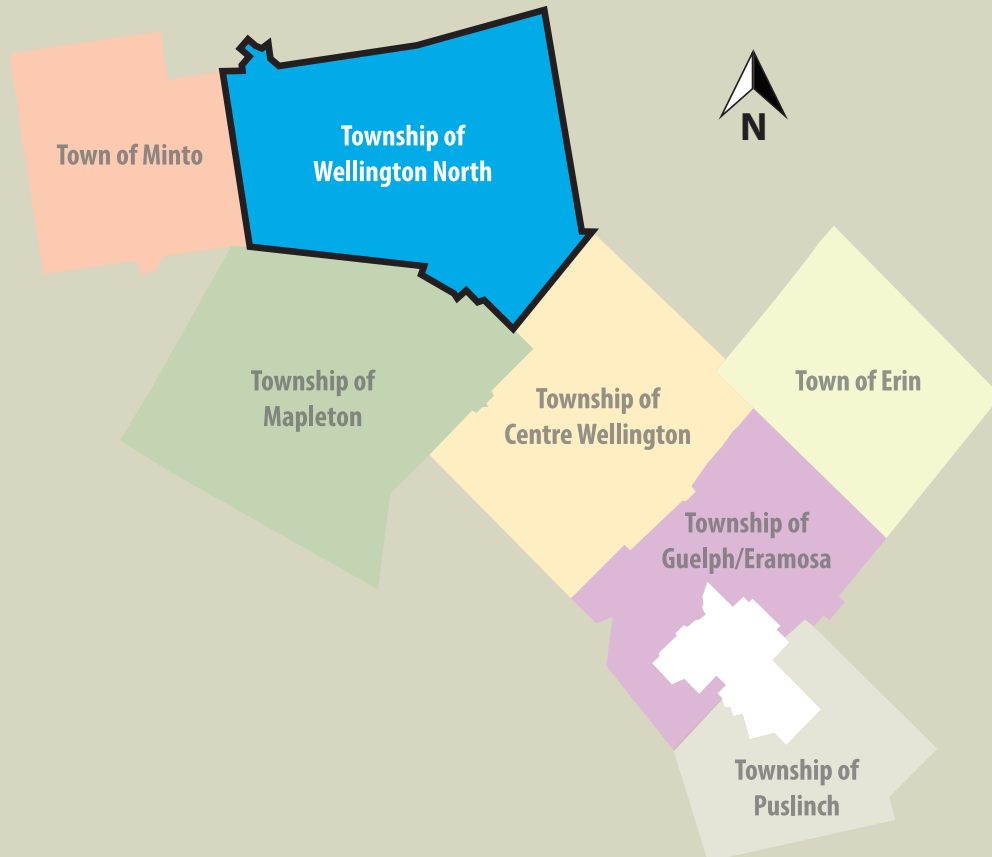




Township of Wellington North BR+E Project

Business Interview Findings and Action Plan

April 2014





COUNTY OF WELLINGTON

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April 23, 2014

The County of Wellington is pleased to announce Wellington's first ever Business Retention and Expansion project and along with our partners in Wellington North enclose our final report.

Businesses and the jobs they create form the basis of all strong economies. Our Council recognizes that supporting the businesses that have already invested in Wellington provides the greatest return for future growth. Through the BR+E, we were able to meet with over 270 of our employers, learning about what they do, what their plans are and what challenges they face.

We have moved swiftly since having completed our first ever Economic Development Strategy just over one year ago. The County is proud of our strong partnerships and will continue to develop effective programming oriented at growing the economic potential of all of our communities. To assist our communities in the next phase of the BR+E project, Council has approved a \$175,000 BR+E Local Implementation Fund in the 2014 budget, designed to help execute local business support activities.

Wellington business owners provided us with a lot of valuable information and an impression of what Wellington is like as a place to do business. We are grateful for that. The prioritization exercise then narrowed the results into themes and showed us where to focus our efforts for the next year. The results are excellent and are in line with the County's commitment to ensuring our employers, newcomers and investors have all of the information they need to make the right decisions.

We know Wellington is an excellent place to live and run a business and that now is time for a coordinated approach to communicating these opportunities with the world. The County is genuinely proud of our communities and the opportunities we have for creating jobs and enhancing our quality of place.

A handwritten signature in blue ink, appearing to be "CW" or "Chris White".

Chris White

Warden 2011-2014

County of Wellington

A handwritten signature in black ink, reading "Raymond Tout".

Raymond Tout

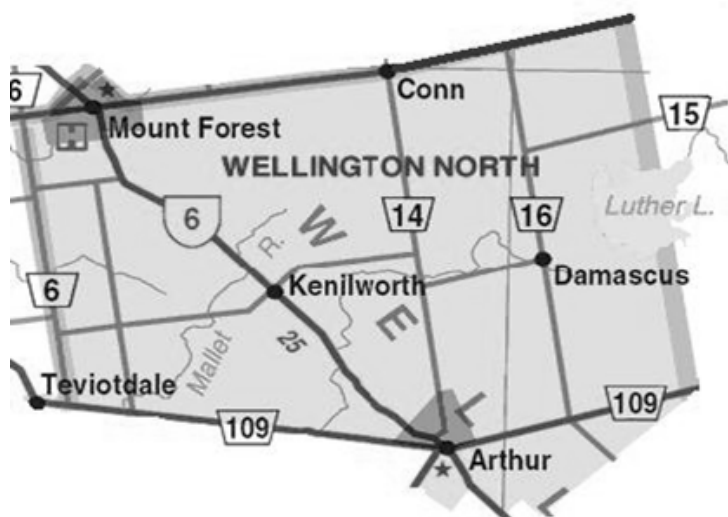
Mayor

Township of Wellington North

Wellington North Acknowledgements

The Township of Wellington North has prepared the following report based on the Business Retention and Expansion (BR+E) survey completed by local businesses in the Agriculture, Creative, Health Care and Manufacturing sectors. This phase of our Business Retention & Expansion Program, which first started in Wellington North in 2005, was completed in partnership with the County of Wellington and all seven member municipalities as well as the Wellington Federation of Agriculture.

The Business Retention & Expansion Program was developed by the Ontario Ministry of Agriculture & Food (OMAF) and the Ministry of Rural Affairs. The collaborative approach taken helps the community identify the needs and concerns of local business and asks their opinions about government services and determines in what ways the local business climate can be improved. Helping our existing businesses is the main objective of the project.



The BR+E project was funded through the Rural Economic Development (RED) program, sponsored by the Ontario Ministry of Agriculture and Food and the Ministry of Rural Affairs. The county wide initiative was led by Carolyn O'Donnell, BR&E coordinator for the County of Wellington and the Township of Wellington North representative was Dale Small. Al Rawlins, from the Wellington North Economic Development Committee, also participated in the project.

Business Retention & Expansion in Wellington North was made possible by the Township of Wellington North Economic Development Committee which is comprised of the following members:

| | |
|---|--|
| Chairperson: | Councilor Dan Yake |
| Council Members: | Mayor Ray Tout, Councilor Andy Lennox, Councilor Mark Goetz, Councilor Sherry Burke |
| Public Members: | Tim Boggs, Al Rawlins: Jim Taylor, Shep Shepetunko, Shawn McLeod, Stephen Dineen |
| Business Economic Manager | Dale Small |
| Tourism, Marketing & Promotion Manager: | April Marshall |

Thank you to all the businesses who participated in the survey. Your input was invaluable to the success of this project. It is important for local businesses to take an active role in building a better business community!

Countywide Acknowledgements

The leaders!

We would like to thank the County of Wellington Economic Development Committee, for their vision and leadership in this project. They are:

- Warden Chris White, Mayor, Township of Guelph Eramosa
- Chair George Bridge, Mayor, Town of Minto
- Councillor Don McKay, Township of Puslinch
- Councillor Raymond Tout, Mayor, Township of Wellington North
- Councillor Shawn Watters, Township of Centre Wellington

Thank you to the Council members of the seven municipalities for their vision to approve this project in their community.

The accomplisners!

We would like to thank the BR+E Coordinators from each of the municipalities, as their diligence and their professionalism was key in getting the interviews completed. They are:

- Mary Venneman for the Town of Erin
- Patricia Rutter, Economic Development Officer, Township of Centre Wellington
- Dale Small, Business and Economic Manager, Township of Wellington North
- Mandy Jones, Business and Economic Development Coordinator, Town of Minto
- Crystal Ellis, Business Development & Marketing Coordinator, Township of Mapleton
- Genny Smith for the Township of Guelph Eramosa and the Township of Puslinch
- Mellissa Luymes, Wellington Federation of Agriculture

The project team!

Thank you to the Wellington Economic Development Group, for their dedication to monthly meetings, for jumping in to assist with interviews and for their ideas and support. Excluding those already listed above, they also include:

- Stephen Morris and Gerry Horst, Ontario Ministry of Agriculture and Food (OMAF), and Ministry of Rural Affairs (OMRA)
- Doug Reddick and Mary Balfour, Ontario Ministry of Economic Development, Trade and Employment (MEDTE)
- Alex Goss, Guelph Wellington Local Immigration Partnership
- Carol Simpson, Workforce Planning Board Wellington Waterloo Dufferin
- Scott Wilson, CAO, County of Wellington
- Andrea Ravensdale, Communications Manager, County of Wellington
- John Brennan, Councillor, Town of Erin

- Kathryn Ironmonger, CAO, Town of Erin
- Karen Landry, CAO, Township of Puslinch
- Patty Sinnamon, CAO, Township of Mapleton
- Alan Rawlins, ED Committee, Township of Wellington North
- April Marshall, Tourism, Marketing and Promotion Manager, Township of Wellington North
- Janice Sheppard and Kim Wingrove, CAO, Township of Guelph Eramosa
- Andrew Lennox, Wellington Federation of Agriculture
- Kirk McElwain, Councillor, Township of Centre Wellington
- Brad Dixon, Grand River Conservation Authority
- Jane Shaw, Wellington Waterloo Community Futures Development Corporation
- Scott Williams, Guelph Wellington Business Enterprise Centre

Thank you for assistance with the interviews and/or the BR+E Data Retreat also goes to:

- Rick Whittaker, General Manager, Wellington Waterloo Community Futures Development Corporation
- Michael Simon, Ontario Works, County of Wellington
- John Mohle, Mapleton Economic Development Committee
- Bill White, CAO, Town of Minto
- Janet Harrop, Wellington Federation of Agriculture
- Joanne Ross Zuj, Mayor, Andrew Goldie, CAO and Chantalle Pellizzari, Planning Coordinator, Township of Centre Wellington

We would also like to thank the Ontario Ministry of Economic Development, Trade and Employment for their financial assistance with this project, as Wellington was a successful recipient of the 2013 Communities in Transition programme.



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BR+E Background

What is a BR+E project?

Business Retention and Expansion (BR+E) is a community-based economic development strategy with a focus on "taking care of, nurturing and supporting" businesses already existing in the community.

The BR+E programme was developed by the Ontario Ministry of Agriculture and the Ministry of Rural Affairs and has been successfully utilized in 220 communities in Ontario since 1997. The programme uses an in depth, four stage process to assist communities in developing and implementing concrete action plans.

Stage 1 Project Planning and Business Survey Development

This stage involves establishing project financing, gathering a leadership team and project coordinator(s) formulating a work plan, selecting businesses to be interviewed and fine-tuning the survey to gather the most relevant information for the community

Stage 2 Immediate Follow-up of Red Flag Issues

This stage is about responding to specific business issues that may be critical to a business remaining or expanding in the community.

Stage 3 Data Analysis and Recommendations

In stage three, communities utilize a secure and confidential BR+E web-based application (e-pulse) to record, store and aggregate the results from their community's business survey. The survey data is then analyzed by the community and forms the basis for development of recommended action plans.

Stage 4 Public Meeting and Implementation

Stage four of the BR+E programme recommends hosting a public meeting to communicate the results of the project to the broader community. This meeting also acts as the "kick-off" to implementation of the recommended action plans that address the issues and opportunities. This stage also includes ongoing monitoring and tracking of action plans.

Why is it important?

The health of communities relies on strong businesses that can sustain and create jobs. Supporting the development and growth of local businesses is fundamental in order to grow and sustain Wellington communities, the region and Ontario's rural economy. The BR+E programme combines both short-term and long-term objectives.

Short-Term Objectives

- Build relationships with existing businesses
- Demonstrate and provide community support for local businesses
- Address urgent business concerns and issues
- Improve communication between the community and local businesses
- Retention of businesses and jobs where there is a risk of closure

Long-Term Objectives

- Increase the competitiveness of local businesses
- Job creation and new business development
- Establish and implement strategic actions for local economic development
- Stronger viable local economy

BR+E in Wellington

Why undertake a BR+E project in Wellington?

In late 2012, The County of Wellington released a five year Economic Development Strategy. Council recognized the need to better support Wellington's economy and to build on many of its existing strengths. The County of Wellington Economic Development Implementation Plan was then completed in early 2013 and outlined important steps and processes to increase the economic activity within the County.

During the strategic planning process, consultations discovered that businesses prefer the County to act as a facilitator and advocate; promoting the existing range of business support services, connecting businesses with appropriate organizations and advocating for the reorientation of existing programming to areas of interest for the County of Wellington (i.e.: agri-tourism, health care).

The priorities identified in the Implementation Plan focused on the need for identifying economic contributors, deriving strategies for growing the employment base, better communicating with employers as well as developing and promoting an identity through four implementation activities:

1. County of Wellington - Economic Development Website
2. Business Retention and Expansion Strategy (BR+E)
3. Wellington Workforce Development and Attraction Initiative
4. Key Sector Profiles: Manufacturing, Agriculture, Health Care and Creative Economy

The four individual sector profiles will provide information on the current strengths and attractive features within those sectors.

The BR+E project allows a deeper understanding of those four key sectors and it logically precedes the creation of sector profiles that will allow the County to identify opportunities to grow those sectors further. For example, the Economic Development Strategy showed that Wellington has a high number of small businesses in the creative economy (78% with less than 10 employees) but an insufficient number of medium sized businesses. Medium sized businesses are typically involved in greater export activity, implement new product lines quickly and are typically well positioned to expand and hire. If the County knew whether it was lack of available space (moving from a home based operation) or available labour for example, then strategies could be developed to resolve such hindrances. Understanding these factors through the BR+E and acquiring in depth information on the four sectors of Wellington's economy will assist the County in further understanding the growth constraints of the local economy.

The intent of the BR+E is also to identify our regional business contributors and make sure they feel recognized and heard. This activity is dear to all of our economic development partners, as it would help us to understand where our markets are going, where business growth constraints exist and whether we need to focus on developing and/or attracting a specific skillset. Understanding the growth potential of top employers might also assist in considering the supply chain implications for a sector, knowing what might be under-represented or what industries can and should be proactively pursued.

With the number of business owners estimated to retire in the next five years, it is important that the County understand the economic implications and be ready for such changes in the local economy. Specifically, the BR+E would assist the County to plan for the future by knowing about ownership succession plans and partnership opportunities. The County wants to keep the jobs in Wellington, even after the current owners approach their retirement years.



Who was involved in the Countywide project?

From a project advisory perspective Wellington's BR+E project relied heavily on the direction and support of the Wellington Municipal Economic Development Group, an active group representing the County, each of the 7 municipalities and key agencies involved in economic development activities in the County. Specifically:

- County of Wellington
- Township of Wellington North
- Town of Minto
- Township of Mapleton
- Township of Centre Wellington
- Town of Erin
- Township of Guelph Eramosa
- Township of Puslinch
- Ontario Ministry of Agriculture and Food. Ontario Ministry of Rural Affairs
- Ontario Ministry of Economic Development, Trade and Employment
- Wellington Federation of Agriculture
- Workforce Planning Board Wellington Waterloo Dufferin
- Wellington Waterloo Community Futures Development Corporation
- Guelph Wellington Business Enterprise Centre
- Guelph Wellington Local Immigration Partnership
- Grand River Conservation Authority

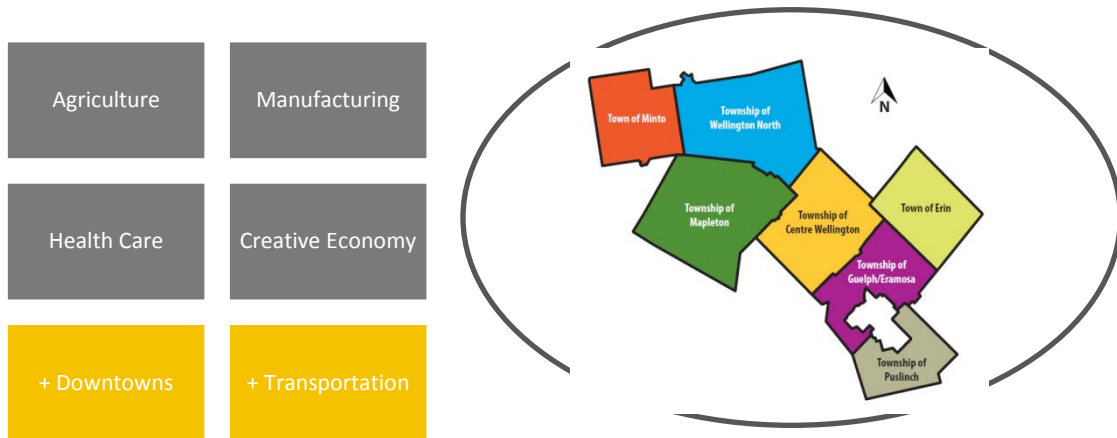
Who was involved in the Wellington North project?

Business Retention & Expansion has been a key strategy for the Wellington North Economic Development Committee for many years with the first BR&E review completed in 2005. This program focused on the Manufacturing and Retail sector and the 2011 BR&E program focused on the Manufacturing and Construction sectors.

From a project advisory perspective in Wellington North we relied heavily on the direction and support of the Wellington North Economic Development Committee. Frequent updates were provided to this committee as well as too Wellington North council. Additionally, Al Rawlins who sits on the Economic Development Committee also provided a key advisory role as the Economic Development Committee Champion for the BR&E Program. In this role Al provided guidance to Dale Small the Business Economic manager during the program and also attended all BR&E training sessions and retreats.

Wellington's Countywide BR+E Project Scope

Wellington's BR+E project was multidimensional as it included its seven municipalities as well as a particular focus on four key sectors; agriculture, health care, manufacturing and the creative economy. Two municipalities completed additional downtown interviews, recognizing the importance that their downtowns play in their local economies. As Puslinch relies heavily on the transportation sector they interviewed ten transport businesses. The Local Immigration Partnership assisted in the interview process and conducted eight interviews to understand a newcomer's perspective.



How did we engage Wellington's businesses?

At the onset of the Business Retention and Expansion (BR+E) exercise the County of Wellington provided council delegations to each of the seven municipalities who had previously given their support. The purpose of the presentations, which took place in Wellington North on July 15th, was to reiterate the goals and timelines and the important role that each of the municipalities would play. While the County provided overall project coordination, administrative functions, media relations and training, each of the seven municipalities in Wellington were instrumental in engaging their local businesses. Each was responsible to select a cross section of 7-10 businesses within each of the four key sectors (agriculture, health care, manufacturing and the creative economy). The business lists were derived from the County of Wellington's list of over 2,900 businesses. All of the selected businesses were then contacted initially by mail and then with a follow-up telephone call to introduce the project and request their involvement.

Each municipality coordinated their interviews during the fall of 2013. All interviewers had previously completed a BR+E training session provided by the County of Wellington and the Ontario Ministry of Rural Affairs (OMRA) in August 2013. Prior to conducting any interviews each interviewer and members of the Wellington Municipal Economic Development Group (WMEDG) who acted as the project advisory group signed a confidentiality agreement.

Completed business surveys were entered into the Ontario BR+E database. A red flag process allowed for immediate follow-up of any urgent issues. During the project 13 of these were identified and followed up by the County and appropriate municipality. There were several questions in the survey that allowed businesses to request information or assistance such as whether they would like information on provincial or federal programmes or apprenticeship programmes that are related to their industry. Information for these businesses is being assembled and will be provided by June 2014.

In January 2014 with the completion of 235 business surveys the County pulled the aggregate data as a whole and also by key sector and municipality. The results that are identified in this report reflect the aggregate response of those 235 interviews. An additional 35 interviews were completed after that date and will be included in the individual municipality data assessments.

The entire data set and sector data was presented in a summary report prepared by the County Economic Development department and provided to the WMEDG in advance of a day long BR+E retreat. The retreat was facilitated in February, 2014 and allowed participants to further understand what businesses had shared anecdotally through the surveys. The group then was able to identify the significant challenges and opportunities that would lead to the development of an action plan. The action plan was then completed in mid-March at a follow up session with the WMEDG.

As a supplement to the countywide retreat each municipality was provided with their own data set that would allow them to understand challenges and opportunities unique to them. By completing the countywide report and action plan first it allows the municipalities to understand their collaborative involvements with the County, neighbouring municipalities and support agencies prior to identifying their own specific and unique needs.

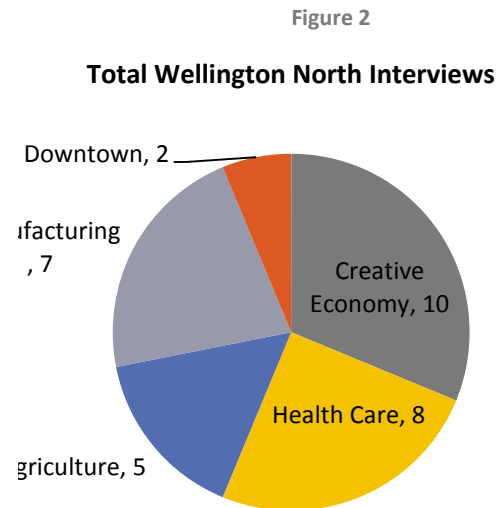
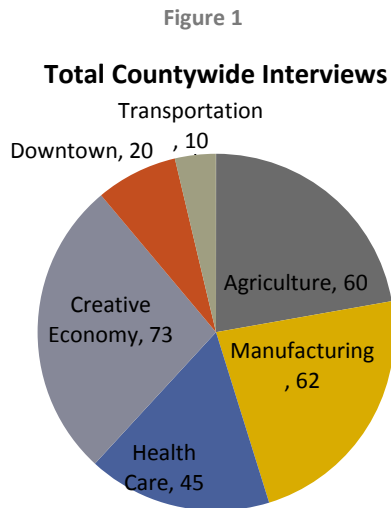
On April 4th, 2014 a Business Retention & Expansion End of Project Celebration was hosted by the County and provided the opportunity to share the aggregate survey results, opportunities and actions with the business community. Over 100 people representing Business, Municipal Staff, Wellington County staff as well as elected officials from all levels of Government attended the celebration. On April 8th the Wellington North specific report was reviewed and discussed and the recommendations and actions were discussed with the Wellington North Economic Development Committee on April 16th. The final report, consisting of both the Wellington County data and Wellington North specific data will be presented to Wellington North council on April 28th, 2014.

Implementation of the recommendations from the BR+E program will take place during 2014 and 2015 under the direction of the Municipalities Economic Development Committee's. At the same time, as part of the 2014 budget process, the County has allocated \$25,000 per municipality to assist with the implementation of BR+E recommendations. This assistance will go a long way to ensuring the success of this program.

Overall, the survey results were positive with 75% of respondents indicating the business climate in Wellington North was good or excellent and 97% indicating the Quality of Life was good or excellent. 77% of the businesses in Wellington North expect sales to grow or remain the same and 78% have a positive outlook for their industry.

Who Did We Talk to?

The Wellington County BR+E project was well received with 270 businesses participating. Those businesses represented a cross section of municipalities and the four key sectors. A snapshot of the participating businesses by sector for the Countywide project is shown in Figure 1. The Wellington North breakdown is shown in Figure 2.



The majority of participating businesses in Wellington North are locally owned and operated with 1 location (55%) followed by locally owned and operated with more than one location (23%), and branches (23%).

Of these businesses 86% of owner operators are involved in the day to day operations and 76% of owners live in the community. Many of the businesses have been in operation in Wellington North for over 10 years as shown below in Table 1.

Table 1

| Years in Business | Total | Total (%) |
|-------------------|-------|-----------|
| Less than 1 year | 1 | 3% |
| 1 to 3 years | 1 | 3% |
| 4 to 10 years | 8 | 25% |
| 11 to 25 years | 9 | 28% |
| 26 to 35 years | 6 | 19% |
| Over 35 years | 7 | 22% |

The participating businesses ranged in size in terms of annual sales as well as workforce, with the majority being small to medium sized (Figure 2 and Table 3).



Table 3

| # of Employees | |
|----------------|-----|
| 1 - 4 | 38% |
| 5 - 9 | 19% |
| 10 - 19 | 9% |
| 20 - 29 | 6% |
| 30 - 49 | 9% |
| 50 - 99 | 6% |
| 100 - 299 | 13% |
| 300 + | 0% |

Participating businesses have a strong reliance on their local and regional markets, however, there is national and international market activity occurring (Table 4).

Table 4

| Primary Market | Total | Total |
|----------------|-------|-------|
| Local | 19 | 59% |
| Regional | 6 | 19% |
| National | 4 | 13% |
| International | 3 | 9% |

Survey Results

The BR+E survey was divided into 6 key areas that guided the interviewer and participating business through a series of questions related to:

- Business Climate
- Future Plans
- Business Development
- Workforce Development
- Community Development
- Wellington County Specific Questions

As well, sector surveys were completed within the agriculture and manufacturing sector with specific questions that were created by OMAF, OMRA included in the following:

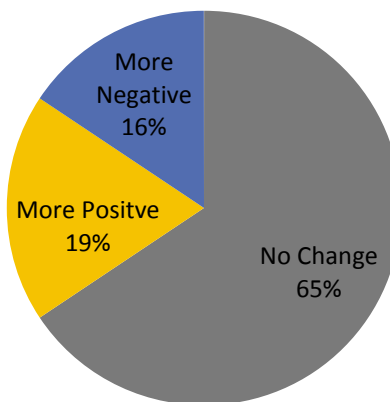
- Farm Survey
- Manufacturing Survey

Business Climate

The overall business climate in the Wellington North is very positive, with 75% of participating businesses stating that the community was good or excellent as a place to do business. Over the past 3 years, the attitudes of most businesses have remained the same (66%), while 19% have become more positive and 16% have become more negative (Figure 3).

Figure 3

Attitudinal Changes in Past 3 Years



Reasons for positive changes in attitude:

"We have moved into a new location and now have more space and opportunity to grow business."

"In the past three years we have moved from a home based business to our new Store Front location in Mount Forest. With this move we have more potential for growth and are in a better position to compete against our competition."

"Overall the economy has picked up and this has just had a good impact on my overall perspective. Also, while not necessarily attributed to a local change both the hospitals in Mount Forest and Fergus are in the midst of renovations/new build and this is a positive thing for our communities."

"Recent work doing Murals in Arthur has been good and has certainly provided exposure."

"Community Animator position has potential in Mount Forest."

"There has been better cooperation between health and health businesses; more linkages have been made with the service providers"

Reasons for negative changes in attitude:

"Customers are mainly other small businesses. Some of these businesses are struggling and one of the first items they cut is their advertising and marketing budget which affects my business. Hopefully this improves over time."

"More and more workforce related issues and difficulty with hiring new employees."

"Building permit issues and concerns with fees and charges"

"Development charges are out of line and restricting Commercial and Industrial growth"

"Unfortunately the community does not give donations to our agency because they feel we are a fully funded agency. In fact our funding only covers 75% of our costs and limit/restrict programming for rural Wellington County."

"Lack of additional capacity at the Arthur Wastewater Treatment Plant will have a negative impact on future growth until it is resolved."

"Community Improvement Program is good however we need to continue to pay close attention to our Main Streets as we have too many vacant/empty buildings"

"There seems to be less and less people wanting to support a local community newspaper. "

Each business was asked to score a variety of factors in doing business using the following scale:

1 = poor

2 = fair

3 = good

4 = excellent

Participants were also given the option to indicate not applicable, or no response. At the end of each section businesses were also able to add any open ended comments. These comments were included in the data retreat package to provide a full understanding of the challenges and opportunities stated by businesses.

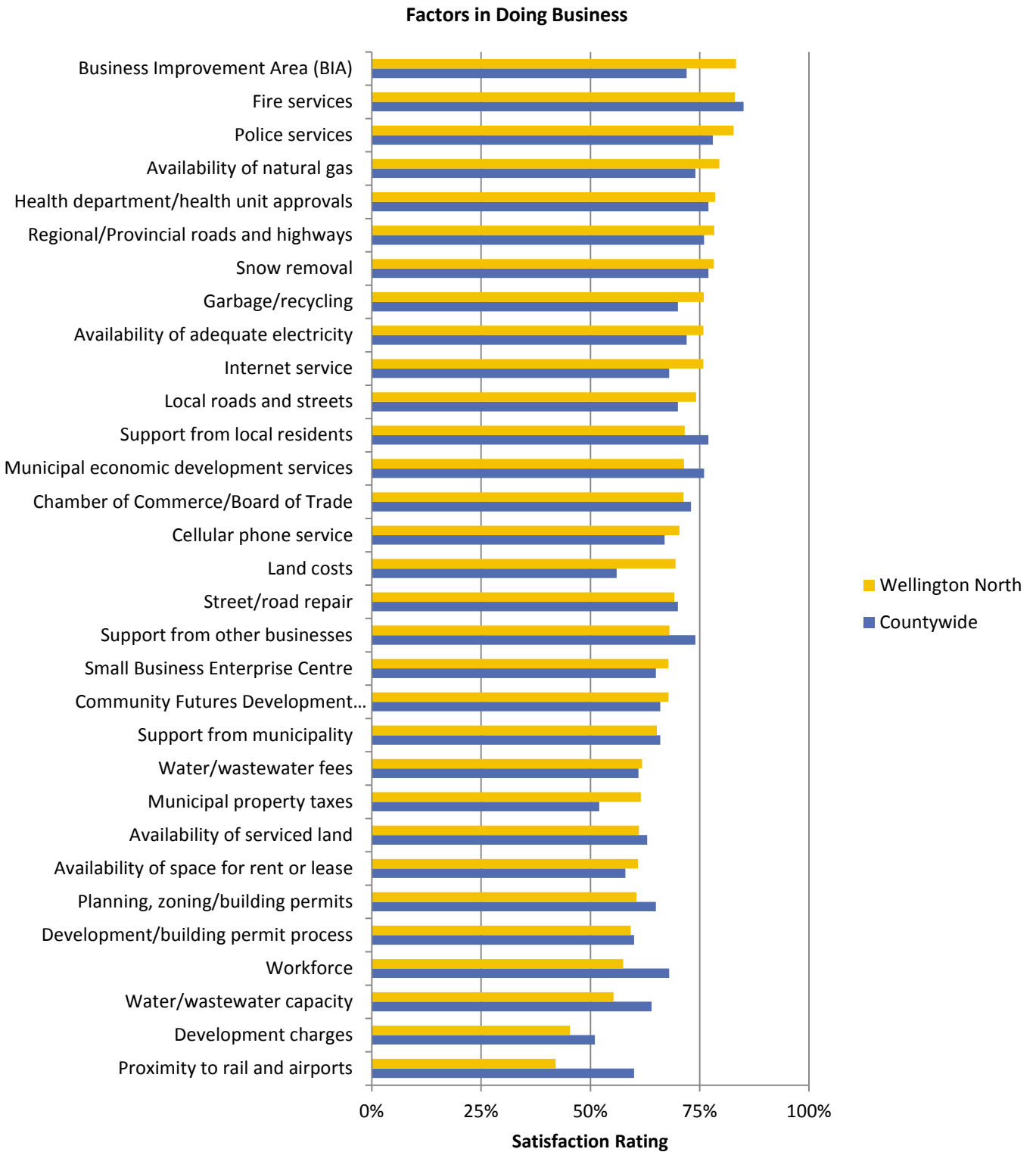
In order to understand the overall results each response for poor was given a numerical score as shown above where poor =1. The scores were then tallied and divided by the number of responses to provide an overall percentage where 100% would be a perfect score of excellent, 75% would indicate good, 50% would be fair and 25% would be poor. Figure 4 shows the factors in doing business related to current business operations as well as factors that would be of consideration to those looking to invest in Wellington.

Quality of life was the highest scoring factor in Wellington North at 97%.

Not one respondent reported quality of life in Wellington North as poor.

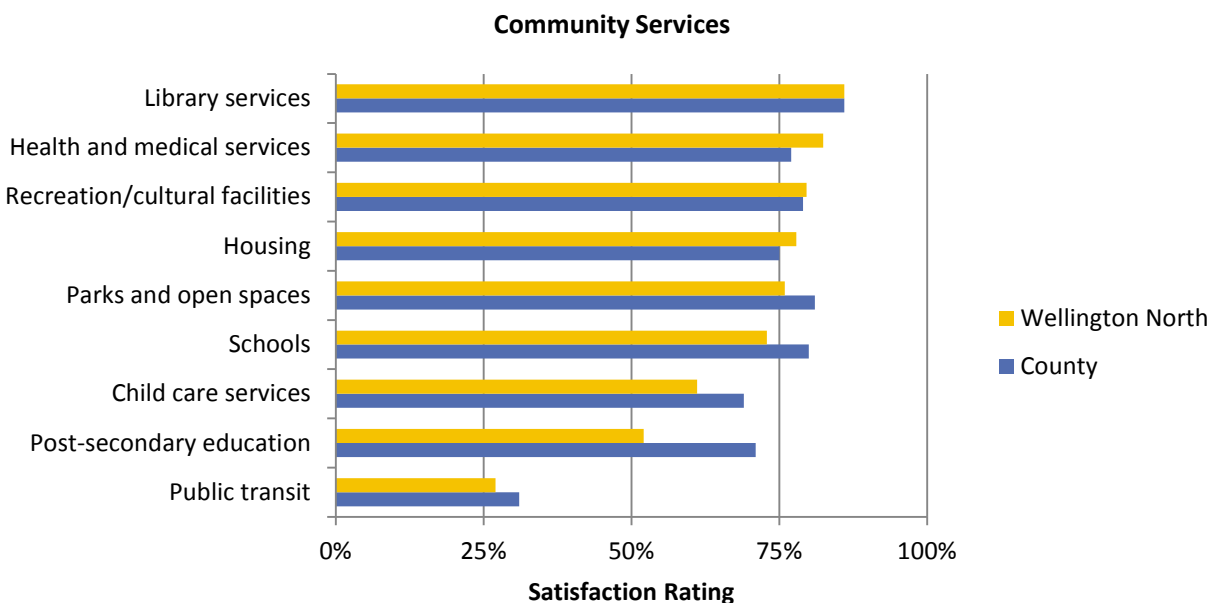


Figure 4



Businesses were also asked to rate a variety of community services. Results from the rating scale as well as the candid comments revealed that libraries and farmers markets are valued as places to find important information about the community. Figure 5 shows the high levels of satisfaction of these community services.

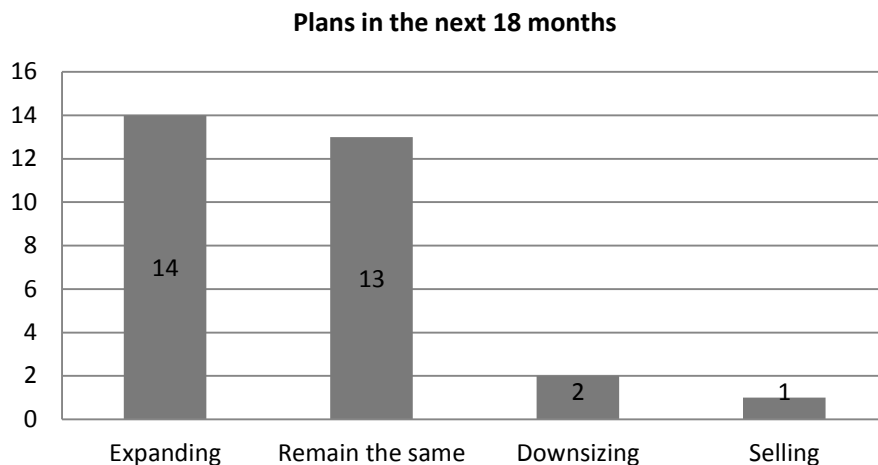
Figure 5



Future Plans

The future plans questions provided an understanding of the short term plans that businesses have in Wellington North within the next 18 months (Figure 6). There are 14 businesses that are planning to expand.

Figure 6



Reasons cited for expansions include:

"Anticipated Business Growth as a result of expansion of services"
"Expect to expand client base outside of the area"
"Business growth"
"Forecast sales growth which will result in additional production"
"Have recently expanded and increased square footage"
"Moved into new store over the past few years and growth has been good"
"Need to expand/grow the business to survive!!"
"Recent completion of new building"
"My home based business is expanding to accommodate additional growth and to also make it more accessible for clients. Expansion will also include additional parking."

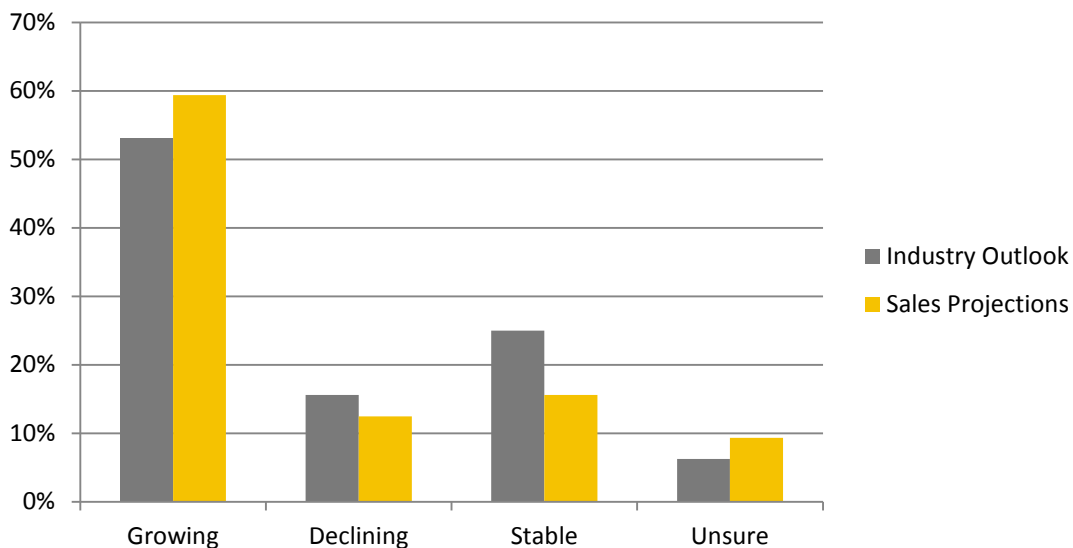
The planned expansions will also lead to increased demand in the workforce of 45 jobs and 48,000 sq. ft. in space.

Business Development

Business development questions asked participants to provide insights into the outlook of their industries, their own business projections, use of technology and interest in business to business or business to government collaborations.

Overall, businesses indicated expected industry growth (53%) and stability (25%). Projected sales were even more optimistic for business with many indicating growth (59%) (Figure 7).

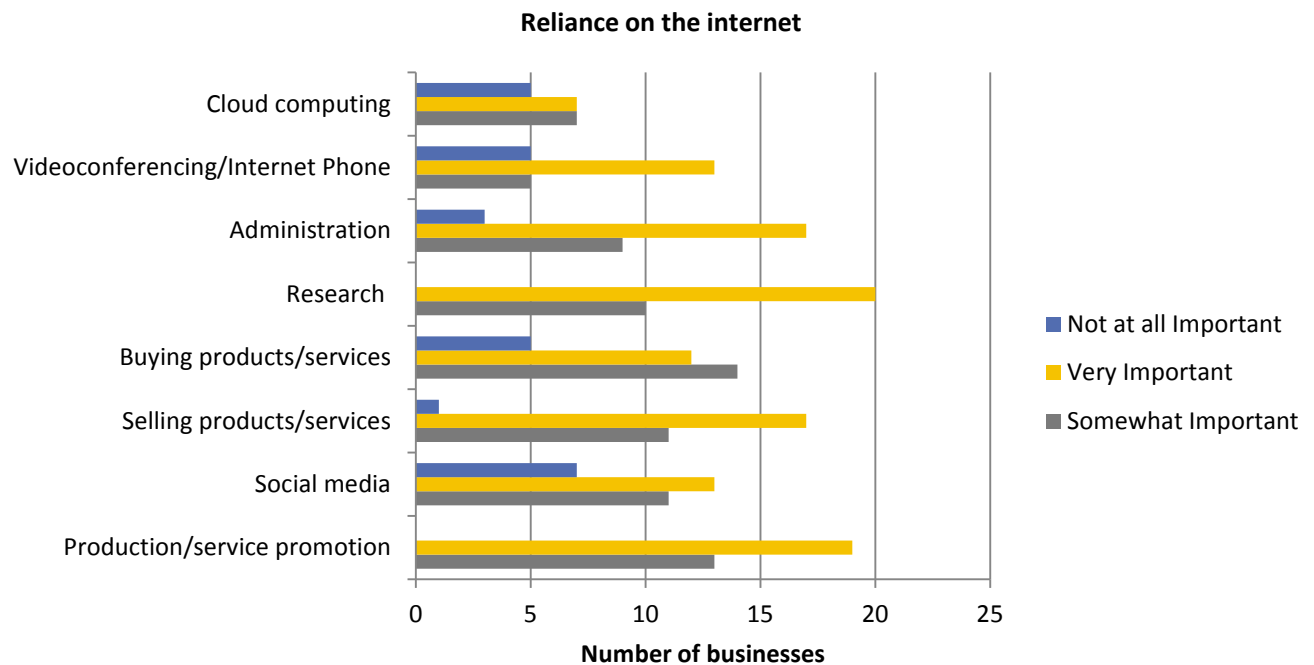
Figure 7



Reliance on the Internet

Businesses in Wellington North are reliant on internet technology and infrastructure with over half indicating that they utilize the internet for administration, research and product and service promotion (Figure 8).

Figure 8



There are barriers for businesses related to internet with knowledge and training (22%), speed (19%), hardware/software support being stated as the top issues (Table 5).

Table 5

| Barrier | Count | % |
|---------------------------|-------|-----|
| Knowledge and training | 7 | 22% |
| Speed | 6 | 19% |
| Hardware/software support | 4 | 13% |
| Access | 3 | 9% |
| Cost | 3 | 9% |

Overall, participating businesses expressed a desire to collaborate and network with 72% interested in networking and information sharing (Table 6).

Table 6

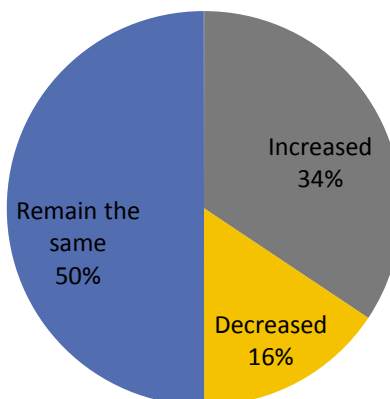
| Interest | Count | % |
|--------------------------------|-------|-----|
| Networking/information sharing | 23 | 72% |
| Joint marketing | 17 | 53% |
| Joint training | 7 | 22% |
| Joint product purchasing | 7 | 22% |

Workforce Development

Businesses indicated stability and growth in their workforce over the past 3 years with 50% remaining the same and 34% indicating growth (Figure 9).

Figure 9

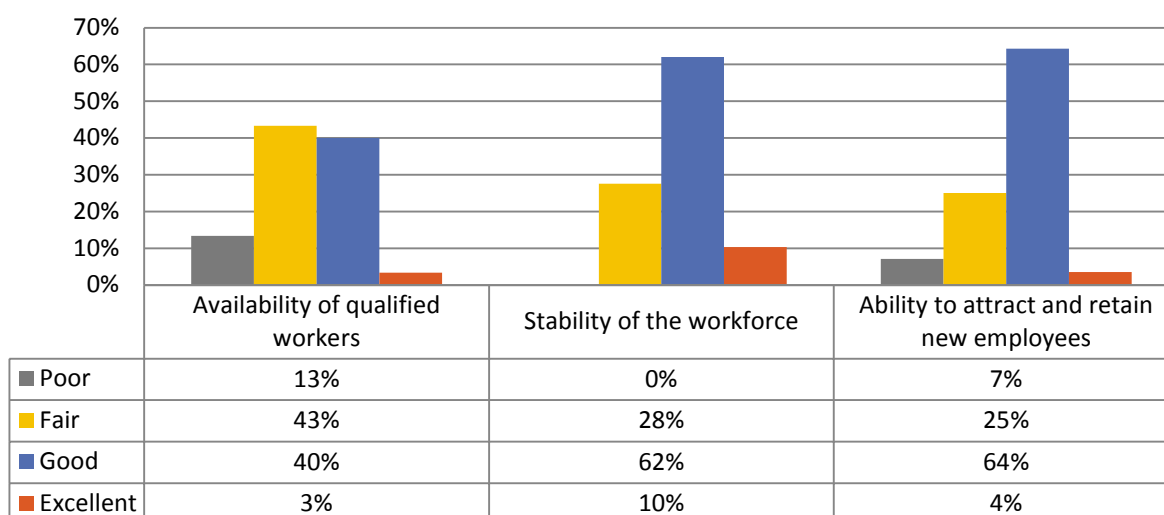
Change in Workforce Over Past 3 Years



Currently, 49% of the businesses have difficulty hiring due to both lack of skills as well as too few applicants for posted positions. Participants felt that these challenges were due to both industry factors (those affecting all businesses in those sectors in Ontario) as well community factors (those unique to Wellington or individual community). For example, lack of locally available training is a community factor.

Businesses were asked to provide insights into the stability of Wellington North's workforce, the availability of qualified workers and their ability to attract and retain employees (Figure 10).

Figure 10



Businesses are concerned about the availability of qualified workers (56% of businesses indicating fair/poor). The specific jobs that were identified to be in short supply are show in Table 7.

Table 7

| Agriculture | Health Care | Manufacturing | Creative Economy |
|----------------|--------------------------|-------------------|-----------------------------|
| Sales staff | Registered nurses | General labourers | Specialty professionals |
| Management | Personal support workers | Engineers | Commercial artist, graphics |
| Farm labourers | Physicians | Welders | Social media expertise |
| Technicians | Administration Support | Electricians | Freelancers |

Currently, businesses are using a variety of methods to hire although most are relying on traditional methods (Table 8) which may not be a match for the new generation of workers.

Table 8

| Responses | Total (%) |
|--|-----------|
| Through your personal network | 81% |
| Employment centres and websites (job boards) | 34% |
| Hiring sign on your premises | 19% |
| Local media advertising | 40% |
| Your own website | 31% |
| Professional recruitment firm | 13% |
| Referrals from friends or current employees | 75% |
| Social Media applications such as LinkedIn or Facebook | 19% |
| Unsolicited resumes | 56% |

External training is used by 45% of businesses. Several businesses identified barriers to owner/operators and their employees in receiving the necessary training. Cost and relevant training available locally were the top issues (Table 9).

Table 9

| Responses | Total (%) |
|--|-----------|
| Cost | 34% |
| Awareness of existing training programmes | 6% |
| Awareness of training support programmes | 3% |
| Relevant training is not offered at local institutions | 31% |
| Availability of training locally | 9% |
| Unable to release employees | 6% |

When asked if there were training programmes that would benefit their business, 42% indicated yes. A wide range of needs were identified including those related to management (leadership, time management, and business development), sales and marketing (social media, web development, and general sales training), safety (WHIMIS, first aid) as well as very specific skills training (equipment operators, food safety, culinary and technology).

Community Development

Businesses provided valuable input when asked to identify the community's top three advantages and disadvantages as a place to do business. The following is a roll-up of those responses however a detailed description of all responses is contained in appendix 1.

Wellington North's top advantages as a place to do business

| | |
|------------------------|--|
| Location: | Close to major centers |
| Community: | Great place to live, affordable, safe, friendly |
| Workforce: | Good educated workforce, good work ethic, easy to retain |
| Land: | Affordable prices, availability of storefronts |
| Infrastructure: | Great Hospitals, schools, police services, fire services |

Wellington North's top disadvantages as a place to do business

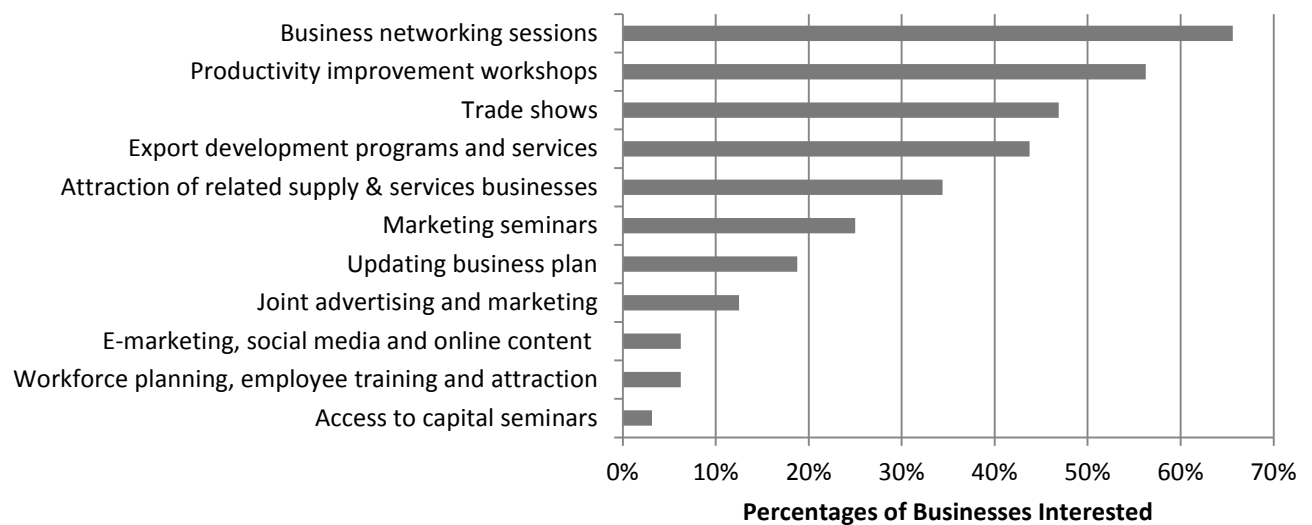
| | |
|------------------------|--|
| Location: | Distance from major centers and transportation routes, transportation costs |
| Community: | Aging population, availability of cultural assets, small community/customer base |
| Workforce: | Shortage of skilled workers, difficult to recruit |
| Land: | Development charges |
| Infrastructure: | Utility costs especially hydro, Roads |
| Government: | High property taxes, zoning and planning |

During the interviews in Wellington North two issues were identified by many businesses as disadvantages of doing business in Wellington North. To the most extent these two issues are well known in the Municipality however due to the frequency that they were raised they have been identified as Red Flag issues by the B.R.& E. Project Team and as such will be auctioned and monitored moving forward. These two red flag issues are:

- Capacity issues at the Arthur Wastewater Treatment Plant
- Development Charges specifically for Commercial and Industrial development

Business expressed that assistance would be helpful to them in a variety of ways with networking being the area where most (44%) felt that could benefit, followed closely by e-marketing workshops (42%) and joint advertising and marketing (41%) supporting an overall theme that Wellington North's businesses are seeking ways to connect with one another and come together for shared learning (Figure11).

Figure 11: Assistance and Opportunities of Interest to Businesses





Wellington County Community Questions

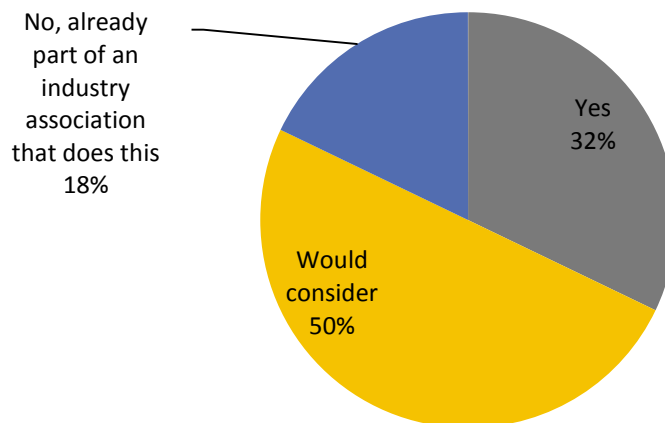
The WMEDG worked together to create additional questions that would provide further information deemed valuable to shape the direction of economic development activities for the County and the municipalities over the next five years.

When asked if there were products or services that they were unable to source locally, 43% of Wellington North's businesses indicated that there was a gap. Specifics include art supplies, IT support, office supplies and equipment, shipping supplies, specialized steel products, and medical supplies.

Public transit proved to be an interesting topic of conversation with 45% of businesses stating that the lack of public transit posed a problem for their workforce.

When asked about interest in attending tradeshow under a Wellington County umbrella 32% of businesses indicated yes (Figure 12).

Figure 12: Interest in Tradeshow



When businesses were asked about their use of local food we found that 90% of businesses are already sourcing locally. This figure was consistent with the comments heard by interviewers throughout the survey where the importance and value of our local food was mentioned.

With a growing demand to fill our gaps in workforce the County in cooperation with the Local Immigration Partnership recognized the need to investigate the businesses' perspective on how we can be more welcoming to those new to our communities (who have moved here from other parts of Ontario or Canada) as well as those who are newly immigrated. Businesses throughout Wellington County had the following suggestions (Table 10).

Table 10: Ways to be More Welcoming to Newcomers

| Those new to the community | New Immigrants |
|---|--|
| Getting a family doctor is important | Translators and translated materials |
| Package with government information (how to renew a license, health card, passport) | Contact and package from municipality |
| Language education that is affordable | Send a small welcome package explaining the services/stores in the area |
| Continued support for the Centre Wellington Resource Centre. | Keep websites up-to-date with information. |
| Ambassador programme | Federal Programmes should be offered locally and advertised. |
| Community celebrations around other cultures, community awareness | More youth activities |
| Welcome Wagon | GRCA rules need to be explained to those new to the community who reside near the rivers |
| Single point of contact | Introduction to community services -include what the County provides |
| Community outreach for newcomers | Be friendly and try to help |

Businesses were asked to identify the most important things for the community to focus on in the next 5 years. Businesses in Wellington North felt that promoting the community (69%) and public transportation (28%) were top priorities (Figure 13). Respondents that stated “other” offered suggestions shown in Table 11.

Figure 13: Suggested Areas of Focus

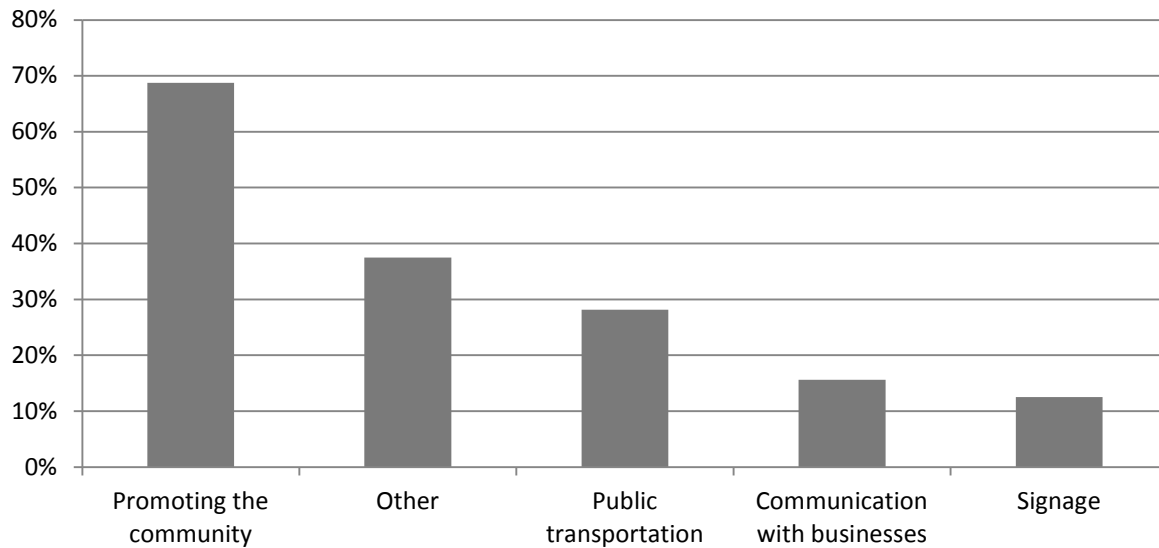


Table 11

| “Other” Suggested Priorities for Wellington North |
|---|
| Finding ways to get more workers here |
| Focus on Seniors and what their requirements and needs are within our community |
| Growing Business & Industry |
| Local communities need to come together to work as one. |
| More BR+E visits |
| More housing both affordable and single family |
| Promote wellness and healthy communities |
| Poverty |
| Rural internet access |
| Supporting local businesses |
| Workforce recruitment |
| Finding ways to get more workers here |

Countywide Key Findings

On February 20, 2014 a BR+E Retreat was held with a working group including members of the WMEDG, the Wellington County Economic Development Committee of Council and the Wellington Federation of Agriculture for the purpose of reviewing the countywide survey results. Participants were assigned to tables that would focus on one of the four key sectors of the industry throughout the session. This was intended to ensure that as the data was reviewed and discussed, the unique challenges and opportunities by key sector would be understood and reported on. The groups reviewed the quantitative data as well as the qualitative data (open ended comments) that had been collected in the survey process. The open ended responses were useful in providing context for the survey responses as well as suggestions on how businesses see the County and municipalities assisting them in the future.

Discussion that day revealed that there are several shared issues that affect all sectors as well as those that are sector specific.

Shared Responses

- Hydro outages and cost problems
- Hi-speed internet availability
- Show youth the job path of future careers
- Commercial banks are limiting start-ups and expansions
- Need commercial/industrial space
- Businesses are unaware of products/services of other Wellington businesses
- Need to market Wellington County
- Need for cross business promotion
- Need affordable housing
- Business training needs (succession planning to online sales)
- Need for commercial/industrial space inventory
- Train small business to become big business

Agriculture

- Lack of 3 phase hydro
- Need help navigating regulatory challenges for value add expansions and on-farm processing
- Misperceptions about career opportunities
- Current networking does not work for farmers
- Local food is huge market opportunity in Wellington
- Need help navigating regulatory hoops
- Lack of natural gas
- Adapting to unforeseen changes

Manufacturing

- Lack of 3 phase hydro
- Not enough commercial/industrial space for small and medium businesses
- Provide assistance/training for international growth
- Need uniformity of municipal permits/zoning
- Transportation of workers is challenging
- Provide starter home options
- Misperceptions about career opportunities
- Lack of natural gas

Health Care

- Challenges recruiting beyond just physicians
- Demands are growing but funding is not
- Be creative with opportunities of new Fergus hospital and Mount Forest expansion
- Need to prepare workforce for changing health care needs
- Market the wellness opportunities in Wellington

Creative Economy

- So many unique products/services in Wellington, but no opportunity to network
- Need more attractive/vibrant downtowns (commercial/residential mix)
- Lack of start-up commercial space
- Need for start-up financing options
- Encourage maintenance of downtown properties
- Attract newcomers for new business

Wellington's BR+E Retreat – February 20, 2014



Countywide Opportunities and Action Plan

As a follow-up to the BR+E Retreat the WMEDG met in mid-march to review the key findings and develop a series of opportunities and Action Plan. The following identifies those opportunities and strategic actions, and states the lead agency and timing for completion.

| Opportunity | Action By the end of 2014 | By Who (lead) | Action After 2014 | By Who (lead) |
|--|--|--|--|---|
| Promote Wellington | <ol style="list-style-type: none"> Investment sector profiles ED website with videos DFAIT Latin America trade convention Festivals and Events Guide | County ED in conjunction with all municipalities | <ol style="list-style-type: none"> Familiarization tours (by sector or general investment) Get on the radar of the Investment Branch of MEDTE Develop potential for agri-super region Discuss potential for newcomers strategy* RTO4 tourism development (enrich existing assets i.e.: Grand River, festivals, trails, IPM) Research on how to promote Wellington – lifestyle - we are a health and wellness community (Safe Community, Active Transportation, Quality of Life, spas, Taste Real) Create a video to highlight Signage strategy | <p>County ED</p> <p>County ED (meet with neighbouring municipalities) GWLIP County ED</p> |
| Support businesses | <ol style="list-style-type: none"> Link companies with apprentices* ED website business resources list Greater media promotion of WWCFDC Minto Small Business Incubator (replicate elsewhere?) | <p>Conestoga College</p> <p>County ED</p> <p>WWCFDC</p> <p>Town of Minto</p> | <ol style="list-style-type: none"> Create a “Wellington Mentors” business resource E-newsletters for businesses (highlight a new business, show business resources, funding for apprentice hiring, land available, industry networking etc.) Discuss how to communicate financing beyond the traditional bank | <p>County ED, WWCFDC, GWBEC</p> <p>County ED</p> <p>Golden Triangle AngelNet, WWCFDC</p> |
| Encourage our downtowns to leave an indelible impression | <ol style="list-style-type: none"> Discuss opportunities for encouraging residential/commercial mix downtown | All municipalities with OMAF to provide education/best practices | <ol style="list-style-type: none"> “First Impressions” for each downtown in Wellington Municipal Community Improvement Plans Research on successful Community Improvement Plans (IntraWest assessment of our downtowns) | Wellington North, Minto, Centre Wellington, Puslinch |
| Advocate for level playing field in utilities infrastructure (natural gas, electricity, internet) | <ol style="list-style-type: none"> Communicate BR+E results with various Ministries | County ED via Council | <ol style="list-style-type: none"> As per County Council recommendation | |

| Opportunity | Action By the end of 2014 | By Who (lead) | Action After 2014 | By Who (lead) |
|--|--|---|--|---|
| Training gaps for small/medium sized businesses | <ol style="list-style-type: none"> 1. Offer 3 workshops (i.e.: management skills, cost control, health and safety, marketing) in various locations across Wellington 2. Map who is providing what training when, to cross promote using one calendar, host on ED website | County ED, WWCFDC, GWBEC and in conjunction with all municipalities | <ol style="list-style-type: none"> 1. Traveling business coach hired for one year (export to accounting advice) 2. Out of the box training "When you run into a cash flow problem, what do you do?" | Innovation Guelph, County ED, WWCFDC, all municipalities |
| Support business networking opportunities | <ol style="list-style-type: none"> 1. WOWSA 2. Wellington North Showcase 3. Waterloo Regional Innovation Summit 4. Mapleton Business Networking Event 5. Mayor's Breakfasts 6. Northern Wellington Young Professional's Network | Town of Minto Township of Wellington North Township of Mapleton County ED where required Andrew Gowan (Mandy) | <ol style="list-style-type: none"> 1. Host 2015 Wellington business symposium (futurist speaker, use sector profile to show what's in your own backyard, offer training, networking, tradeshow, awards?) | County ED in conjunction with all municipalities |
| Business directory for promotion and supply chain development | <ol style="list-style-type: none"> 1. Create an online business directory for Wellington | County ED | <ol style="list-style-type: none"> 1. Maintenance of online business directory | County ED |
| Workforce skills gaps | <ol style="list-style-type: none"> 1. Wellington Waterloo Manufacturing Day*Oct 3 2. Working in Rural Wellington 3. Health Care Human Resource Strategy 4. 2014-2017 Labour Market Plan Wellington Waterloo Dufferin (June consultations begin) | Workforce Planning Board, County ED, Career Education Council and all municipalities Waterloo Wellington Health HR Committee Workforce Planning Board | <ol style="list-style-type: none"> 1. Introduce careers demanded and available locally to grade 10 students, showing full career path (how did I get here in my career)* 2. County to engage school board and career counsellors to formalize partnership 3. Speakers' Bureau | County ED, Career Education Council, Workforce Planning Board, Ontario Youth Apprenticeship Programme All Municipalities Career Education Council |
| Affordable housing | <ol style="list-style-type: none"> 1. Discussion on how do we encourage people to buy a home in Wellington (affordable options?) | WWCFDC, County ED in conjunction with all municipalities | <ol style="list-style-type: none"> 1. Discussion on how to encourage developers to build multi-unit dwellings (linked to DCs? Financing?) Discussion to involve Wellington builders. | County ED in conjunction with all municipalities |

| Opportunity | Action By the end of 2014 | By Who (lead) | Action After 2014 | By Who (lead) |
|---|--|---|---|--|
| | | | 2. Research redevelopment of downtowns as affordable attractive options | County ED in conjunction with all municipalities |
| Vacant land/building inventory | 1. Create relationship with Guelph Wellington Real Estate Board | County ED in conjunction with all municipalities | 1. Municipalities to encourage local inventories to be promoted via real estate board | County ED in conjunction with all municipalities |
| Explore employment commuting patterns* | 1. Assessment of cost-shared rural transportation models | Rural Ontario Institute, County ED, Dillon Consulting, all municipalities | 1. Is this a workforce skills gap (commuters that could possibly work locally) or is this a transit problem (workers can't get to their workplace) | County ED in conjunction with all municipalities |
| Provide consistency in municipal business development services | 1. MEDTE to introduce themselves to municipality and offer support to business enquiries | MEDTE, County ED in conjunction with all municipalities | 1. Sharing of municipal development process, sharing best practices with local building, planning and ED officials, to provide upfront expectations for process and timelines | County ED in conjunction with all municipalities |
| Develop local food sector in Wellington | 1. Taste Real Local Food programme | County ED in conjunction with all municipalities | 1. Develop business to business event beyond Wellington, partnering with Waterloo to encourage greater value chain development | County ED in conjunction with all municipalities |

Wellington North Key Findings

Detailed analysis of the Wellington North specific data is taking place now with the assistance of Al Rawlins our Economic Development Committee B.R. & E. Champion. The majority of the Wellington County action plans and next steps also apply to Wellington North and in some cases reflect programs and initiatives already underway within the Municipality.

Moving forward we are considering the following opportunities. Items that are new or not currently underway have been highlighted for ease of reference and not all current programs have been included however once finalized detailed action plans will be completed.

1) Promote Wellington County & Wellington North:

- Signage strategy for both Wellington North & Wellington County
- Municipal Cultural Plan
- SPARK 88.7FM
- Wellington North Simply Explore and BTT

2) Support business:

- Conduct a Development Charges impact review for industrial and commercial sectors as it relates to surrounding Municipalities
- Business Incubators including Business Mentors
- Continued emphasis on networking programs, web-site development and business directories
- Support efforts underway addressing the capacity issues at the Arthur Waste-water treatment Plant

3) Encourage our downtowns to leave an indelible impression

- **Continue to promote Community Improvement Program**
- **FICE for the Town of Mount Forest**
- **Develop Downtown Commercial Renewal Program**

4) Workforce Development, Housing & Transportation

- Review Workforce skills gap & explore employment commuting patterns
- Encourage developers to build more affordable housing to attract workers
- Address training gaps/requirements for small/medium business
- Support countywide rural transportation review

5) Develop Local Food Sector in Wellington

- Continue to focus effort on Taste Real Local Food program
- 5 Star Food Hub initiative
- Farmers Market Program

Further details and actions will be presented, in-partnership with the County, to Wellington North council on April 28th, 2014. Moving forward action plans and implementation plans will be reviewed and managed through the Economic Development Committee

Wellington North Opportunities and Action Plan

| Opportunity | Action Plans for 2014 - 2015 | By Who (lead) |
|---|---|---------------|
| Promote Wellington County & Wellington North | <ul style="list-style-type: none"> Continued work on Municipal Cultural Plan Economic Development website update as part of overall Municipal update Wellington North "Simply Explore, BTT, Festivals and Events Guide, etc. SPARK 88.7FM Familiarization tours (Manufacturing sector; Musashi & Dana Long) RTO4 tourism development Research on how to promote Wellington – lifestyle - we are a health and wellness community (Safe Community, Active Transportation, Quality of Life, etc) Signage strategy both for Municipal and Wellington County | |
| Support business | <ul style="list-style-type: none"> Support the creation of an online business directory for Wellington County Establish Business Incubator and "Wellington North Mentors" business resource Conduct Commercial & Industrial Development Charges impact review Wellington North Showcase 2015 Mayor's Breakfast Series Northern Wellington Young Professional's Network Better utilization of MEDTI resources E-newsletters for businesses (highlight a new business, show business resources, funding for apprentice hiring, land available, industry networking etc.) | |
| Encourage our downtowns to leave an indelible impression | <ul style="list-style-type: none"> "First Impressions Community Exchange" for Mount Forest Continued emphasis on Community Improvement Program Partnerships with Chambers of Commerce and B.I.A. <ul style="list-style-type: none"> Business Strategies for Downtown & Rural Merchants (Retail Coach) Develop Downtown Commercial Renewal Program | |
| Workforce Development including Housing & Transportation | <ul style="list-style-type: none"> Offer workshops (i.e.: management skills, cost control, health and safety, marketing, etc.) in various locations across Wellington Support Wellington Waterloo Manufacturing Day on Oct 3 Working in Rural Wellington 2015 Support Health Care Human Resource Strategy Support 2014-2017 Labour Market Plan Wellington Waterloo Dufferin (June consultations begin) Discussion on how do we encourage people to buy a home in Wellington (affordable options?) Discussion on how we encourage developers to build multi-unit dwellings Assessment of cost-shared rural transportation models as part of ROI initiative | |
| Develop local food sector in Wellington | <ul style="list-style-type: none"> Support Taste Real Local Food program and initiatives Wellington North Farmers Market Explore involvement with the 5 Star Food Hub. Promote Wellington North's unique Local Food attributes | |

APPENDIX 1: LOCAL COMMUNITY QUESTION 1

What other comments about this community as a place in which to do business would you like to raise?

- The Municipal Cultural Plan is an interesting project. Would like to see a database for the creative sector both businesses and skills.
- Pleased to see a Radio Station is being planned for Mount Forest. Will be a good thing for residents and businesses.
- Community Improvement Program, especially the Public Arts Grant Program, has been good for my business
- Would like to do an Arts show on Saugeen Community Radio.
- This is a good community to do business in and fits our company's goal of working in local rural communities.
- We have very community minded citizens.
- The community has a family orientation feel to it which is different from the city and is very welcoming.
- Hindsight is what it is however we missed a big opportunity locally when the Roxy Theatre shut down.
- Businesses should be encouraged to stay open longer hours and we should try to find ways to financially incent local shopping etc.
- County and Municipal council should work harder to promote ALL local businesses. How we "talk" about business goes a long way to how we "act"
- This is a great community to do business in. On the personal side it is sometimes difficult to attend early morning or evening events as we have four children. Most of the Chamber or Municipal Networking events like Business after 5, The Mayor's Breakfast, Wellington North Showcase, etc. are difficult for me to attend.
- We have had very good growth in our community over the past few years and we need to keep it going!!
- Events like Showcase Wellington North and Working in Rural Wellington are good events. Has gone to both in the past and hopes they continue.
- This is a great community and we are happy to be here. Unfortunately we do not have a large arts culture however our neighbours in Minto have really come together around their cultural plan. Hopefully this community will as well
- Downtown Mount Forest looks good however is not pedestrian friendly
- Community Improvement Program is a good program. Hopefully more businesses take advantage of it.
- Hydro services are Top Notch
- We have a pretty good variety of housing and recreation facilities.
- Need to pay closer attention to keeping our Main Street clean. We could also use some additional Garbage Bins on Main Street.
- Wellington North and the County need to brand ourselves better and signage could certainly be improved. Image is very important and we need to pay attention to this.
- Waste water Treatment Plant capacity issue in Arthur is a big concern and Municipal debt load is pretty high.
- Our business has been around over 50 years and this community has always been very good to us.
- County should consider establishing wireless hot spots in certain locations so individuals would be able to stop and access internet etc.
- Great community to live and work in.
- From transportation perspective look at the Cancer Patient Services Model and look at building on what has been done and what is working.
- Like the High, Healthy and Happy but don't think we are doing enough to promote off this
- Mentioned some rezoning issues as the problem with the Municipality. Believes Wellington North is way more strict with rules and regulations than other local municipalities when it comes to the types of permits required and that neighboring municipalities have a more "business" friendly approach.
- Concerned with Health & Medical Services as they have to go to Fergus for a doctor & also concerned with the lack of capacity at the Arthur Wastewater treatment Plant

What other comments about this community as a place in which to do business would you like to raise? (cont'd)

- Concerned not with the availability of electricity but with the cost of electricity
- Concern expressed with the capacity issue at the Arthur Waste Water Treatment. Does not specifically impact this business but the impact to the overall community was discussed
- Some concerns also expressed with Ontario Hydro and response time to outages. Water and Wastewater Capacity in Mount Forest is excellence however is a very different situation in Arthur
- While not a specific concern for this business the issues of capacity at the Arthur Waste-Water Treatment Plant is of big concern for the community
- When we were looking for a Main Street location there were very few buildings available. While it is good to have most building occupied it is not so good for anyone looking for a place to rent/purchase
- Wightman Internet and telecommunication services for Mount Forest is great however for our customers outside Town it is not so good.
- Very concerned about the lack of capacity at the Arthur Wastewater Treatment plant.
- Although just located outside of Mount Forest power is provided by Hydro One. Outages seem to last longer and take longer to get service.
- Very concerned about the lack of capacity at the Arthur Wastewater Treatment Plant and impact on future growth of the town if it does not get actioned quickly.
- Development Charges are not well understood. Need to do a better job explaining where the development charges go and how they are used.
- While housing was rated good it is also a challenge especially with the lack of high density housing available. Mentioned it is difficult for new workers or young families to find affordable housing.
- Internet service in Mount Forest is great now that Wightman has put fibre into all locations however still have some pockets in the rural areas that are not good.
- Concerned over the lack of capacity at the Arthur Wastewater Treatment Plant was raised as a concern for the Town in general.
- Located in the country so have their own well however are very aware of the Wastewater Treatment Plant capacity issue in Arthur and hopes it gets resolved quickly. We cannot afford to have this impact development.
- Morriston by-pass/lack of one is a big problem for their trucks.
- Hydro is becoming more and more of a concern. Serviced by Hydro One however the number of outages and the length of the delays are increasing
- Would like to be supplied with natural gas however have to use propane.

LOCAL COMMUNITY QUESTION 2

What are the communities top 3 advantages as a place to do business

ADVANTAGE 1

| | |
|--|---|
| <p>Size is an advantage</p> <p>Good strong rural community</p> <p>Good location</p> <p>Good availability of land</p> <p>Location on corner of 109 & 6</p> <p>Location (1 hour from major centers)</p> <p>Good market/not saturated</p> <p>A great place to live, not necessarily to do business</p> <p>Number of Municipal/Rural Clients</p> <p>As a Community newspaper this is where we need to be</p> <p>Easy to network and get to know people</p> <p>Strong economic base</p> <p>Rural connectivity. Everyone knows everyone</p> <p>Workforce that we have is well trained & dedicated</p> <p>Being connected/internet service</p> <p>Workforce is reasonably educated & has a good work ethic</p> | <p>Housing prices are good</p> <p>Connectedness/People know each other</p> <p>You know the people</p> <p>Location based on the market we serve</p> <p>People are proud of their community</p> <p>Workforce (Farmers for welding)</p> <p>Size of community</p> <p>Labour Force</p> <p>Good safe Community</p> <p>Location</p> <p>Good safe community</p> <p>Cost of Living</p> <p>Most people know each other</p> <p>Easy to find a place to rent</p> <p>Highway 6 is busy on the summer</p> |
|--|---|

ADVANTAGE 2

| | |
|---|--|
| <p>People care and look out for each other</p> <p>Support from local businesses</p> <p>People care about their properties</p> <p>Everybody knows everybody</p> <p>Size of the Town/Mount Forest</p> <p>Excellent medical and Health Care Services</p> <p>Nice/Kind/Caring/Compassionate Community</p> <p>Size is an advantage in terms of limited competition</p> <p>Cost of living & cost of property</p> <p>Cohesion amongst Health Care Professionals</p> <p>Good dedicated workers</p> <p>Good Infrastructure/Hospitals/Schools/ etc</p> <p>Ability to walk everywhere/walk downtown</p> <p>Able to run business out of home and have everything we need to do this</p> | <p>Quality of life</p> <p>Good community spirit and volunteers</p> <p>Loyal customers</p> <p>Good location for their market</p> <p>Tight Knit community</p> <p>Everybody knows everybody</p> <p>Hospital and medical services</p> <p>Friendly small town atmosphere</p> <p>Land costs</p> <p>People like living here</p> <p>Location (6 & 109)</p> <p>Municipality is easy to deal with</p> <p>Great Community Involvement</p> |
|---|--|

What are the community's top 3 advantages as a place to do business? (cont'd)

ADVANTAGE 3

| | |
|--|----------------------------------|
| Good Police and Fire Services | Employee Retention |
| Good infrastructure/good tax base | Good small town attitudes |
| Good location | Location (highway 109 & 6) |
| Infrastructure (Schools, Hospital, etc.) | Easier to retain local workers |
| Location/proximity to major centers | Schools & medical facilities |
| Most people/businesses try to purchase locally | Skilled & qualified workforce |
| Honest people | Sense of community |
| People are honest and trusting | People/Word of mouth advertising |
| Proximity to larger markets | Community Support |
| Parking availability | Good Small Town, Rural Feel |
| Strong volunteers as well as Mennonite community | Outdoor Recreation |
| Must businesses are locally owned and people have trust and confidence dealing with them | |

LOCAL COMMUNITY QUESTION 3

What are the communities top disadvantages as a place to do business

DISADVANTAGE 1

| | |
|--|--|
| Size is a disadvantage | Distance from major centers |
| Not all services available locally | Heavy competition |
| Transportation and related costs of shipping | Public Transportation |
| Distance required to obtain some services | Location |
| Small close knit community/no secrets | Size of our community |
| Size is also a disadvantage | Distance/Proximity to our markets |
| Small Businesses have a small budget for my services | Lots of competition for good local workers |
| Transportation costs | Location distance to new markets |
| Specialized training not available locally | Conservative |
| Population size | Somewhat poorly educated workforce |
| Have to drive to get some amenities | Customer base |
| Non Arts community | Transportation |
| Small Population | Low average income |
| Proximity to other amenities (Theatres Culture, etc) | Workforce Availability |
| Lack of restaurants | |
| Difficult to recruit professionals due to lack of jobs for spouse | |
| Not the size of population to support some of the creative enterprises | |

DISADVANTAGE 2

| | |
|--|--|
| Price of some products higher | Transportation costs are higher |
| No high school or hospital in Arthur | Location of our business |
| Transportation costs | Transportation costs |
| Small budget but expect high quality | We are located beside the dump |
| Need a by-pass to reduce traffic congestion on Main Street | Lack of some amenities |
| Weather for travel can be an issue | Proximity to larger markets |
| Lack of general support for Community Newspapers | Small market size |
| Promotion of the business | Transportation (Patients & Staff) |
| Not all services available | Lack of amenities |
| Lack of conveniences of urban centers | Size of population |
| Meetings Places | Lack of available workforce |
| Transportation that is affordable | Difficulty in attracting long term workers |
| You would have to know there is a need for your type of business or be a unique business to be successful. | |



ALTERNATE FORMATS AVAILABLE UPON REQUEST

April 2014