital media.



Service Delivery

A more aggressive approach to Business Retention and Expansion requires additional staff resources and is a team effort. If Middlesex County implements a more robust and calculated approach to meeting with, listening to, and following up with businesses large and small, demand for the service is expected to increase. Later in the report, it is recommended that an Investment Attraction Officer and a Tourism Development Officer are hired to increase the service level. Prioritizing staff time is important.

Completing a sector-specific derived importance matrix makes the recommendations and actions that much more specific. The following approach (Figure 9) outlines a sector-specific Triage BR+E effort. Given the comparatively high proportion of businesses in agriculture and professional services, it makes sense to dedicate Year 1 to these sectors. Year 2 efforts can be focussed on the other three sectors, namely, manufacturing; tourism, arts and culture; and transportation and Logistics. This rotation of sectors so that they are completed every 2 years can be an effective approach that allows remeasuring the benchmarks and performance. Triage follow-up can also be conducted here and may account for an equivalent workload as identified above.

Figure 9: BR+E Sector Focus Approach (Numbers Indicate Completed Telephone Surveys)

Triage BR+E Sector Focus	2021	2022	2023	2024	2025
Agriculture	60		60		60
Professional Services	60		60		60
Manufacturing		40		40	
Tourism, Arts and Culture		40		40	
Transportation and Logistics		40		40	



Business Investment and Attraction Plan

Middlesex County has been a leader in rural business investment attraction, taking a mindful, evidence-based approach to its strategy and tactics, with sincere attempts to work with regional partners for years, such as the Ontario Food Cluster and South Central Ontario Economic Development Corp. (SCOR). Southwestern Ontario political dynamics present a multitude of complexities around the administration of economic development across this massive territory, with its high number and diversity of municipal (single-tier, lower-tier, upper-tier, separated), not-for-profit, ad hoc, and informal coalitions large and small. Now is the time to take a sober look at the outcomes of those collaborations, to validate their effectiveness and resilience, to consider new relationships, and to address the aspirations of Middlesex County going forward. The Target Industry Snapshot, completed in 2020, provided detailed data and recommendations for Middlesex County's Foreign Direct Investment (FDI) program. The Target Industry Snapshot document also outlines recommendations for developing optimal target company prospect lists, as well as conversation strategy and industry "battle cards." Useful advice is provided for engaging and messaging prospects, as well as best practices for lead nurturing. Recommended investment sector priorities and recruitment zones included:

Target 1: Technology-based Manufacturing / Food Products and Supply Chain

- **Key trends:** Plant-based protein, nutraceuticals, packaging, food waste.
- **Origin:** Prospects highly concentrated in California, New York, Minneapolis, Boston, and Texas. FDI success from outside North America has originated from Germany, Switzerland, Japan, the UK, France, and China.
- **Value Proposition:** Middlesex County is in the heart of Canada's largest food and beverage processing cluster, employing over 100,000 people, with steady growth. The area combines a rural location with numerous food growers and agricultural assets, modern infrastructure, and access to nearby urban centers such as Toronto and Detroit, but also New York, Chicago, and Montreal. Middlesex is home to almost 100 companies engaged in food and beverage manufacturing – a strong local cluster considering the size of the region – not including London's cluster nearby. Freight and logistics firms are among the biggest employers in the region. Combined with the modern infrastructure and market access, it presents excellent "take to market" opportunities. Ontario boasts labour costs that are below the G7 average, apprenticeship training tax credits for skilled workers, and attractive innovation and R&D tax credits.

Target 2: Creative Industries

- **Key Trends:** Shift to remote work, key subsectors are finance, insurance, management, professional, scientific, technical, information technology and telecommunications, and education



- **Origin:** Prospects located in urban centres across Ontario and U.S. cities.
- **Value Proposition:** Since highly skilled workers take their trade with them to a community that offers the quality of life they desire, Middlesex County is well-positioned with its safe, charming rural environment. The area is a short drive to metropolitan amenities in urban centres like London and Toronto and is serviced by major highways, a nearby international airport, and commuter rail. Internet connections are satisfactory for core remote-working tasks: online discussions and seminars, graphic design, analysis, supervision and mentorship, training, and facilitation.

Target 3: Agricultural Technology

- **Key trends:** Bioprocessing, vertical farming, agricultural machinery, drones/uncrewed aerial vehicles
- **Origin:** Prospects located near major farm producing regions such as California, the U.S. Midwest, as well as Texas and Florida, and research-focused areas in New England.
- **Value Proposition:** Middlesex County's agricultural operators are tech-savvy, using more technology per farm than the national or provincial average. The area also grows a wide range of commodities using a variety of technology applications: field crops, livestock, greenhouses, and cannabis. Over 150 million consumers live within a one-day drive, accessible via 400-series highways and major freight and logistics firms. Provincial and federal government incentives are available to attract companies to carry out innovation and product development. Western University's Faculties of Science (Biology) and Engineering support innovation in the sector and generates a qualified workforce.

Target 4: Technology-based Manufacturing / Automotive Supply Chain

- **Key Trends:** Autonomous vehicles, electric vehicles
- **Origin:** Prospects located in California, Washington State, Michigan, New York, and Massachusetts.
- **Value Proposition:** Middlesex County is in the middle of Ontario's automotive corridor that stretches from Windsor to Oshawa. The region is home to five original equipment manufacturers (OEMs), 700+ parts suppliers, and 500+ tool, die, and mould makers. A wide range of climate conditions allows companies across the supply chain to test their products. Provincial and federal government incentives are available to attract companies to carry out innovation and product development. The province hosts over 100,000 workers in the automotive supply chain, with a reputation for high-quality output. The Western Research Advanced Manufacturing Park could be an ideal location for a "soft-landing" site for a company wishing to carry out R&D projects in the region.



Investment Attraction Resources

Available Employment Land

Investment attraction activities require land that is available for sale, competitively priced, appropriately serviced, and sized for use. A review of Middlesex's bank of available land reveals some excellent choices and some challenges which must be overcome if there is hope for consistent long-term success.

- One of the best positioned and most active in recent years is the Molnar Industrial Park, which is serviced, has plenty of available acreages, and is very close to the 402. The park was previously certified but is not currently participating in the Investment Ready program. These sites have advantages for companies involved in the supply chain for automotive manufacturing and food processing.
- Business parks in Glencoe, Thorndale, and Lucan are priced very competitively but are further from 400-series highways, which will limit certain types of investors. These locations are closer to agricultural producers and technology adopters and would be best suited for ag-tech firms.
- Glencoe and Thorndale are certified shovel ready, but Thorndale has only two publicly owned parcels remaining for sale. Phase One of Lucan is sold out.
- The remaining industrial lands in Thames Centre and Middlesex Centre are well situated near Highway 401 or 402, but all require services to be extended. Unserviced sites are attractive to users such as trucking firms, service yards, and warehouses, but these firms are not normally the subject of FDI inquiries.
- Rural industrial areas such as those at 402 and 81 have challenges related to unmotivated landowners.





Regional and Sector Alliances

The most important resource for investment attraction for Middlesex County is its alliance and collaborative efforts with other municipalities and agencies. The Ontario Food Cluster represents the primary alliance that has effectively demonstrated benefit to Middlesex. Almost since the launch of the Cluster in 2011, Middlesex County has been an active member of the alliance of 18 economic development offices and senior government Ministries, including communities such as Guelph, Hamilton, London, Waterloo, Windsor-Essex, Simcoe County, Niagara Region, and Eastern Ontario. The Ontario Food Cluster builds international trade and investment opportunities for its expanding 3,000-company agri-food and beverage sector. Food and beverage processing in the province is expected to grow to a \$40 billion industry, and the agriculture and agri-food sector is Ontario's number one employer.

Ontario food exports total \$9.91 billion, with 130,000 people working directly in agri-food processing/manufacturing and wholesaling, and another 483,000 in related sectors such as food service, retail, and specialty stores. The area grows more than 200 agricultural commodities and hosts 460 million consumers. Using lead generating consultants in the U.S. and Europe, the Food Cluster partners have successfully tapped into the food processing supply chain. Representatives attend international food trade shows each year, such as SIAL in Brazil, Anuga FoodTec in Germany, and PLMA in Chicago. The cluster reviews the capitalization of prospective companies and determines if their products are a match for the Great Lakes market area. The annual cost to participate is \$5,000, plus additional expenses where appropriate. Moving forward, Middlesex County may leverage its relationships with local businesses that currently possess customers or suppliers in these markets and create a tag team that maximizes a visit to the U.S. or Europe.

Another alliance that would be fruitful is the Southwestern Ontario Marketing Alliance (SOMA), a select group of municipalities including Woodstock, Ingersoll, St. Thomas, Stratford, and Tillsonburg. SOMA works with all levels of government and businesses to attract investment to the region. Its focus on site selection assistance and development and sale of industrial land has led to new industrial construction in the area. Relationships between economic development offices also build capacity and knowledge to explore solutions to ongoing bottlenecks in a community. For example, Woodstock has become a provincial leader in land assembly, parcel servicing, and sales, which are elements that Middlesex's municipalities could gain experience from. The annual cost to participate, at a minimum three-year commitment, ranges from \$35,000 to \$45,000, plus a \$6,000 one-time initiation cost and other expenses.

Lead Handling and Response

Prompt response times to leads generated by investment attraction efforts are key, as are coordinated and appropriate information packages in the requested format. When a community receives a lead, that is not the time to discover your data is out of date, and the person responsible is on vacation. There is no time for disorganized, late responses. By all reports, Middlesex County provides stellar responses to site inquiries. However, internal coordination can always be improved, especially if several municipalities are involved in shaping one response to a deadline. This report recommends the hiring of a full-time investment attraction officer to ensure site selectors



are handled not only in an appropriate and timely manner but that Middlesex is positioned as a preferred destination above its competitors. Staff from the County and all municipalities would continue to communicate on a regular basis and cooperate on joint activities. In the absence of any effort to merge the staff under one director, a coordinated work plan and communications protocol should be developed. A charter, for example, or memorandum of understanding, agreed upon by the staff, would be helpful for ensuring expectations are met.

Connections to Local Innovators

A local network of innovative companies and individuals will build capacity for original, inventive concepts that leverage local assets and talent to maximize the spin-off benefit of companies relocating to Middlesex County. Innovators nurture their global networks, and tapping into those resources can only help the economy. Such a network is recommended later in this report and should be harnessed together with outreach to educational institutions, existing businesses, and other partners.

Leveraging Business Champions

A County-wide team of business champions is recommended. While the effort – as described later in this report – is primarily positioned to help local businesses maximize potential opportunities in government procurement, the existence of a forward-thinking, community-minded team can be applied to other tasks and projects. This is not a committee but a loose network of local ambassadors. Champions can help generate positive word of mouth and add incremental value to communications efforts. The effort can also attract the interest of service club members, retired (or active) professionals, young entrepreneurs, and newcomers. Economic Development staff would keep the business champions program organized by maintaining a database of contact information as part of the County's ongoing business retention and expansion efforts. Champions could be invited to networking sessions in cooperation with local chambers of commerce and provided with champion materials, such as pins, licence plate frames, etc., as well as current and relevant economic information on Middlesex County for distribution to their contacts. By providing sufficient





material and training to inform the Champions on various aspects of life in the County, they can then be assigned to teams depending on their strengths or interests, such as agriculture, manufacturing, tourism, education.

Champions could be invited to functions, for example, trade events, familiarization tours, or reception to promote new industry growth. By developing a team of economic development supporters, Middlesex County has a new resource to which to delegate some volunteer work while fulfilling typical motivations of the champions: helping their community and staying informed.



Political Advocacy

Elected representatives are essential for any attempt to attract provincial and federal funding to Middlesex County for improved infrastructure. Middlesex County Council and municipal councillors should work closely with effective advocacy groups, such as the Association of Municipalities Ontario or the Federation of Canadian Municipalities, which have demonstrated their worth on policy alternatives and infrastructure lobbying. The political play happens on a parallel plain to staff-led business investment attraction efforts, but the two worlds rarely mix well. Later in this report, it is recommended that Middlesex County implement a robust political advocacy team in cooperation with like-minded municipalities to affect policy change, attract new sources of funding, and generate evidence-based outcomes that can be attributed directly to the advocacy effort. Regional advocacy alliances such as the Western Ontario Wardens' Caucus and SCOR are relatively new to the landscape. WOWC has advocated for broadband expansions across most of southwestern and central Ontario through the SWIFT collective and has been successful.



Investment Attraction Action Plan

The following approach (Figure 10) outlines a sector-specific Investment Attraction effort over the next five years. A prerequisite to this plan would be the hiring of a full-time Investment Attraction Officer and an increase in financial resources to carry out tasks.

Given the momentum that the Ontario Food Cluster provides and the relatively recession-proof nature of the food sector, it makes sense to sustain and enhance the ongoing focus on attracting food products and supply chain opportunities. At the same time, if resources are increased, the attraction of creative industries can begin. It aligns well with BR+E efforts, resident attraction, and tourism promotion.

With an additional staff person and related budget for expenses, emphasis related to attracting investment in the automotive supply chain and agriculture technology could alternate on a bi-annual assertive/passive basis to maximize budgetary resources. A focus on agricultural technology is well-aligned with Middlesex's existing strengths and assets. It is more relevant to the food supply chain, possesses more linkages to local universities and colleges, and the size and scale of that sector are complementary to the size of Middlesex communities. However, if Middlesex County chooses to join the SOMA partnership, then next year may be best dedicated to ramping up an automotive supply chain effort, leaving some breathing space, networking, and learning opportunities to prepare for an ag-tech focus in the following year.

In the absence of a new hire and related expenses, Middlesex County cannot enhance efforts on Ontario Food Cluster initiatives. Without additional staff resources, it is also not possible to expand the investment attraction effort into other sectors.

Figure 10: Investment Attraction Sector Focus

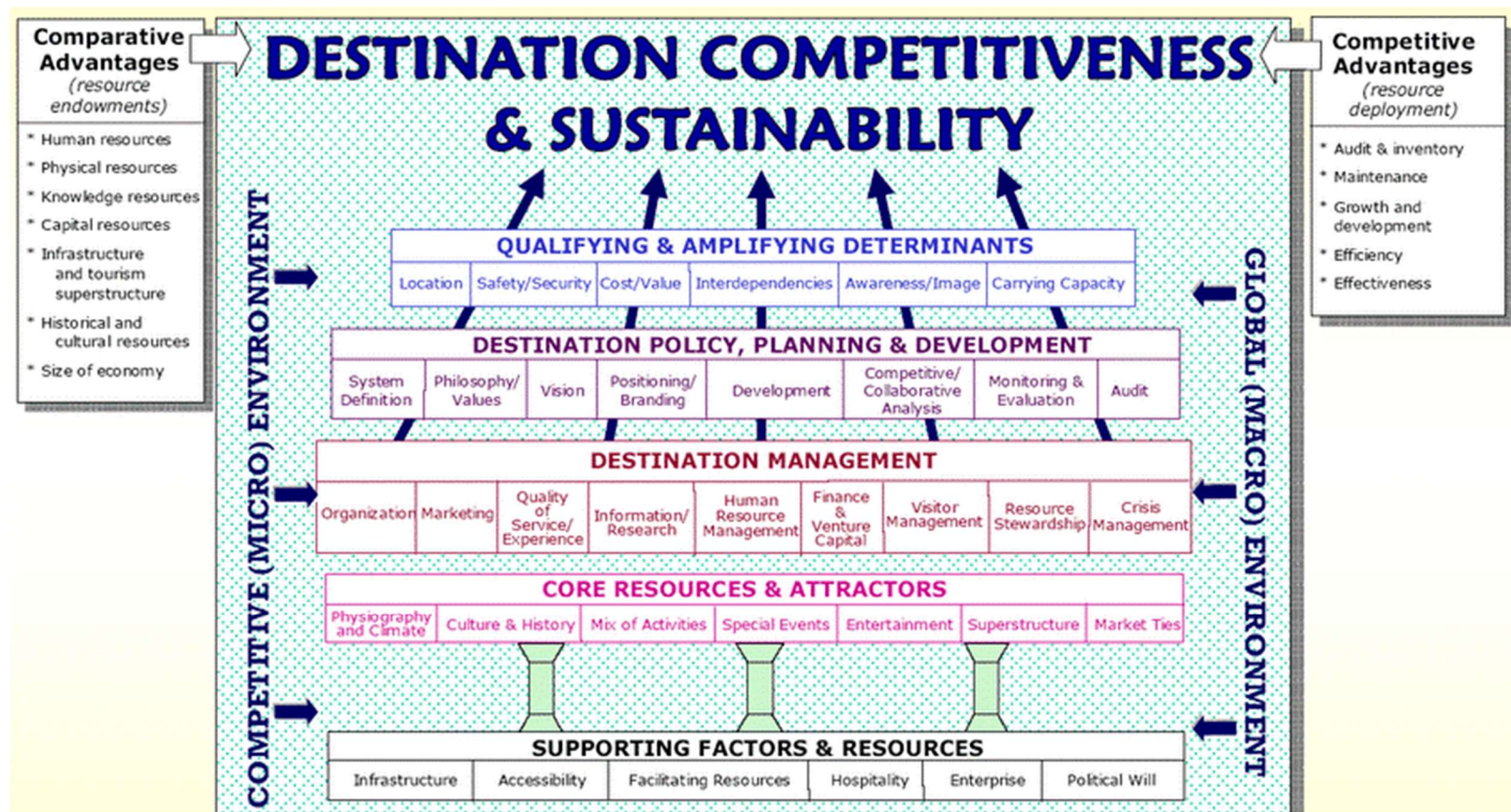
Investment Attraction Sector Focus	2021	2022	2023	2024	2025
Food Products & Supply Chain	X	X	X	X	X
Creative Industries	X	X	X	X	X
Agricultural Technology	X		X		X
Automotive Supply Chain		X		X	



Tourism Plan

This part of the Middlesex County Economic Development Strategy is an outline for a Tourism Plan. Using the Ritchie/Crouch Model (Figure 11) of Destination Competitiveness/Sustainability, the plan identifies present and future opportunities for domestic, regional tourism markets, and international tourism markets once border restrictions are lifted. It focuses on tourism assets, marketing and service delivery, product development, and destination management.

Figure 11: Ritchie/Crouch Model of Destination Competitiveness/Sustainability





Tourism Assets

Middlesex County has as pleasant physiography and climate as most other parts of southwestern Ontario, and small-town rural culture and history that people are drawn to. Its location adjacent to Highways 401 and 402 and near London lends a number of market ties that boost its potential. Taking in nearby London and acknowledging tourists do not recognize municipal boundaries, there is a moderate mix of activities in the area of interest to tourists, including some events and entertainment, and a tourism superstructure that is rural in nature.

In the tourism industry, core attractors are those destinations within a geographic area that are responsible for tourism demand. These are the places providing motivation for tourists to visit. From a provincial perspective, Middlesex County is surrounded by several regional demand generators: Grand Bend, London, Pinery Provincial Park, Port Stanley, and Stratford.

Presently, Middlesex County promotes agri-tourism, arts, barn quilts, day spas, eco-tourism, entertainment, the heritage trail, highway routes, and museums as its key experiences. Activities include conservation areas, fishing, golf, hiking and trails, horseback riding, and sports and recreation. The County has also recently invested in marketing culinary tourism assets, which has been met with positive feedback.

Within Middlesex County, the following attractions rank on travel planning websites and social media platforms as popular: Apple Land Station, Delaware Speedway, Fort Rose Maple Company, Great Canadian Hideaway, Heeman's, Kains Woods, Komoka Provincial Park, Kustermans Berry Farm, Lucan Area Heritage and Donnelly Museum, Ska-Nah-Doht Village and Museum, Texas Longhorn Ranch, and Tree Lane Farms.





Product Development

Middlesex County is not currently resourced on a go-forward basis to pursue tourism product development in a meaningful way. With the assistance of tourism regional relief funding during the pandemic, Middlesex County undertook a number of product development partnerships, such as the Komoka Community Market extension, expansion of restaurant patio service in Strathroy-Caradoc, and Lucan Biddulph, and storefront enhancements. The Middlesex County Economic Resiliency Plan also proposed developing and disseminating an Experiential Tourism workshop in a virtual format to showcase industry best practices and encourage niche tourism opportunities. County staff developed a workshop with a grant from the Canadian Experiences Fund, but the event was cancelled due to Covid-19. A manual for experiential development was created.

Destination Management

Destination management, according to the Ritchie/Crouch model, relates to the capacity for a community to control, on a daily basis, marketing, service experience, information and research, wellbeing of the destination, safety and security, finance and venture capital, human resource development, awareness and image, visitor management, resource stewardship, cost/value, and carrying capacity. In Middlesex County, the upper and lower-tier municipalities manage these roles and responsibilities from a community perspective, and inasmuch that good management translates into a healthy and attractive community, then tourism can benefit as well.

Community Improvement Plan (CIP) incentives in public and private realms help to enable destination development. As this Strategy was being developed, municipalities within Middlesex County are in the process of modernizing their CIPs.

- Lucan Biddulph is considering incentives for the entire township with specific programs for main streets and rural areas. Public art, accessibility, rural economic development, public land acquisition, streetscaping, and facade improvements have been discussed. The annual budget may be \$30,000.
- North Middlesex is considering incentives municipality-wide. Consultations are underway, and a background report has been prepared with some anticipated tools and programs. The annual budget may be, at a minimum, of \$15,000.
- Southwest Middlesex recently received a background report recommending Glencoe be the primary focus area with a phased approach to include multiple settlement areas and agricultural areas (the latter requiring an Official Plan amendment). Possible incentives to be discussed are Development Charge Reduction Grant, Building Permit Fee Grant, Façade/Signage/Property Improvement Grant, Sustainability Grants, and a pandemic relief grant. Anticipated budget for 2021 is \$20,000.
- Strathroy-Caradoc and Middlesex Centre have had CIPs in place for several years with a focus on downtown facade improvements in Strathroy and Mount Brydges and Ilderton, respectively. Amendments are being reviewed.

Target Market

Primarily women
68%

49% aged 55-69

29% aged 40-54

Origin of Travelers



1 20%
Greater Toronto Area

2 13%
London, ON

3 10%
Hamilton-Brantford-Halton

4 8%
Kitchener-Waterloo-Cambridge

Middlesex County was identified by 25% of the respondents as a part of the region they had travelled to

54%
Travelled with spouse/partner

17%
Travelled with family

Trip Planning

93%
Of trips were fully independently planned

26% Daytrippers

15% Stayed one night

23% Stayed two nights

Summer was the busiest time of the year for tourism - 58% visited

Reason of Travel

23%
Visiting a beach

9%
Visiting a provincial park, national park or conservation area

8%
Visiting a winery

7%
Shopping

7%
Camping

About 58% spoke to friends/relatives as a source of information to plan their trip, 31% used an online booking website, and 22% used social media (facebook and TripAdvisor)





Marketing

Marketing requires an understanding of the target market desired, appropriate promotional tactics to attract attention, and measurement to confirm the effectiveness of the overall plan.

The target market for tourism in Southwestern Ontario region is primarily women (68%), with 49% aged 55-69 and 29% aged 40-54, according to a survey of 2,100 people by the Southwestern Ontario Tourism Corporation in 2019. See page 55 for an infographic summarizing some of this data. 20% of respondents were from the Greater Toronto Area, 13% were from London, 10% were from Hamilton-Brantford-Halton, and 8% were from Kitchener-Waterloo-Cambridge. Middlesex County was identified by 25% of respondents as a part of the region they had travelled to.

Most respondents (54%) were travelling with a spouse/partner. The next largest group was families (17%). Trips were planned fully independently by 93% of respondents. Most respondents were daytrippers (26%), stayed for one night (15%), or two nights (23%). Their primary reason for travel was visiting a beach (23%), visiting a provincial, national park, or conservation area (9%), visiting a winery (8%), shopping (7%), and camping (7%). Top write-in responses included visiting friends/family, going to a cottage, and road-tripping or sightseeing. In terms of seasonality, summer was the busiest time of year for tourists, when 58% visited.

About 58% spoke to a friend/relative as a source of information to plan their trip, 34% used a tourism website, 31% used an online booking website (e.g., Expedia, TripAdvisor), and 22% used social media, primarily Facebook and TripAdvisor.

Due to its budget and staff complement, Middlesex County limits its promotional activities to a website, social media, printed collateral, print advertisements, billboards, and other digital media. The County also participates in regional efforts related to social media influencers and motorcycle enthusiasts.

With the assistance of the Canadian Experiences Fund and other pandemic relief funding, Middlesex County was able to develop the Middlesex County Culinary Guide and to partner on marketing projects, such as the “I Love Thorndale” welcome kits and the County-wide Dine Local Map and social media campaigns, such as Young & Free Press.

Through a partnership with the Culinary Tourism Alliance, Middlesex was able to help 15 local businesses participate in The Great Taste of Ontario Road Trip as part of the COVID-19 Recovery Program. Many of these initiatives involve one-time emergency funding and are not sustainable without increasing the County's contribution to tourism.



Service Delivery

There are generally four structures used to deliver tourism services for a destination marketing organization (DMO):

- Municipal Tourism Department, with funds from the operating levy and/or a bed tax, using municipal staff and passive support from the tourism industry support. Council is ultimately in charge.
- Municipal Tourism Department with Pay-to-Play Program for the industry, with funds from the operating levy and/or bed tax, using municipal staff, matching funding from the tourism industry, such as annual fees and other charges, and a Council-appointed Advisory Committee. Council is ultimately in charge.
- Municipally-funded Tourism Contract, with funds from municipal grant and/or bed tax, with funds flowing to an existing arms-length organization with their own staff or seconded municipal staff, additional funding from the tourism industry, and an arms-length board of directors reporting annually to Council.
- Autonomous Tourism Association, an independent non-profit organization, supported financially by tourism businesses, perhaps receiving a small grant from the municipality, operated with little or no staff and/or volunteers, and an independent board of directors.

Middlesex County currently operates as a municipal tourism department embedded with economic development services, a common practice in rural Ontario. Given the small size of the tourism sector in the County and the existence of large DMOs nearby, such as Tourism London and the regional tourism organization, it is not recommended that Middlesex County move aggressively into expanded tourism marketing.

However, product development and destination development are both important goals for the industry here. They also have a major impact on resident and talent attraction, community pride, and small business development, and should therefore be supported.





Opportunities

Within the current budget, Middlesex County does not have the capacity to continue expanding its tourism program. With the hiring of a tourism development officer and a modest budget for expenses, several valuable objectives could be achieved:

- Among the low-hanging fruit of present opportunities is raising awareness. Middlesex County could help several of its tourism businesses boost their online profile by ensuring they are listed accurately on primary trip-planning sites such as Google Maps and TripAdvisor.
- A renewed emphasis on tourism will boost "buy local" campaigns to support all small and independent businesses in Middlesex County. By promoting and developing unique existing attractions and encouraging more entrepreneurs to enter the tourism space, cooperative destination development and tourism marketing can help over time to build year-round, high-yield, County-wide visitors.
- Specifically, on-farm agriculture diversification can be encouraged. In several rural Ontario communities, incentives are in place to enhance improvements on farm properties, including the development of craft breweries, wineries and distilleries, farm markets, and farm stays. On-farm learning experiences are popular but will need washrooms, parking, and landscaping. These types of improvements can be boosted with the presence of matching Community Improvement Plan grant funds and must be enabled through supportive Planning policies.
- An effective tourism development program can be used to leverage resident and talent attraction by identifying, promoting, and celebrating experiences and products made in Middlesex County and the people and stories behind them, then integrating those into other types of communications. To promote vacant jobs, business succession gaps, and new enterprise opportunities, the quality of place of Middlesex County is paramount. Tourism development and marketing helps remind us to build a better image, provide warmer customer service, and support local.



Tourism Plan Timeline

Figures 12 and 13 below outline proposed timelines on two options: status quo or enhanced tourism programming:

Figure 12: Status Quo Tourism Programming

Status Quo	2021	2022	2023	2024	2025
County tourism website	X	X	X	X	X
County tourism publication	X		X		X
Representation at regional tourism table	X	X	X	X	X
Special projects		X		X	

Figure 13: Enhanced Tourism Programming

Enhanced	2021	2022	2023	2024	2025
Employ full-time Tourism Development Officer	X	X	X	X	X
Expand tourism product development, assisting businesses to grow their experiential offerings, connect and collaborate, hone their presence on social media, regular business visits, workshops, ongoing communications, and regional collaboration	X	X	X	X	X
Integrate experiences and products made in Middlesex County, and the people and stories behind them, into resident and talent attraction promotions, as well as tourism marketing that will complement neighbouring and regional DMO work plans	X	X	X	X	X
Develop networks, programs, and incentives to support rural revitalization, new enterprises (e.g., breweries, on-farm experiences), business succession gaps (e.g., small businesses in town), hard-to-fill jobs (attracting remote workers, newcomers)	X	X	X	X	X
Coordinate an ambassador program of Community Champions, integrated within expanded Investment Attraction efforts, to maximize community pride and an expanded network of potential development prospects and/or new residents	X	X	X	X	X
Plus, all status quo programs (Figure 12)	X	X	X	X	X



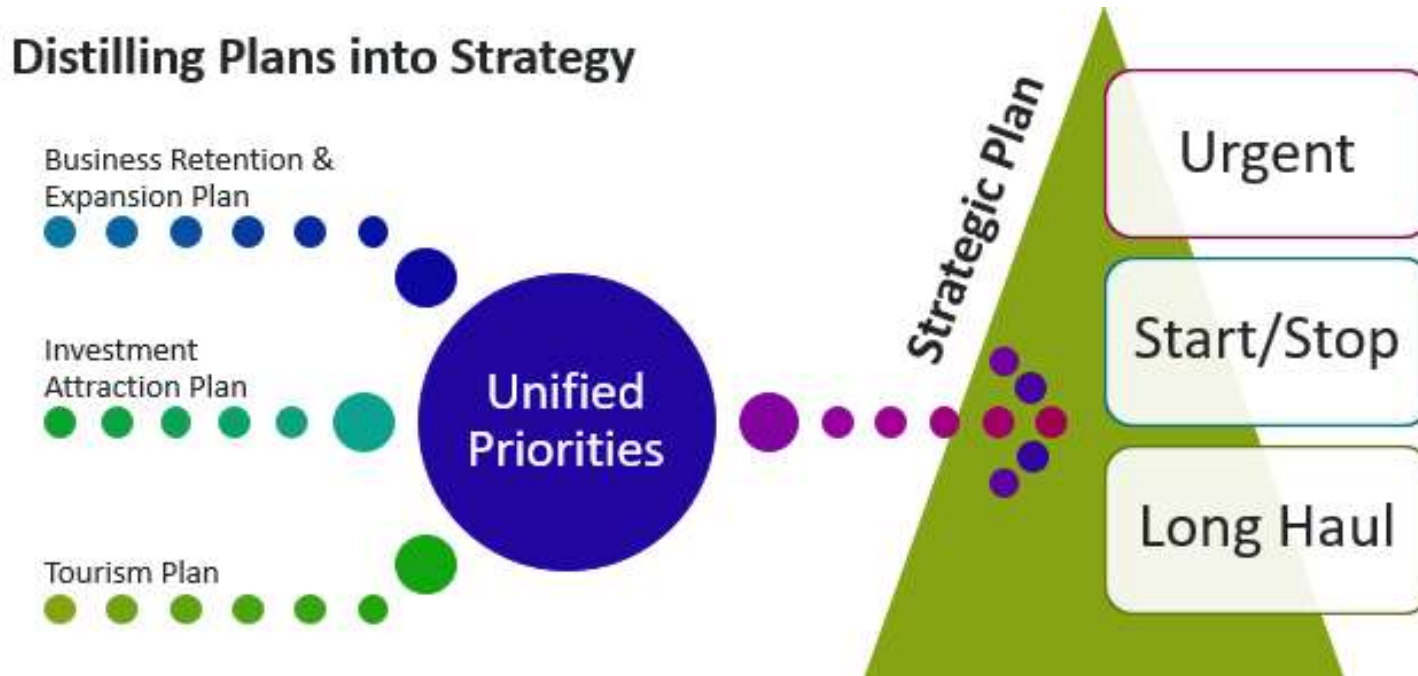
Strategic Objectives and Action Plan



Strategic Objectives

For the Economic Development Strategy to be actionable and effective, it must be distilled into one set of priorities that can be implemented and measured (Figure 14). The Steering Committee reviewed the future directions and provided feedback on how best to shape the action plans. As a result, three strategic objectives were established, distilling key aspects from the Business Retention & Expansion Plan, the Investment Attraction Plan, and the Tourism Plan. At the end of the section, we outline priority actions and expected outcomes.

Figure 14: Unified Priorities





Strategic Objective 1: Invest in people and places via rural revitalization

- **What we heard:** By nature, people are collaborative in Middlesex. A strong rural work ethic still exists here.
- **Why this objective:** People are proud of their communities. Local procurement and tourism development offer ways to retain investment in the community and attract new revenue.
- **Examples of Outcomes:**
 - More value-added agricultural products, such as artisan food, craft brewers, and wineries.
 - More bookable rural experiences with viable business plans that can be marketed to tourists.
 - Small towns and villages that are vibrant and prosperous.

Strategic Objective 2: Entice talented workers and entrepreneurs to relocate here by leveraging the pace of rural life and nearby urban amenities

- **What we heard:** Middlesex is a desirable place to live, with lots of beautiful towns and friendly people. Location is close to 400-series highways, plus London's urban amenities are nearby.
- **Why this objective:** Professionals seek places that offer a quality of life and quality of place. Long-term growth is estimated among employment for Creative Industries. Talented new citizens will have a significant contribution to the local economy and civic duty.
- **Examples of Outcomes:**
 - More housing options for all income levels, including infill development in towns.
 - More activity and collaboration among individuals and business groups to build networks and dynamic partnerships.
 - More spending in local business and increased vitality in towns and villages.



Strategic Objective 3: Attract investment in tech-based manufacturing, food production, and ag-tech

- **What we heard:** Reshore manufacturing related to technology and food production. Future development land is somewhat available. Food production is a recession-proof, regional strength.
- **Why this objective:** Middlesex farmers are adopting technologies faster than provincial or Canadian averages. Existing manufacturers and food producers are connected to warehouse/logistics opportunities.
- **Examples of outcomes:**
 - New tech-based food production and processing facilities that offer above-average incomes for workers.
 - Create an agri-tech and agri-food network of excellence that attracts the attention of international thought leaders and investors.

Strategic Objective 4: Advocate for investment readiness and implement improvements in business development services

- **What we heard:** Infrastructure improvements are needed for internet, water/sewer, and other utilities. Middlesex and its partners collaborate well. It's a big County, and difficult to know what's going on, learn from each other.
- **Why this objective:** Businesses choose to make expansion and relocation decisions in communities that are ready to receive new investment. Cooperation and collaboration – across sectors, regions, and political realms – always has positive results for economic development.
- **Examples of Outcomes:**
 - Accelerated installation of fibre networks across Middlesex.
 - New solutions to activate vacant land as being shovel ready.
 - Perception of fairness, goodwill, and mutual opportunity across all communities in the County.



Action Plan

Strategic Objective 1: Invest in people and places via rural revitalization

Action 1A: Reduce barriers and increase support to spur investment and employment in agri-tourism and rural enterprises	
<p>Action Steps</p> <ol style="list-style-type: none"> 1. Redefine agriculture and tourism uses within policy documents to broaden flexibility and support for more on-farm diversification, rural enterprises, and small-town experiences 2. Balance business incentives in Community Improvement Plans to trigger small-scale rural industrial and commercial expansions 3. Celebrate unique attractions through cooperative tourism development and marketing focused on improved yield, seasonality, and regionality 	
<p>Industry Cluster Impacts</p> <p>Agriculture, Tourism, Retail</p>	<p>Retention vs. Attraction</p> <p>Largely retention</p>
<p>Rationale and Estimated Costs</p> <ul style="list-style-type: none"> <p>▪ Policy Reform: Diversification in rural areas, especially on agricultural lands, is effective if Official Plans and Zoning By-Laws empower innovations instead of prohibiting them. Definitions of uses, designations, and zones in land-use policies must be modernized and creative. For example, amendments to Agriculture zones could include ‘farm experience activities,’ on-farm breweries, and wineries listed among legal uses. Then, projects could proceed ‘as-of-right’ without zoning amendments, just building permits.</p> <p>Cost: This action forms part of ongoing document review processes, which would typically already be budgeted under Planning.</p> <p>▪ Destination Marketing: Key objectives for successful tourism development are to attract affluent visitors who stay overnight for multiple days, spend more per trip, with expanding visitation in shoulder seasons (preferably year-round), and spreading the positive impact beyond two or three high-traffic locations across as much of Middlesex as possible. Tourism promotions are most effective when marketed collaboratively. A properly resourced municipal tourism authority, supported by businesses and organizations, can champion tourism product development, fine-tune the area’s messages and stories, develop meaningful long-term relationships with marketing influencers, and bring professional practices and tactics to the table that translate into tangible outcomes for all.</p> <p>Cost: One full-time-equivalent tourism coordinator (\$60,000 per annum, including benefits) to liaise with businesses and coordinate the program, plus \$50,000 annually for advertising, media relations, promotions, and other marketing tactics. Maintain</p> 	



Action 1A: Reduce barriers and increase support to spur investment and employment in agri-tourism and rural enterprises

\$50,000-\$60,000 budgeted annually for tourism development support through regular communications, workshops, support materials, memberships, conferences. This investment can help leverage other actions noted elsewhere in this document.

- **Broadened Incentives:** Rural municipalities may see higher multiplier effects and more jobs if Community Improvement Plan incentives move beyond façade improvements in small-town cores and support expansions in on-farm value-added processing, including craft breweries, distilleries, wineries, and outdoor tourism experiences. Lower-tier municipalities in Middlesex County should be encouraged to amend their CIPs to provide for sustainability of central business districts and provide adaptive reuse of commercial, industrial, and agricultural properties. Programs, loans, and grants from Community Futures Middlesex should also be promoted.

Cost: Most CIP documents are in the process of being updated, so no additional cost is expected. A long-term goal for CIP funding should be established so that Middlesex County and its municipalities remain competitive alongside comparable rural regions.

Key Community Partners

- County
- Municipalities
- Farms, Businesses
- Community Futures Middlesex, Chambers of Commerce, Federation of Agriculture, Regional Tourism Organization, Provincial Ministries

Timing

- Priority:** High
- Feasibility:** High
- Prerequisites:** Accelerate updates to policies and incentives for long-term improvements. The hiring of a tourism development officer is needed for most of these recommendations.

Case Studies

- Prince Edward County – County Food Hub
- Norfolk County – Alternative Accommodation Toolkit
- Haldimand County – Rural Community Improvement Plan

Sources of Funding

- County Operating Budget, Municipalities’ Operating Budgets
- Property Owners
- Regional Tourism Organization Partnership Fund

Policy Considerations

Official Plan documents, Zoning By-Laws, and other policies and procedures need to be reviewed and updated to support this action. Municipal processes beyond land-use must be considered, such as health inspections, road signage, use of parks and trails, etc. Official Plans and zoning by-laws need to address planning policy’s appetite for large-scale agriculture processing on agricultural land and which uses are prohibited. It is important that Middlesex County remains as competitive and flexible as the next municipality while respecting the confines of the Provincial Policy Statement.



Action 1B: Increase financial support for public realm improvements and strategic amenities in towns and villages

Action Steps

1. Collaborate with municipalities to inspire volunteers and employers in rural settlement areas to create individual public-space action plans
2. Communicate ideas with communities, groups, and volunteers to increase interest, viability, community capacity, and citizenship
3. Leverage municipal funds with financial support from community groups and businesses to trigger the revitalization of public spaces

Industry Cluster Impacts

Rural Revitalization, Small Business

Retention vs. Attraction

Resident Attraction, Business Retention

Rationale and Estimated Costs

- **Public Space Action Plans:** Placemaking is important to revitalizing all communities because it improves citizens’ feelings of belonging. Rural revitalization may require all departments and programs at the County and lower-tier municipalities to think holistically, rather than inside compartmentalized mandates. Without some sense of leadership, a patchwork of outcomes can result if municipalities lean solely on local service clubs to improve the public realm since some groups are better resourced than others. Post COVID-19, service clubs will have fewer funds and may have weakened volunteer rosters. The key to building collaboration is citizen belonging.

Cost: Municipalities may second a skilled staff member for each rural settlement to dedicate time for community consultations to develop action plans. Only communities that showed a willingness to participate and contribute would continue. Members of service clubs may step up early on to assist. The Community Champions effort recommended in Action 4B may also support public realm initiatives.
- **Community-Wide Sharing:** Building on Teeny Tiny Summit initiatives, communication, and cross-pollination of ideas builds resilience in towns and villages and awareness of other best practices. A more regular sharing roundtable may be established, with an eye to highlighting outcomes.

Cost: Similar cost structure as Teeny Tiny Summit program.
- **Activating Revitalization:** A vibrant public realm will help to attract residents and businesses to the area. Projects developed through the Public Space Actions Plans could attract financial support from municipalities, local fundraisers, business donors, and others. The process could provide learning opportunities to help develop the public realm sections of Community Improvement Plans for the



Action 1B: Increase financial support for public realm improvements and strategic amenities in towns and villages

future. Criteria would need to be developed to ensure that funds are spent on physical improvements to public realm. Design guidelines should be prepared to acknowledge County and/or municipal support in a unified approach while allowing individual communities to add their own character and flair.

Cost: Variable, depending on each action plan. Perhaps an earmark of \$10,000 per town/village could be made available on an annual basis to trigger matching dollars from community groups and local businesses.

Key Community Partners

- County
- Municipalities
- Services Clubs and Community Groups
- Community Futures Middlesex

Timing

Priority: High
Feasibility: Medium
Prerequisites: Complete another Resident Survey targeting increased response rates and specific project suggestions

Case Studies

- Bruce County – Spruce the Bruce
- Canmore, Alberta – Cyclist Amenities
- City of Winnipeg – Warming Huts
- Town of Lincoln – Community Chalkboard

Sources of Funding

- County Capital Budget
- Municipalities’ Capital Budgets
- Granting Agencies and Foundations
- Business and Individual Donors

Policy Considerations

Any relevant policies and procedures related to Public Works would need to be reviewed, focusing on how projects could be advanced without hurdles. Risk Mitigation should be reviewed to ensure that volunteers can safely participate in activities on public property without undue paperwork related to waivers, etc.



Action 1C: Boost "buy local" campaigns to ensure residents and businesses double down on local procurement

Action Steps

1. Integrate within tourism marketing initiatives the identification, promotion, and celebration of experiences and products made in Middlesex County and the people and stories behind them.
2. Explore supply-chain challenges and import-replacement opportunities with businesses locally and in neighbouring municipalities to identify potential reshoring

Industry Cluster Impacts

Retail, Agriculture, Tourism, Manufacturing, Professional Services

Retention vs. Attraction

Largely retention, but the initiative could attract new businesses

Rationale and Estimated Costs

- **Buy-Local Storytelling:** The pandemic has generated an increased demand among residents for local sources of products and services and has caused many businesses to sell products online. Post-pandemic, the pattern is expected to continue. A community that integrates stories about its people and the goods they make into their marketing and promotional messaging will help support local procurement and encourage consumers to participate.

Cost: The resource recommendations identified in Action 1A should be focused on local stories, experiences, and products, primarily in agri-tourism, culinary tourism, and home-based businesses. Additional funds could be allocated if there are specific local events or tactics (such as continuing the “Storefront Makeovers on Shoestring Budgets” project) and other region-wide efforts.
- **Reshoring:** A County-wide team of business champions, with support from the County, would help local businesses better understand how to maximize potential opportunities with government procurement and industry buyers. This effort requires more frequent interaction with and understanding of local manufacturers and processors. New enterprises led by young entrepreneurs, newcomers, or new owners of business successions bring new vitality to business communities.

Cost: See Action 3A, which complements this action.



Action 1C: Boost "buy local" campaigns to ensure residents and businesses double down on local procurement	
<p>Key Community Partners</p> <ul style="list-style-type: none"> ▪ County ▪ Municipalities ▪ Community Futures Middlesex ▪ Farms, Businesses ▪ Chambers of Commerce, Federation of Agriculture, Other Business Associations 	<p>Timing</p> <p>Priority: High Feasibility: High Prerequisites: Action 3A, related to Investment Attraction, should be activated at same time.</p>
<p>Case Studies</p> <ul style="list-style-type: none"> ▪ City of Calgary – “Come In We’re Local” signs ▪ Town of Arnprior – “Live Love Local” loyalty cards ▪ Shop Kelowna online 	<p>Sources of Funding</p> <ul style="list-style-type: none"> ▪ County Operating Budget ▪ Municipalities’ Operating Budgets ▪ Businesses
<p>Policy Considerations</p> <p>In order to ‘walk the walk,’ the Purchasing Departments of Middlesex County and the municipalities should support local procurement for municipal contracts whenever possible, providing advice and support in general to businesses on how to pursue bids and respond to requests for proposals.</p>	



Strategic Objective 2: Entice talented workers and entrepreneurs to relocate by leveraging the pace of rural life and nearby urban amenities

Action 2A: Engage the housing sector to review dwelling inventories to determine options for buyers and renters

Action Steps

1. Create a task force of employers, real estate professionals, homebuilders, and workforce and housing agencies to identify opportunities and pinch points associated with any plan to attract new residents and talent/employees to Middlesex County.
2. Fast-track strategic initiatives for affordable and attainable housing options contained within the Middlesex County Homeless Prevention and Housing Plan.
3. Re-tool financial incentives in the Community Improvement Plan and other policy changes to expand the supply of housing stock.

Industry Cluster Impacts

Real Estate, Construction, Major Employers

Retention vs. Attraction

Attraction

Rationale and Estimated Costs

- **Ground-Truthing Housing Gaps:** The municipalities of Middlesex County currently rely on the Housing Development Corporation, London (HDC) to deliver provincial funding for this purpose. Employers, the real estate community, homebuilders, and workforce agencies need to work together better with housing agencies and developers to mitigate short-term challenges and to prepare for long-term needs. A task force would allow key stakeholders to understand what is happening, what gaps are real and which ones are perceived, and what the best way forward may be.
Cost: Nil.
- **Strategic Initiatives:** Numerous priorities are articulated in the Middlesex County Homeless Prevention and Housing Plan. Implementation of the plan by its lead agency should be supported by all communities.
Cost: Nil.
- **Housing Policies and Incentives:** Regional collaboration is key to initiatives of this scope. Middlesex County and the municipalities should work together with housing authorities to review any plans, policies, or zoning by-laws. The County should encourage municipalities to extend their CIPs into creating more opportunities for diverse housing. Cost: See Action 4C



Action 2A: Engage the housing sector to review dwelling inventories to determine options for buyers and renters	
<p>Key Community Partners</p> <ul style="list-style-type: none"> ▪ Housing Development Corporation, London (HDC) ▪ Elgin Middlesex Oxford Workforce Planning and Development Board ▪ London St. Thomas Association of Realtors ▪ London Home Builders Association ▪ County ▪ Municipalities ▪ London Economic Development Corp. ▪ Western Ontario Wardens’ Caucus 	<p>Timing</p> <p>Priority: Medium Feasibility: Medium Prerequisites: None</p>
<p>Case Studies</p> <ul style="list-style-type: none"> ▪ Grey County - Housing Rehabilitation and Conversion Grant ▪ York Region - Affordable Rental Housing Incentives ▪ City of Peterborough - Affordable Housing Tax Increment Based Grant Program 	<p>Sources of Funding</p> <ul style="list-style-type: none"> ▪ Agency Support ▪ Provincial Government ▪ County Operating Budget ▪ Municipalities’ Operating Budgets
<p>Policy Considerations</p> <p>As outlined in AMO’s Municipal Recommendations for Housing in Ontario, municipalities should “revisit zoning to explore zero-lot-line housing, tiny homes, laneway housing, flex housing, shared housing, and other types of housing that reduce land costs and increase density,” among other suggestions.</p>	



Action 2B: Collaborate to promote employment and new enterprise opportunities

Action Steps

1. Promote vacant jobs, business succession gaps, and new enterprise opportunities
2. Explore linkages with local youth, recently graduated students and motivated expatriates
3. Implement a targeted talent recruitment plan aimed at specific geographic areas and demographic personas

Industry Cluster Impacts

Manufacturing, Food Processing, Small Business

Retention vs. Attraction

Attraction

Rationale and Estimated Costs

- **Business Opportunities Database:** Building on the success of the Jobs Hub, a catalogue of gaps in business succession as well as new enterprise opportunities would be helpful for enticing new talent to Middlesex County. Lone Eagles (export-oriented sole proprietors) will also enjoy the quality of life of Middlesex’s small towns. Working with stakeholder agencies, a simple list of opportunities and contacts could be maintained collaboratively.
Cost: Nil.
- **Connecting to Young Talent:** Remote work, as well as employment opportunities in small towns and rural areas, offers young talent and motivated expatriates the opportunity to settle down and raise a family in Middlesex. Using the County’s Client Relationship Management (CRM) messaging system, subscribers could receive specific alerts about opportunities curated by a network of stakeholder agencies.
Cost: Additional staff time.
- **Talent Recruitment Plan / New Residents:** A poorly targeted resident attraction plan may flood the County’s available housing stock with retirees or non-working residents. Talented new citizens will hopefully make significant contributions to the local economy and embrace civic duty. Incentives could be explored within Community Improvement Plans to attract new residents. The plan should focus on specific geographic areas with high numbers of target demographic personas.
Cost: Development of plan, \$25,000. Promotion of plan, \$50,000 per year. These costs do not include tax rebates that may be enacted by municipalities or associated administrative costs.



Action 2B: Collaborate to promote employment and new enterprise opportunities	
<p>Key Community Partners</p> <ul style="list-style-type: none"> ▪ Elgin Middlesex Oxford Workforce Planning and Development Board ▪ London Economic Development Corp. ▪ Community Futures Middlesex ▪ Employers ▪ Chambers of Commerce, Federation of Agriculture, Other Business Associations ▪ County 	<p>Timing</p> <p>Priority: Medium Feasibility: High Prerequisites: Action 2A, “Engage housing sector to review dwelling inventories to determine options for buyers and renters,” should be significantly underway before this action is pursued.</p>
<p>Case Studies</p> <ul style="list-style-type: none"> ▪ Town of Ponoka, Alberta - New Resident Attraction and Incentive Program ▪ Town of Penhold, Alberta – New Home Buyer Incentive Program ▪ Regional District of East Kootenay, B.C. – Upper Columbia Valley Resident Attraction and Retention Strategy ▪ Smooth Rock Falls, Ontario – Municipal Property Acquisition Programs 	<p>Sources of Funding</p> <ul style="list-style-type: none"> ▪ County Operating Budget ▪ Municipalities’ Operating Budgets
<p>Policy Considerations</p> <p>Attraction strategies will need to align with infrastructure capacity. For example, talent recruitment aimed at tech-based remote workers should direct newcomers to communities with adequate internet connectivity. New resident incentives will require adoption in the Community Improvement Plan, as well as policy considerations involving the Treasury Department and Financial Services at participating municipalities if the incentives are particularly aggressive. For example, the Municipal Property Acquisition and Sale Program in Smooth Rock Falls, Ontario, reimburses purchasers of residential lots by up to a maximum of 90% below market value. The community also offers “enormous tax breaks for new homeowners over three years,” according to their website.</p>	



Strategic Objective 3: Attract investment in technology-based manufacturing, food production, and agriculture technology

Action 3A: Double down on results-oriented tactics to attract foreign direct investment-related to tech-based food production and ag-tech

Action Steps

1. Review and implement recommendations within the Employment Lands Needs Study, including the extension of servicing to industrial lands and upgrades to treatment capacities
2. Continue collaborating with the Ontario Food Cluster and join the Southwestern Ontario Marketing Alliance to generate leads of prospective new investments in Middlesex County and respond to them efficiently
3. Create a network of innovative companies involved in applied agriculture technology and agri-food processing to stay current with technologies and trends and to position Middlesex County as a destination for related thought leaders and influencers

Industry Cluster Impacts
 Technology-based Food Production, Agriculture Technology, Advanced Manufacturing, Education

Retention vs. Attraction
 Largely Attraction, but also Retention

Rationale and Estimated Costs

- **Industrial Land:** Although some investment has occurred on industrial lands in Middlesex, there are still large tracts of land available. Extending services to those parcels are critical to attracting more investment. Strategic servicing may also help existing employers, which will encourage them to expand *in situ* rather than relocating.
Cost: Capital budget forecasts of Middlesex’s lower-tier municipalities may already contain projected costs to build extensions to servicing industrial lands.
- **Lead Response:** Middlesex County and its municipalities have built strong relationships among allied municipalities related to attracting investment in the food industry. A dedicated economic development officer focused on investment attraction would assist with maximizing the potential of leads generated by the Ontario Food Cluster and other FDI efforts, such as the Southwestern Ontario Marketing Alliance. Efforts should be coordinated with the London Economic Development Corp. to maximize resources and outcomes.



Action 3A: Double down on results-oriented tactics to attract foreign direct investment-related to tech-based food production and ag-tech

Cost: One full-time-equivalent economic development officer (\$90,000 per annum, including benefits) to coordinate investment attraction, local business networks, and talent attraction initiatives. An investment attraction plan should be developed and resourced appropriately (\$75,000 in total per year). This investment can help leverage proactive involvement of local economic development officers as part of the County’s Foreign Direction Investment team, as well as other actions, such as joining SOMA.

- **Innovation Network:** Developing a “network of excellence” involving local innovators would build capacity for original, inventive concepts that would leverage local assets and talent. A County-wide team of business champions is proposed under Action 1C, as well as resident and talent attraction initiatives recommended in Action 2B. Harnessed together with outreach to educational institutions and other partners (see Action 3B), these initiatives would dovetail well with a local network of innovative companies, coordinated by a dedicated staff member for investment attraction.

Cost: \$10,000 per year for meeting expenses, materials, and supplies, and pilot projects.

<p>Key Community Partners</p> <ul style="list-style-type: none"> ▪ County ▪ London Economic Development Corp. ▪ Municipalities ▪ Ontario Food Cluster ▪ Southwestern Ontario Marketing Alliance 	<p>Timing</p> <p>Priority: High Feasibility: High Prerequisites: Hiring of an economic development officer is needed for most of these recommendations</p>
<p>Case Studies</p> <ul style="list-style-type: none"> ▪ Wellington County - Ontario European Agri-Food Trade Forum ▪ Downtown Orillia Investment Attraction Project ▪ York Region - York Link marketing campaign and communications strategy 	<p>Sources of Funding</p> <ul style="list-style-type: none"> ▪ County Operating Budget ▪ Municipalities’ Capital Budgets – servicing employment lands
<p>Policy Considerations</p> <p>Financing of extensions of service will require budget review and potentially reviews of policies related to development charges and financial incentives. Consideration should be given to collaborating with the City of London on the extension of services.</p>	



Action 3B: Collaborate with educational institutions, research partners, businesses, and others to define and promote the regional advantage

Action Steps

1. Gather intelligence and build rapport between secondary and post-secondary education leaders, and tech-based employers
2. Document and promote regional advantages and opportunities
3. Explore potential for expanded post-secondary programming in Middlesex County

<p>Industry Cluster Impacts</p> <ul style="list-style-type: none"> ▪ Education, Technology-based Manufacturing, Agriculture Technology 	<p>Retention vs. Attraction</p> <p>Retention and Attraction</p>
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Rationale and Estimated Costs

- **Education/Employer Network:** Continuing to build bridges and communications among educational institutions, employers, and other agencies is an ongoing and important objective. Key outcomes are stronger networks, increased awareness of opportunities, and attraction of desired talent. The value of such a network should be mutual and the format attractive to ensure all participants continue to invest their time and knowledge. This initiative aligns well with the development of a “network of excellence” (Action 3A) involving local innovators and a County-wide team of business champions as proposed under Action 1C, coordinated by a dedicated staff member for investment attraction.
 - **Cost:** Encourage the continuation of the Workforce Development Partnership (2020 budget was \$66,000, including 50% contributions from the provincial government).
- **Regional Advantages:** As the economy evolves and business players change, the relative strengths and opportunities change, too. Understanding and utilizing new regional advantages in investment attraction efforts is critical to tell an accurate, authentic story for potential investors and talent.
 - **Cost:** Nil.
- **Satellite Post-Secondary Education:** Middlesex County has expressed a desire to foster relationships with post-secondary education providers and grow established programming. The Environmental Sciences Western Field Station is a Faculty of Science facility owned by Western University, located 1km east of Ilderton. Other faculties, along with researchers from Agriculture and Agri-Food Canada, also use the facility. There had been discussions about expanding its importance, but there has been no news. Fanshawe College owns



Action 3B: Collaborate with educational institutions, research partners, businesses, and others to define and promote the regional advantage	
<p>A.M. (Mac) Cuddy Gardens in Strathroy, where development and routine maintenance is done through the Horticulture Technician program. Other opportunities exist to bolster the Agri-Management Program at Fanshawe College as well as their research facilities in London.</p> <ul style="list-style-type: none"> ▪ Cost: Nil. 	
<p>Key Community Partners</p> <ul style="list-style-type: none"> ▪ Western University ▪ Fanshawe College ▪ University of Guelph - Libro Professorship in Regional Economic Development ▪ Conestoga College ▪ School boards ▪ TechAlliance ▪ Employers ▪ County ▪ London Economic Development Corp. ▪ Elgin Middlesex Oxford Workforce Planning and Development Board 	<p>Timing</p> <p>Priority: Medium Feasibility: High Prerequisites: None</p>
<p>Case Studies</p> <ul style="list-style-type: none"> ▪ Sault Ste. Marie - Rural Agri-Innovation Network (RAIN) ▪ Virginia Tech - SmartFarm Innovation Network ▪ Europe - Short Supply Chain Knowledge and Innovation Network (SKIN) 	<p>Sources of Funding</p> <p>N/A</p>
<p>Policy Considerations</p> <p>None</p>	



Strategic Objective 4: Advocate for investment readiness and implement improvements in business development services

Action 4A: Implement a robust political advocacy team in cooperation with like-minded municipalities to attract new sources of funding infrastructure

Action Steps

1. Implement a robust political advocacy team in cooperation with like-minded municipalities to affect policy change, attract new sources of funding, and generate important outcomes for the economic development of the region.
2. Grow a connected, nimble County-wide economic development team that leverages all assets for the greater good

Industry Cluster Impacts

Public Administration

Retention vs. Attraction

Retention and Attraction

Rationale and Estimated Costs

- **Political Advocacy Team focused on Economic Development:** Enabling innovations in agriculture technology and rural revitalization will require access to broadband connectivity. Better internet infrastructure requires advocacy. In rural municipal circles, engagement related to political advocacy tends to be accidental or infrequent. Middlesex County representation on associations such as AMO, FCM, and ROMA is strong and provides an opportunity for lobbying to be more frequent and consistent. Middlesex County should establish a targeted, clear set of potential outcomes for economic development advocacy, and then pursue other like-minded municipalities as partners, regardless of location. Council should work with administrative staff, with input from all County Departments and Municipal Councils, to establish a game plan or playbook for focused advocacy.

Cost: Membership fees for AMO, FCM, and ROMA are already included in the County’s administrative budget. Additional administrative budget may be considered to encourage elected representatives from Middlesex County to travel (post-COVID) to meet with senior government leaders at their offices in Toronto and Ottawa, as well as conferences and advocacy missions.
- **Networked Economic Development Staff:** The Strategy review uncovered evidence of a well-respected economic development effort that demonstrates excellent communications and collaboration, a strong work ethic, and efficient results. Staff communicate on a periodic basis and cooperate on joint activities. There is an expressed desire to continue working together. In the absence of any effort to merge the staff under one director, a coordinated work plan and communications protocol should be developed. A charter, for



Action 4A: Implement a robust political advocacy team in cooperation with like-minded municipalities to attract new sources of funding infrastructure

example, or memorandum of understanding, agreed upon by the staff, would be helpful for ensuring expectations are met. Actions 1A and 3A recommend the hiring of additional full-time staff by the County, which would help create a team outlook. Professional development is also very important for all employees, regardless of who they report to.

Cost: Additional professional development budget to support employees acquiring formal Economic Development education. Lower-tier municipalities are encouraged to invest in formal education for their economic development staff.

Key Community Partners

- County
- Local Municipalities and Others
- Association of Municipalities Ontario – County Caucus
- Federation of Canadian Municipalities - Rural Forum
- Rural Ontario Municipal Association
- Ontario Federation of Agriculture

Timing

Priority: High
Feasibility: High
Prerequisites: A careful review of deliverables and benefits provided by existing memberships in advocacy organizations should be undertaken by County Council.

Case Studies

- Eastern Ontario Wardens’ Caucus
- Northwestern Ontario Municipal Association
- Alison Shott, Western University, “Municipal Associations, Membership Composition, and Interest Representation in Local-Provincial Relations,” 2015

Sources of Funding

County Operating Budget
 Municipalities’ Operating Budgets

Policy Considerations

An advocacy team and an internal collaborative team may review current policies and learn about best practices elsewhere.



Action 4B: Spur business development with focused community improvement plan incentives

Action Steps

1. Focus and fund Community Improvement Plan (CIP) incentives on targeted rural revitalization impacts
2. Promote incentives aggressively and report performance annually, with a goal to ensure that CIPs are adequately funded
3. Ensure all elected representatives and municipal staff are aware of incentives and the process for applying

Industry Cluster Impacts

Agriculture, Small Business, Tourism, Creative Economy

Retention vs. Attraction

Retention

Rationale and Estimated Costs

- **Focused Incentives:** While façade improvement is important for main streets, there is an increasing demand for revitalization beyond bricks and mortar and outside settlement areas. To spur on-farm value-added processing, municipalities are expanding CIP incentives to industrial/commercial-related construction on agricultural land, including interior and exterior improvements. Business start-up space in small towns and hamlets, upgrades to tourism infrastructure (outlooks, landscaping, parking, washrooms), and more roofed tourist accommodation and affordable housing are other opportunities in the private realm. There is support for housing development to be a targeted consideration in the CIPs being developed locally. A few municipalities are offering tax-increment grant rebates on developing employment land. The municipalities of Middlesex County are in the process of reviewing their CIPs or establishing them. Now is the best time to create synergies across the policies, so the collaborative effect is very positive.

Cost: Nil.

- **Right-size CIP Budgets:** Access to an adequate amount of capital that is within the influence of municipal government is a very important resource for small businesses. Increased communication and networking through the hiring of additional County staff with a mandate to leverage involvement of local economic development staff will expand the cross-pollination of ideas and opportunities for all corners of Middlesex County, boosting confidence in the area’s Open for Business philosophy. Comparable counties are budgeting \$150,000 to \$250,000 annually to spur businesses to participate in reinvesting in the properties. The estimate for CIP budgets in Middlesex totals about \$100,000.

Cost: Over time, Middlesex County could consider matching lower-tier municipal CIP budgets to provide adequate resourcing.



Action 4B: Spur business development with focused community improvement plan incentives

- **Incentive Champions:** A successful Community Improvement Plan involves capturing the attention of a motivated businessperson at exactly the right time during the decision-making process for their project. Once an entrepreneur has thought through the return-on-investment for a potential expansion and decided to proceed or delay, they may not revisit that situation for some time. If building inspectors, planners, Councillors, and other customer-facing municipal officials or business association representatives are aware of incentives and motivated to share accurate details about them, a businessperson is more likely to include that information in their decision-making process. Internal communications, lunch and learn sessions, and other training opportunities will augment the effectiveness of promoting CIP programs.

Cost: Nil.

Key Community Partners

- County
- Municipalities
- Other Department Staff and Councils
- Chambers of Commerce and Business Improvement Areas

Timing

Priority: High, Long-term
Feasibility: High
Prerequisites: Official Plan Reviews

Case Studies

- Springwater – Tax Increment Grant (Value-Added Agricultural / On-Farm Diversified Uses)
- Grey County – Destination Infrastructure Grant, Start-up Space Leasehold Improvement Grant
- Norfolk County – Agricultural Buildings & Facilities Improvement Grant
- Town of Lincoln - Industrial Lands & Rural Areas Revitalization (Tax Increment) Grant
- Bruce County - Spruce the Bruce Community Improvement Initiative

Sources of Funding

- County Operating Budget
- Municipalities’ Operating Budgets

Policy Considerations

Community Improvement Plan incentives require approval via Official Plan Review, so getting Planning colleagues on board and motivated to accelerate the process would be most helpful. Support from colleagues in Treasury/Finance to ensure financial, administrative procedures can be fast-tracked is also important. Middlesex County is not eligible to provide financial incentives directly to businesses through a County-wide CIP. Therefore, partnering with lower-tier municipalities who are implementing their CIPs may be a more appropriate means to fulfill his action.



Priority Actions and Timelines

Priority actions and timelines are based on the recommended hiring of additional staff resources for Middlesex County's Economic Development and Tourism Department. In the absence of additional resources, many of the actions below will need to be reprioritized or delayed to a subsequent budget year.

Action	Priority	Outcome Timeframe
1A: Reduce barriers and increase support to spur investment and employment in agri-tourism and rural enterprises	Urgent	Medium-term
1B: Increase financial support for public realm improvements and strategic amenities in towns and villages	Start-Stop	Long-term
1C: Boost "buy local" campaigns to ensure residents and businesses double down on local procurement	Urgent	Short-term
2A: Engage the housing sector to review dwelling inventories to determine options for buyers and renters	Start-Stop	Medium-term
2B: Collaborate with educational institutions, research partners, businesses, and others to define and promote the regional advantage	Long Haul	Long-term
3A: Double down on results-oriented tactics to attract foreign direct investment-related to tech-based food production and ag-tech	Urgent	Medium-term
3B: Collaborate to promote employment and new enterprise opportunities	Long Haul	Short-term
4A: Implement a robust political advocacy team in cooperation with like-minded municipalities to attract new sources of funding infrastructure	Long Haul	Medium-term
4B: Spur business development with focused community improvement plan incentives	Urgent	Long-term

