



Economic & Tourism
Development Action Plan:
2020 - 2024

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1.0 Executive Summary

Strategic directions, focus areas and recommendations contained within this refreshed Hastings County Economic and Tourism Development Action Plan are based on local and regional data, consultations, surveys and other engagement.

This new Action Plan also takes into account the new established mandate. In January, 2017 Hastings County Council received a final report on a review of the operations and mandate of its Economic Development services. Following an extensive review of the mandate, services and organization of the County's economic development function, County Council approved the following recommended statement of its overall mandate in economic and tourism development:

- Provide **County-wide leadership, advocacy and support** for the direct and indirect benefit of all member municipalities;
- Helping Hastings County to **stand out** from regional competitors as a place to live, work and visit;
- Spearhead **key County-wide and regional initiatives in economic and tourism product and sector development and marketing**;
- **Attract entrepreneurs** and providing **support to existing businesses** operating in Hastings County;
- Serve as a coordinating and connecting window to facilitate **access to and leverage** the contributions of a wide range of economic and tourism development **partners and supports**;
- **Be** a central hub for **information, research, analysis and communication**;
- **Encourage and facilitate** local community development efforts by member municipalities and supporting the sharing of information and knowledge among member municipalities;
- Develop and sustain the **critical mass** and **breadth of capabilities** required to be effective over time in economic and tourism development.

The recommendations also included, which have been implemented:

- Develop and implement an integrated branding strategy for economic and tourism development;
- Strengthen the role and operations of the Municipal Partners Group;
- Establish an Economic and Tourism Development Advisory Committee to support industry engagement;
- Implement more direct reporting to County Council;
- Invest in the organizational resources needed to effectively fulfill recommended County mandate in economic and tourism development; and,
- Implement a formal process of measuring and reporting in success.

Building on the foundation established:

In 2014 a new Economic Development Action Plan was produced and approved by County Council. It replaced the previous Plan. The 2014 Plan was developed using the most recent data available from the 2011 Census and the results of a business survey, personal interviews with key stakeholders and a review of related strategies already in place.

The intention of a new Economic Development Action Plan: 2020-2024 is that it will be a “refresh” and there is no aim to simply replace the foundation established. As well, it is taking into account other related Plans and approved strategic directions that have been approved by County Council, including the formal Mandate and Operations Review and Recommendations. Utilizing the most recent data available, the Situation Analysis provided in Section 3.0 of this report provides an overview of the current situation in Hastings County, utilizing the most recent data available, and outlines areas of focus going forward. It includes the results of a business survey that focusses on employment and workforce issues, the results of one-on-one interviews with all fourteen Heads of Council and their senior staff, and a review of related and existing strategies. A good understanding of the local economy is a must and the Situation Analysis is an essential first step.

Bur first, on the following page a summary of the Strategic Priorities is provided that have been identified and discussed with the Economic and Tourism Development Advisory Committee.

2.0 Strategic Priorities – Economic Development Action Plan

The Situation Analysis, in section 3.0, and consultations with the Economic and Tourism Development Advisory Committee generated three Strategic Priorities, listed below, and under which a series of several recommendations have been developed. Each Strategic Priority and associated actions are outlined in greater detail in Appendix A.

Strategic Priority
Increase the Population & New Development

Strategic Priority
Supporting startups & existing businesses

Strategic Priority
Increase awareness of Hastings and Visitation

Increase the Population and New Development

- 1) *Create inventory of available (and potential) development lands, buildings and opportunities. This should include municipal assets, input from commercial real estate agents, private landholders, MNR (Crown Land), etc.;*
- 2) *Identify local developers to be encouraged to invest in Hastings;*
- 3) *Based on personas identified in the new Branding Strategy, research and develop packages that can be marketed to target audiences and invite them for a “tourism experience-type test drive”;*
- 4) *As per the request by member municipalities, assist them in the development of SMART Goals and Visions (Specific, Measurable, Achievable, Realistic and Timely); and,*
- 5) *With a growing tourism economy, and to support the attraction of tourists and longer visits, conduct an audit and inventory of current roofed*

accommodations, both traditional hotel/motel and short-term accommodations (e.g. AirBnBs). Identify occupancy rates during all seasons and provide a set of recommended actions to respond to the findings as necessary.

Support startups and existing businesses

- 1) The County’s popular business coaching service continues while expanding “word-of-mouth” and promotions to help increase the number of clients served;*
- 2) Setup an “Action Team” of County staff and representatives of the Economic and Tourism Development Advisory Committee to collaborate with the Eastern Ontario Leadership Council on the creation of a workforce development and deployment action plan;*
- 3) Review the recently released and County sponsored report on the Future of Farming in Hastings County and determine which of the 14 recommendations Hastings County should take the lead on implementing; and,*
- 4) With a high concentration of employment in forestry, and the importance of the industry to the local economy, build a closer partnership with the forestry sector to establish their current and future needs.*

Increase awareness of Hastings and visitation

- 1) Develop and implement a formal strategy for marketing the County as a place to invest, visit and live including identification of target audiences; and,*
- 2) Support the local tourism industry, member municipalities and related organizations on improving identified underperforming and underdeveloped assets with a new specific Tourism Development Plan.*

3.0 Situation Analysis – a background to the Action Plan

To inform the Action Plan, a combination of data/statistical analysis was undertaken along with a collection of field data/information. Regarding the data/statistical analysis, data has been sourced from Statistics Canada and from an online tool called “Analyst” provided by Economic Modeling Specialists International (EMSI), and access to this tool is courtesy of the Ontario Ministry of Agriculture and Food and the Ministry of Rural Affairs.

Data collected is complemented by the business telephone survey, interviews with all fourteen Heads of Council and their senior staff from member municipalities, as well as related reports including the Demographic and Forecasting and Land Demand Analysis completed for the County in 2013, the Eastern Ontario’s ‘Refreshed’ Regional Economic Development Strategy, the Future of Farming in Hastings County: Report for the community and local policy-makers, the Hastings County Economic and Development Mandate and Operations Review as well as the Hastings Wildly Authentic Branding and Positioning Strategy. Reference to these reports is provided in Section 4.0.

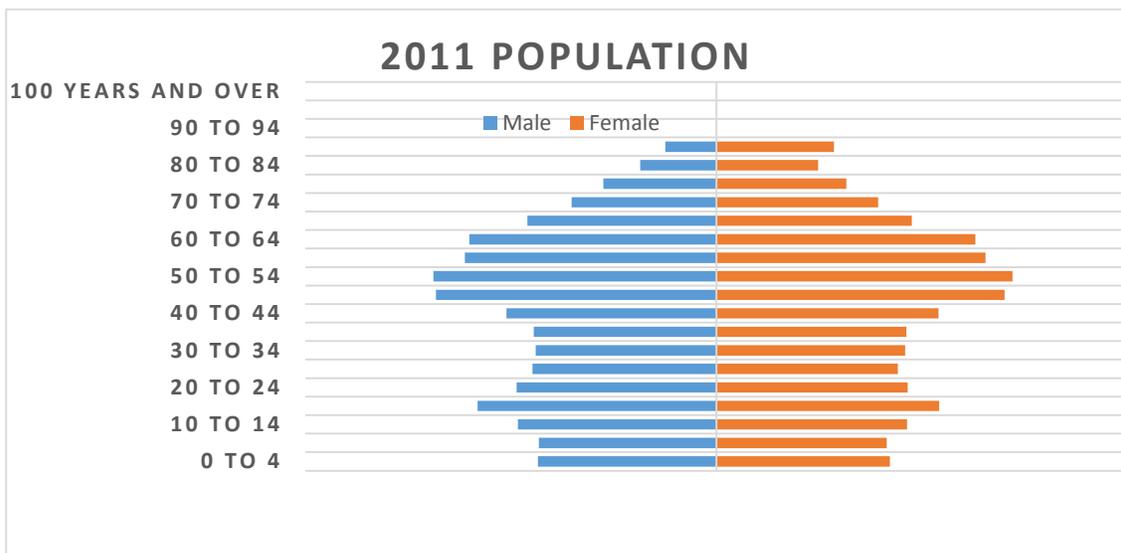
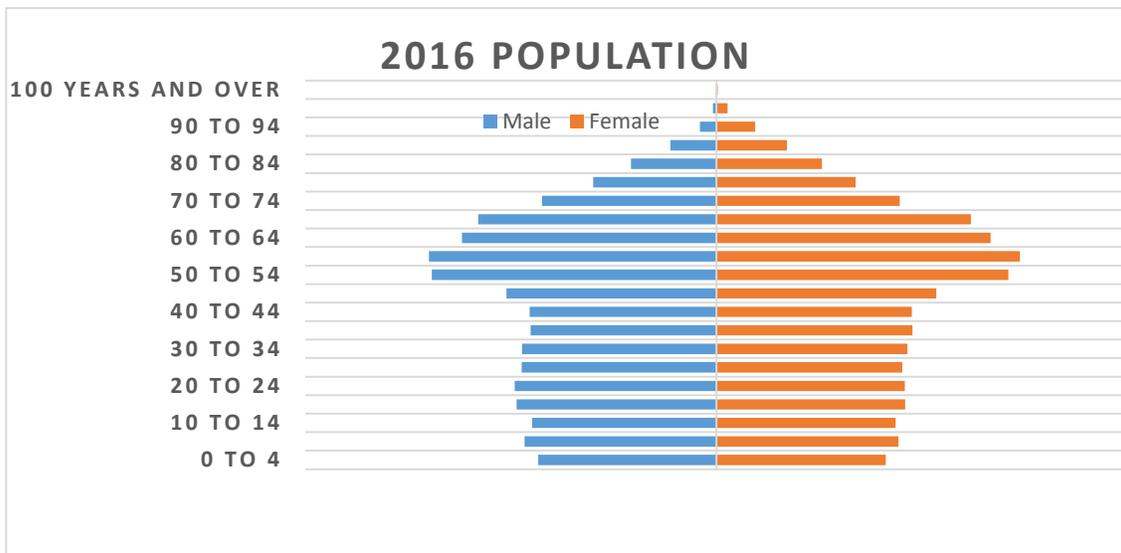
Regarding EMSI, it combines employment data from the Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Canada Census and Canadian Business Patterns (CBP) to form detailed geographic estimates of employment.

3.1. Situational Analysis – General Profile

The following provides an overall picture of Hastings County’s population and related statistics:

- According to the 2016 Census, Hastings County, including the separated Cities and Mohawk Territory, has a population of 139,268 excluding seasonal residents. This is a 1% increase (917 more people) compared to the 2011 Census. From 2006 to 2011 the population increased by 1,709 people (1%) from 136,642 to 138,351;
- Excluding the Cities and Mohawk Territory, the population of our 14 member municipalities combined in 2016 is 39,588 which is 300 fewer residents than the 39,888 population in 2011;
- Despite the drop in population for the fourteen member municipalities combined, there was an increase in the number of private dwellings. In 2016 there were 22,645 private dwellings which is 5% higher (1,011 dwellings) more than the 21,623 private dwellings counted in 2011. As well, there are 285 more permanently occupied private dwellings (16,502) in 2016 compared to 2011 (16,217);
- There are fewer people per dwelling: 2.46 persons in 2011 to 2.40 in 2016;
- Despite the population drop, more dwellings are being built supporting the notion that people are choosing to relocate to Hastings County. With

- fewer people per dwelling, this reinforces suspicions that they are in an older age demographic, possibly retired, and/or do not have children;
- The median age of the County is 46.3 compared to 41.3 for the Province. Currently the largest cohort includes those in the 50 to 69 years of age range;
- In North Hastings, over 50% (51.3) of the population are between the ages of 50 and 79 years of age.
- The following two population pyramids represent the populations for all of Hastings County including the separated Cities and Territory. Notice the number of residents in the teenage years within the 2011 Census which appears to be missing five years later in the 2016 Census, possibly indicating an exodus of young adults following high school graduation?:



- The average total income of households in 2015 according to the 2016 Census is \$73,527. In contrast in Prince Edward County the figure is \$86,366;
- Regarding education, for 2016 Hastings County had fewer residents with a university certificate, diploma or degree (38%) compared to the province (45%);
- In 2016, single detached homes made up 73% of the dwellings within Hastings County;
- According to the figures provided by local Realtor Associations, the average residential prices (2018 figures) are:

Location	Average Residential Sale Price
Bancroft	\$263,139
Belleville	\$322,260
Carlow/Mayo	\$236,906
Centre Hastings	\$275,954
Deseronto	\$176,711
Faraday	\$252,642
Hastings Highlands	\$271,902
Limerick	\$337,395
Madoc Township	\$291,475
Marmora and Lake	\$295,416
Quinte West	\$295,916
Stirling-Rawdon	\$295,232
Tudor and Cashel	\$266,375
Tweed	\$268,335
Tyendinaga Township	\$279,145
Wollaston	\$341,206

*Average price across all 16 combined is \$279,375

Moving to business numbers and employment, since 2011, the number of businesses operating in the fourteen member municipalities combined has jumped by 1,180 according to Canadian Business Patterns Data supplied by the Ministry of Agriculture, Food and Rural Affairs. The biggest gains for employers are in Real Estate and rental and leasing (364), Agriculture, forestry, fishing and hunting (202), Construction (88), Professional, scientific and technical services (80) and Health Care and social assistance (49). Retail Trade saw a reduction in the number of businesses (40). The “Unclassified” category, for businesses which have not received a NAICS code, increased by 324 locations;

Several businesses (69%) in the 2018 Business Patterns Data fall into the “Indeterminate” employment category which are those without employees that are incorporated and show a minimum of \$30,000 in revenue. In 2011 51% of businesses were classified as “Indeterminate”, and compared to the most recent

data, the number of home based or independent businesses has increased by 18%.

Regarding employment and participating in the labour force, Tables 1 and 2 below provide an overview of Participation Rate, Employment Rate and Unemployment Rate for Hastings County (including the Cities of Belleville and Quinte West) in comparison with Ontario as a whole. It is clear when looking at both Tables that while the Unemployment Rate has dropped from 8% to 7.1% so has the Participation Rate. The Participation Rate total for Hastings County dropped from 59.6% to 57.8%. The Participation Rate is a measure of the total labour force (comprised of those who are employed and unemployed, combined). It is the share of the working-age population that is working or looking for work.

Table 1: Key Labour Force Indicators: Hastings versus Ontario, 2011

Labour Force Indicators	Hastings (data includes Belleville & Quinte West)			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate	59.6	63.2	56.2	65.5	69.9	61.4
Employment rate	54.8	57.9	57.9	60.1	64.2	56.3
Unemployment rate	8	8.4	7.7	8.3	8.3	8.3

Table 2: Key Labour Force Indicators: Hastings versus Ontario, 2016

Labour Force Indicators	Hastings (data includes Belleville & Quinte West)			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate	57.8	61.2	54.6	64.7	69.1	60.6
Employment rate	53.7	56.7	50.9	59.9	63.9	56.1
Unemployment rate	7.1	7.3	6.8	7.4	7.5	7.4

3.2 Summary of Findings – Business telephone survey results

A telephone survey of 89 business owners from across the fourteen member municipalities was conducted in early June, 2019. The objective was to collect information pertaining to the hiring and retention of employees. Staff chose to focus the survey on this topic considering the labour force participation rate has steadily decreased over the past 10 years. The working age population refers to people aged 15 to 64. Hastings County is part of the Kingston-Pembroke Economic Region. In 2008-09 the participation was 63.6 percent, and in 2017-18 it dropped to 57.4 percent.

The complete survey report is available in Appendix C. To summarize:

- From a random list of 300 businesses across the fourteen member municipalities, 89 businesses participated in the survey;
- Over the next 12 months, 97% of businesses surveyed say that the number of people they employ will stay the same or increase;
- During the past 3 years, only 6% (5 total businesses surveyed) say the number of people they employ decreased;
- Most (90%) of businesses surveyed are satisfied with the ability to retain new employees;
- Only 1 in 10 businesses surveyed have difficulty with retention. Among those who do have difficulty, transportation and seasonality of the work are reasons given, although it was only 5-6 total businesses surveyed out of 89 that claim this retention challenge;
- 57% of businesses surveyed are dissatisfied with the availability of qualified workers;
- 65% (two out of three businesses surveyed) have difficulty when hiring due mostly to: Lack of qualified applicants with relevant experience, Lack of appropriate skills or training, and Lack of work ethic. Among the 65% of respondents who have difficulty, they did not consider the following to be factors: Work environment/Nature of the job, Wages they are able to offer or Hours of work available; and,
- Regarding how businesses recruit people to fill their job openings, the most common sources indicated by respondents were: Referrals and using their personal network. Less than half surveyed use an employment centre to help. 31% use local media advertising and only 44% use their own website to promote a job opening;

The preceding information was presented to the Hastings County Economic and Tourism Development Advisory Committee on September 18, 2019. The following are thoughts and advice provided to County staff at that meeting:

- It's encouraging and positive to learn that most of the businesses surveyed have not downsized or plan to reduce the number of employees they have. Many plan to hire;
- Coordinate a brainstorming session or "think tank" of sorts with some business owners in the room;
- Some areas of skilled trades that are observed to be lacking in Hastings include:
 - Carpenters;
 - Electricians;
 - Plumbers;
 - Mechanics;
 - Building and renovation (kitchen, bathroom, basement etc.) contractors.
- Invite Brad Labadie from the Centre for Workforce Development to a future Advisory Committee meeting, along with Hastings and Prince Edward District School Board (HPEDSB) Trustee Lucille Kyle and/or the

- New Director of HPEDSB and a representative from Loyalist College to discuss training in trades;
- Make better use of the Loyalist College in Bancroft for training as well as public libraries that have meeting rooms, Internet and often computers available to use?;
 - Encourage High School Students to go into trades;
 - Make employers more aware of subsidies for hiring and for training. For example, the Canada-Ontario Job Grant can provide up to \$15,000 per trainee to provide employers with funding to train individuals including current employees or new hires;
 - Should Hastings focus on recruiting outside of the Province, say Alberta, to recruit workers who may have the skills that we need?;
 - Businesses themselves need training themselves to look inward and become better employers. Perhaps have some employers who are “doing it right” share their stories to entice/inspire other employers to follow-suit;

The results of the Business Survey was also presented to the Municipal Economic and Tourism Development Partners Group at their meeting on September 25, 2019. The following are thoughts and advice provided to County staff at that meeting:

- Is it possible to identify the number of licensed workers in various fields (etc. electricians) to put a number on how many skilled workers we actually have here now?;
- Job grants can often hinder employers due to the requirements that may be age restricting as well as other stipulations that limit who can be hired. Employers are reactive to the grant criteria as opposed to hiring for the needs of their business;
- Some small employers have problems handling benefits and offering them to their employees. An option is to join a local Chamber of Commerce to utilize their partnerships with access to benefit deals to help retain employees;
- An effort could be made by an organization, or a partnership, to better highlight the benefits available to employers that hire an apprentice or intern and/or get an employee trained with a grant available;
- The Municipality of Tweed, through their Business Retention and Expansion Program (BR+E), has an action plan for workforce development and training. They also held an event with 30 trades people in a room to discuss ideas. They are partnering with the Centre for Workforce Development and Loyalist College to offer WSIB, confined space and fall arrest training. They also provide access to an offer for training at a 50% reduced rate to share costs for types of training that isn't necessarily taught by the local College but by those in the skilled trades who are soon going to retire; and,

- Consider setting up a “task force” or “action group” from the Hastings County Economic and Tourism Development Advisory Committee to focus on a specific action plan for local workforce development;

3.3 Summary of Findings – Municipal interviews results

A series of 14 separate interviews with each Head of Council (from Hastings County’s 14 member municipalities) was carried out by the Hastings County Manager of Economic and Tourism Development and the Small Business Coordinator during the months of February and March of 2019. Senior staff at each municipality, as well as any other staff that have involvement in local economic development, participated in the interviews. A detailed report is provided in Appendix B.

The purpose of the interviews was to help create an inclusive economic development plan to support future development and growth of all communities in the County.

In addition, nine of the fourteen Heads of Council are new to their role, as well as many new council members. There are also several new CAO/Clerks in the municipalities. The interviews help to ensure the County economic development plan is in alignment with the 14 municipal partners (for the current four year council term and beyond).

Each individual municipality interviewed received a copy of their responses collected. The following is a summary of suggested actions and it was apparent from the meetings with member municipalities that the top goal should be to increase the population in most communities through residential development:

- 1) Encourage developers to build in Hastings County;
- 2) Attraction of Infrastructure Funding;
- 3) Perform a comprehensive review of building by-laws;
- 4) Create an awareness campaign to attract tourists and potential residents;
- 5) Host Networking, appreciation events and workshops with local businesses;
- 6) Follow-up meetings with municipalities to development SMART (Specific, Measurable, Attainable, Relevant and Timely) Goals and Visions.

The preceding information was presented to the Hastings County Economic and Tourism Development Advisory Committee on September 18, 2019. The following are thoughts and advice provided to County staff at that meeting:

- Make it easier for developers to get the information they need when seeking to establish a development in Hastings, such as streamlining approval processes.

The results of the Municipal Survey was also presented to the Municipal Economic and Tourism Development Partners Group at their meeting on September 25, 2019. The following are thoughts and advice provided to County staff at that meeting:

- We need SMART Goals established (Specific, Measurable, Achievable, Realistic and Timely). For example, how many more houses/people do we want to see in Hastings County in the next four years? How do “we” know that targets have been met? How much is too much or too little?;
- If new housing development is the primary goal, and the wish is to have Hastings County Economic Development attract developers, land for development needs to be identified and approved. Where specifically will the new housing (subdivisions etc.) go? This is needed in place first to have something tangible to pitch to developers; and,
- For the Hastings County Marketing Strategy, as part of the Wildly Authentic Branding Strategy implementation, include a target persona being “The Developer”.

3.4 Economic Base Analysis

3.4.1 Description of Economic Base Analysis

At this point in the Situation Analysis, the focus now moves towards a deeper analysis of Hastings County, an Economic Base Analysis. What is an Economic Base Analysis? It is simply an analysis of how the local economy of Hastings County functions. It will not provide Hastings with solutions to economic problems, but it can provide useful information required for decision-making about economic strategies.

Carvalho and Scott¹ provide a good description of what it is in their published University of Waterloo Economic Development Bulletin. The economy of a community can be described as composing two forms of economic activity: basic and non-basic:

- ✓ **“Basic”** industries are recognized as exporting companies who produce goods and services for sale in markets outside the local economy. This can include agricultural operations, manufacturing, tourism and resource industries. Take for example tourism. When someone from Ottawa spends their money at one of our Bed and Breakfasts through an overnight stay, the revenue generated is known as “new money” to the local economy by adding to the monies already circulating in the

¹ Emanuel Carvalho and Charles Scott, “Local Economic Impact Analysis”. Economic Development Bulletin, Number Five. Economic Development Program, University of Waterloo. 1996.

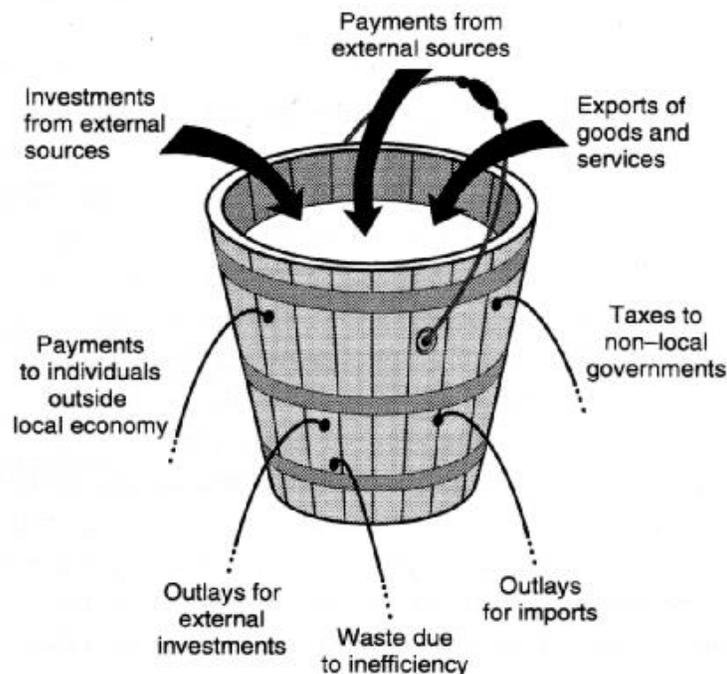
community. “New money” has the potential to stimulate growth and development of other businesses in the community.

- ✓ **“Non Basic”** industries include businesses that primarily serve local customers. This includes mainly retail, personal and business services along with elementary and secondary education and health care providers. Take for instance a pet grooming business. It is likely that someone living within the community will take their pet to this establishment before someone living in Ottawa will. While “new money” may not necessarily be generated by a pet grooming business, “non basic” businesses such as this are still important to the local economy because they redistribute wealth through the local community.

In the past, many communities focused their efforts quite extensively on the attraction of “Basic” sector industries and business by pursuing secondary manufacturing industries. While attraction of the basic sector is important, it is also important to retain non-basic sector businesses and ensure that the “new money” collected gets circulated within. As well, if a community has an under-developed non-basic sector, leakage of money can occur. An example would be if a community did not have a pharmacy or grocery store. Residents would be forced to shop outside of the area taking our money into another community and letting it escape. Therefore, a balanced approach is needed when retaining and attracting economic activity in both sectors.

A good way of visualizing all of this and to understand the function of the local economy is through the “Leaky Bucket” example. Many academics and economic development practitioners will compare the local marketplace to a bucket with holes in it whereby wealth can leak out of the local economy and escape to other markets. Figure 4 helps to visualize this “Leaky Bucket” model.

Figure 1: “Leaky Bucket” model for the local economy



Source: Matthew Fischer & Assoc. Inc. “Theory & Practice of Economic Development”, 2007, p. 3.
A good description of this “Leaky Bucket” model is taken from Matthew Fischer²:

“The water in the bucket is stirred by economic activity. It swirls around to every part of the bucket. It goes from person to person, business to business, person to business and is constantly moving.

One person purchases a house and the realtor makes a deposit at the bank. The banker makes a loan to another person who buys a car. The car salesman buys a new shirt. The storeowner pays a life insurance premium. The insurance agent pays his school tax. The teacher pays the water bill. The money moves on and on. The process is dynamic and is in constant motion.

However, there are holes in the bucket through which water leaks out. Every region experiences leakage to some degree. A manufacturer purchases raw materials from suppliers outside the local marketplace. Retailers import the bulk of the items that stock their shelves. Income taxes and sales taxes leave the local economy. Even the funds invested by individuals for their retirement leaves the community. The list goes on and on.

² Matthew Fischer & Assoc. Inc. “Theory & Practice of Economic Development”, 2007, p. 14.

For a local economy to be healthy and growing, the inflow of new money must exceed the outflow of money leaking out.”

While measuring the actual flow of money in and out of Hastings County would be the most accurate means of describing our economic base, this cash flow data is not available. Instead, what can be studied is an economic base analysis tool called the “**Location Quotient**” (described in detail below in section 3.4.2). This compares the level of employment concentration in Hastings County to the level of employment concentration in one or more benchmark areas (i.e. Canada).

3.4.2 Location Quotient Analysis

The formula for the Location Quotient (LQ) is:

$$\frac{\text{\% of local employment in sector A}}{\text{\% of provincial (Ontario) employment in sector A}}$$

The end result is a ratio called “location quotient” indicating the level of specialization of the selected geographic area (i.e. Hastings County), in the selected sector (e.g. Manufacturing). To interpret a LQ, it starts with assessing where it fits into the following ranges:

- LQs < 0.75** (“low”) indicate that local needs are not being met by the sector and the municipality is importing goods and services in that sector
- LQs between 0.75 and 1.25** (“medium”) indicate the community is self-sufficient in that sector. LQs of 1.0 result if local % employment is equal to national % employment in the sector
- LQs > 1.25** (“high”) indicate that the sector is serving the needs that extend beyond the boundaries of the municipality. The sector is likely “exporting” goods and services
- LQs of 5 and over** are very high and suggest a high level of local dependence on the sector

Basically the question that needs to be answered is whether Hastings County has proportionately more or fewer employees in specific industries than does the benchmark area (Canada as a whole)? By doing so, information can be collected on:

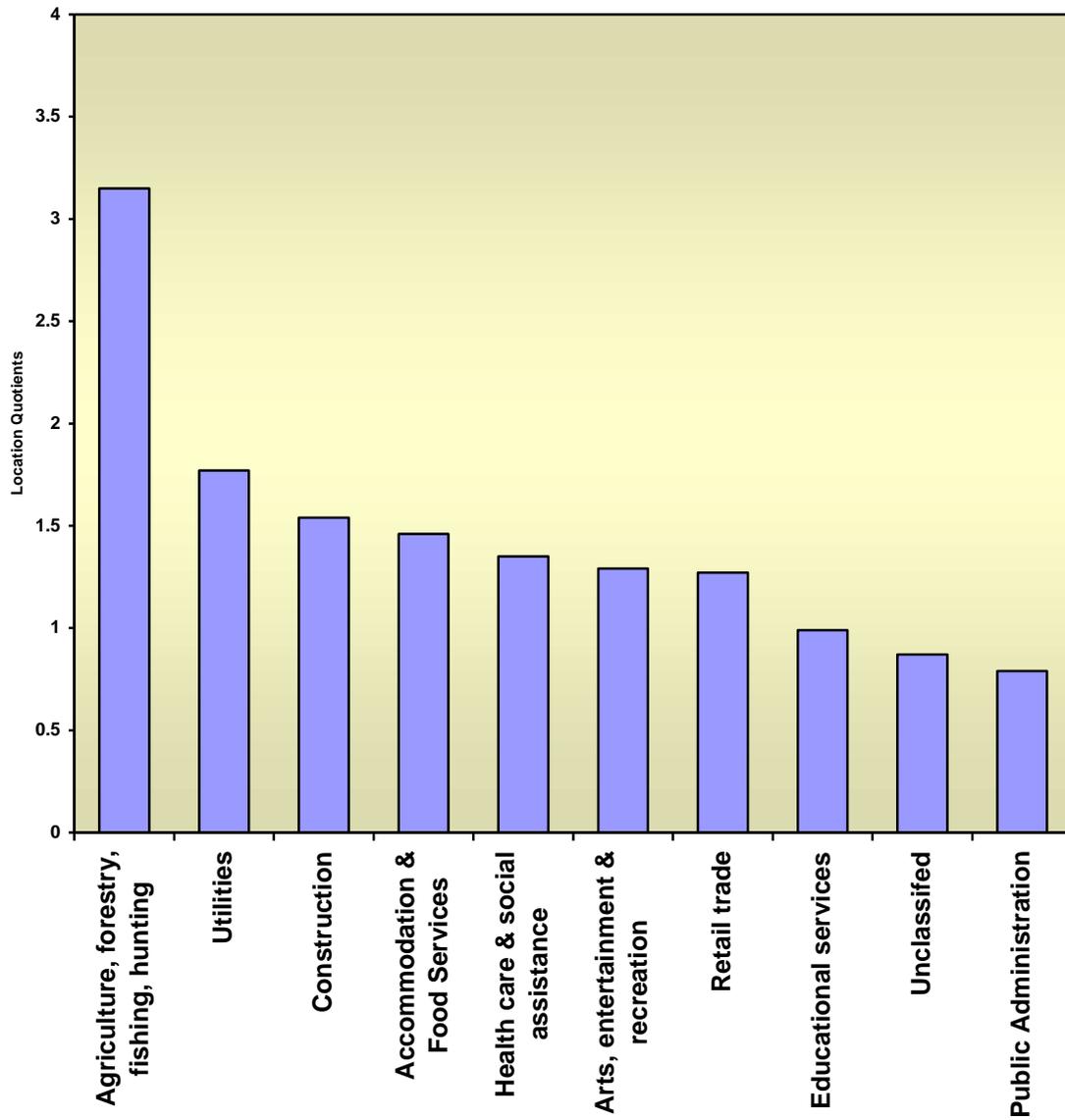
- Whether Hastings County is producing all the goods or services required for consumption in Hastings County – could tell us whether there is an opportunity to replace the imports with locally provided goods and services;
- Whether Hastings County is producing goods or services in excess of quantities required for local consumption, indicating a high degree of

development and specialization, or concentration which is a result of goods or services being consumed by non-residents (“New Money!”)

Location Quotient as a method of analysis can point the community and the economic development office into a better direction of where a more thorough and in-depth analysis is needed. Generally a location quotient of between 0.75 and 1.25 generally indicates the Hastings County economy is self-sufficient in an industry. A 1.0 would indicate the exact same proportion of an industry’s jobs to all Hastings County jobs as that of the benchmark (Canada). If it is less than 0.75, this usually indicates a lack of self-sufficiency requiring the import of goods or services because there is insufficient local employment to produce the required goods/services. A location quotient greater than 1.25 usually indicates an industry has more local employment than is required to sustain the needs of Hastings and is exporting goods or services bringing “new money” into the County.

Figure 2 on the following page illustrates the location quotients by Industry for Hastings County in terms of Place of Work. Belleville and Quinte West have been subtracted, as well as the Mohawk Territory, to give a more accurate picture of the 14 member municipalities making up the County.

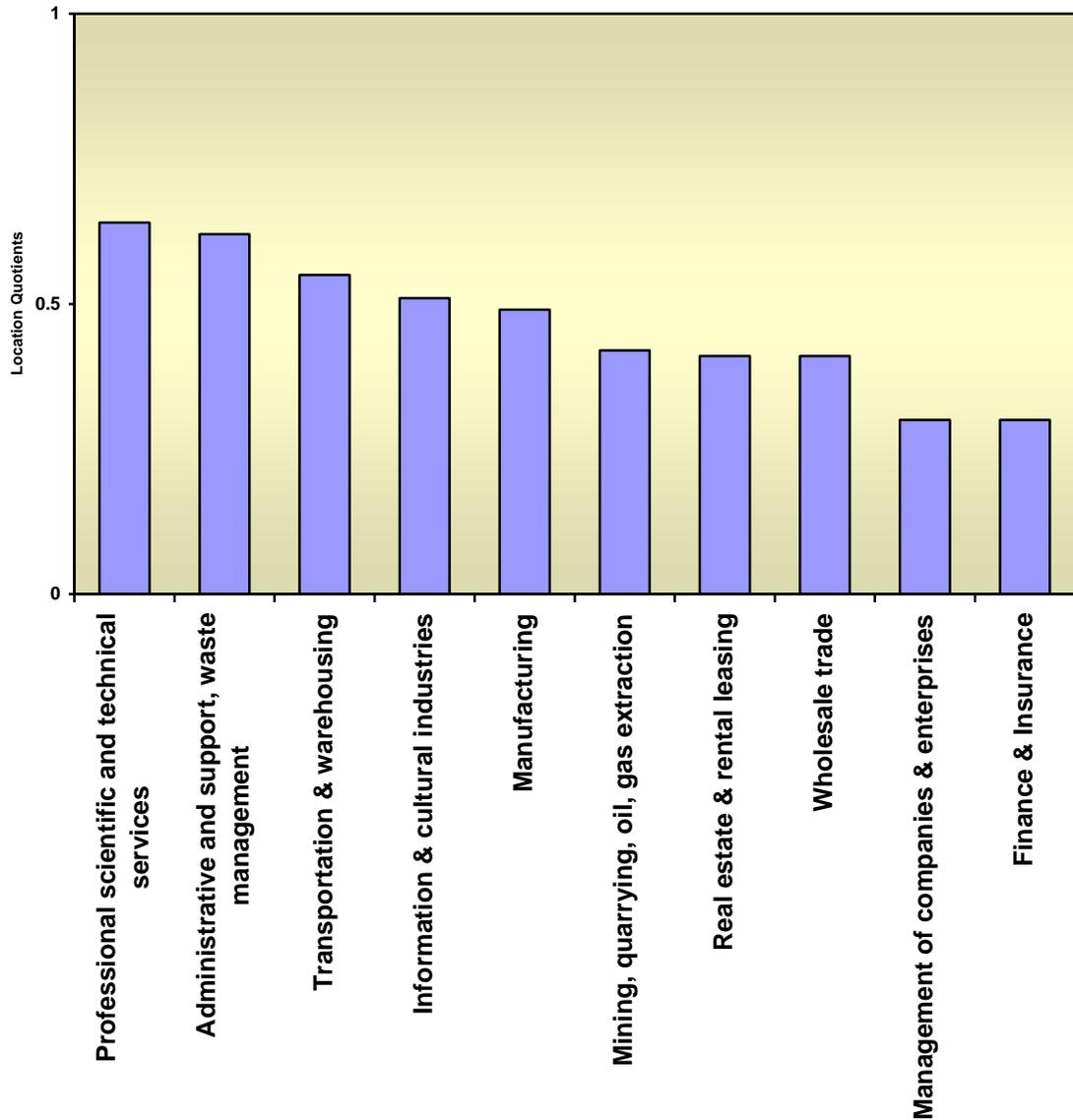
Figure 2: Location Quotients by Industry – 2016



Source: Employees & Self-Employed – EMSI 2018.3

The normal range is between 0.75 and 1.25. Overall, most of the Sectors fall in the normal range compared to the Nation or stand out with a high location quotient (LQ). This analysis indicates that Hastings has strengths in agriculture, forestry, construction, accommodation and food services, arts, entertainment and recreation and retail trade.

Figure 3: Location Quotients by Industry



Source: Employees & Self-Employed – EMSI 2018.3

The industries that have a lower LQ are displayed in Figure 3 above. Compared to the Nation, these industries account for a lower than average “share” of total jobs. Low location quotients in services such as Finance and Insurance,

Professional, Scientific and Technical Services may suggest that businesses in the region either have in-house experience or that they use professional advisors outside the region for their legal accounting, architectural, engineering, marketing and other business services.

With a high LQ in Agriculture and Forestry, it is worth a closer look at different levels of this Sector under NAICS. Table 3 provides this snapshot.

Table 3: Employment in Agriculture and Forestry – Hastings County 2016

	Employment	Location Quotient
11 Agriculture forestry fishing and hunting (sector)		
1110 Farms	533	3.09 (High)
1131 Timber tract operations	0	N/A
1132 Forest nurseries and gathering of forest products	0	N/A
1133 Logging	78	4.60 (High)
1141 Fishing	<10	0.57 (Low)
1142 Hunting and trapping	<10	14.13 (Very High)
1150 Support activities for farms	22	3.93 (High)
1153 Support activities for forestry	32	3.83 (High)

Source: Source: EMSI Analyst

Manufacturing industries are highly prized in economic development not only for the wages and salaries paid but because manufacturers are “Basic” industries that ship products to customers outside the local marketplace. Revenues from manufacturing can add to the local economy’s wealth and stimulate growth in other sectors, especially the personal and business services in the community. Those Industry Groups that have a high location quotient (LQ) are provided in Table 4 below. Note that the first few are agriculture related.

Table 4: Employment in Manufacturing, Industry Groups with high location quotients – Hastings County 2016

	Employment	Location Quotient
31-33 Manufacturing	737	0.62 (Low)
3111 Animal Food Manufacturing	<10	.99
3112 Grain and Oilseed Milling	13	3.49 (High)
3115 Dairy Product Manufacturing	72	5.75 (High)
3149 Other textile product mills	23	5.18 (High)
3211 Sawmills and wood preservation	50	2.50 (High)
3219 Other wood product manufacturing	52	2.50 (High)
3241 Petroleum and coal products manufacturing	26	2.55 (High)
3259 Other chemical product manufacturing	15	2.52 (High)
3262 Rubber product manufacturing	26	3.05 (High)

Source: EMSI Analyst

Underdeveloped Industries

Table 5 represents industry Sectors in Hastings County that are underrepresented in terms of employment in comparison to the overall Nation. While this table may reveal industry development opportunities, this should be taken into context considering the fact that Hastings County is rural for the most part meaning the underdevelopment of certain groups is to be expected. One example could be manufacturing. Depending of course on the nature of activity, manufacturing operations typically situate themselves in large industrial parks that are serviced and in proximity to the 401. This gives an advantage to cities like Belleville and Quinte West. This is not to say that manufacturing does not exist in Hastings. It is just not as prominent as is evident in the statistics. Furthermore, as indicated in Table 5, manufacturing jobs across Canada as a whole dropped 2% between 2011 and 2016. Manufacturing jobs also decreased 5% across all of the Eastern Ontario Economic Development Commission’s coverage area.

Table 5: Underrepresented Sectors in Hastings County

Sectors NAICS	Total Hastings Jobs 2016	LQ vs. Canada	Employment Growth Canada
52 Finance and Insurance	130	0.30	5%
55 Management of Companies and Enterprises	16	0.30	-6%
41 Wholesale Trade	191	0.41	4%
53 Real Estate and Rental Leasing	92	0.41	12%
21 Mining, quarrying, and oil and gas extraction	48	0.42	-7%
31-33 Manufacturing	412	0.49	-2%
51 Information and cultural industries	101	0.51	1%
48-49 Transportation and Warehousing	267	0.55	10%
56 Administrative and support, waste management and remediation services	326	0.62	6%

Source: Source: EMSI Analyst & OMAF & RA

Table 6 outlines major Sectors and compares them to Neighbouring Counties for comparison and contrast purposes. The County with the highest LQ for each Sector is highlighted in yellow and those in second place are highlighted in light blue.

Table 6: Industry Concentrations Compared with Neighbouring Counties, Location Quotients

Industry	Hastings (excluding cities)	Northumberland	Peterborough	Haliburton	Lennox & Addington	Prince Edward County	Renfrew
Agriculture, forestry, fishing & hunting	3.15	1.83	.69	.80	2.07	4.28	0.06
Mining, oil, gas extraction	0.42	.27	.55	.32	.11	.07	0.09
Utilities	1.77	.65	.91	1.82	2.74	.87	1.75
Construction	1.54	1.18	.91	2.32	1.44	1.75	0.77
Manufacturing	.49	1.71	1.02	.68	1.39	.58	1.06
Wholesale Trade	.41	.74	.86	.57	.19	.50	.52
Retail Trade	1.27	1.06	1.12	1.27	1.03	.92	1.74
Transportation, Warehousing	.55	.50	.79	.43	.89	.62	0.40
Information, cultural industries	.51	.40	.72	.81	.27	.52	1.33
Finance and Insurance	.30	.48	.54	.34	.44	.38	0.41
Real Estate, Rental Leasing	.41	.92	.98	.81	.90	.73	0.99
Professional, scientific and technical services	.64	.76	.74	.73	.48	.95	0.46
Mgt. of Companies & Enterprises	.30	.00	.01	.00	.04	.11	0.00
Administrative/ Waste Mgmt / Remediation Services	.62	.98	1.11	1.24	.66	1.15	0.63
Educational Services	.99	.66	1.14	.63	.77	.52	0.52
Health Care & Social Assistance	1.35	.124	1.38	.85	1.30	.98	2.30
Arts, Entertainment & Recreation	1.29	.91	1.29	1.53	1.16	2.58	0.19
Accommodation & Food Services	1.46	1.14	1.09	1.64	.99	1.63	1.15
Public Administration	.79	.79	.87	.77	1.64	.72	0.66
Unclassified	.87	.88	.94	.77	.94	.76	0.98

Source: Source: EMSI Analyst

The following are some observations from Table 6:

- **Hastings** has a high concentration of jobs in the Agriculture, forestry, fishing and hunting sector;
- **Hastings** has a high concentration of jobs in the Mining sector;
- There is a high concentration of jobs in Construction for most of the Counties including **Hastings**;

- There is a high concentration of jobs in the Arts, Entertainment and Recreation sector including **Hastings**;
- Northumberland and Lennox and Addington have a higher concentration of jobs in manufacturing than most of the other neighbouring counties. This may be attributed to both having serviced industrial properties and parks along the 401 which other Counties listed do not have;
- Regarding Retail Trade, Hastings, Haliburton and Renfrew County have a high concentration of jobs in Retail Trade;
- Prince Edward County has the highest concentration of Professional, scientific and technical services jobs, but the other Counties are not far behind;
- **Hastings** leads the way with the concentration of Management of Companies and Enterprise jobs, but it is still a low LQ overall;
- Haliburton has the highest concentration of jobs in Accommodation and Food Services followed by Prince Edward County and **Hastings**;
- Most have low concentrations of jobs in transportation and warehousing, information and cultural industries (except for Renfrew), and finance and insurance.
- Lennox and Addington has the highest concentration of jobs in Public Administration followed by Peterborough County.

Figure 4: Industry Concentrations Compared with separated cities, Location Quotients

Industry	Hastings	Quinte West	Belleville
Agriculture, forestry, fishing & hunting	3.15	.72	.14
Mining, oil, gas extraction	0.42	.0	.01
Utilities	1.77	.35	.55
Construction	1.54	.75	.68
Manufacturing	.49	1.56	1.72
Wholesale Trade	.41	1.19	.92
Retail Trade	1.27	.84	1.16
Transportation, Warehousing	.55	1.50	.91
Information, cultural industries	.51	.31	.57
Finance and Insurance	.30	.24	.56
Real Estate, Rental Leasing	.41	1.15	.81
Professional, scientific and technical services	.64	.41	.51
Mgt. of Companies & Enterprises	.30	.04	.00
Administrative/ Waste Mgmt / Remediation Services	.62	1.07	1.88
Educational Services	.99	.56	.94
Health Care & Social Assistance	1.35	.82	1.42
Arts, Entertainment & Recreation	1.29	.67	.46
Accommodation & Food Services	1.46	.91	.98
Public Administration	.79	3.21	.76
Unclassified	.87	1.01	1.00

Source: EMSI Analyst & OMAF & RA

The following are some observations from Figure 4:

- **Hastings** has a higher concentration of jobs in Agriculture, Forestry and Mining than both cities certainly due to the topography;
- Manufacturing is more predominant in Quinte West and Belleville. Quinte West employs 2,655 in manufacturing while Belleville employs 5,284 people. This can be attributed to both having a vast number of industrial / commercial properties and parks and the fact that they both are situated along the 401 highway;

- **Hastings** has a high location quotient in Retail Trade and Belleville’s LQ is not far behind;
- **Hastings** has the highest concentration of jobs in Accommodation and Food Services and also in Arts, Entertainment and Recreation jobs;
- Most have low concentrations of jobs in Information and cultural industries, and Finance and insurance;
- However, **Hastings** has the highest concentration of jobs in Management of companies and enterprises. It’s possible that many Management type jobs are capture under “Unclassified”. This is a new category for those that have not yet received a NAICS code;
- Quinte West has a high concentration of jobs in Transportation and Warehousing;
- Quinte West also has a high concentration of jobs in Public Administration due largely in part to the Canadian Forces Base;
- **Hastings** has the highest concentration of jobs in Real Estate and Rental Leasing and Construction; and
- Belleville has the lowest concentration of jobs in Public Administration.

3.5 Summary of Findings – Sectors and Industry Groups requiring Priority Attention

Based on the analysis, the following summarizes the competitive strengths of Hastings County and outlines those Sectors needing priority attention which helped establish key themes for the discussions that took place with the Hastings County Economic and Tourism Development Advisory Committee.

Several industrial and business concentrations are understood as having the best potential to attract new business investment or that could represent the existing and future export base of Hastings County. They are listed below:

Core proactive sectors for attraction, retention and expansion efforts

- Agriculture;
- Forestry;
- Construction;
- Accommodation and food services;
- Arts, Entertainment and Recreation; and,
- Retail Trade.

In addition to above, there is a high concentration of businesses that fall into an “Indeterminate” category. These are businesses without employees that are incorporated and show a minimum of \$30,000 in revenue. 2018 Business Patterns Data indicates 68% of businesses in Hastings County fall into this category, which is an increase of 18% up from 51% in 2011. This reinforces the

need to add a seventh sector to focus on which is the “*Lone Eagles*” – consultants, designers, specialty trades, wellness practitioners and others.

4.0 Other related studies and strategies

There are other strategies and plans that have been introduced recently and are worth covering since the information is beneficial towards determining a new Economic Development Action Plan.

4.1 Economic Development Strategy for Eastern Ontario

The Eastern Ontario Leadership Council (EOLC) prepared and launched a regional economic development strategy in 2014. The EOLC partnered with the Ontario Ministry of Economic Development, Job Creation and Trade to take stock of the strategy implementation progress, update knowledge and perceptions held by the region’s businesses and other stakeholders, and identify which strategies should remain part of the go-forward plan and which might need revision in light of changing economic factors and trends, new information and developments.

Based on the research and input, the 2014 Eastern Ontario Economic Development identified three priorities. They include:

1. Workforce Development and Deployment
2. Technology Integration and Innovation
3. Integrated and Intelligent Transportation System

Through the efforts to refresh the Strategy, it has been determined that these three priorities should remain, while adding a fourth ‘foundational’ priority, Digital Infrastructure.

4.2 The Future of Farming in Hastings County: Report for the community and local policy-makers

The organization Harvest Hastings, with the support of Dr. Peter Andree and Kim Bittermann from Carleton University, conducted 30 interviews with farmers from Hastings County and public officials throughout 2017 and 2018 and reviewed data available through the Ontario Ministry of Agriculture, Food and Rural Affairs, Hastings County and Statistics Canada. Supplemented by discussions at three public presentations and two asset-mapping workshops, The Future of Farming in Hastings County Report was produced. With policy recommendations prepared by community-based food system consultant Ken Meter, major findings about the state of farming in Hastings County and recommendations to local governments and community organizations are provided. A copy of the report is at www.harvesthastings.ca. The following summarizes the recommended actions that directly relate to actions that Hastings County Economic and Tourism Development may be able to assist with:

1. Build on the wealth of agricultural knowledge through field days, workshops, an annual conference and other events to help farmers learn from one another;
2. Feasibility studies should be completed to assess new community food infrastructure, including how to make better use of the new Colborne Agri-food Venture Centre;
3. Mobilize consumer support through outreach campaigns such as “Buy \$5 a week” from Hastings County farms translating into over \$35 Million / year income for local farms;
4. Develop a coordinated marketing strategy for farmers’ markets that sell locally produced foods;

4.3 Branding and Positioning Strategy

In 2018 Hastings County commenced the development of a branding strategy to elevate recognition of the County and speak to the quality of life and experiences available. Following extensive consultation, research and meetings, Hastings County launched, on March 21, 2019, a new brand that positions Hastings County as a “Wildly Authentic” destination that delivers wilderness experiences, sustainable lifestyles creative activities and a climate for growth.

More information about the new brand and guidelines is available at www.hastings.ca.

4.4 Demographic Forecasting and Land Demand Analysis

In December of 2012, Hastings County retained Watson & Associates Economists Ltd. To undertake a long-term population, housing, employment and land demand forecast analysis for the North and South Hastings Markets of the County. The results were intended to guide decision making and policy development specifically related to planning and growth management, urban land needs, master plans and municipal finance. The 176 page Analysis that was produced has been helpful for the formal review of the County’s Official Plan and provides some good insights towards tailoring economic development efforts.

Regarding employment, the Land Demand Analysis found that the County’s economy is highly oriented towards service-providing sectors, including retail trade, accommodation and food services, utilities and construction, as well as education, health and social services. This is consistent with the data collected separately for this Situation Analysis.

It was also reported that a significant proportion of the County’s existing employment base is comprised of “work at home” employment (approximately 20% of the employment base). Regarding the next 25 years, page 7-5 of the Analysis outlines an anticipation that Hastings County’s employment activity rate

will increase slightly, largely driven by employment growth in retail and tourism services to serve the growing permanent and seasonal population base. It also goes on to say that it is not expected Hastings County will see employment growth in the industrial sector which is experiencing a steady decline already. Also of note on page 7-5 is the comment that:

Much of the local job growth within the County is expected to be in response to permanent and seasonal population growth within the County and surrounding area in sectors related to retail and business services, tourism/agri-tourism and creative industries (i.e. arts and culture). In addition, the number of residents within the County who work from home is expected to steadily increase. This increase is anticipated to be primarily driven by the transition of the economy towards the service sector and “creative” economy, combined with continued improvements to telecommunications and communication technology.

One of the other items the Analysis touched on was the County having two distinct regional market areas – North Hastings Market area and a South Hastings Market Area. The thinking is that residents in Stirling-Rawdon are more apt to identify themselves with Belleville or Quinte West while residents in Faraday Township identify themselves more with Bancroft. As well, the South Hastings Market Area is growing at an annual rate slightly above the County average, while the North Hastings Market Area has experienced a decline in population. However, this is not to say that in terms of economic development the North and South have differing needs. As outlined in the 2007 Economic Development Strategy prepared by consultant Paul Blais, there are more similarities than differences across the County when it comes to economic development.

Appendix A: Economic Development Action Plan

Strategic Priority #1 – Increase the Population & New Development

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
Increase the number of new private residences and population, and the businesses will follow.	<ul style="list-style-type: none"> • Create inventory of available (and potential) development lands, buildings and opportunities. This should include municipal assets, input from commercial real estate agents, private landholders, MNR (Crown Land), etc. • Identify local developers to be encouraged to invest in Hastings 	<p>Q1-Q3 2020. Inventory of available development lands. Lead – Member municipalities and Municipal Economic and Tourism Development Partners Group</p> <p>Q2 2020. Create a list of developers to be approached. Q4 2020 Ongoing. Commence pitching identified development lands to developers. Lead – County Economic and Tourism Development</p>	<ul style="list-style-type: none"> • Investment-ready lands identified • Inquiries processed with developers 	<ul style="list-style-type: none"> • Tax assessment • Population increase

Strategic Priority #1 – Increase the Population & New Development CONTINUED

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
<p>Increase the number of new private residences and population, and the businesses will follow.</p>	<ul style="list-style-type: none"> • Based on the personas identified in the new Branding Strategy, research and develop packages that can be marketed to target audiences and invite them for a “tourism experience-type test drive”. • As per the request by member municipalities, assist them in the development of SMART Goals and Visions (Specific, Measurable, Achievable, Realistic and Timely) 	<p>Q2-Q4 2020. Commence 1 on 1 meetings with tourism-related businesses providing coaching, host workshops and seminars and coordinate formal experiential training to support. Lead: County Economic Tourism Development staff while Economic and Tourism Development Advisory Committee will engage local industry encouraging their involvement. By Q4 2021: have packages ready to market.</p> <p>Q1-Q4 2020. County staff to arrange meetings. Lead – County Economic and Tourism Development and Member Municipalities</p>	<ul style="list-style-type: none"> • Inquiries processed • Number of partner engagements, number of training sessions and participants • Number of people who enroll in the “tourism test drive” • Member municipalities have established SMART Goals for their own local economic development efforts and know how to best support County effort 	<ul style="list-style-type: none"> • Population increase • New businesses

Strategic Priority #1 – Increase the Population & New Development CONTINUED

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
<p>Support and expand the accommodation industry across Hastings County</p>	<ul style="list-style-type: none"> • With a growing tourism economy, and to support the attraction of tourists and longer visits, conduct an audit and inventory of current roofed accommodations, both traditional hotel/motel and short-term accommodations (e.g. AirBnBs). Identify occupancy rates during all seasons and provide a set of recommended actions to respond to the findings as necessary 	<p>Q2-Q4 2020. In partnership with Ontario’s Highlands Tourism Organization conduct a formal analysis and inventory accommodations followed by an action plan to respond. Lead: County Economic Tourism Development staff, Ontario’s Highlands Tourism Organization</p>	<ul style="list-style-type: none"> • Up-to-date understanding of accommodation offerings, their needs and seasonal occupancy rates • Potential opportunities for new investment in accommodations identified 	<ul style="list-style-type: none"> • Capital investment • Total visitor spending

Strategic Priority #2 – Support startups and existing businesses

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
<p>Increased number of businesses are starting, growing and moving into Hastings, and businesses are finding it easier to locate the workforce talent they need.</p>	<ul style="list-style-type: none"> • The County’s popular business coaching service continues while expanding “word-of-mouth” and promotions to help increase the number of clients served. • As per the business telephone survey and consultations with the Economic and Tourism Development Advisory Committee and Economic and Tourism Development Partners Group, setup an “Action Team” to collaborate with the Eastern Ontario Leadership Council on the creation of a workforce development and deployment action plan. 	<p>Ongoing. Continue and expand promotions. Lead - County Economic and Tourism Development, Economic and Tourism Development Advisory Committee, Municipal Economic and Tourism Development Partners Group. Q2 – Q4 2020. Action Team will consist of four members of the Economic and Tourism Development Advisory Committee and County staff. Will focus on engaging local industry, business owners and relevant stakeholders. Lead – Economic and Tourism Development Advisory Committee (engage industry)</p>	<ul style="list-style-type: none"> • Inquiries processed • Clients served • Client satisfaction • Development of workforce and deployment action plan 	<ul style="list-style-type: none"> • Job creation • Capital investment • Number of businesses operating • Number of business startups • Fewer job vacancies

Strategic Priority #2 – Support startups and existing businesses CONTINUED

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
<p>Collaborative relationships are in place to help agriculture businesses, farms and the local forestry industry build more wealth, health, connections and capacity.</p>	<ul style="list-style-type: none"> • Review the recently released and County sponsored report on the Future of Farming in Hastings County and determine which of the 14 recommendations Hastings County Economic and Tourism Development should take the lead on implementing. • With a high concentration of employment in forestry, and the importance of the industry to the local economy, build a closer partnership with the forestry sector to establish their current and future needs. 	<p>Q1-Q2 2020 review Future of Farming Report and identify plan of action to respond. Lead – County Economic and Tourism Development, Economic and Tourism Development Advisory Committee Agriculture Representative. Q1 – Q3 2020. Work with the Bancroft Area Forestry Industry Association (BAFIA) and other stakeholders to identify what specifically Hastings County can take part in to assist the industry. Lead – County staff, Advisory Committee Forestry Representative, BAFIA.</p>	<ul style="list-style-type: none"> • Number of agricultural operations profiled and promoted • Closer working relationship with local forestry industry 	<ul style="list-style-type: none"> • Sales of local agricultural and forestry products • Increased presence of locally grown products in stores and restaurants

Strategic Priority #3 – Increase awareness of Hastings and visitation

<u>Aspirational Outcome</u>	<u>Actions</u>	<u>Timing, Lead</u>	<u>Outputs</u>	<u>Outcomes</u>
<p>Recognition of Hastings is elevated as delivering easy access to inspiring wilderness experiences, sustainable lifestyles, one-of-a-kind creative activities and an opportunity-rich climate for growth. Recognition of Hastings is elevated as a place to escape to from the city and live and work full-time.</p>	<ul style="list-style-type: none"> • Develop and implement a formal strategy for marketing the County as a place to invest, visit and live including identification of target audiences. • Support the local tourism industry, member municipalities and related organizations on improving identified underperforming and underdeveloped assets with a new specific Tourism Development Plan. 	<p>Q1-Q2 2020 As per the new Wildly Authentic Branding Strategy, establish a formal marketing strategy to best guide efforts and marketing budgets. Lead – County Economic and Tourism Development. Q2 2020 to Q4 2024 Ongoing. Implement the marketing strategy and its recommendations. Lead – County Economic and Tourism Development. Q1-Q2 2020. Based on existing and recent research and plans, develop and implement a plan to drive development in tourism, enhance offerings and guide County staff actions. Lead – County Economic and Tourism Development</p>	<ul style="list-style-type: none"> • Creation and implementation of a formal marketing strategy and tourism development plan • Website Traffic • Number of followers / social media shares / impressions online • Visits to Hastings County (from Ontario Ministry of Tourism data and Visitor Information Centres’ tracking) • Number of inquiries and leads 	<ul style="list-style-type: none"> • Capital investment • Population increase • New businesses • Total person visits • Key event attendance • Total visitor spending • Greater awareness of Hastings as demonstrated through social media tracking

Appendix B: Municipal Interviews

Summary of Municipal Interviews: Economic Development – Spring 2019

A series of 14 interviews (with the 14 individual municipal partners) was carried out by the Hastings County Manager of Economic Development and his staff during the months of February and March of 2019. The purpose of these interviews was to create a relevant and inclusive economic development strategy and action plan to support future development and growth of all communities in the County.

Rationale: With nine of the fourteen County councilors being new to their role, and with many new faces on the 14 partner municipality councils, and with several new CAO / Clerks in the municipalities; it is important to ensure the County economic development strategy plan is in alignment with the 14 municipal partners (for the current four year council term and beyond). It was recognized that each of the 14 partner municipalities have unique resources, economic drivers, populations and challenges. While a unified approach to economic development is important, we recognize that there are different needs and wants with respect to economic development across the 14 member municipalities.

Approach: Individual meetings were booked with each of the 14 partner municipalities. The meeting attendees included: head of council, top ranking staff member, and any staff persons or volunteers who were responsible for economic development activities in the municipality. The objective of these meetings was to develop specific, tangible, measurable goals and objectives for economic development in the municipality (which could be completed by the end of current council's term). The intention was for County Economic Development staff to review these individual municipal goals and identify similarities with some of the other partners resulting in the development of action plans to assist in achieving the goals. During the assessment of the interviews, County staff would assign responsibility for each of the actions to municipal or County staff and would identify proposed action steps, timelines, measurements of success and resources required.

Assumptions: Prior to these meetings, it was assumed that several of the member municipalities would have common goals, needs and action plans, as well as common current economic drivers. During the meetings these assumptions were validated or rejected (indicated by ~~strike-through~~) by municipal representatives.

- Large Scale Farming is an important economic driver in Stirling-Rawdon, Tweed, Centre Hastings and ~~Tyendinaga Township~~.
- Downtown development is important to Stirling-Rawdon, Marmora & Lake, Centre Hastings, Tweed, Deseronto and Bancroft.
- Rural Service Industries, ~~natural resource extraction~~ and ~~smaller farming operations~~ are important to Carlow/Mayo, Tudor/Cashel, Faraday, Wollaston, ~~Limerick~~, Tyendinaga Township, Madoc Township, Bancroft and Hastings Highlands. Note: although Hastings County history is steeped in mining and natural resource extraction activity, there were no current mining operations identified and there was an obvious resistance to development of this sector. Although some small scale farming was identified in Hastings Highlands, Tweed and Tyendinaga Township it was not identified as a “major” economic driver.
- Tourism will be an economic driver in Hastings Highlands, Bancroft, Tudor/Cashel, Carlow/Mayo, ~~Faraday~~, Wollaston, Limerick, Tweed, ~~Madoc Township~~, Centre Hastings and Marmora & Lake.
- Highway 7 traffic flow is relevant to Marmora & Lake, Centre Hastings, Madoc Township and Tweed
- Proximity to Belleville and the 401 are economic drivers for Stirling-Rawdon, Deseronto and Tyendinaga Township
- Municipal water and sewer are attraction advantages in Deseronto, Tweed, Stirling-Rawdon, Marmora & Lake, Centre Hastings, and Bancroft
- Smaller downtowns and highway frontage businesses are relevant to villages in several municipalities (eg. Coe Hill, Maynooth, L’Amable, Bird’s Creek, Lake St. Peter, Faraday, Ivanhoe, Springbrook, McArthur Mills, ~~Shannonville~~, Marlbank, Thomasburg)

The following questions were discussed in the meetings (*summary of responses in italics*):

1. In an ideal world, what does your municipality look like (using an economic development lens) at the end of this four-year term?

This was a difficult question for most municipalities. Several suggested that a follow-up meeting to discuss and work on goal setting would be a valuable exercise. The primary goal expressed by the majority of municipalities was for development. A focus on the attraction of developers for residential builds (individual homes, subdivisions, and multi-unit / affordable housing, and seasonal residences) was the most common desired action identified. Measurability and specific tangible goals with timelines were difficult to create in the short time allotted for the interviews.

Individual Municipalities' Vision Themes included in Appendix

2. What is the prime objective of Economic Development in your municipality?
 - a. Increase in tax base?
 - b. Increase of services for residents?
 - c. Attraction of residents both seasonal and permanent?
 - d. Increase of wealth, quality of life, sustainability through job creation?
 - e. Other?

Results were: Increase the tax base – 4/14 Population Growth – 5/14

Attract More Service Businesses - 2/14 Create Jobs – 2/14 All of the Above - 1/14

It was identified that all these points were somewhat interrelated. Most municipalities wanted to primarily increase population, but lack of housing was identified as a major barrier to accomplishing this goal. Most indicated increased population required residential development which would create construction / trades jobs, and in turn, increased tax base for the municipality. The increased population would have needs for services thus increasing market size while stimulating the creation of small businesses and jobs, again resulting in increased tax base. Everything was interlinked but needed to start with attracting people and providing places for them to live. In other words, "Attract people and businesses will follow."

3. What assets does your municipality have which can be leveraged, promoted, developed?

Each of the municipalities created extensive lists of assets. Several of the attendees were quite surprised at the length of the list of “what their communities had to offer” and suggested these assets should be communicated and promoted, not only as attractors, but also to develop community awareness and build community spirit. Specific responses to this question are listed in the attached appendix.

4. How do you view Tourism as an economic driver – how would you enhance tourism?

During the interviews a distinction between tourism and seasonal residents / cottagers was evident, as was the distinction between “day-trip” type tourism and overnight tourism.

Bancroft, Carlow Mayo, Hastings Highlands, Limerick, Tudor Cashel and Wollaston all indicated Tourism was a major driver. They did not differentiate between Tourism and seasonal residents.

Faraday, Marmora & Lake, Tweed (and somewhat Centre Hastings) identified seasonal residents as the major economic driver.

Deseronto, Stirling-Rawdon, and Tyendinaga saw themselves as more “day-trip” destinations with people attending events or specific activities (such as fishing, fairs, performing arts, sports tournaments)

Madoc Township did not see Tourism as being an economic driver.

All municipalities identified the limited number of available roofed accommodations as a barrier to growth in the Tourism sector. Many mentioned the lack of tourism “product” – meaning: What is there to see and do in the area on an extended stay? Although the wilderness and outdoors were an attraction to some respondents, some said we lacked any major attractions such as zip lines, water parks, etc.

The seasonality of our cottage and water-based activities was also identified as a barrier to growth. The need for development of shoulder-season and off-season activities and attractors was identified as a priority. It was recognized that, in the north, hunting was an autumn attractor and snowmobiling was an economic driver in the winter season, but both did not attract the volumes of tourists experienced in the summer months.

5. What barriers do you see to future development?

Regulations from all three levels of government was identified as a major barrier. Specifically, the Conservation Authority’s involvement was mentioned, many times, as an impediment to development, as was the Ministry of

Transportation. The “Red Tape”, created by the multiple approvals from multiple organizations (with sometimes directly conflicting rules and opinions), slowed and demotivated people from developing properties. Lack of internet connectivity and poor cell phone coverage were common themes in the more remote areas of the County and in urban Bancroft.

Deseronto’s barriers were mostly linked to the pending Land Claim settlement. Investment and development has been hard to attract with the uncertainty of future ownership.

A lack of infrastructure funding from provincial and federal governments was identified by many. This is impeding development of municipal sewer treatment, expansion of water distribution and maintenance of roads.

Several municipalities identified the “resistance to change” culture prevalent in their communities as an impediment to development. Additionally, several respondents mentioned residents with negative attitudes, prevalent depressed outlooks and overly critical elements in their municipalities are challenges they faced when trying to improve the economy.

A few municipalities in the north highlighted the large amount of land tied up by the Crown and MNR, where development could take place but currently the Province is not open to developing these lands. For example, during the interview with Carlow Mayo, reference was made to the significant amount of waterfront lands which are owned by the Crown, but could be sold and developed resulting in more municipal tax revenue.

6. What staff resources do you currently have to work on development projects?

This varied by municipality. Most had no dedicated staff resources, many were part time roles shared with other duties (economic development functions ranging from 5% of an employee’s time to 75%) Hastings Highlands and Bancroft had dedicated staff but both were hired for specific projects and were only in the roles temporarily. Marmora was the only municipality with full time staff dedicated to economic development.

Most municipalities either had (or were developing) committees using community volunteers and councilors to address economic development issues. Limerick, Madoc Township and Tudor & Cashel had no staff assigned specifically to economic development. Most of the northern municipalities have had elected officials attend meetings of the NHEDC.

7. Should we work on attraction? If so, what do you want attracted to the area?

Developers – Residential: Affordable Housing, Multi-Unit, Seniors, Recreational

Developers – Commercial: Tourism Product, Accommodations, Long Term Care Facility

Residents – Transition from the city – Seasonal convert to Permanent

Tourists – All Season (need more in shoulder and off-season)

Light Industrial – Tweed, Tyendinaga, Marmora (dry), Hastings Highlands (Y Road), Madoc Township (Bonjour Blvd.),

Specific development requests: Centre Hastings identified the need for a long term care facility. Stirling for seniors' housing, Wollaston identified infill development in Coe Hill. Tweed and Tyendinaga identified attraction of Light Industrial. Hastings Highlands, Centre Hastings and Marmora & Lake identified attracting development to their business parks. Deseronto identified attracting a developer for their waterfront lots and Tyendinaga for development of a parcel on Marysville Road / 401 interchange.

8. Should we work on development of existing business? If so, what do they need?

Majority identified the continuation of the Small Business Support Program (Enterprise Facilitation) was important. Most believed the local businesses need assistance with marketing and promotion (as did their municipality) and coaching on techniques to survive during the off-season. Many suggested the need for networking events and workshops for local business owners which could be used to promote the County's Small Business Support program.

9. What do you have available for business – buildings, development lots, utilities (water, sewer, hydro, internet, natural gas, roads, rail, airport, labourforce)

An extensive list of resources for each municipality is included in the appendix section

10. Do you believe local businesses are having problems hiring? Or is there currently a large unemployed group of the available labour force? OR Both conditions exist? Discuss the causes for any employment / labourforce issues you have identified.

General consensus was that, although there were many residents not participating in the labourforce, there was a general lack of motivation and work ethic exhibited by many in this group.

Several identified that their residents commuted to other towns for employment, due to the fact there wasn't work in their field locally, or that the local wages offered were not attractive enough.

Common themes were: Not enough local jobs, not enough year-round/full-time jobs, pay was not high enough. Additionally barriers to employment were lack of public transportation and lack of affordable housing.

Identified was the need for more trades people – specifically in the construction related fields.

Appendix C: Business Telephone Survey

(see enclosed PDF slide document)