



Halton Hills Economic Development and Tourism Strategy Background Discussion Report

Mellor Murray Consulting
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Cover Images: Mold-Masters, Culture Days, Acton Fall Fair

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Figure 1: Gellert Community Centre





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1. Introduction

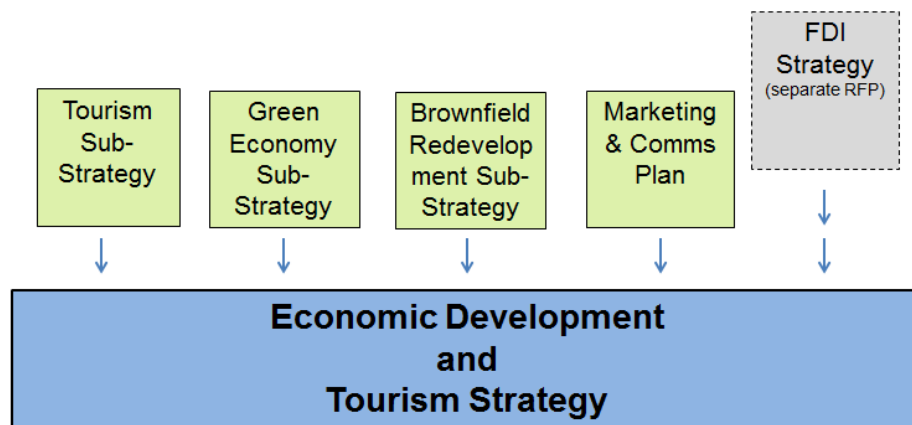
The Town of Halton Hills is in the process of developing an Economic Development and Tourism Strategy to guide business development and investment attraction for the next five years. The Economic Development and Tourism Strategy will include sub-sector recommendations for tourism, the green economy, brownfield redevelopment and marketing/communications.

The Town's existing Economic Development Strategy was created in 2012. Since then, significant progress has been made in implementing the Strategy's goals and recommendations. During this same period, there have been many changes in demographics, technology and business conditions. These changes have had a compelling impact on local, regional, national and international economies – including within Halton Hills, rendering the 2012 Strategy outdated. Likewise, the Town's Tourism Strategy is now four years old and needs an update. New, actionable and effective strategies are needed to position Halton Hills as a prime destination for investment and job growth. Furthermore, a Foreign Direct Investment (FDI) Strategy was approved by Town Council in March 2020 and will also feed into the broader Economic Development and Tourism Strategy.

The Strategy will include three components:

- Strategic Plan Development: research and analysis, recommendations and the recommended Strategy;
- Supporting Sub-Strategy Recommendations: Tourism, Green Economy, Brownfield, Marketing and Communications;
- Economic Recovery and Resilience Plan: detailing best practices for economic recovery planning and identifying particular areas of relevance for Halton Hills.

Figure 2: Components of the Economic Development and Tourism Strategy





The goals for the Economic Development and Tourism Strategy are to:

- Reflect the changing local, regional, national and international market conditions
- Align the Strategy with advancements in key Town studies and initiatives
- Complete a SWOT analysis
- Reflect the success of the Community Improvement Plan
- Align with the Town's tourism, arts and cultural opportunities and priorities
- Guide specific actions over the next three years
- Guide communications related to the Strategy and Action Plan
- Reflect the Town's commitments to climate change
- Maintain the Town's economic competitiveness
- Further the Town's 'open for business' approach, including best practices across the municipal sector
- Support local job growth
- Maximize economic benefits from the tourism sector
- Increase local investment
- Increase non-residential assessment
- Improve non-residential to residential assessment ratio
- Increase in job quality – that is, add more professional/technical jobs which offer competitive compensation
- Determine key sectors of focus
- Review applicable processes, practices, tactics, policies and structures to best facilitate economic development

This strategic planning process began in mid 2019. There have been a number of internal and external changes which have significantly impacted the operations of the Economic Development, Innovation and Culture Division and the local economy.

The economic analysis, investment readiness assessment and community consultation referenced in this report was conducted through the fall of 2019. Throughout the fall of 2019 and the first quarter of 2020, the Economic Development and Culture Division hired three additional staff to bring the economic development and tourism team up to 5.25 full-time equivalents. These new staff members quickly mobilized and began work on many of the issues identified in the initial analysis. Some of these initiatives are well on their way or are completed as of the issuing of this report.

On March 11, 2020, the World Health Organization declared the global outbreak of the COVID-19 pandemic. The Province of Ontario declared an official State of Emergency on March 17. The Town of Halton Hills followed the provincial lead and declared a State of Emergency for the Town on March 24. Work on the Economic Development and



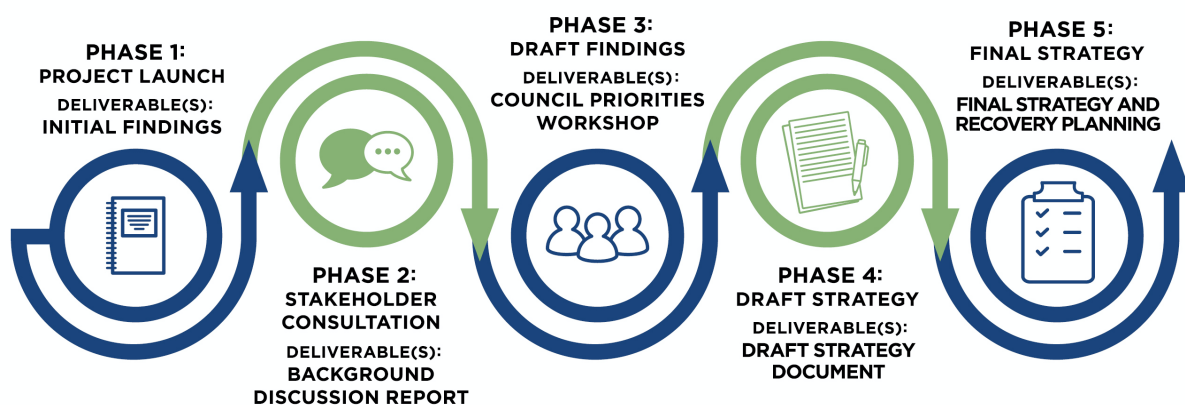
Tourism Strategy was paused for several months to focus on addressing the COVID crisis.

This report documents the analysis and consultation conducted **before** the pandemic and the declaration of the State of Emergency.

The strategic planning process will conclude with two subsequent documents. The **Halton Hills Economic Development Strategy** will build upon the vision and mission established in the Halton Hills Corporate Strategic Plan. It will provide goals, objectives and actions based on economic development and tourism fundamentals that remain relevant regardless of ensuing issues resulting from the COVID-19 pandemic.

A second report will address **COVID-19 Recovery Planning**. It will outline disaster recovery planning guidelines and identify issues with particular relevance to Halton Hills based on the Halton Hills Economic Development Strategy.

Figure 3: Amended Strategic Planning Process



This Background Discussion Report is the deliverable of Phase 2 and builds on the [Executive Summary of Initial Findings \(March 2020\)](#). The Background Discussion Report includes the following elements:

- Summary of Initial Findings
- Community Engagement Report
- Economic Development Stakeholder Consultation – Themes Identified
- Tourism Stakeholder Consultation – Themes Identified
- SWOT Analysis
- Strategic Priorities for Consideration
- Appendices



This Background Discussion Paper includes the results of comprehensive stakeholder consultation. It, along with the [Executive Summary of Initial Findings \(March 2020\)](#), provides the foundation for the development of the draft Economic Development and Tourism Strategy.

2. Summary of Initial Findings

The purpose of the [Executive Summary of Initial Findings \(March 2020\)](#) was to perform extensive data analysis, a comprehensive literature review, study trends and activities, as well as identify local strengths, gaps and priorities that would feed into this Background Discussion Report – and ultimately the final Strategy. The Initial Findings provided an analysis of: economic development, planning, tourism, demographic and market trends; Halton Hills' business profile; target sectors; the Town's economic development investment benchmarks; and investment readiness.

The [Executive Summary of Initial Findings \(March 2020\)](#) characterizes the Town of Halton Hills as a vibrant and growing community with a unique geography made up of both urban and rural features. With its high quality of life, strategic location in the GTA and proximity to major transportation networks and shipping hubs, the community offers a prime location for investment.

The document identifies a number of cross-departmental successes achieved in recent years that provide a solid foundation from which to pursue the Town's next stage of economic development and tourism initiatives. These include:

- Organizational changes that have positioned economic development to be more strategic in pursuit of longer-term objectives and investment opportunities, including advocating for the Town's interests at federal and provincial levels of government.
- Leveraging linkages between economic development, culture and tourism with the establishment of the Economic Development, Innovation and Culture division.
- The Town's recognition of the link between a vibrant arts and culture scene, high quality of life and investment attraction. The result has been a substantially expanded Cultural Services portfolio with dedicated resources, and the development/implementation of key strategies and initiatives. Recent cultural successes build on prior and ongoing cross-departmental initiatives, including those by the Library and Recreation and Parks.
- Successful uptake on the Community Improvement Plan (CIP) program which has generated over \$1.2 million in private and public investment for CIP-funded works since 2017.
- Allocation of \$40,000 per year in dedicated funding for the Manufacturing Expansion Fund (MEF) incentive program.



- Launch of the Business Concierge program by leveraging past successes to continue to modernize and streamline the attraction and processing of key economic development opportunities.
- Approval of the Town's first Foreign Direct Investment (FDI) Attraction Strategy and Action Plan.
- Expanded stakeholder partnerships and collaboration with the Chamber of Commerce, BIAs, Halton Region, Regional Tourism Organization 3 (RTO3), Haltech, provincial ministries, real estate industry and individual businesses.
- Town approval of the Phase 1B Secondary Plan that will facilitate major investment opportunities and projects in the Premier Gateway. This relates to leveraging five million sq. ft. of existing non-residential development in the Premier Gateway to advance an additional five million sq. ft. of development that is in various stages of being developed or contemplated for potential construction in the future.
- Initiation of planning work for the Phase 2B Secondary Plan.
- Approval of the Vision Georgetown Secondary Plan which will lead to the development of 1,000 acres, providing a home to 18,000 residents and 2,025 new jobs.
- Approval of the Transit Service Strategy which will result in a right-sized 'made-in-Halton Hills' strategy that serves the needs of residents and businesses.
- Council's ongoing commitment to leadership on climate change.
- Launch of the www.InvestHaltonHills.com website to provide information tailored for the business audience.
- Redevelopment of the www.VisitHaltonHills.com website as the Town's main tourism communication tool.
- An expanded economic development communication and marketing program in collaboration with the Town's Corporate Communications division, including marketing videos, brochures, social media, digital advertising and use of the Town's Let's Talk community engagement platform.

2.1 Key Initial Findings

In light of these successes, the key observations, themes and findings identified in the Executive Summary of Initial Findings (March 2020) can be grouped into the following categories (shown in Figure 4):



Figure 4: Key Findings Emerging from Baseline Research



- **Growing Community:** The population grew an estimated six percent in the past five years and is expected to grow a projected nine percent in the next five years. Halton Hills is experiencing increasing demand for developable residential, commercial and industrial land, as well as higher density development. The number of business locations in Halton Hills increased by 22 percent between 2012 and 2018, and estimated employment grew by 15 percent during that same period.
- **Room to Grow:** A large portion of potential employment lands in Halton Hills is not currently shovel-ready and pending final planning approvals and/or completion of key planning studies (e.g. Premier Gateway Phase 2B Secondary Plan). Though the Town has an adequate inventory of future employment lands to accommodate growth through 2031, demand for development in the Premier Gateway has been outpacing supply.
- **Quality of Place:** Halton Hills is a desirable location to live, consistently ranking highly in a comparison of Canadian communities. The community has a small town feel with safe neighbourhoods, significant local amenities, an active arts and culture community, and easy access to the rest of the GTA and regional/international markets.
- **Climate Change and Sustainability:** The Town is a leader (especially among small communities) in sustainability policy and programming, and in addressing climate change. These priorities have been successfully integrated across corporate operations and have benefited from extensive community



engagement and participation. The Town is making significant investments in climate change-related initiatives with another \$1.3 million in the 2020 budget dedicated to climate change projects.

- **Resources:** With the additional staff hired in 2019, Halton Hills now has an economic development and tourism team on par with similar sized communities in Ontario. The tourism budget in Halton Hills is lower than established industry best practices of \$1.15 per capita in Ontario. Going forward Halton Hills will need to consider the FDI Strategy's recommendations for a dedicated investment attraction resource, competition for investment with the sophisticated and well-established economic development departments in much larger communities in the GTA. Halton Hills will also need to be prepared to address future demand as the community grows and the number and complexity of economic development/investment files increases.
- **Economic Development Fundamentals:** The Economic Development, Innovation and Culture division has evolved considerably over the past two years, resulting in a more strategic approach to doing business, as well as greater efficiencies and synergies. Going forward, areas for enhancement include expanding the data and functionality of the www.investhaltonhills.com website, an online inventory of available industrial and commercial land and buildings, developing a database of local businesses and implementing a Business Retention and Expansion (BR&E) program. Work is already underway on these items.
- **Regulatory Process:** There are multiple approval authorities for development in Halton Hills, including the Town itself, Halton Region, Niagara Escarpment Commission, Conservation Halton, the Credit Valley Conservation Authority, Grand River Conservation Authority and the Province of Ontario. Building on past and ongoing cross-departmental successes, including the Process Review of Development Systems (PRODS), the new Expeditor and Business Development Portfolio Manager position will assist major investors and developers in navigating these regulatory requirements in order to streamline review processes. The Town could further assist developers by providing development process flowcharts and typical approval timelines.
- **Economic Development Vision:** The division's current vision should be reviewed to consider how Halton Hills will manage the pace of growth; ensure an adequate supply of employment land, buildings and housing stock; and address servicing capacity. The Town will also need to consider economic development priorities such as total employment, job diversity, job density,



industry diversity, expanding the tax base and urban density/brownfield development.

- **Target Sectors:** Halton Hills has previously established advanced manufacturing, food and beverage processing, agri-business, clean technology/green economy, logistics, tourism, and arts and culture as target sectors.
- **Marketing:** Building on past and ongoing successes, a variety of marketing tools and tactics are in use, with more under development. To ensure continued competitiveness, subsequent marketing efforts should focus on maintaining up-to-date websites (i.e. VisitHaltonHills.ca and InvestHaltonHills.com), consistent messaging, developing an enhanced and data-rich Community Profile, expanding digital marketing, launching marketing campaigns to differentiate Halton Hills, and securing an adequate marketing budget.

The key findings suggested that to continue to strengthen Halton Hills' economic prosperity the Town should build on the fact that:

- Halton Hills enjoys a strategic location in the GTA.
- The community has favourable social-demographic characteristics, including a growing population, growing local employment base, low unemployment rate, relatively young population, high employment participation rate and high household incomes.
- The top three employment sectors for Halton Hills are sales and service; business; finance and administration; and management.
- Future job growth in Halton Hills will be driven by manufacturing, construction and professional/scientific services – with an additional focus on growing the green economy, tourism and arts and culture sectors, as well as the sectors identified in the FDI Strategy (advanced manufacturing, agri-business, food processing/manufacturing and clean technology).
- Halton Hills has a relatively high concentration of jobs in the food processing, advanced manufacturing, warehousing and logistics, and agri-business sectors.
- Demand for shovel-ready employment lands is exceeding supply.
- Halton Hills offers a high quality of life, highly skilled workforce, high household incomes and leadership in climate change.
- A comprehensive Business Retention and Expansion (BR&E) program is needed to support economic activity.

For more details, refer directly to the [Executive Summary of Initial Findings \(March 2020\)](#) document.



This Background Discussion Paper includes the results of comprehensive stakeholder consultation. It, along with the [Executive Summary of Initial Findings \(March 2020\)](#), provides the foundation for the development of the draft Economic Development and Tourism Strategy.

3. Community Engagement

This section provides a summary of the main themes that emerged from stakeholder consultation activities completed to support the analysis and recommendations that will eventually be part of the Economic Development and Tourism Strategy. The input received will be reviewed and evaluated by the consulting team as the draft Strategy is developed, and be supplemented by the [Executive Summary of Initial Findings \(March 2020\)](#), best practices, SWOT analysis and professional knowledge.

The summary that follows highlights the perspectives and insights provided by participating stakeholders, businesses, residents, elected officials and staff. The goal of the consultation was to inform, consult and collaborate with a diverse range of residents and stakeholders.

This information should not be considered recommendations. Public input collected has not been modified – even in instances where some comments may not be accurate and/or do not accurately reflect actual Town and/or regional policies, work plans, priorities and/or practices. Comments may also not reflect the many successes already achieved in recent years in pursuing economic development and tourism objectives, as highlighted in the [Executive Summary of Initial Findings \(March 2020\)](#) report.

Figure 5 outlines the stakeholder consultation activities completed. Table 1 provides a schedule of community engagement and communication. The scope of consultation was broad and represented a multi-pronged approach. Several communication methods were used, in addition to regular input from a project steering committee. A brief summary of the background and methodology of each consultation activity method follows.



Figure 5: Summary of Stakeholder Consultation Activities





Visioning Workshops	Interviews	Focus Groups	On-line Surveys
 <ul style="list-style-type: none"> • Project Steering Committee • Halton Hills Senior Management Team • Tourism Advisory Committee • Detailed Responses in Appendix A (Economic Development) and Appendix B (Tourism) 	 <ul style="list-style-type: none"> • Council • Business Community Leaders • Key Stakeholders (25 for Economic Development; 23 for Tourism) • Detailed responses in Appendix E (Economic Development) and Appendix H (Tourism) 	 <ul style="list-style-type: none"> • 2 for Economic Development • 2 for Tourism • Presentations to Georgetown & Acton BIAs • Detailed responses in Appendix I (Economic Development) and Appendix J (Tourism) 	 <ul style="list-style-type: none"> • Sept. 17 – Oct 11, 2019 • 103 responses to Economic Development Survey • 91 responses to Tourism Survey • Detailed responses in Appendix L (Economic Development) and Appendix N (Tourism)

Table 1: Detailed Consultation Schedule and Communication/Promotion Plan

Date	Item	Format/communication tools
June 7	Strategic Plan Launch	• Meeting Project Steering Committee
August 23	Initial Findings	• Meeting Project Steering Committee
August	Interview invites	• Email, telephone follow-up
August 12	Focus Group Save the Date notification	• Email
August 29	Council interviews	• Email, telephone follow-up



Sept. 16 - Oct. 15	Tourism and Economic Development Survey Launch	<ul style="list-style-type: none"> • Media release • Email distribution through business and community networks • Web page posting • Social media • Newspaper notifications • Business cards with survey link • Hard copy surveys at libraries • Banners at local events • TV monitors at Town facilities
August 23	Focus Group invites	<ul style="list-style-type: none"> • Email
August 28	Visioning Workshops (Project Steering Committee, SMT)	<ul style="list-style-type: none"> • Email
September 17	Focus Groups	<ul style="list-style-type: none"> • PowerPoint presentation, facilitated discussions, summary report
Aug. 6 - Sept. 17	Interviews	<ul style="list-style-type: none"> • Individual in-person interviews, (telephone if stakeholder prefers)
Throughout October	Presentations	<ul style="list-style-type: none"> • Presentations to the Halton Hills Chamber of Commerce Economic Development Committee, Acton BIA and the Georgetown BIA
October 7	Survey Reminder	<ul style="list-style-type: none"> • Email distribution through networks • Web page • Social media • Newspaper notification
October 10	Information meeting and discussion	<ul style="list-style-type: none"> • Meeting with new Tourism Advisory Committee
February 1	Review Discussion Report	<ul style="list-style-type: none"> • Meeting with Project Steering Committee
March 1	Executive Summary of Initial Findings	<ul style="list-style-type: none"> • Reviewed by Project Steering Committee
Ongoing	Economic Development E-Newsletter	<ul style="list-style-type: none"> • Updates on Strategy progress are regularly provided to subscribers
TBD	Draft Strategy Review	<ul style="list-style-type: none"> • Meeting with SMT, Project Steering Committee
TBD	Economic Recovery and Resilience Plan Review	<ul style="list-style-type: none"> • Meeting with SMT, Project Steering Committee



3.1 Focus Groups and Visioning Sessions

Participants	Date
Project Steering Committee	August 28, 2019
Community Focus Group 1	September 17, 2019
Community Focus Group 2	September 17, 2019
Senior Management Team (SMT)	October 2, 2019
Tourism Advisory Committee Meeting (facilitated by staff)	October 10, 2019

The Halton Hills' Economic Development and Tourism Strategy Project Team hosted two economic development focus groups, and one tourism focus group, with representatives from tourism-related businesses, festivals and event coordinators, BIAs, the Chamber of Commerce, municipal and regional government bodies.

Each group received a brief presentation on the project process and the Project Team's Initial Findings. The participants were then asked to divide into smaller groups and provide their insights on a series of questions.

The participants' responses regarding economic development are summarized in Section 4, and responses regarding tourism are summarized in Section 5. The list of questions asked, along with detailed responses from the focus group and visioning session participants, are included in Appendices A (economic development) and B (tourism).

3.2 Interviews

A total of 25 interviews were conducted between August 28 and September 20, 2019 with business, community leaders, elected officials and staff that contribute to Halton Hills' economic development. The consulting team also conducted interviews with 23 individual stakeholders in Halton Hills' tourism industry.

Representatives from civic institutions, tourism-related organizations, tourism operations and service providers (i.e. accommodations, attractions, agri-tourism businesses, foodservice, retail, recreation, etc.), and municipal and regional government departments (economic development and tourism) were invited to participate in the discussions. Discussion guides were provided by the consultants during these meetings to provide a framework for the conversation.



Stakeholder interviews presented an opportunity to have pointed discussions with a range of stakeholders in Halton Hills. This was a valuable opportunity to gather a range of responses relevant to various opportunities and challenges to economic development and tourism development in the Town (be it issues with marketing and strategic coordination, or opportunities for attractions or new experiences).

The key themes of participants' responses regarding economic development are summarized in Section 4, and responses regarding tourism are summarized in Section 5. For the complete list of interview questions, participants and detailed responses, refer to Appendices C through H.

3.3 Online Surveys

Two online surveys were developed – one was prepared to help shape the overall Economic Development Strategy, while the second was designed to gain input on Halton Hills' tourism industry.

There was a total of 103 completed economic development surveys. The majority of respondents (55 percent) were residents of Georgetown. A further 16 percent were from Acton, 12 percent were from the hamlets or rural areas in Halton Hills, and another 17 percent of respondents did not live in Halton Hills.

The largest share of respondents worked in Georgetown, followed by 23 percent who worked outside the Town. Ten percent of respondents worked in Acton, with two percent working in the hamlets or rural areas in Halton Hills. Only one percent worked in the Premier Gateway Employment Area. 21 percent of the respondents did not work (students, unemployed, retired, etc.).

Understanding the social media channels these respondents use will help Halton Hills determine the most appropriate and popular social channels for these individuals. Three quarters of the respondents indicated that they used Facebook. Google was also popular with 67 percent of respondents. YouTube, Instagram and LinkedIn also ranked highly with approximately half of the 103 respondents indicating they used these three channels.

The employed respondents were asked to identify their role with their employer. Over one third of the respondents were the business owner, while 28 percent were employees and 23 percent were managers or supervisors. The largest share of the respondents came from very small businesses that were either owner-operated or under five employees. There was also a larger share of respondents who worked in large organizations with over 100 employees.



The second survey, focusing on Halton Hills' tourism industry, had a total of 91 respondents. It included an opinion-based section focusing on the present and future needs of the tourism industry, as well as questions specific to people that work in the industry.

Both surveys were made available via web link to the public on the *Let's Talk Halton Hills* website on September 17, 2019 and were closed on October 15, 2019. The key themes identified in the online survey regarding economic development are summarized in Section 4 and responses regarding tourism are summarized in Section 5. The list of economic development survey questions and detailed responses are included in Appendices K and L. The list of tourism survey questions and detailed responses are included in Appendices M and N.

4. Economic Development Stakeholder Consultation – Themes Identified

The main themes identified through all public and stakeholder consultations, related to Economic Development specifically, are shown in Figure 6. These themes were identified across the visioning workshops, interviews, focus groups and online surveys. The summaries are organized by the following themes, rather than by consultation activity:

- 4.1 - Diversity
- 4.2 - Transit
- 4.3 - Land and Buildings
- 4.4 - Downtowns
- 4.5 - Regulatory Process
- 4.6 - Housing
- 4.7 - Economic Development Programs
- 4.8 - Access and Strategic Location

For a summary of the themes identified through the Tourism-specific consultations, refer to Section 5.



Figure 6: Stakeholder Themes Identified – Economic Development



4.1 Diversity

In each of the four consultation activities (visioning workshops, interviews, focus groups and online survey) participants brought up the importance of diversity when positioning Halton Hills for future growth. Diversity by type of business, assessment and residents were the most common themes for all of the focus group participants when describing their vision of success. The theme of diversity was specifically related to:

- **Job/Employment Diversity** – Finding skilled workers was a common concern among businesses, community leaders, elected officials and staff. Some participants noted the connection between staff shortages and the lack of housing diversity in Halton Hills. Others spoke about limited diversity in the local workforce compared to other parts of the GTA.
- **Industry Diversity** – Stakeholders said they would like to see greater diversity in the types of businesses in Halton Hills, with an emphasis on manufacturing and other globally-focused businesses to balance the commercial businesses serving local residents. Some individuals said the Town should ensure that there is sufficient quantity and diversity of employment land and buildings for large and small businesses in the Premier Gateway Employment Area, as well as in Georgetown and Acton. In the Project Steering Committee Visioning Session, employment sector diversification was identified as being an important part of local resilience when faced with changes in the economy.



- **Population Diversity** – Interview participants said they would like to see greater diversity in the population (by age, gender, ethnicity and skills), and that they felt housing stock was limited in terms of both rented and owned properties.

4.2 Transit

Public Transit was raised several times in the stakeholder interviews, with participants noting that the lack of a local transit system was a factor in staffing shortages and a distinct disadvantage with real impact for residents earning lower wages. Interviewees said that they wanted a transit plan that connects workers from Halton Hills and neighbouring communities with employers and employment lands throughout Halton Hills. There was also strong support for advocating for regular GO Transit service as soon as possible.

In the online survey, Public Transit scored lowest in respondents' satisfaction rankings, with 53 percent of respondents reporting being either somewhat, or very, dissatisfied. When asked about the disadvantages of investing and doing business in Halton Hills compared to other communities in Ontario, online survey respondents identified the lack of transit and improvements to existing GO Transit service as the most common responses. Furthermore, providing local transit and GO Transit improvements was tied for the number one response when respondents were asked about the greatest opportunities to stimulate economic growth in Halton Hills. Focus group feedback closely aligned with the online survey results.

4.3 Land and Buildings

Several stakeholders that were interviewed recounted challenges in finding sufficient land or buildings to expand their operations – especially the small and medium-sized businesses in Georgetown and Acton. They said the lack of available and serviced employment land was restricting the Town's ability to address the needs of existing businesses and prospective investors. They did, however, speak of the strengths of available employment land in Acton and additional employment land that will soon be available for new developments in the Premier Gateway.

Some stakeholders said that they would like to see more greenfield employment land to support new development, while others spoke about adopting green building standards or using a ratio of jobs-to-building footprint. A couple of individuals noted the need to balance land development with parks and natural community assets.

Online survey respondents identified "lack of serviced land, range of serviced lots, lack of buildings, access and investment in infrastructure" as being the second largest disadvantage to investing and doing business in Halton Hills (21 percent of



respondents). Survey respondents also ranked “employment land, buildings, infrastructure to employment land and development support” as the second highest opportunity area for stimulating economic growth in Halton Hills. Efficient development processes was ranked as very important by 70 percent of survey respondents, followed by availability of building and land at 64 percent.

In the focus groups, one group talked about the supply of employment land that will soon be available in Halton Hills while there is a limited supply of employment land elsewhere in the GTA. The focus groups also identified the lack of shovel-ready serviced land as a barrier to Halton Hill’s economic growth.

4.4 Downtowns

In the stakeholder interviews, almost all of the participants said they wanted vibrant downtown cores with a strong retail component. They thought there was potential to support more residential development in both Georgetown and Acton downtown cores with a variety of housing types, density and ownership.

Online survey respondents identified Downtown revitalization (including increased parking, community development programming, retail attraction and support) as the third greatest opportunity to stimulate economic growth in Halton Hills.

A common theme from focus group participants was that increased awareness of Halton Hills revitalized downtowns was needed. Focus group participants echoed stakeholders interviewed in suggesting that more Downtown development – in terms of mixed-use properties, including residential and specialty retail/restaurants – would contribute to a successful and thriving Halton Hills in the future. Limited parking in the Downtown cores was also identified as a possible threat for tourism development.

4.5 Regulatory Process

The multiple approval authorities required for development in Halton Hills, along with an approval process that was seen as being too long and a comprehensive zoning by-law that is too restrictive, were all identified as barriers to local economic development in the stakeholder interviews. Some participants identified this as a possible opportunity for the Town to help developers navigate regulatory requirements and streamline review processes. Participants agreed that timely and efficient processes should be a key priority for Economic Development staff.

When online survey participants were asked about the disadvantages of investing and doing business in Halton Hills compared to other communities in Ontario, regulatory processes (including approval process and timing, inflexible regulations and by-laws)



was the second highest response behind the lack of public transit. 70 percent of survey respondents ranked efficient development process as very important. Efficient development processes were also ranked second in the top five most important factors for creating and maintaining a strong economy in Halton Hills. Additionally, 52 percent of survey respondents were somewhat or very dissatisfied with current development processes.

The theme of a cumbersome regulatory process was also discussed in the focus groups. A suggestion was made that the municipality should walk people through the development process to better facilitate it. Others commented that there are too many municipal departments to go through, and that the process needs to be streamlined. Streamlined development processes came up regularly across each of the focus groups. One group also discussed the positive impact that improved infrastructure (e.g. water, waste water, telecommunications and high-speed internet) would have on investment and speed of development.

4.6 Housing

Some interview participants noted the possible connection between local staffing shortages and the lack of housing diversity in Halton Hills. This theme was discussed in the focus groups as well, with some participants sharing their belief that available local jobs don't align with the cost of housing (i.e. lack of affordable housing).

Many participants supported increasing the variety of housing types, density and ownership in Downtown cores, and their future vision for the Town included a diversity of housing stock, including owned and rented properties.

Housing affordability and range of housing options was also identified by 48 percent of online survey respondents as an important factor in creating and maintaining a strong economy. Six percent of survey respondents identified housing as one of the greatest opportunities to stimulate economic growth in Halton Hills by increasing affordable, accessible housing and providing a diversity of housing stock (e.g. townhouses and condos).

4.7 Economic Development Programs

In the interviews, participants saw a real opportunity to leverage quality of life and the well-educated residents to promote Halton Hills as a source of a quality workforce. Several spoke about the opportunities to access U.S. markets by using Halton Hills as a soft-landing point. Other individuals spoke about the potential to attract businesses with a sustainability mandate; specifically, that the Town should provide leadership and



support to green development by providing incentives and targeting prospective investors with environmental priorities that are similar to those of Halton Hills.

Other interview participants spoke about challenges the local agriculture sector would face without adequate supply of agricultural lands. Many stakeholders expressed concerns about the potential impact of an imbalance of residential and agricultural assessment.

In the online survey, respondents ranked Economic Development Programs (e.g. supports for small business, investment attraction, promotion, commercial development, business retention, existing business, work from home, partner collaboration) as tied, with transit, for the greatest opportunity to stimulate economic growth in Halton Hills.

The largest share of survey respondents (61 percent) agreed or strongly agreed that Halton Hills has an attractive image for prospective business investors. 55 percent of respondents also agreed or strongly agreed that there are sufficient services to support business start-ups. However, respondents were mixed on the Town's business investment promotion. Slightly more than half disagreed or strongly disagreed that the Town was aggressively promoted to prospective business investors.

The importance of the availability of economic development services in creating and maintaining a strong economy was ranked as 'very important' or 'somewhat important' by 85 percent of survey respondents while 64 percent of respondents were either very satisfied or somewhat satisfied with this factor. Some respondents spoke about the need for community-specific strategies that recognize the unique strengths and nature of the communities in Halton Hills. Suggestions included providing incentives, investment attraction, promotion and commercial development initiatives.

4.8 Access and Strategic Location

Interview participants spoke about the Town's location close to Toronto with access to all the amenities in Toronto and the broader GTA. They described Halton Hills as a commuter town with a mix of professional and blue-collar workers. They identified location as a significant advantage, providing easy access to Toronto and the GTA, and all the resources in the region. They spoke about the Town's strong transportation linkages, including close proximity to major highways, rail service and Pearson Airport. However, they also called for the Town to address growing traffic congestion problems, as additional traffic could negatively impact residents' quality of life and impact businesses' access to markets.

In the online survey, respondents were asked to identify those advantages of investing and doing business in Halton Hills that differentiate the Town from other communities in Ontario. The most common answers were related to Halton Hills' location, namely the



Town's location in the GTA and the easy access to highway networks, Pearson Airport and larger markets. Location was mentioned by 53 percent of respondents as a key advantage of investing and doing business in Halton Hills when compared to other communities in Ontario. Access to highways and growing traffic congestion was also a common theme in the online survey, with 13 percent of respondents saying required improvements to transportation routes and traffic congestion was a disadvantage of investing and doing business in Halton Hills.

The focus groups were well-aligned on the topic of access, all stating similar barriers to growth. The most common barriers included the lack of accommodations, no public transit/accessibility, and the lack of wayfinding and advertising. Several groups mentioned that without a car, Halton Hills is not accessible, especially considering the wide-spread communities and attractions. However, the focus groups also agreed that Halton Hills' accessible transportation linkages were a key strength.

5. Tourism Stakeholder Consultation – Themes Identified

A Tourism Sub-Strategy is being developed through extensive consultation with the public and a range of key regional and local stakeholders (community groups, business, public, private and not-for-profit) through a variety of means. This Sub-Strategy will be an important element of the overall Halton Hills Economic Development and Tourism Strategy.

Over the August to October 2019 period, the consulting team conducted interviews with 23 individual stakeholders in Halton Hills' tourism industry, prepared an online survey, and hosted visioning sessions and a dedicated tourism focus group. Section 5 provides a summary of the tourism-specific stakeholder input and is based solely on views expressed throughout stakeholder interviews, workshops, focus groups and the online survey. Information obtained from these consultations will be used, together with other research, to help develop recommended actions, roles and responsibilities, and other aspects of the Tourism Sub-Strategy as appropriate. The following main themes were identified through the tourism consultation activities (also shown in Figure 7):

- 5.1 - Product and Experience Clusters
- 5.2 - Key Target Markets
- 5.3 - Destination Development
- 5.4 - Visitor Information Services
- 5.5 - Event Support
- 5.6 - Wayfinding/Signage
- 5.7 - Visitor Friendliness
- 5.8 - Overnight Accommodations
- 5.9 - Marketing and Promotion
- 5.10 - Partnerships



As with the Economic Development findings, this information should not be considered recommendations. The views expressed do not necessarily reflect the views and opinions of the consulting team. Comments may also not reflect the successes already achieved in recent years in pursuing economic development and tourism objectives, as highlighted in the **Executive Summary of Initial Findings (March 2020)** report.

Figure 7: Stakeholder Themes Identified - Tourism





5.1 Tourism Product and Experience Clusters

When asked to identify the main reasons why people visit Halton Hills, interview participants provided a relatively short list. The list was then divided into the following categories, and ordered by the number of total mentions.

Table 2: Halton Hills Tourism Key Products/Experiences

Tourism Cluster	Key Products/Experiences	% Mention
Nature & Outdoors	Cycling, trails, hiking, hills, rural areas, Escarpment, wellness	27%
Historic Downtowns/Rural Communities	Getting out of the City, Hamlets (Limehouse, Glen Williams), local small-town experience	18%
Festivals & Events	Head for the Hills, Acton and Georgetown Fall Fairs, Leathertown Festival, Light up the Hills	15%
Retail/Shopping	Toronto Premium Outlets (TPO), boutique retail in historic downtowns	10%
Visiting Friends & Relatives	Seasonal events, family gatherings	9%
Arts & Culture	Art installations, local studios, artisan communities, Georgetown Theatre, Lucy Maud Montgomery	7%
Agri-Tourism	Farmers markets, family farm/pick-your-own experiences	6%
Sports & Recreation	Hockey, soccer, skating, visiting tournaments	6%
Culinary Tourism	Ice cream, wine bars and brew pubs	1%

The key takeaways for future product and experience cluster development, identified from these findings, are:

- Nature and outdoors, Festivals and events, agri-tourism and shopping are the primary motivators for day trips.
- Arts and Culture is a growing cluster, with existing assets and experiences starting to grow in popularity not just for residents, but for tourists as well.
- Culinary Tourism is also emerging, but many businesses are closed weekends, which makes it difficult to include on itineraries.



5.2 Key Target Markets

Stakeholders interviewed identified several key tourist markets for Halton Hills, including the following:

- Visiting Friends and Relatives (VFR)
- Young Families (engaging in agri-tourism and visiting rural communities)
- Short-term Stays from the GTA
- Cyclists
- Eco-tourism (including hiking, naturalists, etc.)
- Sport Tourism (including hockey, soccer, baseball)
- Artist Community
- International tourists (particularly for TPO)

Stakeholders felt that some of these key tourist markets were not being reached, stating that the communication process for providing visitors with information was especially confusing. As an example, stakeholders mentioned that there is currently no tourism-specific social media stream for tourists to engage with.

Stakeholders also stated that domestic tourism should be the top priority, with VFR being the most lucrative, as it is easy to reach this market through local residents inviting their friends and family to Halton Hills. Further, the Town should build on and find new ways to keep the VFR market engaged during all four seasons.

Suggestions also included better promotion of Halton Hills, especially targeting families in the GTA, and leveraging existing assets by offering more trail and outdoor experiences. For instance, learning what visitors are coming for and adding experiences to their day (e.g. a list of restaurants located throughout Halton Hills for TPO visitors, or educational signage on trails).

5.3 Destination Development¹

Interview participants provided the following positive suggestions for implementing a new Tourism Sub-Strategy:

- Improve key existing assets and build on Halton Hills' strengths (i.e. connecting and organizing trail systems for cycling and hiking),

¹ Destination Development is the strategic planning and advancement of defined tourism offerings to support the evolution of desirable destinations for travellers. It focuses on the supply side of tourism, including providing compelling experiences, as well as quality infrastructure and services that encourage tourist visitation.



- Educate and inform residents to help them understand the tourism potential of Halton Hills.
- Consider developing elements that will benefit residents first, which in turn will help to manage visitor expectations.

According to respondents of the online survey, nature and outdoor tourism experiences are the primary tourism drivers to Halton Hills, followed by Agri-Tourism, Sports and Recreation, and Culinary Tourism. Retail/Shopping was tied for the fifth position along with Arts & Culture products and experiences.

When online survey respondents were asked to suggest any opportunities for new tourism activities that they would like to see, they listed:

- **Events** – including music festivals, a larger Leathertown Festival, car shows, and other outdoor festivals.
- **Accommodations** – including a new hotel, additional B&B establishments, and encouraging residents to become Airbnb hosts.
- **Trail Systems** – participants spoke of expanding trail systems to reach both Acton and Georgetown downtowns, and to offer more amenities for cycling and hiking.
- **New Community Buildings** – including a museum, an art gallery, a theatre, music centre, and meeting and conference centre.
- **Sport Tournaments and Facilities** – including hockey, pickleball, soccer and gymnastics, especially centred around adult leagues. There was also mention of offering bike rentals.
- **Agri-Tourism and Culinary** – suggestions included a beer tour, new restaurants, and better advertising of fall festivals and existing agri-tourism businesses such as Andrews Scenic Acres.
- **New Attractions** – including a cinema, indoor playground centre, indoor trampoline park, indoor mini golf, spa, and casino.
- **Improved Marketing** – of existing festivals, attractions, and experiences.

Survey respondents were asked to provide an indication of their agreement with five statements relative to tourism in Halton Hills. Approximately 60 percent of participants choose either “Strongly Disagree” or “Somewhat Disagree”, when asked whether Halton Hills has provided sufficient services to support tourism businesses and has historically been successful in its efforts to promote tourism and attract more visitors. (The Town of Halton Hills took over management of the Tourism portfolio in 2018.) However, 60 percent of respondents also displayed positive sentiments when asked whether Halton Hills presents an environment where tourism businesses can succeed.

When asked for further input, respondents were varied in their opinions. Several respondents stated that Halton Hills is not a tourism destination and that they do not want it to become one. Other participants stated that Halton Hills needs to do more to



promote tourism across the region with new infrastructure, wayfinding and marketing. A common thread in respondents' comments was the desire for tourism products and experiences, regardless of form, to benefit not only out-of-town visitors, but also locals.

Survey participants were asked about their "favourite destination" in Halton Hills. The most popular answers have been consolidated into the following list:

- Bruce Trail and other unnamed conservation areas and trails
- Glen Williams, including Williams Mill
- Toronto Premium Outlets
- Acton Leathertown festival
- Furnace Room Brewery
- Downtown Georgetown and/or Acton
- Chudleigh's
- Farmer's markets
- Hungry Hollow
- Limehouse
- Georgetown Craft Beer Festival
- Lucy Maud Montgomery Gardens
- Prospect Park and Fairy Lake

When the topic of Destination Development was discussed in the focus groups, participants said that Halton Hills is known as a destination for arts, wellness, outdoors and sustainable tourism practices. They said that a successful tourism sector in Halton Hills would result in the following key changes within the next five years:

- Increased visitation and spending at tourism businesses
- Increased length of stay for tourists
- More tourism-related jobs
- More overnight accommodations
- Vibrant downtown hubs with restaurants, events and unique experiences
- Better wayfinding and connection of trail systems (i.e. Credit Valley Trail)
- Local residents use and promotion of local tourism assets and experiences
- Better partnerships and collaboration between operators
- Better awareness of Halton Hills as a destination, as measured by website hits
- Increased tourist attendance at local events
- Halton Hills becoming known as a destination for arts, wellness, outdoors and sustainable tourism practices
- Halton Hills becoming known as 'easy to visit' with more tourism infrastructure and packaged experiences
- Maintenance of the small-town feel despite a growing tourism industry



5.4 Visitor Information Services

Most interview stakeholders identified a need to improve visitor information services in Halton Hills, but there was also a common sentiment that there would not be enough walk-in business to justify support for a full-time tourism office. One suggestion was to develop a kiosk or pop-up booth that focuses on local tourism businesses and events, potentially located at the Toronto Premium Outlets. Electronic kiosks could also be put in different locations with similar signage around the Town.

Common issues raised in conjunction with the need for visitor information services were the requirement for better wayfinding and signage, as well as basic visitor information training for staff working at Town facilities and business serving the tourism industry. Some suggestions included:

- Have a promotional event for festivals and events at the Toronto Premium Outlets (TPO)
- Use electronic media (focus on TripAdvisor and Google) to get people to area, and paper collateral to help them stay
- Provide more maps (i.e. Cycling, Pumpkin Trail, etc.)
- Information kiosks at TPO; though this may need to be a regional initiative.

5.5 Event Support

In the stakeholder interviews, some individuals noted that volunteer levels are decreasing, as many volunteers are older, and identified this as a pressure/threat for tourism development in Halton Hills. They also mentioned the requirement to rent equipment from the Town as a limiting factor for those seeking to establish local events.

According to respondents of the online survey, broader promotion of local festivals and events and new/enhanced accommodations were the highest priority improvements to stimulate Halton Hills' tourism industry. When asked for suggestions that may help grow tourism in Halton Hills, respondents also identified the need to support the growth of local events and festivals.

5.6 Wayfinding/Signage

Stakeholders interviewed identified signage limitations for businesses and events, as well as trails that are not connected to Downtowns, as pressures/threats for tourism development in Halton Hills.



The focus groups were also well-aligned on this question, all stating similar barriers to growth, including: lack of wayfinding and advertising, and the need for better connection of trail systems (i.e. Credit Valley Trail). Several groups mentioned the need for additional signage on trails, specifically, and the lack of public rest stations.

Many online survey respondents also mentioned the need for more signage leading to, and within, Halton Hills.

5.7 Visitor Friendliness

Interview participants identified the following pressures/threats to Halton Hills' visitor friendliness:

- Retailers are often closed Sunday/Monday
- Operators have limited knowledge of other events, attractions and foodservice establishments to direct tourist
- Parking is limited in downtown cores

Some participants supported the idea of offering 'visitor friendliness' training for small businesses (i.e. retail, restaurants), including suggestions to extend store hours to evenings and to open on weekends. Online survey respondents also suggested the extension of operating hours for retail and restaurants as a way to help grow tourism in Halton Hills.

5.8 Overnight Accommodations

Tourism-specific stakeholders echoed the economic development stakeholders' sentiments about the Town's limited capacity for quality overnight accommodations.

In the online survey, new/enhanced accommodations was the second highest priority improvement for Halton Hills' tourism industry.

Focus groups were also aligned with this question, stating that more overnight accommodation options would help increase the length of stay for tourists, leading to increased visitation and spending at tourism businesses.

5.9 Marketing and Promotion

Stakeholders had several suggestions for Tourism Marketing Opportunities, stating that Halton Hills is currently lacking in this area. Stakeholders mentioned they felt this is in part due to insufficient funds, as well as a historic lack of strong direction regarding



Tourism in Halton Hills with no dedicated Tourism staff member. They said additional funding allocated to product development and brand recognition would go a long way towards improving tourist awareness and visitation to the Town.

Community differentiation and the lack of integration/cross-promotion between communities were identified as pressures/threats for tourism development in Halton Hills. Stakeholders suggested that the perceived rivalry between Georgetown and Acton could present a challenge for cross-promotion and tourism players working together.

Most of the opportunities identified by stakeholders focused around creating strong partnerships, but online presence was also mentioned. Suggested opportunities to improve online presence included:

- No clear tourism website; comments included there are too many different websites and customers are confused which website to use
- Better leveraging TripAdvisor and Google reviews
- Building up content-based experience versus just listing experiences
- Providing online itineraries
- Incorporating the 'natural' element of Halton Hills, as the current look and feel is too corporate/bureaucratic
- Making better use of key descriptors such as: rich agricultural lands, nature, small town feel, getting out of the city, relaxing.

Online survey respondents believed that better advertising and promotion of Halton Hills (including promoting the hamlets' 'unique personalities', a better website, itineraries and social media) would be an effective way to help grow local tourism.

5.10 Partnerships

While many focus group stakeholders identified strong tourism assets in Halton Hills, they also highlighted the need for coordination, as they felt the local tourism industry is currently disjointed and both residents and tourists are largely uninformed about local tourism offerings.

When asked about future marketing opportunities, interview stakeholders provided several suggestions, most of which centred around better leveraging partnership opportunities:



Table 3: Tourism Marketing Opportunities Identified by Stakeholders

Marketing Opportunity	Stakeholder Suggestions
Regional Partnerships	<ul style="list-style-type: none">• Partner with RTO3 on regional promotion with marketing and data collection• Partner with RTO4 (the bordering RTO) to promote agri-tourism and arts (e.g. Glen Williams)
Local Partnerships	<ul style="list-style-type: none">• Increase cross-promotion among tourism players (e.g. School boards, recreation clubs, sport tourists, partner with TPO to promote the rest of Halton Hills)• Package existing experiences (e.g. outdoor, culture, and shopping)
Halton Hills Tourism Division	<ul style="list-style-type: none">• In order to take on special projects, there may be an opportunity to acquire sponsorship funding or to leverage Halton Region resources

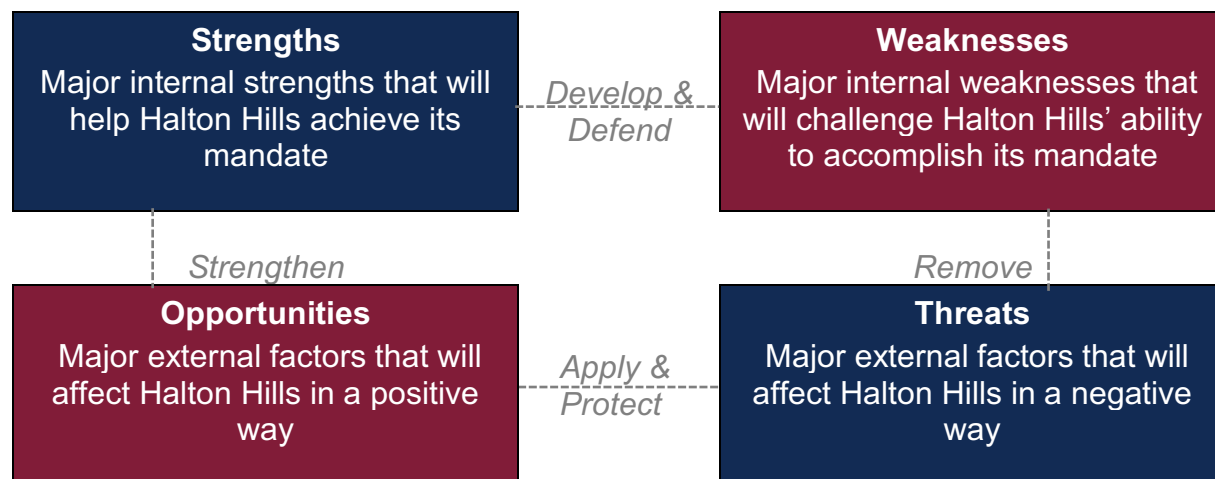
Online survey respondents were also aligned with regards to partnerships, listing improved collaboration between industry partners and operators as a way to help grow tourism in Halton Hills.



6. SWOT Analysis

A SWOT (strengths, weaknesses, opportunities, threats) analysis considers the internal and external factors that can affect Halton Hills' economic development and tourism objectives. The SWOT analysis process entailed a comprehensive review of the internal and external components that have the potential to impact Halton Hills' ultimate success.

The SWOT analysis will help determine those internal and external factors Halton Hills can build upon and those which must be mitigated.




The following tables provide a summary of the strengths, weaknesses, opportunities and threats related to the overall economic development and tourism potential, and those factors that are specific to tourism, the green economy, brownfield redevelopment and marketing. The SWOT analysis is based on the [Executive Summary of Initial Findings \(March 2020\)](#) report, stakeholder engagement, best practices review and the professional assessment of the consultants.

Numerous actions and projects are already underway to directly address some of the items identified as weaknesses or threats. Further information is available in the [Executive Summary of Initial Findings \(March 2020\)](#) report.



6.1 Strengths

Major internal strengths that will help Halton Hills achieve its mandate:

	Overall Strengths
<ul style="list-style-type: none">• Workforce – growing population, high participation rate, smaller share set to retire (population over 55) and growing future workforce (population under 20)• Location – proximity to GTA, major markets, highway networks, Pearson Airport• High quality of life – attractive for potential residents and for prospective employers• Small town charm/feel, safe neighbourhoods, safe destination• Affluent residents – strong purchasing power for local businesses• Well above average concentration in employment in manufacturing, agriculture and retail trade• Above average employment concentration in transportation and warehousing, recreation and public administration	

	Tourism Strengths
<ul style="list-style-type: none">• Mature nature and outdoor offerings, including forests, fields and farms, the Greenbelt and Niagara Escarpment, as well as cycling and hiking trails (Credit Valley Trail, etc.)• Active festival and event culture, with locally-driven festivals (e.g. Highland Games, Leathertown Festival, etc.)• Variety of culinary tourism and agri-tourism offerings (e.g. farmers markets, brew pubs, wineries and restaurants)• Heritage and culture assets in hamlets and other cultural tourism experiences (e.g. Lucy Maud Montgomery Children's Garden, Cultural Asset Tours, Public Art Initiative, etc.)• Toronto Premium Outlets – Halton Region's largest retail operation and biggest attraction in Halton Hills• Excellent sports facilities are already drawing out-of-town visitors for tournaments• Halton Hills' staff track festival attendance and gather valuable market data through surveys at events• Recreational experiences for all seasons (e.g. golf, hiking, cross-country skiing, etc.)• Perceived as a safe, family destination• New Tourism Advisory Committee with local and regional stakeholder participation• Launch of the Tourism Ambassador Program	



Brownfields Strengths

- Community Improvement Plan in place
- Town has delivered two Brownfield financial Incentives
- Secondary Planning for one key Brownfield completed (Georgetown GO Station)
- Region of Halton has a program that may support Halton Hills' Brownfield remediation efforts



Green Economy Strengths

- Demonstrated commitment to becoming a leader in addressing climate change and related programs via the Town's commitment to become a Net-Zero community by 2030
- Recognized leader in sustainability policy and programming and addressing climate change among smaller Canadian communities
- \$1.3 million included in 2020 budget for climate change initiatives, including a Low-Carbon Transition Strategy
- Recognition of the connection between economic development and climate change, as well as the associated benefits achieved from aligning economic development and climate change objectives
- Dedicated staff resources in place to lead climate change initiatives




Marketing Strengths


- Corporate Communications supports economic development initiatives
- New Economic Development website, video, social media efforts
- Evolving marketing efforts
- New marketing video to promote Halton Hills, which could be re-edited to be used as an Economic Development campaign
- A strong Economic Development logo
- Town staff have indicated that additional funds may be available to support marketing initiatives, if required
- Social media efforts are gaining momentum
- Economic development and tourism functions are evolving with new staff allocations and new marketing tools under development
- A digital economic development newsletter
- Using local TV to promote 'grand openings' is good for public relations



6.2 Weaknesses

Major internal weaknesses that will challenge Halton Hills' ability to accomplish its mandate:

	Overall Weaknesses
<ul style="list-style-type: none">• Employers reporting a shortage of skilled workers• No local transit to facilitate movement of workers or tourists• Increasing congestion that threatens quality of life• Greater number of approval authorities relative to most other jurisdictions complicates the development review process• Perception of a restrictive development approvals process• Very limited supply of land and buildings for prospective investors• Diversity of housing stock is limited• As smaller size community, Halton Hills doesn't have the clout of some other neighbouring jurisdictions or regional peers• Confusion/awareness of community identity due to the amalgamated community, multiple community names and Halton Hills/Halton Region, multiple logos• Limited diversity in the Halton Hills' workforce• Some fundamental economic development tools/activities not in place (e.g. Community Profile, corporate visitation program)	

	Tourism Weaknesses
<ul style="list-style-type: none">• Minimal fixed roof accommodations, limiting overnight stays beyond visiting friends and relatives• Some operators lack awareness of visitor-friendly practices (i.e. businesses closed on evenings, weekends and/or Mondays; may not accept newer payment systems like WePay, which are important to international visitors)• Limited cross-promotion between local businesses, festivals and events, and other tourism experiences• Limited municipal tourism marketing budget compared to surrounding and similarly-sized communities• Restricted wayfinding and signage in and around Halton Hills, including wayfinding to direct visitors to various destinations and hamlets within the Town• No central 'hub' for visitors or experiences in the Town• Current tourism website and events calendar do not provide sufficient information to effectively engage out-of-town visitors	



- Trail systems within Halton Hills are not connected (e.g. Credit Valley Trail, Bruce Trail, Escarpment Trail, etc.)
- Lack of public restroom facilities and other tourism infrastructure (i.e. Visitor Information Centre)



Brownfield Weaknesses

- Modest financial resources (Town and Region) currently available to support significant brownfield redevelopment
- During the stakeholder consultation key brownfield landowners indicated they were not currently seeking to develop lands at the two GO stations and the South Acton lands. Staff has subsequently been advised there is some interest in redeveloping these lands
- Inaccurate/incomplete Brownfield mapping/data



Green Economy Weaknesses

- Lack of data regarding Halton Hills' existing Green Economy
- The Green Economy effort is new with relatively few municipal best practices to draw upon




Marketing Weaknesses

- Limited economic and tourism marketing resources to address an ambitious marketing mandate
- New Tourism website required to enable visitors to plan ahead and have e-commerce capabilities. Must improve ease-of-use for people who need to update information or post events
- Missing clear economic development and tourism messaging or 'call to action'
- Limited marketing materials, no current marketing or social media campaigns for economic development or tourism
- A weak Tourism logo/brand, (use of multiple logos is confusing)
- Lack of budget dedicated solely for tourism marketing
- Limited budget/human resources for both Economic Development and Tourism compared to neighbouring communities
- InvestHaltonHills.com economic development website is missing fundamental data (e.g. Community Profile, available land and building inventories)
- Content and technology need to be updated on the existing Tourism website



6.3 Opportunities

Major external factors that will affect Halton Hills in a positive way:

	Overall Opportunities
	<ul style="list-style-type: none">• Completion of the <i>Phase 1B Secondary Plan</i> will help facilitate investment opportunities in the Premier Gateway Employment Area• Initiation of the <i>Phase 2B Secondary Plan</i> will provide additional employment land supply between 2021 and 2031, and will help meet pent-up demand for employment land in GTA that has Highway 401 access. Thus, the Town is poised to have employment land along Hwy. 401 when other areas have run out of land• Transit plan underway – once established, it will help businesses attract and retain workers, and facilitate visitor movement• Vision Georgetown poised to attract more residents (workforce) and commercial activity• Expansion of GO train routes will make Halton Hills more attractive to commuter workforce• Efforts to expedite regulatory process via the Business Concierge initiative will help address approvals challenges• High commuting rates – opportunity to retain a greater share of the workforce locally• Increase in employment in the real estate sector reflects strong real estate activity in residential and small commercial sectors• Employment is shifting strongly toward retail and wholesale trade, food services and real estate sectors• Opportunity to leverage expanded post-secondary offerings, especially in nearby Milton, Guelph, Brampton and Mississauga• Local and regional municipalities and organizations (e.g. Halton Region, RTO3, Culinary Tourism Alliance) are open to exploring and strengthening strategic partnerships related to economic development, small business, tourism and brownfield redevelopment



Tourism Opportunities

- Local operators and municipal/regional governments are engaged in the development of the new Tourism Sub-Strategy, ensuring its long-term sustainability
- Rise in the number of development/investment inquiries relative to hospitality and tourism uses, given the Town's strategic location in the GTA, unique urban/rural mix and natural environment
- Trends of family-friendly, outdoor tourism experiences (agri-tourism, hiking, cycling trails) and culinary tourism are aligned with Halton Hills assets
- RTO3 mandate to support and facilitate partnerships with neighbouring Destination Management Organizations will lead to the efficient use of limited resources, and cross-promotion of tourism experiences
- Digital tools (e.g. maps, directories, databases, social, digital advertising) are more cost-effective than traditional media, allowing for more strategic and targeted messaging and greater impact with a limited economic development and tourism budget
- Canada's new tourism strategy is focused on authentic, off-the-beaten-path experiences and destinations, and aligns with Halton Hills' tourism products
- Large New Canadian resident market in the GTA that values family-friendly activities and outdoor tourism experiences, such as: agri-tourism, hiking and cycling trails, and culinary tourism – all available in Halton Hills
- Opportunity to leverage Toronto Premium Outlets' popularity for food and beverage and entertainment options elsewhere in Halton Hills
- Potential to attract larger sporting events to Trafalgar Sports Park and the Gellert Community Centre
- Potential to leverage Halton Hills' health and wellness experiences both indoor and outdoor, and year-round
- Potential to attract greater speciality retail to Downtown cores of Georgetown and Acton
- Trend towards developing tourism experiences over attractions aligns with Halton Hills offerings
- Potential to engage the private sector to combine tourism assets of trails, with agri-tourism and culinary tourism offerings
- Third-party services such as TripAdvisor or Airbnb Experiences are inexpensive ways to promote Halton Hills experiences to a broader audience
- Untapped potential for tourism itineraries and packages combining existing activities and attractions (e.g. agri-tourism, cycling tour), as well as hotels in nearby municipalities
- The Culinary Tourism Alliance works directly with Ontario municipalities to develop culinary products and experiences that will attract culinary tourists
- Potential to leverage hotels in nearby communities to drive visitation



Tourism Opportunities

- Having a strong public sector ‘champion’ (i.e. a resource completely dedicated to tourism) can help break down tourism development barriers and lobby for private sector operator needs
- Growth in New Canadian resident markets is leading municipalities to adapt tourism offerings to changing demographics with different services, experiences, and languages



Brownfield Opportunities


- Limited greenfield properties could result in greater demand and investment potential for brownfield properties in the short-term
- Transit-oriented, mixed-use development proposed for the Georgetown GO lands is aligned with consumer demand for commuter focused residential development
- New approaches to increasing municipal funds available for Brownfield development
- Growing recognition of investment and community development associated with brownfield redevelopment



Green Economy Opportunities


- National economy is moving towards a ‘green economy’
- A growing number of businesses are including ‘going green’ as part of their corporate vision and mandate
- Provincial guidelines on permitted uses in prime agricultural areas expanded in 2016 to allow for greater agri-tourism and agri-business activity
- Halton Hills’ climate change and green development initiatives provide a strong foundation to support growth of local green economy
- Growing appreciation globally of the importance of green development aligns with Halton Hills’ established policies and programs
- Adaptive definition of what is meant by ‘Green Economy’
- Halton Region and other municipalities are already working to position the area as a Green Economy Hub



	Marketing Opportunities
<ul style="list-style-type: none">• Halton Hills' size and sustainability mandate serve to differentiate the Town from more developed neighbouring jurisdictions• Regional organizations – RTO3 and Halton Region – have the mandate to support Halton Hills' marketing efforts• Halton Hills has a compelling value proposition for business investment• Local business representatives that are strong advocates and provide first-hand experience of Halton Hills' features and benefits• A number of long-standing, thriving local businesses can help showcase and demonstrate Halton Hills' vibrant, successful business community• Town's Corporate Communications Division is available to assist and implement marketing initiatives, including marketing tools	

6.4 Threats

Major external factors that will affect Halton Hills in a negative way:

	Overall Threats
<ul style="list-style-type: none">• Agricultural businesses limited due to restrictions imposed on on-farm activities by land-owners and regulatory bodies• Older age of farmers – succession plans needed to sustain agri-business and farming activity• Developers own some of the agricultural land in Halton Hills and are restricting activity on the land to facilitate future sale and development, limiting agri-tourism and agri-business opportunities today• Growing traffic congestion threatens quality of life and shipping times/costs for existing businesses, and discourages TPO visitors from exploring the rest of Halton Hills• Larger markets provide strong competition for local retail and services• Pent-up demand could create approval process capacity issues when employment land becomes available• Existing businesses under pressure to grow may be forced to leave unless they can find additional land/building space in Halton Hills• Halton Hills does not offer the urban alternative many younger workers are seeking	



Tourism Threats

- The increasing age of local volunteers is negatively impacting volunteer capacity at events, as is staff capacity to assist in organizing local events
- Halton Region/RTO3 may be further impacted by a reduction in Provincial funding for tourism
- Limited local tourism data available through traditional sources such as Statistics Canada
- Competition from surrounding communities such as Milton, Burlington and Hamilton, which are already well-established and adept at drawing tourism to their communities
- Surrounding communities have strong accommodation infrastructure and some have, or were about to, implement a Municipal Accommodation Tax (MAT) for additional tourism funding
- Neighbouring communities are enhancing their retail offerings, which may diminish TPO's draw over time (e.g. new outlet mall planned for Brampton)



Brownfield Threats

- Other municipalities attracting investment have larger, better financed brownfield programs
- Potential for changes to provincial legislation, plans and regulations lessens demand, need and/or financial support for intensification



Green Economy Threats

- Planned future development in the Premier Gateway and in Georgetown could shift economic development priorities in Halton Hills
- Overall national shift to a Green Economy mutes Halton Hills' ability to differentiate itself from other municipalities, particularly larger GTA municipalities
- Forecast employment growth in the Premier Gateway continues to be dominated by sectors such as warehousing, distribution, wholesale trade and manufacturing that are not typically associated with the Green Economy



Marketing Threats

- Nearby competitors have established years of branding/marketing campaigns (and sophisticated supporting marketing materials) and larger budgets to get their messages out and are now recognizable and memorable
- Existing marketing budget is insufficient to create campaigns that could utilize the current marketing tools and trends to reach markets that may be responsive

7. Strategic Priorities for Consideration

Strategic Priorities are those factors that will have the most significant impact on Halton Hills' economy.

The following list is provided to initiate the discussion of strategic priorities. This list will be amended as the Town confirms its vision for economic development and tourism. It may also be amended in response to the COVID-19 pandemic. Once finalized, the strategic priorities will provide the foundation for the Halton Hills Economic Development Strategy along with the Tourism, Green Economy, Brownfield and Marketing Sub-Strategy recommendations.

Economic Development Priorities:

- Investment readiness – ensuring Halton Hills has all remaining key foundational economic development elements in place (e.g. land/buildings supply, human resources, marketing, data)
- Facilitating regular and structured engagement with local business community (e.g. development of a business retention and expansion program)
- Sector-specific initiatives – focusing on identified target sectors of advanced manufacturing (labour, transit, access to markets), agriculture/agri-business (permitted on-farm uses, succession planning), food processing (access to markets, room to grow), and arts and culture
- Ensuring adequate supply of land and buildings to meet investment demand
- Addressing development processes and perceptions
- Furthering development of Downtowns (e.g. mixed-use, specialty retail, restaurants) including the Destination Downtown Secondary Plan

Green Economy Priorities:

- Establishing the region (both Halton Region and neighbouring jurisdictions) as a Green Economy Hub
- Establishing a definition of what the 'green economy' means in Halton Hills



- Building on the Town's green economy leadership role achieved thus far, as well as the Town's ongoing commitment to future climate change actions
- Supporting more green development and adopting green building standards

Brownfield Priorities:

- Developing an inventory of the size and scope of local brownfield properties
- Providing greater financial support for both the Halton Hills and Halton Region brownfield redevelopment programs

Tourism Priorities:

- Tourism product development and market readiness (e.g. experiences and assets, bundling, itinerary-building)
- Targeting market segments (e.g. families, New Canadians, international visitors) that are aligned with the Town's existing experiences and assets (e.g. outdoor recreation, shopping at TPO, and successful local events like Culture Days, the Leathertown Festival, Highland Games, etc.)
- Facilitating partnerships to pool human and financial resources, and encourage cross-promotion
- Promoting Halton Hills as a single tourism destination – including improved wayfinding and signage, as well as developing consistent messaging for local communities
- Encouraging visitor friendliness and best practice sharing between operators
- Aligning the new Tourism Sub-Strategy with Tourism Advisory Committee discussions
- Consideration of an Accommodation Needs Study for Halton Hills
- Defining key performance indicators, key target markets and associated messaging
- Growing local awareness related to tourism

Marketing Priorities:

- Branding – Increasing consistency between the Town brand and economic development and tourism brands
- Awareness – developing tactics to build awareness of economic development and tourism brands
- Positioning – establishing economic development and tourism positioning statements and value propositions
- Targets sectors – identifying target sectors and related values and motivators
- Marketing tools – evaluating appropriate tools and budgets required to reach targets



8.1 Appendix A – Economic Development Visioning Workshops – Questions & Detailed Responses

Two Visioning Workshop sessions were held as part of the stakeholder activities:

- Project Steering Committee Visioning Workshop - Aug. 28, 2019
- Halton Hills Senior Management Team (SMT) Visioning Workshop – Oct. 2, 2019

* **Bold** represents those responses identified as most important by Focus Group Participants

1. Project Steering Committee Visioning Workshop – Aug. 28, 2019

The Project Steering Committee Visioning Workshop participants were separated into two smaller groups (Group 1 and Group 2 below).

Q1. If this project is successful, what will have changed in 5 years?

Group 1:

- **Sector diversification**
 - Large # of manufacturers, but if there's change in economy – better to have more diversity
- **Increased connection between advanced manufacturing and green economy (“hub”)**
- **Increased awareness of Halton Hills i.e. brand recognition (FDI, investment & tourism)**
- Business growth
- More \$ into economy
- Talent retention
- Assessment growth (balance between res & ICI)
- Increase in visitor spending and # of visitors
- Increase in overnight visitors
- Increased brownfield program & remediation (reinvestment in underutilized ICI properties)
- Product development – tourism and attractions
- Leader in tech/digital tourism technology
- “Open for business” recognition

Group 2:

- **More jobs locally - population growth aligned with job growth**
 - Aligning job growth with population growth
- **Public transportation**
- **Culture, arts, entertainment at TPO – hotel!**



- More clear, well defined identity (brand)
- 4 star hotel on the 401 corridor (Premier Gateway)
- Great website
- Green economy integrated throughout the strategy
- More cultural and creative industries
- Utilize more modern technology to market HH (wayfinding apps)
- Linking people to TPO
- Updated comprehensive community improvement plan
 - Developing TPO as a hub
- More residential rental units
- More stuff to do at TPO besides shopping
- Some kind of bike share system
- Leverage tour buses at TPO to bring people into the community
- Bigger presence for the Town at TPO

Q2. What do you see as barriers to Halton Hills' economic development and tourism efforts?

Group 1:

- **Allocation / water / regional plan / province**
- **Funding & staff resources – regional, provincial, town**
 - Changing in funding that could hurt some elements of strategy
- **Transit – tourists / visitors, access to talent**
- Diversity of stakeholders/levels of approval
- Brand confusion
- Internal politics
- Provincial agenda – Regional Review
- Availability of land – timing constraints
- Transit – for tourists, visitors and economic development perspective – finding talent and bringing it into town
- Competition – geography
- Lack of accommodations (no new hotels)
- Succession planning – decline in agriculture
- Change in national economy – departure of large employers (recession, tariffs, etc.)

Group 2:

- **Lack of accommodation – hotel & rental**
 - Hotels and rental units for employees
- **Lack of public transit and all day two-way GO service**
- **How to balance economic development & growth with small town character**



- Challenge of aligning growth and small town – certain people are adverse
- Barriers to developing available land – lack of servicing
- Aging population
- Lack of succession plans – especially agriculture
- Ability to recruit talent
- Available jobs don't align with cost of housing – lack of affordable housing

Q3. What makes Halton Hills a better place to visit or do business than other communities?

Group 1:

- **Greenfield available land/cost**
- Most other places in GTA have no greenfields – Halton Hills does but there are just challenges here with servicing
- **Quality of life** (Small town mix of urban/rural, safety; kids walk to school, green spaces, etc.)
- **Combination of tourism-friendly assets** (Natural/environmental assets and TPO are a good mix)
- Highways/goods movement
- Rural/urban within GTA ('small town living')
- Affluence and education
- Retail assets
- Proximity to Toronto and Airport
- Agri-Tourism
- Business/tourism friendly politicians and leaders
- Environmental assets/nature
- Innovation corridor
- 'Green'-focused

Group 2:

- **Locational advantage** – Bruce Trail, Greenbelt, Niagara, Toronto
- **Cultural – Beer Fest, Lucy Maud Montgomery house, pottery, large art community** (not many cultural employees but lots of events, particularly Beer Fest)
- **Sustainability- eco-friendly policies** (Commitment and engagement with sustainability)
- Large concentration of labour force, low unemployment rate, skilled population
- Small town, quality of life, good restaurants
- Opportunity to leverage agri-tourism
- Development framework in place (downtown)



Q4. What is the most important thing we can do to stimulate economic growth in Halton Hills?

Group 1:

- **Brand awareness – tourism, ROI**
- **Shovel-ready land (servicing, approvals)**
- **Regional transit plan**
- **Support local entrepreneurs/start-ups (BIAs, Small Business Centre, Haltech, Silicon Halton) events, etc.**
- Activate local influencers (must get the word out about tourism offerings)
- Establishment of a Green Super Cluster – tied in with advanced manufacturing
- Willingness/advocacy (residents, business, provincial)

Group 2:

- **Grow town assets that are attractive to young professionals/young families**
- **BR&E – strategy for existing businesses**
- **Develop strategy to transition to low-carbon economy**
- Engaging residents to promote tourism assets
- Quality jobs/quality investment (FDI)
- Increase experiential goods and services

Further discussion:

- Transit is a big challenge and there's a new strategy underway
- Need transit to take locals to TPO as well as take out-of-town visitors
- When tour operators bring people to TPO there's very little awareness that they're in another community – this is an opportunity to tell stories through local branding
- From a regional perspective there's a missed opportunity there around helping visitation
- Opportunity to organize shuttle buses from TPO to Lucy Maud Montgomery house
- Provide local businesses space at TPO – they have great open space for tasting, samples, etc.
- We have 19 festivals – We should do 19 demonstrations and do an ongoing show
- RTO3 can leverage funding for that type of event
- Niagara Outlets have local flavor with wineries – we could try to do a similar thing with TPO
- RTO3 has Niagara Escarpment backdrop – used for launching website – use that in background? – good for international tourists
- Understanding fundamental attributes of quality of life helpful
- Barrier: no post-secondary institution (Milton is getting one, one in Guelph, a college in Brampton)



- No trade schools (i.e. Trios College)
- Private sector culinary program in Oxford is an interesting model
- Commercial kitchen space is lacking – we hear that a lot from entrepreneurs
- Lose people when they graduate so losing local talent pool

2. Halton Hills Senior Management Team (SMT) Visioning Workshop – Oct. 2, 2019

The following material is directly from the notes provided by the focus group participants. Some of these comments have been expanded or modified to provide greater context of the group discussions.

* **Bold** represents those responses identified as most important by Focus Group Participants.

Q1. What does a successful thriving Halton Hills look like to you?

Group 1

- **Infrastructure keeping up with growth (to mitigate transit issues)**
- **Shovel ready land**
- **Leverage green economy**
- **Regional transit service**
- **Resurgence of downtown cores (both communities)**
- **More family amenities (e.g. theatre, bowling)**
- **Low vacancy rates**
- **Fostering the mindset that growth is good/okay**
- More diverse economy
- Build tourism industry

Group 2

- **Family driven tourism (attractions that appeal to residents)**
- **Low vacancy rate (employment areas)**
- **Resolve accommodation shortage**
- **More mobility options (transit, active transportation)**
- **More local job opportunities (less travel out)**
- **Attract office jobs**
- Intensify existing employment areas (Armstrong, Acton)
- Balanced residential to non-residential ratio
- Clean tech industry (automotive up)



Q2. How would you describe Halton Hills to someone who has never been here before?

Group 1

- **Quality of life**
- **Natural environment (Niagara Escarpment, greenbelt)**
- **Community minded- engaged, volunteers, above average wealth/money**
- **Rural urban mix**
- Well governed
- Moderate growth (not like Milton)
- Close to GTA, highways
- More than Georgetown and Action (other hamlets that have lost their identity)

Group 2

- **Diffused communities** (made of various hamlets, etc. divided by geography)
- Part of the GTA West
- **Growing community with 'small town feel'**
- **Accessible transportation links**
- **No true town centre**
- A family-oriented community with strong community connections
- Blend of suburban and small town

Q3. What are the greatest opportunities to increase visitation to Halton Hills and keep tourists in Town overnight?

Group 1

- **Hotel and conference centre**
- **Daily itineraries**
- **Increase sports tourism, accommodations**
- **Leverage Toronto Premium Outlets**
- Increase agri-tourism
- Greenbelt, tours, camping, trails
- More marketing
- Provide contact/coordination with restaurants
diversity of sports offering
- GO train familiarization tours
- Linkages between different location, trails GO, bus, etc.



Group 2

- **Bundling shopping, eating, sports and accommodation**
- **Hotels and Bed and Breakfasts**
- **Increase media – amplify beyond borders**
- **Increase hockey rinks, increase tournaments**
- Increase entertainment options (NHL team)
- Lucy Maud Montgomery Home

Q4. How should we gauge the effectiveness of Halton Hills' economic development and tourism efforts?

Group 1

- **Jobs**
- **Awareness of Halton Hills (e.g. website, etc.)**
- **Follow-up on survey results (change in trends, spending)**
- **Change in assessment ratio**
- **Assessment growth, Development Charges**
- **Redevelopment of brownfield sites (e.g. parks) – Halton Park**
- Circle back to public consultation (KPIs)

Group 2

- **Development of vacant land/floor space**
- **Increase diversification – industry and population**
- **Increase in the number of visitors**
- **Greater voice/profile over other local municipalities**
- **Jobs**
- **Spending (local)**
- **Increase in attendance at events**



8.2 Appendix B – Tourism Visioning Workshop – Questions & Detailed Responses

Tourism Advisory Committee Meeting – Oct. 10, 2019

Q1. Who are the key target markets for Halton Hills and are they being reached?

- Population in the GTA, city dwellers
- Use anchor spots to understand market, for example: Andrew's Scenic Acres and TPO already have a lot of visitors; they don't need anymore. Find out what those people like to do in addition to agri-tourism and retail shopping
- RTO4 (Central Counties Tourism) uses a software called Environics to analyze trends via visitor cell phones
- China is a target market for TPO
- Find what visitors are coming here for and add onto their day (i.e. if they are coming to shop, give them restaurant options. Or if they are here during the summer and fall season, give them a list of farms to go to)
- Landscape Learning is a big market that we could tap into, hikers and naturalists really enjoy those extra education pieces on top of a tourist experience. Educational signage around Town (e.g. monarch migration, Lucy Maud Montgomery history in Norval, maps with key destination points)

Q2. What are the greatest opportunities to increase visitation to Halton Hills and keep tourists in Town overnight?

- Focusing on more accommodations as a long-term win, but try to increase the spending from the day trippers we already have as a priority
- Gathering as much data from sports associations (people who want accommodations in Halton Hills) so we have the data to give to hotel investors when they are looking to develop here
- International visitors will not be easily swayed to stay over-night here; they are more likely to come to the GTA for a few weeks (staying overnight in Toronto or Mississauga) and to take day trips into Halton Hills
- New accommodations could offer conference opportunities
- Airbnb is a great avenue (i.e. a few rentals that would fit with the atmosphere and environment of small town, rural, agriculture, natural environment – rather than staying at a big hotel)
- TIFF and the film industry is a good opportunity to identify a gap with overnight stays. We have a lot of filming that happens here and they could fill up a hotel
- Arts and culture tours
- Scottsdale Farm is an anchor for overnight stays as there are many weddings and events there



- Scottsdale Farm is a great place for photography because they do not require a permit
- Overnight farm stays? Is there a program or service that we can promote to farmers to create Farm Stays?
- Religious Tours are an option

Q3. In your opinion, what are the top priorities to consider for Halton Hills'

Tourism Strategy?

- Support resources for visitors who are already coming here (e.g. everyone needs food and a washroom)
- We need to define what tourism success looks like
- Make sure tourism operators (restaurants and experiences) know what message we are sending. This doesn't work if tourism operators are not involved and giving their feedback. The Town has limited capacity to control what experiences visitors have. It is more about tourism operators telling people they are a part of Halton Hills
- Educating operators about tourism revenues and their stake
- Letting people know how important tourism is to the community
- This Tourism Strategy is about the Town and how the community will benefit across many sectors



8.3 Appendix C – Economic Development Stakeholder Interview Questions

1. How would you describe Halton Hills to someone who had never been here before?
2. What is your impression of Halton Hills as a location to:

	Excellent	Good	Fair	Poor
Operate a business				
Expand a business				
Start a new business				

Why?

3. If we're successful with Halton Hills' economic development strategy what will have changed in 10 years' time?
4. What are Halton Hills' greatest economic assets or strengths?
5. What are Halton Hills' greatest economic challenges (weaknesses)?
6. What do you consider to be the greatest economic opportunities to build upon?
7. What do you think are the most significant threats (barriers) that could compromise Halton Hills' ability to realize its potential?
8. What is the most important thing that we can do to help grow Halton Hills' economy?
9. How do we ensure that Halton Hills' economic development strategy is environmentally sustainable?
10. Do you have any additional thoughts or questions?



8.4 Appendix D – Economic Development Interview Participants

Representatives from the following organizations were interviewed as part of the stakeholder consultation:

- Communications and Power Industries (CPI)
- Escarpment Realty
- Green-Port: Environmental Managers Ltd.
- Halton Hills Chamber of Commerce
- Halton Hills Hydro
- Halton Region
- IntiVac
- Minus Forty Technologies
- Mold-Masters
- QuadReal
- Royal LePage
- Saputo/Neilson Dairy
- Sheridan Nurseries
- Superior Glove
- Terra Cotta Cookies Co. Ltd.
- Trimaster
- Town of Halton Hills



8.5 Appendix E – Economic Development Interview Detailed Responses

Describing Halton Hills

All the individuals interviewed referenced the quality of life in Halton Hills. They described Halton Hills as a small town that was safe, clean and beautiful. They referenced the many natural resources including the Niagara Escarpment and the Bruce Trail.

The individuals spoke about the Town's location close to Toronto with access to all the amenities of Toronto and the broader GTA. Some people described Halton Hills as a commuter town with a mix of professional and blue-collar workers.

Operating, Expanding and Starting a Business

The majority of the stakeholders said that Halton Hills was an excellent place to operate or start a business. Their assessment of Halton Hills as a location to expand a business, however, was mixed.

The stakeholders reported Halton Hills has an educated employee base, competitive costs and tax structures with grants to support business expansion. The proximity to major highways and Pearson Airport were noted as strategic advantages. They said that the Town's quality of life and community amenities contributed to employers' ability to retain the local employee base.

Several stakeholders recounted challenges of finding sufficient land or buildings to expand their operations; especially the small and medium size businesses in Georgetown and Acton. Finding skilled workers was also a common concern. Several said that the lack of a local transit system was a factor in staffing shortages. Others noted the connection between the staff shortages and the lack of housing diversity in Halton Hills.

The assessment of the Town's support for development was also mixed; some individuals described the Town as supporting and accommodating while others said the approval process was too long and that the new comprehensive zoning by-law was too restrictive.

Future Vision

Stakeholders said that they would like to see greater diversity in the types of businesses in Halton Hills with an emphasis on manufacturing and other externally focused businesses to balance the commercial businesses serving local residents. They



supported a balance of residential and industrial development and assessment. Interest in vibrant downtown cores with a strong retail component was also noted.

They said they would like greater diversity in the population (by age, gender, ethnicity and skills) and in the housing stock including owned and rented properties. They would like sufficient jobs in the community for residents who choose to live and work in Halton Hills. Interest was also noted in a transit plan that connects workers from Halton Hills and neighbouring communities with the employers and employment land throughout Halton Hills.

Several stakeholders said they would like more greenfield employment land to support new development. They also said that they would like to see a streamlined approvals process to help fast track new development. They cited the need for sufficient road infrastructure for competitive truck transit times and manageable resident commuting times.

Some individuals noted the need to balance land development with parks and natural community assets. Others spoke about creating triple bottom line measures such as the adoption of green building standards or a measure of the ratio of jobs to building footprint.

Strengths

All stakeholders agreed that Halton Hills' location is a significant advantage; providing easy access to Toronto and the GTA and all the resources in the region. They spoke about the Town's strong transportation links, including major highways, rail service and proximity to Pearson Airport.

They acknowledged the quality of the workforce in Halton Hills and the role quality of life plays in making the Town an attractive place to live and work. They spoke of the available employment land in Acton and additional employment land that will soon be available for new development in the Premier Gateway. A comment was made about the Town's efficient approval process and accommodating staff.

Weaknesses

Stakeholders identified the lack of a local transit service as a distinct disadvantage with real impact for those residents earning lower wages.

Several reported that the lack of available and serviced employment land was restricting the Town's ability to address the needs of existing businesses and prospective investors. They reported that the development approval process was too slow; in part due to the large number of approval agencies involved.



Some spoke about Halton Hills' lack of a common community identity as a barrier to collaboration within the Town. A comment was made that Halton Hills' small size meant that its financial clout was limited relative to other municipalities in Halton Region and the GTA. Others spoke about a lack of diversity in the workforce compared to other parts of the GTA.

Economic Opportunities

Halton Hills' location on the edge of the GTA, was identified as a real opportunity as other jurisdictions struggle to meet the demands of business and residential growth. They saw real opportunity to leverage the quality of life and the well-educated residents to promote Halton Hills as a source of a quality workforce. Several spoke about the opportunities to access the U.S. markets.

A few individuals spoke about the potential to attract businesses with a sustainability mandate. Others said that there was potential to support residential development in the downtowns with a variety of housing types, density and ownership.

Economic Threats

The pressure of demand for residential, industrial and commercial growth was recognized as a potential threat to the Halton Hills' economic future. Some stakeholders said that they saw a burdensome development process, restrictive zoning by-laws and infrastructure limitations creating barriers for business investment. They also noted that 'unrestricted' growth could over-tax existing infrastructure. Additional traffic could negatively impact residents' quality of life and impact businesses' access to markets.

Some said agricultural businesses were limited by the restrictions on their on-farm operations while others said that the agricultural sector would suffer without limitations to the permitted development on agricultural lands. Many stakeholders expressed concern about the potential impact of an imbalance of residential and agricultural assessment.

Priorities

Some common themes emerged regarding the greatest potential to growth the local economy. Stakeholders said that the Town should ensure that there is sufficient quantity and diversity of employment land and buildings for large and small businesses in the Premier Gateway, Georgetown and Acton. They recommended supporting businesses throughout the development process and ensuring timely and efficient processes.

There was strong support for providing transit for residents to employment areas as soon as possible, links to transit in adjacent communities and advocating for all day GO Transit service. There were also calls for the Town to address growing traffic congestion.



Sustainability

Stakeholders recognized the challenge of balancing growth and sustainability. Some individuals spoke of their desire to establish triple-bottom-line metrics for economic development. Others said that Halton Hills' environmental efforts may discourage some economic activity in the Town.

Several said that the Town should provide leadership and support to green development, establishing a local transit program and providing incentives for green development. Some individuals suggested targeting prospective investors with environmental priorities that are similar to those of Halton Hills.



8.6 Appendix F – Tourism Stakeholder Interview Questions

1. Please describe your business (retail/attraction/accommodation/industry association, etc.)
2. Where are you located within Halton Hills?
3. Do you see yourself first and foremost as a stakeholder in the tourism industry? Please describe.
4. Who is your target customer?
5. How many customers/visitors do you get annually? (est.)
6. Do you have any plans for expansion? Please describe.
7. Do you host any events or have periods of the year that require additional staffing? Have you ever had trouble hiring part-time/support staff and/or volunteers?
8. Does your company rely on any support from the Town, financially or otherwise?
9. What does your business need from the Town in terms of support?
10. In general, what are the main reasons that people come to visit Halton Hills?
11. The following is a preliminary list of tourism product/experience clusters that we've identified:
 - i. Sports and Recreation – cycling
 - ii. Festivals and Events
 - iii. Agri-Tourism
 - iv. Arts & Culture
 - v. Accommodations
 - vi. Culinary Tourism
 - vii. Retail
 - viii. Anything else?
12. What would you say are the main clusters of tourism products/experiences that drive visitors to the area? What do people stay overnight to do?
13. In your opinion, which clusters are strongest? Weakest?
14. Are there opportunities for new clusters of tourism products and experiences in Halton Hills, either based on gaps in the market, or compared to other communities? (i.e. attractions, support infrastructure, restaurants, etc.)
15. Are there any pressures or threats that could impact new tourism product development moving forward, i.e. zoning issues, new developments in adjacent communities, etc.?
16. Do you believe Halton Hills has put enough emphasis on tourism in the past, i.e. from a budget and/or organizational perspective?



17. Do you think the current organizational structure where tourism is a portfolio under the mandate of economic development is advantageous for Halton Hills? Why or why not?
18. Do you think there is an opportunity to enhance visitor information services?
19. In your opinion, what are the key tourist markets for Halton Hills and are they being reached? Why or why not?
20. What is your opinion of Halton Hills' current tourism marketing efforts (digital and print)?
21. Do you think there are opportunities for partnerships with external stakeholder groups to enhance tourism marketing? Please describe.
22. Who should Halton Hills look to for best practices in terms of:
 - i. Tourism Product and Experience Development
 - ii. Tourism Marketing
 - iii. Organizational Structure
23. Do you foresee any challenges with implementation of a Tourism Sub-Strategy in the future? Why/why not? Priorities to consider?



8.7 Appendix G – Tourism Interview Participants

Representatives from the following organizations were interviewed as part of the stakeholder consultation:

- Acton BIA/Leathertown Festival
- Andrews' Scenic Acres/Scotch Block Winery
- Centre Stage School of the Arts
- Circus Communications
- Club at North Halton
- Georgetown Highland Games
- Halton Hills Chamber of Commerce
- Halton Place
- Halton Region Planning
- Helson Gallery
- Heritage Acton
- Norval Community Association (Lucy Maud Montgomery Children's Garden of the Senses)
- Pinecone Music Studios
- Regional Municipality of Halton
- RTO3
- Sharkey & Associates
- Stone Edge Estate Bed & Breakfast
- Toronto Premium Outlets
- Town of Halton Hills
- Willow Park Ecology Centre



8.8 Appendix H – Tourism Interview Detailed Responses

Tourism Product and Experience Clusters

When asked to identify the main reasons why people visit Halton Hills, respondents provided a relatively short list that was divided into the following categories and ordered by the number of total mentions:

Tourism Cluster	Key Products/Experiences	% Mention
Nature & Outdoors	Cycling, trails, hiking, hills, rural areas, Escarpment, wellness	27%
Historic Downtowns / Rural Communities	Getting out of the City, Hamlets (Limehouse, Glen Williams), local small town experience	18%
Festivals & Events	Head for the Hills, Acton and Georgetown Fall Fairs, Leathertown Festival, Light up the Hills	15%
Retail / Shopping	Toronto Premium Outlets, boutique retail in historic downtowns	10%
Visiting Friends & Relatives	Seasonal events, family gatherings	9%
Arts & Culture	Art installations, local studios, artisan communities, Georgetown Theatre, Lucy Maud Montgomery	7%
Agri-Tourism	Farmers markets, family farm/pick-your-own experiences	6%
Sports & Recreation	Hockey, soccer, skating, visiting tournaments	6%
Culinary Tourism	Ice cream, wine bars and brew pubs	1%

Implications:

- Festivals and events, agri-tourism and shopping are the primary motivators for day trips.
- Arts & Culture is a growing cluster, with existing assets and experiences starting to grow in popularity for not just residents, but tourists as well.
- Culinary Tourism is also emerging, but many businesses are closed weekends, which makes it difficult to include on itineraries.

In addition to describing what might attract visitors to the area, respondents were asked to identify pressures and threats to new tourism asset development, which are listed in the following chart:



Pressures/Threats for Tourism Development in Halton Hills

Category	Description
Event Support	<ul style="list-style-type: none">• Volunteer levels decreasing• Requirement to rent equipment from Town is limiting
Wayfinding	<ul style="list-style-type: none">• Signage limitations for businesses and events• Trails are not connected
Community Differentiation	<ul style="list-style-type: none">• No integration/cross-promotion between communities
Parking	<ul style="list-style-type: none">• Limited in downtown cores
Visitor Friendliness	<ul style="list-style-type: none">• Retailers closed Sunday/Monday• Operators have limited knowledge of other events, attractions and food service establishments to direct tourists
Planning/Zoning	<ul style="list-style-type: none">• Known as a community where the planning processes are hard to manoeuvre; permitting is onerous• Vision Georgetown growth may have impact on rural businesses (roads busier with no room for tractors, etc.)• Town water and wastewater infrastructure needs are being addressed, but must be reviewed in conjunction with the Ontario Growth Plan• Very difficult to develop on the Escarpment• Challenges working with the Niagara Escarpment Commission• Concern about the future possibility of amalgamation
Accommodations	<ul style="list-style-type: none">• Limitations on capacity• Quality concerns
Neighbouring Developments	<ul style="list-style-type: none">• Large mall planned for Brampton (size of Yorkdale)
Transportation	<ul style="list-style-type: none">• Lack of transportation (i.e. GO Transit or local transit)
Infrastructure	<ul style="list-style-type: none">• Lack of accessible public washrooms



Opportunities for Visitor Information

Most stakeholders identified a need to improve visitor information services in Halton Hills, but there was also a common sentiment that there would not be enough walk-in business to justify a full-time tourism office. One suggestion was to develop a kiosk or pop-up booth that focuses on tourism businesses and events in the local area, potentially located at the Toronto Premium Outlets. Electronic kiosks could also be put in different locations with similar signage around the Town.

Common issues raised in conjunction with the need for visitor information services included a requirement for better wayfinding and signage, as well as basic visitor information training for those serving the sector, including businesses and front line Town staff (e.g. Service Halton Hills). Other suggestions included:

- Have a promotional event for festivals and events at TPO
- Electronic marketing gets people to area, but paper helps them stay – must focus on TripAdvisor and Google
- More maps – Cycling, Pumpkin Trail, etc.
- Kiosk at TPO would be an ideal location

Key Tourist Markets for Halton Hills

Stakeholders identified several key tourist markets for Halton Hills, including the following:

- Visiting Friends and Relatives (VFR)
- Young Families (engaging in agri-tourism and visiting rural communities)
- Short-term Stays from GTA
- Cyclists
- Eco-tourism (including hiking, naturalists, etc.)
- Sport Tourism (including hockey, soccer, baseball)
- Artist Community
- International tourists (particularly for TPO)

Stakeholders felt that some of these key tourist markets are currently not being reached, stating that the communication channels for visitors was especially confusing. As an example, stakeholders mentioned there is currently no tourism-specific social media stream for tourists to engage with. Stakeholders also stated that domestic tourism should be the top priority with VFR being the most lucrative and easy to reach this market through locals inviting their friends and family to Halton Hills.

Suggestions also included better promotion of Halton Hills, especially targeting families in the GTA, and leveraging existing assets by offering more trail and outdoor experiences. For instance, learning what visitors are coming for and adding experiences to their day (i.e. list of restaurants for visitors to TPO or educational signage on trails).



Tourism Marketing

Stakeholders had several suggestions for Tourism Marketing Opportunities, stating that Halton Hills is currently lacking in this area. Stakeholders mentioned that they felt that this is in part due to insufficient funds, as well as a historic lack of strong direction regarding Tourism in Halton Hills, with no dedicated Tourism staff member². Additional funding allocated to product development and brand recognition would go a long way towards improving tourist awareness and visitation to the Town. The table below highlights some marketing opportunities that were discussed.

Marketing Opportunity	Stakeholder Suggestions
Regional Partnership	<ul style="list-style-type: none">• Partner with RTO3 on regional promotion with marketing and data collection• Partner with RTO3 to promote agri-tourism and arts, (i.e. Glen Williams)
Local Partnership	<ul style="list-style-type: none">• Increase cross-promotion among tourism player (i.e. School boards, recreation clubs, sport tourists, partner with TPO to promote rest of Halton Hills)• Package existing experiences (i.e. outdoor, culture, and shopping)
Halton Hills Tourism Division	<ul style="list-style-type: none">• In order to take on special projects, there may be an opportunity to acquire sponsorship funding or to leverage Halton Region resources
Online Presence	<ul style="list-style-type: none">• No clear tourism website, comments included there are too many different websites, customers are confused which website to use• Leverage TripAdvisor and Google reviews• Build up content-based experience versus just listing experiences• Provide online itineraries• Incorporate the 'natural' element of Halton Hills, current look and feel is too corporate/bureaucratic• Make use of descriptors such as rich agricultural lands, nature, small town feel, out of the city, relax

² Since taking over management of tourism in 2017, the Town has allocated significant resources and implemented major initiatives to amplify the economic benefits of tourism. As noted in the Executive Summary of Initial Findings and earlier in this report, significant progress has and continues to be made.



Tourism Sub-Strategy Implementation

Stakeholders were positive but realistic in their feedback regarding implementation of a new Tourism Sub-Strategy, realizing that the process will not be without challenges. Several stakeholders also mentioned that Halton Hills is still small in comparison to its neighbouring communities and may not be ready for tourism, voicing concern that they don't want the Town to try to become something it's not.

Potential challenges with implementation included the following:

- The Town may receive pushback from residents who don't want tourists in their 'backyard'
- It may be challenging to acquire necessary infrastructure from the Town or keep resident volunteers engaged in supporting community events when these events do not generate a positive revenue stream
- With a dedicated tourism strategy, the Town's role will need to shift to serve non-residents as well
- Perceived rivalry between Georgetown and Acton could present a challenge for cross promotion and tourism players working together
- Balancing tourism growth with the small-town character of Halton Hills
- Lack of succession plans for some operators, especially agri-tourism assets

Stakeholders also provided positive suggestions for implementation, including the following:

- In addition to the Strategy, a good communication plan will need to be put in place
- Offer 'visitor friendliness' training for small businesses (i.e. retail, restaurants) including suggestions to extend store hours to evenings and to open on weekends
- When forming committees regarding the Strategy, it will be important to provide clear terms of reference and a clear mandate
- The champion(s) implementing the Strategy will need to be able to understand and make use of tourism data gathered
- Support and engagement will be needed from all stakeholders
- In order to be successful, the Tourism Sub-Strategy will need to benefit both residents and tourists
- Build on and find new ways to keep visiting friends and relatives ('VFR') engaged during all four seasons
- The Strategy will need to include a fund dedicated to implementation
- Work with the Region on implementing inter-municipal strategic actions, such as recommendations from the Halton Region Cycling Tourism Strategy
- Improve key existing assets and build on Halton Hills' strengths (i.e. connecting and organizing trail systems for cycling and hiking)
- Educate and inform residents to help them understand the tourism potential of Halton Hills



- Consider developing elements that will benefit residents first, which in turn will help to manage visitor expectations

8.9 Appendix I – Economic Development Focus Groups – Questions & Detailed Responses

1. Economic Development Focus Group #1 – Sept. 17, 2019 – 8:30 to 10:00 am

Q1. If this project is successful, what will have changed in 5 years?

- Increase work/life balance in Halton Hills
- Attract talent
- Self-sustaining community
- Transportation for workforce
- More choices for industrial land
- More flexible choices for landlords (warehousing)
- Infrastructure restrictions removed
- Halton Region is an active partner
- High speed internet/telecommunications provided for all
- Want growth but with limits
- Want to be the jewel in the GTA

Q2. What makes Halton Hills a better place to visit or do business than other communities?

- People value the small town – clean, friendly, arts
- A place to raise kids
- CEOs find Halton Hills to be a nice place to live
- Quality of life
- Celebrate the unique communities

Q3. What do you see as barriers to Halton Hills' economic growth?

- Transportation to and from Halton Hills
- Infrastructure – lack of water, waste water, telecommunication, internet
- Perception that dealing with the municipality to get things done will be difficult
- Zoning – needs to be forward thinking and see opportunities
- More holistic/inclusive approach
- Disconnect with landlords and municipal vision
- Official Plan too rigid – needs to be flexible
- Intimidating start-up process



Q4. What is the most important thing that we can do to stimulate economic growth in Halton Hills?

- Define what economic development growth is to Halton Hills – need a clear vision
- Build a quality of life/art/green space
- Municipality – walk people through process
- Make Halton Hills accessible to and from Milton (via transit)
- Educated workforce that live in Halton Hills
- Need to work with developers to service available property
- Need to attract educated workforce
- Increase diversity of residential real estate – include townhouses/condos
- Zoning and by-laws – need to listen to what business owners need
- Consider brownfields as future opportunities

2. Economic Development Focus Group #2 – Sept. 17, 2019 – 1:00 to 3:00 pm

Q1. If this project is successful, what will have changed in 5 years?

- Pressure more intense on rural areas
- Attract workforce
- Stable transit system critical for business success
- Support for agricultural areas and industries and rural living
- Infrastructure changes reflected in community seeing their rural living respected and retained
- Initiative to get people to move to Halton Hills
- Lots of investment coming in/growth
- Peaceful existence/maintained quality of life

Q2. What makes Halton Hills a better place to visit or do business than other communities?

- Competitive prices compared to other places
- Transportation linkages 401 – need infrastructure improvement to capitalize more on this
- Proximity to more expensive areas – should leverage this
- Help setting up businesses in Halton Hills
- Manufacturing – incentives for expansion
- Very large markets surround Halton Hills

Q3. What do you see as barriers to Halton Hills' economic growth?

- Transit/getting employees to work
- Lack of diversity living/working in Halton Hills



- People don't know what/where Halton Hills is – (confusion with Acton/ Georgetown/ Halton Region)
- Too many departments to go through to get started – process needs to be streamlined
- Land-locked without transit
- Lack of shovel-ready land
- Lack of post- secondary education facilities
- Street-scaping could be improved
- Conservation comes before development

Q4. What is the most important thing that we can do to stimulate economic growth in Halton Hills?

- Need marketing/promotion
- Population growth
- Incentives for businesses to grow
- Workforce recruitment
- Transit
- Matching work needs and skills
- Incentives to build Green Buildings
- Streamline development processes
- Testimonials
- Tourism needs to increase
- Market – visitors to stay overnight
- Need accommodation – hotel/Airbnb/diversity of options



8.10 Appendix J – Tourism Focus Group – Questions & Detailed Responses

1. Tourism Stakeholder Focus Group – Sept. 17, 2019

Q1. If the Tourism Sub-Strategy is successfully implemented, how will you describe Halton Hills as a destination in 5 years' time?

- Community of Norval will be major destination for international and national tourists with the Lucy Maud Montgomery house and gardens, trails, increased parking requirements, and accommodations for increased traffic
- Downtown Georgetown will be a vibrant downtown hub including more restaurants and variety of restaurants, accommodations, expanded weekend event schedule and unique experiences, and the Credit Valley Trail system through expansion and linking existing trails
- Halton Hills will be fully engaged in its tourism products, understanding what tourism is all about and how to market it locally – tourism is not just about TPO, but all the other assets Halton Hills has to offer
- Halton Hills will have a dedicated tourism association to work with residents and stakeholders, both regionally and nationally
- Partnerships and collaborations between players
- Halton Hills will be known as a destination for:
 - Arts and culture
 - Wellness
 - Hiking
 - Leadership in sustainability
- Halton Hills will become 'easy to visit' through offering:
 - Ample accommodations, including alternative and short-term rentals
 - Amenities such as rest areas, food and beverage options, public washrooms
 - Conference and meeting spaces
 - Packaged experiences
- Halton Hills will maintain its small-town feel
- Visitors' length of stay will increase

Q2. What makes Halton Hills a better destination to visit than other communities?

- Proximity and accessibility to the GTA
- Unique geographic topography with recreational experiences for all seasons (golf, hiking, cross-country skiing, kayaking)
- Organized sports
- Safe family destination
- Community events, fairs, and farmers' markets



- Greenspace – escarpment, forests, fields, farms, trail systems including Credit Valley foot paths
- Friendly small-town charm
- Artisan community (Glen Williams)
- Quaint Ontario towns and hamlets

Q3. What do you see as barriers to growth for Halton Hills' tourism industry?

- Accommodations
- Accessible, public washrooms
- Public transit
- Financial, business, legal support for small business – timing may be problematic?
- Lack of advertisement and way-finding, signage on 400 series roads- production of pamphlets, info kiosk
- Multiple brands – 'mini communities' - Hamlets of Halton Hills celebrate this separateness
- Anti-growth mentality
- Greenbelt, Niagara Escarpment Commission, Credit Valley Conservation – stop some businesses from establishing or growing
- Infrastructure, hydro, internet, water
- Budgetary constraints
- Dedicated association to promote tourism – stand alone
- Tourism partnerships
- Tourism data – how to breakdown Halton data and learn about visitors
- Promotional materials – tourism-related collateral, maps
- Tourism grants for tourism partners who want to expand existing product, create new product
- Lack of communication on tourism education opportunities for tourism operators – in partnership with the Region and RTO3

Q4. What is the most important opportunity to build on to grow Halton Hills' tourism industry?

- TPO parking could be a key player, (i.e. 'TPO plus' what's close by? Leverage cross-promotion)
- Diversify offerings beyond retail (i.e. shopping, plus agriculture, plus nature, etc.)
- Airbnb and accommodations – perhaps an association or promotion of Airbnb operators, need to help people get on board
- Keep focused on building on our strengths – trail association, cycling, Credit Valley Trail – what truly sets us apart is 'Celebrate the Hills'
- Appeals for more resources to implement the Tourism Strategy – promote tourism opportunities more, support our small, rural agricultural businesses, build the capacity for the local business sector to service tourists
- Support and engagement from all stakeholders



- Opportunity to leverage existing assets as an experiential package that are supported by Halton Hills
- Design and create experiences which are advertised to a target market
- Reinvest profits from increased tourism to improve infrastructure; stay focused on the long-term objective



8.11 Appendix K – Economic Development Online Survey Questions

1. Where do you live?
 - Georgetown
 - Acton
 - Hamlet or rural area within Halton Hills
 - Other (please specify)
2. Where do you work?
 - Georgetown
 - Acton
 - Hamlet or rural area within Halton Hills
 - Not applicable (student, unemployed, retired) – move to question 6
 - Other (please specify)
3. Which of the following social media channels do you use?
(personally or for business)
 - Facebook
 - Flickr
 - Google
 - Instagram
 - LinkedIn
 - Other (please specify)
 - Pinterest
 - Reddit
 - Salesforce Chatter
 - Skype
 - Snapchat
 - TripAdvisor
 - Tumblr
 - Twitter
 - WhatsApp
 - YouTube

For owners, managers or representatives of businesses in Halton Hills. Tell us about your business/employer



4. What is your role where you work?
 - Owner
 - Manager/supervisor
 - Employee
 - Other (please specify)
5. Approximately how many people are employed in your organization?
 - Sole proprietor (no paid staff)
 - 1-5
 - 6-9
 - 10-19
 - 20-49
 - 50-99
 - 100-499
6. Over the past 5 years, has your attitude about doing business in Halton Hills changed?
 - More positive
 - More negative
 - No change
7. What three (3) words would you use to describe Halton Hills?
8. How strongly do you agree or disagree with the following statements?
 - Halton Hills has an environment where businesses can succeed
 - Halton Hills provides sufficient services to support business start-ups
 - Halton Hills has an attractive and welcoming image for prospective business investors
 - Halton Hills is promoted aggressively to prospective business investors
9. How important do you believe the following factors are for creating and maintaining a strong economy in Halton Hills?
 - Availability of buildings and land (office, retail, industrial)
 - Access to quality education, skills development and training
 - Access to skilled workers
 - Local wage rates
 - Energy costs
 - Public Transit
 - Transportation costs
 - Transportation infrastructure (i.e. trucking routes, rail freight, airport proximity)
 - Availability of economic development services



- Efficient development processes (approvals and permits)
- Quality of life factors (housing, shopping, restaurants, arts and culture, parks and recreation, community image)
- Range and affordability of housing

10. How satisfied are you with Halton Hills' performance in the following areas?

- Availability of buildings and land (office, retail, industrial)
- Access to quality education, skills development and training
- Access to skilled workers
- Local wage rates
- Energy costs
- Public Transit
- Transportation costs
- Transportation infrastructure (i.e. trucking routes, rail freight, airport proximity)
- Availability of economic development services
- Efficient development processes (approvals and permits)
- Quality of life factors (housing, shopping, restaurants, arts and culture, parks and recreation, community image)
- Range and affordability of housing

11. In your opinion, what are the advantages of investing and doing business in Halton Hills compared to other communities in Ontario?

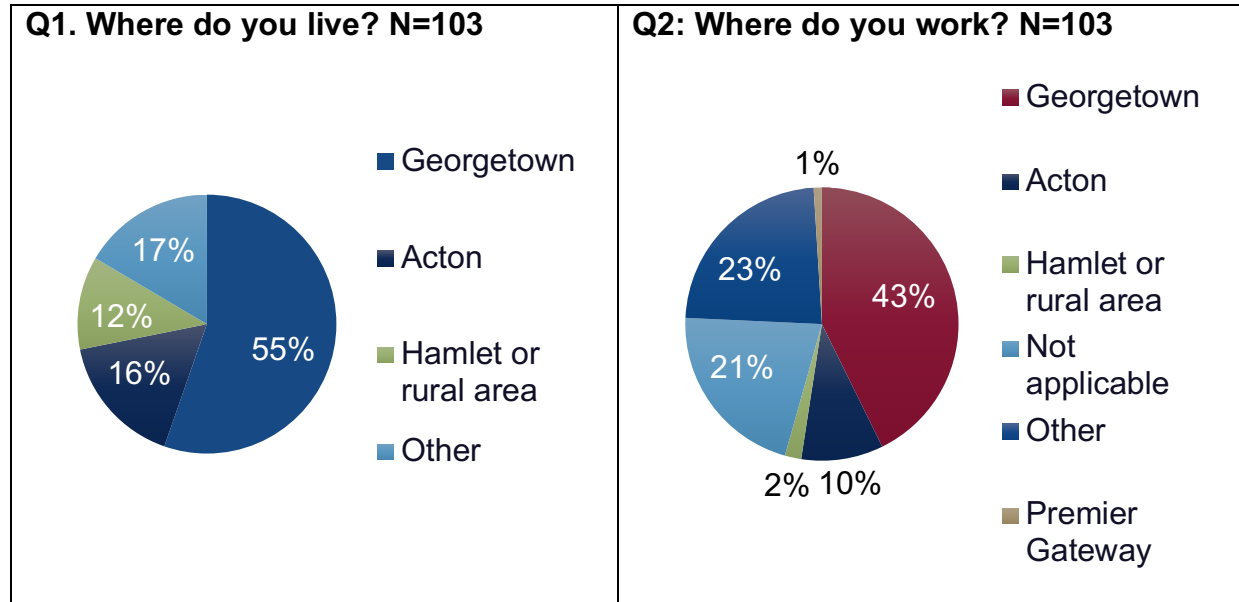
12. In your opinion, what are the disadvantages of investing and doing business in Halton Hills compared to other communities in Ontario?

13. In your opinion what are the greatest opportunities to stimulate economic growth in Halton Hills?

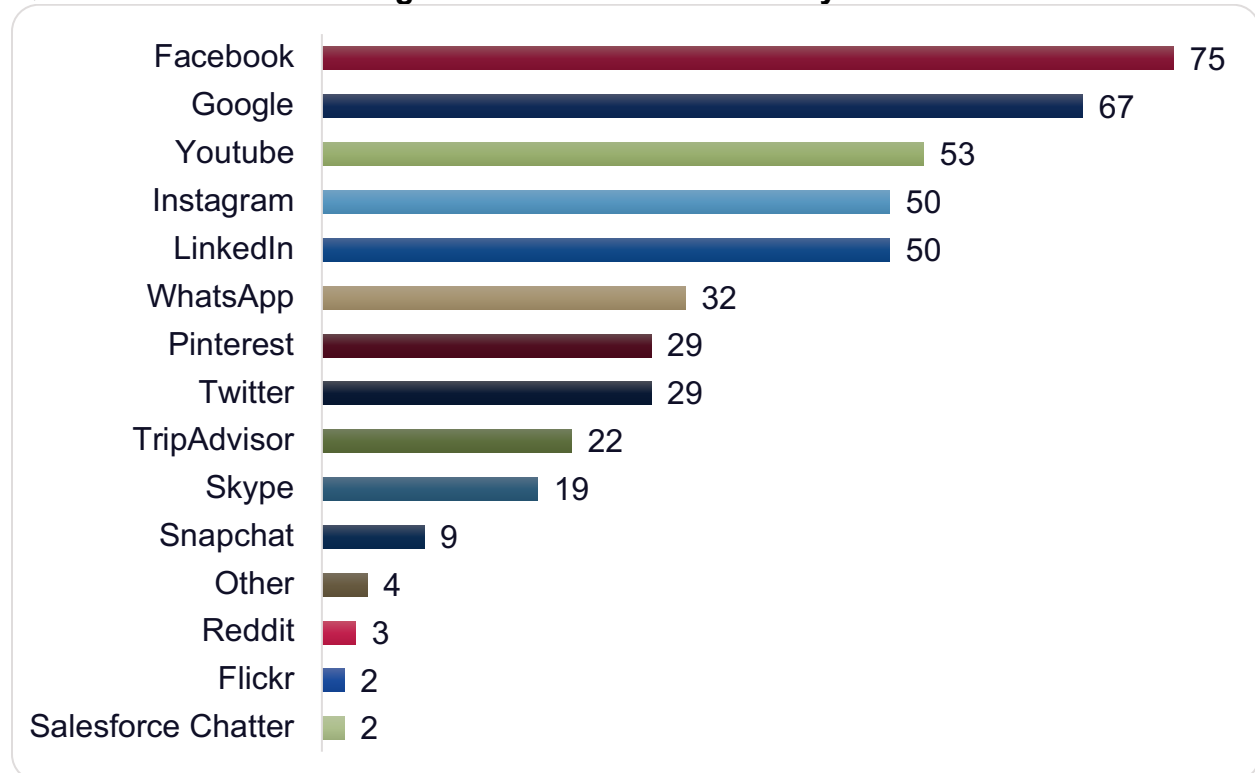
14. Do you have any other comments, questions, or concerns about the Halton Hills Economic Development Strategy and future economic prosperity in Halton Hills?

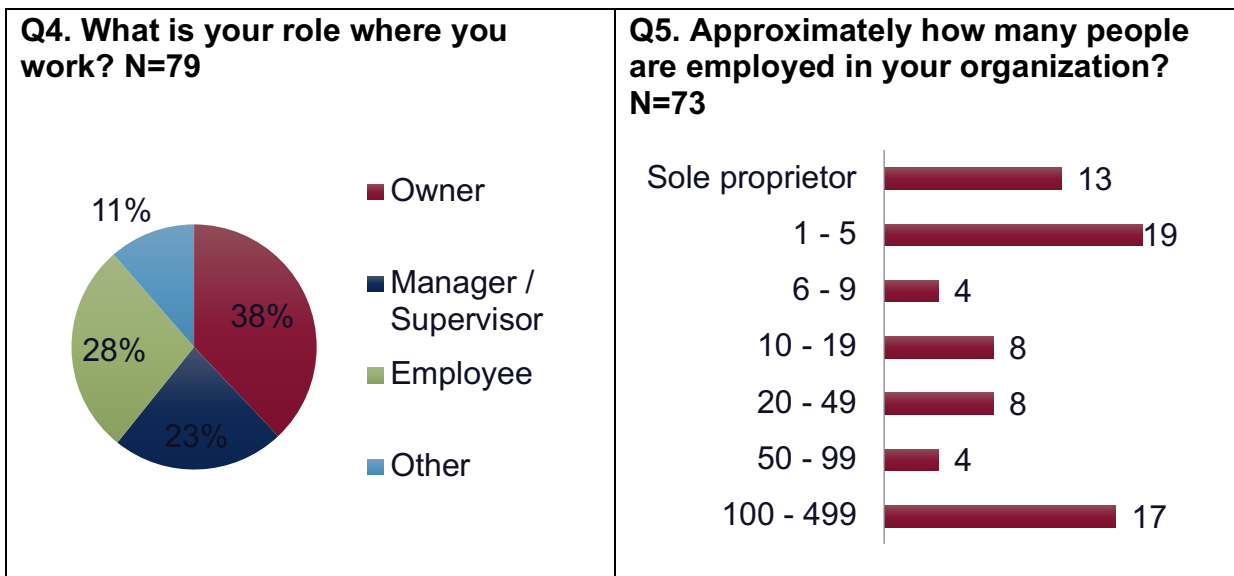


8.12 Appendix L – Economic Development Online Survey – Detailed Responses

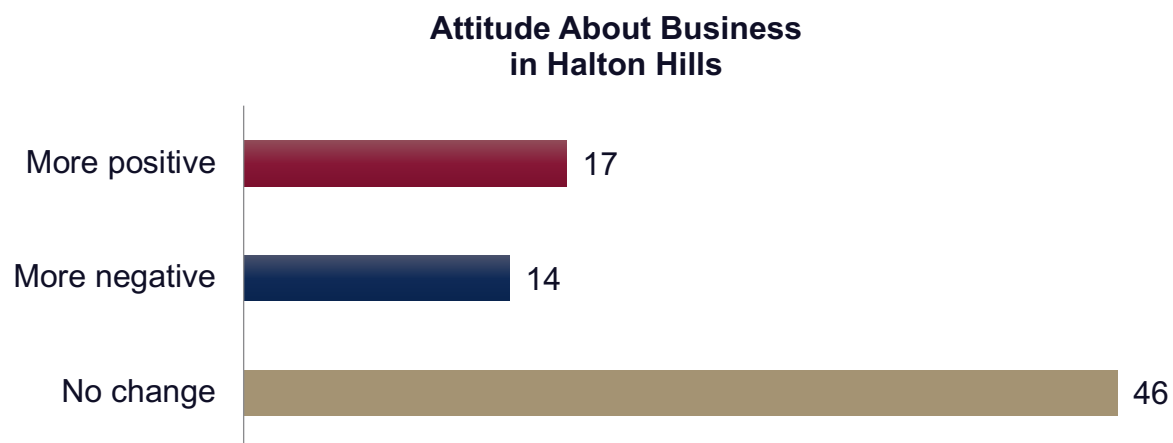


Q3. Which of the following social media channels do you use? N=103





Q6. Over the past 5 years, has your attitude about doing business in Halton Hills changed? N=77



The respondents were asked to provide three words to describe Halton Hills. The most common theme was “caring, friendly and welcoming” with 29 percent of the comments. A further 13 percent of the responses included references to the community and its small population size. Nine percent of the responses suggested the Town was not progressing as it should (e.g. behind, stuck, outdated). Other common descriptions were beautiful, bedroom community, rural, expensive, peaceful, each representing five percent of the responses.



Q7. What three words would you use to describe Halton Hills?

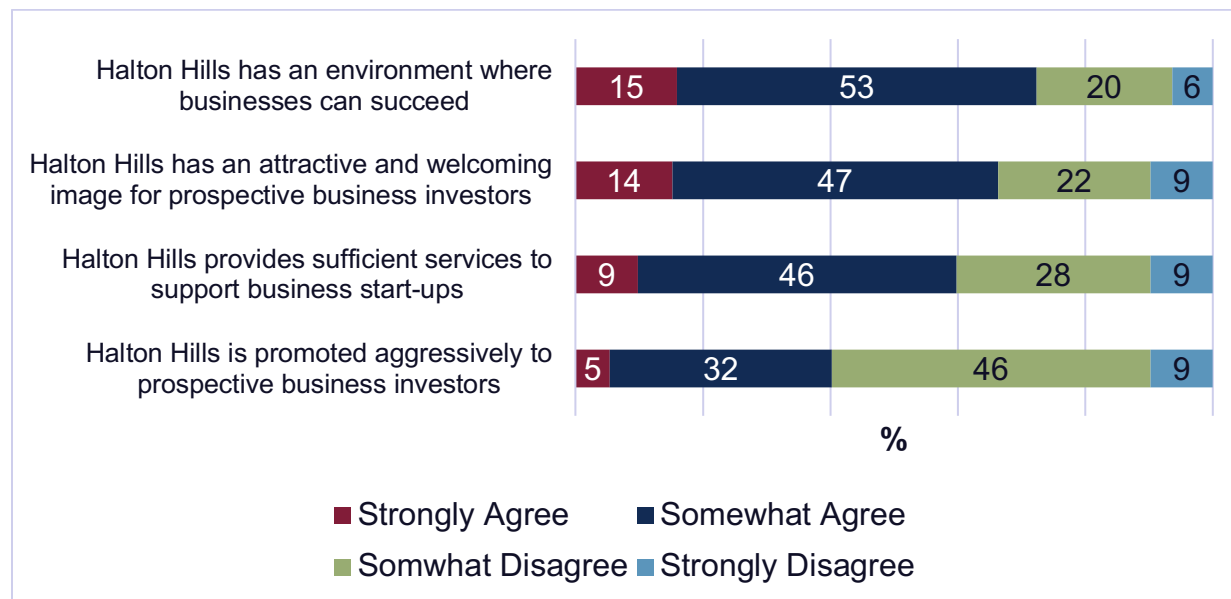
Description	% of comments
Caring, friendly, welcoming	29%
Community	13%
Small	13%
Behind, stuck, outdated, stagnant	9%
Welcoming	6%
Beautiful + pretty	5%
Bedroom	5%
Country, rural	5%
Expensive	5%
Peaceful, quiet	5%
Old, history	4%

The respondents were then asked to evaluate the environment for business, image, services for business start-ups and investment attraction efforts. The largest share of respondents (68 percent) agreed or strongly agreed that Halton Hills has an environment where businesses can succeed. The largest share of respondents (61 percent) also agreed or strongly agreed that Halton Hills has an attractive image for prospective business investors. The Town also scored high with 55 percent of respondents agreeing or strongly agreeing that there are sufficient services to support business start-ups.

The respondents were mixed on the Town's business investment promotion. Slightly more than half disagreed or strongly disagreed that the Town was aggressively promoted to prospective business investors.



Q8. How strongly do you agree or disagree with the following statements? N=94

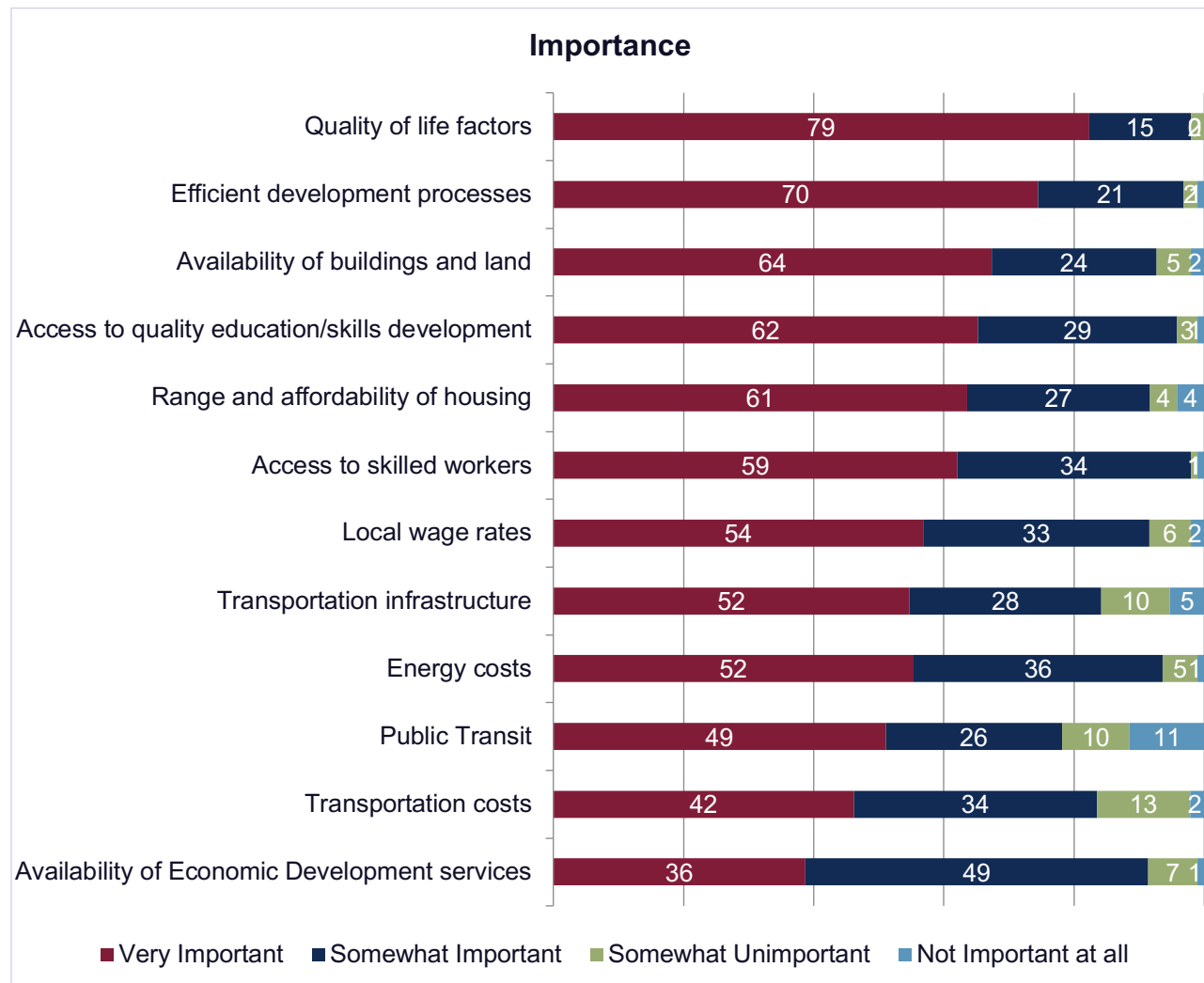


The respondents were asked to evaluate the importance of a variety of factors in creating and maintaining a strong economy. They were then asked to report on their satisfaction with Halton Hills' performance in these same factors. The respondents ranked the importance of all of the factors very highly. A full 79 percent of respondents said quality of life was very important. Efficient development processes were ranked as very important by 70 percent of respondents, following by availability of buildings and land and access to quality education and skills development by 64 and 62 percent respectively. The lowest ranked factor; the availability of economic development services, was still ranked as either very important or somewhat important by 85 percent of the respondents.

The top five factors ranked by importance were quality of life, efficient development processes, the availability of buildings and land, access to quality education and skills development, and the range and affordability of housing. The Town's current Economic Development work plan includes a focus on all of these key factors.



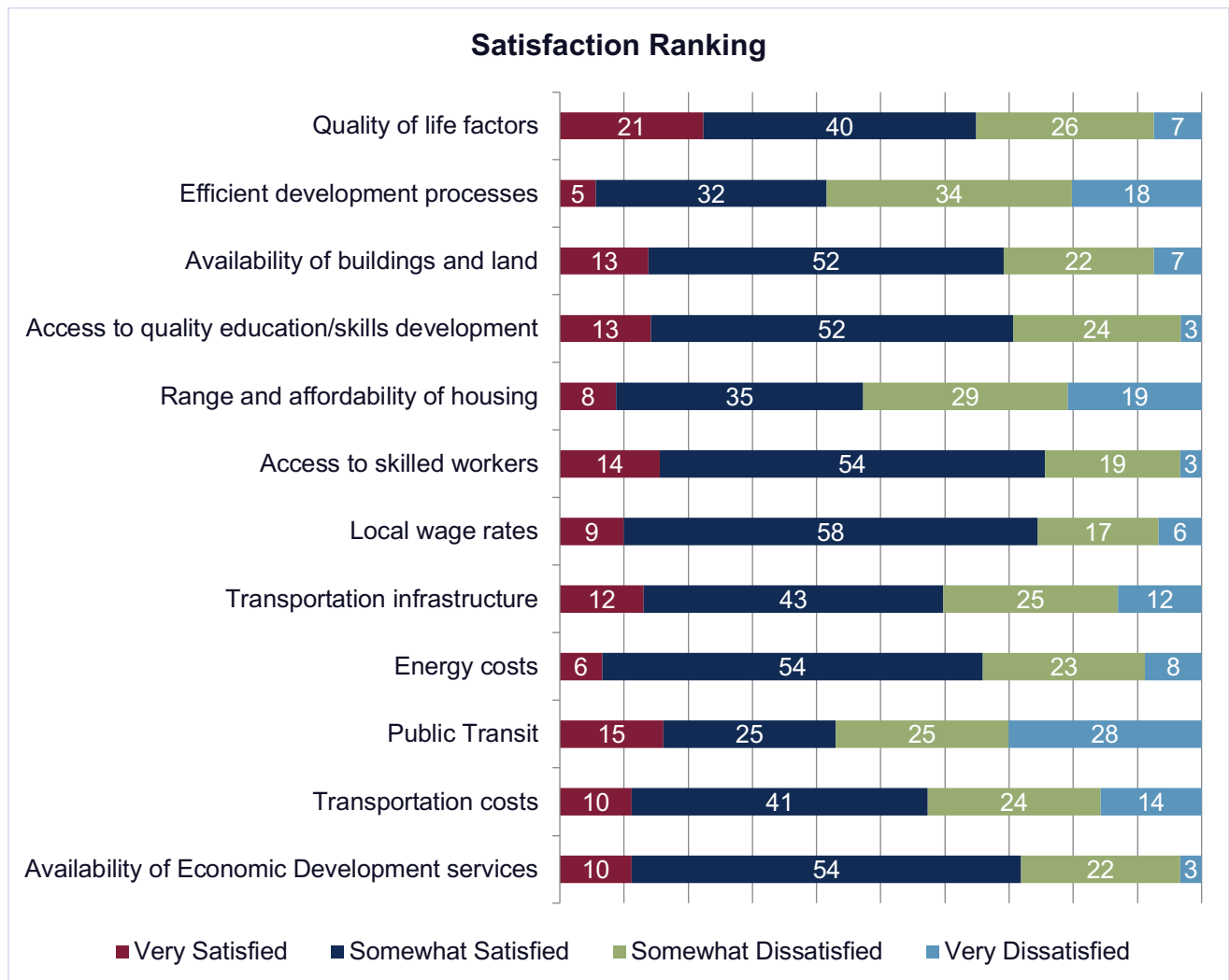
Q9. How important do you believe the following factors are for creating and maintaining a strong economy in Halton Hills? N =94



The respondents were then asked to report on their satisfaction with Halton Hills' performance with these same factors. They reported the least satisfaction with public transit (53 percent either somewhat or very dissatisfied), development processes (52 percent somewhat or very dissatisfied), range and affordability of housing (48 percent), transportation costs (38 percent) and transportation infrastructure (37 percent). The factors receiving the highest rankings were, in order, access to skilled workers, local wage rates, availability of local economic development services, access to quality education and skills development, and availability of buildings and land.



Q10. How satisfied are you with Halton Hills' performance in the following areas?
N= 94



The respondents were asked to identify those advantages of investing and doing business in Halton Hills that differentiate the Town from other communities in Ontario. The most common answers were related to Halton Hills' in the GTA and the easy access to highway networks, Pearson Airport and larger markets. Many also noted the Town's quality of life, strong community and its small-town feel. Other comments included the local business community and the loyal local customers that support them. Respondents also commented on the growing population base which provides additional workers for local businesses.



Q11. In your opinion, what are the advantages of investing and doing business in Halton Hills compared to other communities in Ontario? N=65

Advantages Themes	Description	% of Mentions
Location	Proximity to GTA and major centres, highway access, proximity to Pearson airport,	53%
Quality of Life	Community amenities, natural environment, recreation	12%
Small town	Community, support for small businesses, loyal customers, lifestyle	29%
Workforce	Growing population increasing the potential workforce	6%

The participants were also asked to comment on any disadvantages in Halton Hills. The lack of transit and related comments about improvements to the GO Transit service were the most common responses. Some respondents described the development approvals process as being difficult and lengthy. Several referenced the lack of industrial land for new development or expansion and labour shortages. Several others spoke of the cost of establishing and operating businesses in Halton Hills. Access to highways and traffic congestion was also a common theme.

Q12. In your opinion, what are the disadvantages of investing and doing business in Halton Hills compared to other communities in Ontario? N=73

Disadvantage Themes	Description	%
Transit	Lack of local transit, lack of improvements to GO Transit service	27%
Regulatory process	Approvals process and timing, inflexible regulations and by-laws	21%
Land and buildings	Lack of serviced land, range of serviced lots (especially smaller lots), lack of buildings, access and investment in infrastructure	21%
Access	Improvements to transportation routes, traffic congestion	13%
Small	Small market size and customer base, dispersed population, competition from nearby larger centres	11%
Cost	Escalating and prohibiting land and rental costs	5%
Youth	Insufficient programs, access to post-secondary education	3%



The respondents were asked to identify the greatest opportunities for economic growth in Halton Hills. As shown in question 13, below, the most common answers related to providing local transit and improved GO services. Other suggestions included investment in water infrastructure, providing a variety of housing, including more affordable options. Respondents recommended providing additional employment land for investment, supporting small business and creating a development friendly environment. Others spoke about the need for community specific strategies that recognize the unique strengths and nature of the communities within Halton Hills. Some individuals provided suggestions for road improvements on specific roadways. Other suggestions included providing incentives, investment attraction, promotion and commercial development initiatives.

Q13. In your opinion what are the greatest opportunities to stimulate economic growth in Halton Hills? N=61

Opportunity Themes	Descriptions	%
Transit	Provide local transit, GO transit improvements	21%
Economic development programs	Supports for small business, investment attraction, promotion, commercial development, business retention, existing business, work from home, partner collaboration	21%
Land and buildings	Employment land (various sizes), buildings (large and small), infrastructure to employment land, development support	19%
Downtown	Downtown revitalization, increased parking, community development programming, retail attraction and support	14%
Regulatory process	Improvements to approval process, more flexible regulations, by-laws, investment incentives	7%
Housing	Increase in affordable, accessible housing, diversity of housing stock	6%
Tourism	Tourism development, additional accommodation and tourist events	6%
Youth	Develop programs for youth, access to post-secondary education	3%
Access	Address congestion on transportation routes, road improvements	3%



8.13 Appendix M – Tourism Online Survey Questions

1. Are you a resident of Halton Hills?
 - Yes
 - No
2. Where do you work?
 - Halton Hills
 - Brampton
 - Mississauga
 - Milton
 - Not applicable (student, unemployed, retired)
 - Other (please specify)
3. How old are you?
 - Under 25
 - 25-39
 - 40 to 60
 - Over 60
4. Which of the following social media channels do you use? (personally, or for business.) Select all that apply.
 - Facebook
 - Flickr
 - Google
 - Instagram
 - LinkedIn
 - Pinterest
 - Reddit
 - Salesforce Chatter
 - Skype
 - Snapchat
 - TripAdvisor
 - Tumblr
 - Twitter
 - WhatsApp
 - YouTube
 - Other (please specify)
5. In your opinion, what are the primary categories of tourism products and experiences that people participate in when they visit Halton Hills?
(Please pick up to 3)



- Festivals and Events
 - Agri-Tourism (i.e. farmers markets, farm visits, etc.)
 - Arts & Culture (including religious facilities and/or camps)
 - Sporting Events (e.g. hockey tournaments)
 - Recreation (including trails, cycling, etc.)
 - Accommodations/Lodging
 - Culinary Tourism (i.e. restaurants, breweries and brewpubs, wine bars, etc.)
 - Retail/Shopping
 - Small Town Communities
 - Other (please specify)
6. Can you think of any opportunities for new tourism activities that you would like to see in Halton Hills? (Please list up to three in as much detail as possible)
7. How strongly do you agree or disagree with the following statements?
- I invite friends and relatives to visit me in Halton Hills because of specific tourism offerings/assets
 - Halton Hills presents an environment where tourism businesses can succeed
 - Halton Hills provides sufficient services to support tourism businesses
 - Halton Hills has an attractive and welcoming image for prospective tourism business investors
 - Halton Hills is successful in its efforts to promote tourism and attract visitors
8. Please rate the following priorities in terms of potential improvements to Halton Hills' tourism industry
- Accommodations
 - Public transit services
 - Strengthening and consolidating Halton Hills' tourism branding to represent a single municipality (rather than separating urban areas, hamlets and rural areas)
 - Large-scale attractions
 - Building itineraries around tourism experiences to provide more opportunities for day or weekend visits
 - Enhanced visitor information services
 - Broader promotion of local festivals and events (i.e. across Halton Region, West GTA etc.)
9. Do you work (or volunteer) in Halton Hills' tourism industry? (i.e. retail, food service, attractions, accommodations, arts & culture, festivals and events, industry association, etc.)
- Yes
 - No



10. If you answered “yes” to question 9, how important are the following potential improvements to Halton Hills’ tourism industry?
- Addition of more accommodation options
 - Long-term sustainable funding for tourism development and marketing
 - Developing options and sources for seasonal/part-time staffing
 - Affordable housing in the community for tourism industry employees
 - Incentives for tourism business development
 - Packaging and discounting of tourism products and experiences to help extend visitor length of stay
11. Have you logged on to www.VisitHaltonHills.ca in the last 6 months?
- Yes
 - No
 - I am not familiar with this website
12. What is your favourite tourist destination within Halton Hills?
13. What are the first three digits of your postal code?
14. Do you have any other suggestions or comments that may help to grow tourism in Halton Hills?



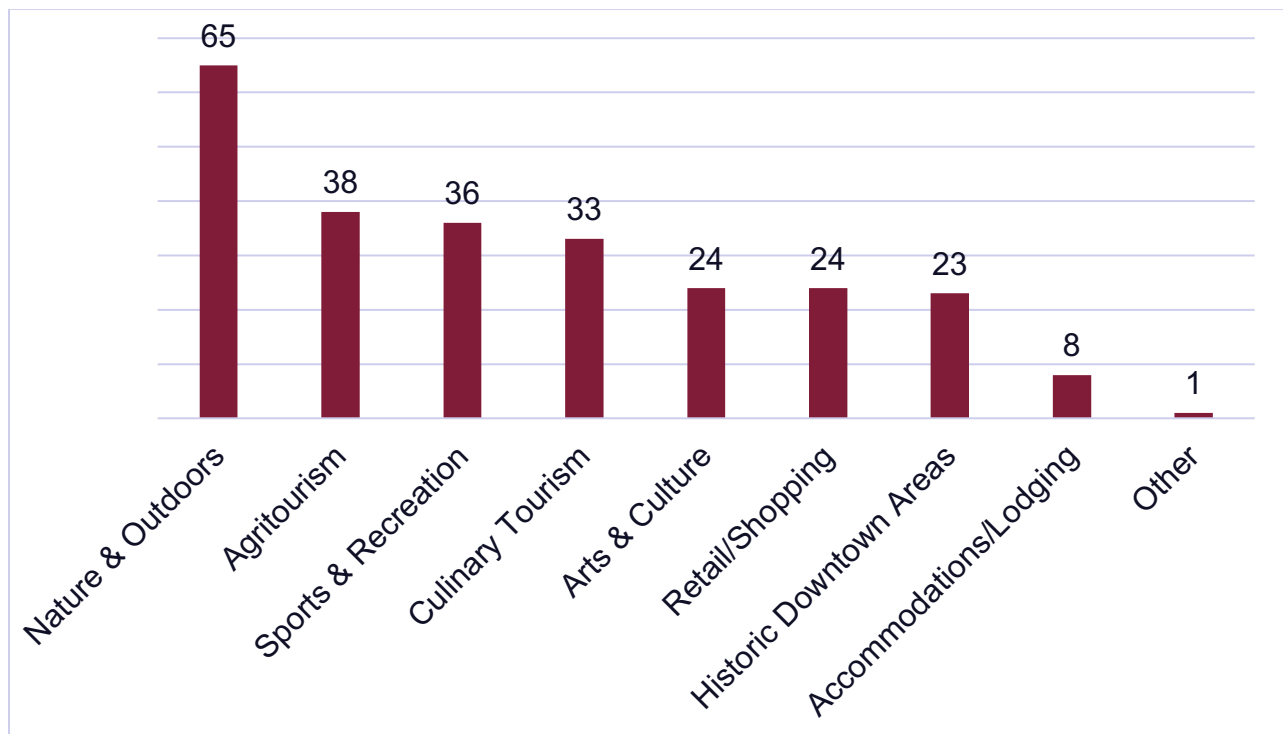
8.14 Appendix N – Tourism Online Survey – Detailed Responses

Demographics Summary – Questions 1 to 4: (N=91)

Of 91 survey respondents:

- 87 percent are residents of Halton Hills, and 13 percent are non-residents.
- The majority of respondents work in Halton Hills (41 percent), with 30 percent answering “Not Applicable” indicating they are not in the labour force as they are a student, unemployed, or retired, and 14 percent answered “Other”. A further 15 percent of respondents work in Mississauga (7 percent), Milton (5 percent), and Brampton (2 percent).
- 46 percent of respondents are aged 40 to 60 years old, 35 percent are over 60 years old, 17 percent are aged 25 to 39, and 2 percent of respondents are under 25.
- The most common social media channels used are Facebook, Google, YouTube, Instagram, and LinkedIn.

Q5. In your opinion, what are the primary categories of tourism products and experiences that people participate in when they visit Halton Hills? (Please pick up to 3).



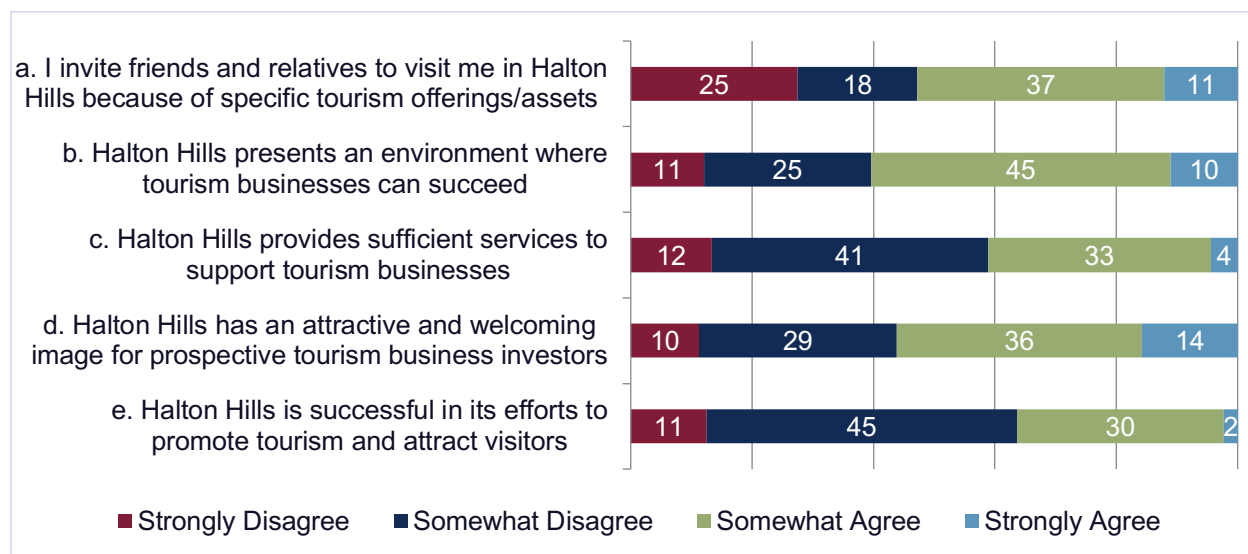


According to respondents, nature and outdoor tourism experiences are the primary tourism drivers to Halton Hills, followed by Agri-Tourism, Sports and Recreation and Culinary Tourism. Retail/Shopping was tied for the fifth position along with Arts & Culture products and experiences. The respondent who chose “Other” mentioned special events such as auto shows, beer gardens, fall fairs, and the Highland Games.

Q6. Can you think of any opportunities for new tourism activities that you would like to see in Halton Hills? N=54

- Events including music festivals, larger Leathertown Festival, car shows, and other outdoor festivals.
- Accommodations including a new hotel, additional B&B establishments, and encouraging residents to become Airbnb hosts under a collaborated effort.
- Trail Systems Participants spoke of expanding trail systems to reach both Acton and Georgetown downtowns and offer more amenities for cycling and hiking.
- New Community Buildings including a museum, an art gallery, a theatre, music centre, and meeting and conference centre.
- Sport Tournaments and Facilities including hockey, pickleball, soccer, gymnastics, etc., especially centred around adult leagues, one participant also mentioned offering bike rentals.
- Agri-Tourism and Culinary suggestions included a beer tour, new restaurants, and better advertising of fall festivals and existing agri-tourism businesses such as Andrews Scenic Acres.
- New Attractions including a cinema, indoor playground centre, indoor trampoline park, indoor mini golf, spa, and casino.
- Improved Marketing of existing festivals, attractions, and experiences.

Q7. How strongly do you agree or disagree with the following statements?

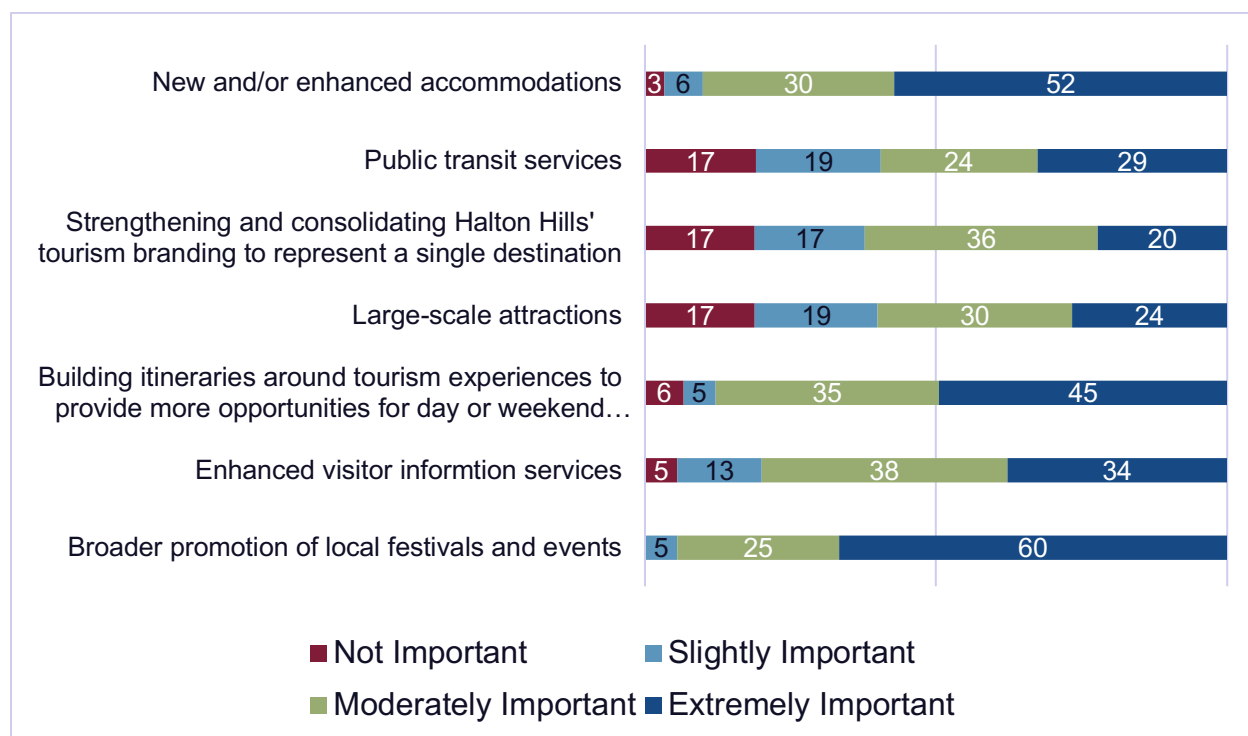




Survey respondents were asked to provide an indication of their agreement with five statements relative to tourism in Halton Hills. Statements C and E received the lowest level of agreement from participants with approximately 60 percent of participants choosing either “Strongly Disagree” or “Somewhat Disagree”, displaying sentiments that Halton Hills has not provided sufficient services to support tourism businesses and has historically been successful in its efforts to promote tourism and attract more visitors. Statements A and D had almost equal results with just over 50 percent of participants agreeing and disagreeing. Statement B had the highest rating with 60 percent of answers displaying positive sentiments that Halton Hills presents an environment where tourism businesses can succeed.

When asked for further input, respondents were varied in their opinions. Several respondents stated that Halton Hills is not a tourism destination and that they do not want it to become one. Other participants stated that Halton Hills needs to do more to promote tourism across the region with new infrastructure, way finding, and marketing. A common thread in respondents’ comments was the desire for tourism, regardless of form, to benefit not only out-of-town visitors, but also locals. Many respondents also mentioned the need for more signage leading to and within Halton Hills.

Q8. Please rate the following priorities in terms of potential improvements to Halton Hills’ tourism industry.

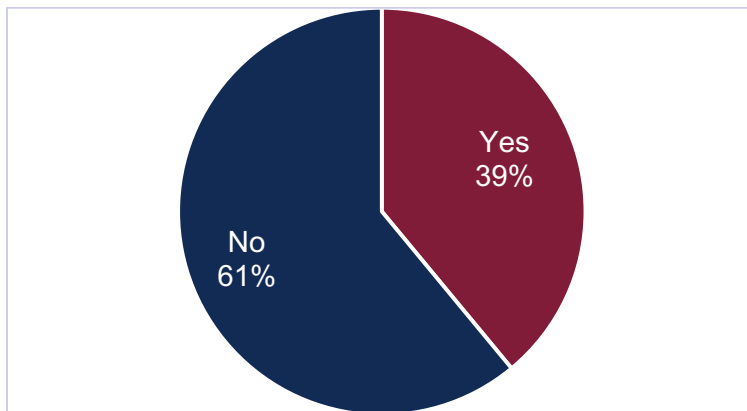


According to participants, broader promotion of local festivals and events and new/enhanced accommodations represent the highest priority improvements to Halton



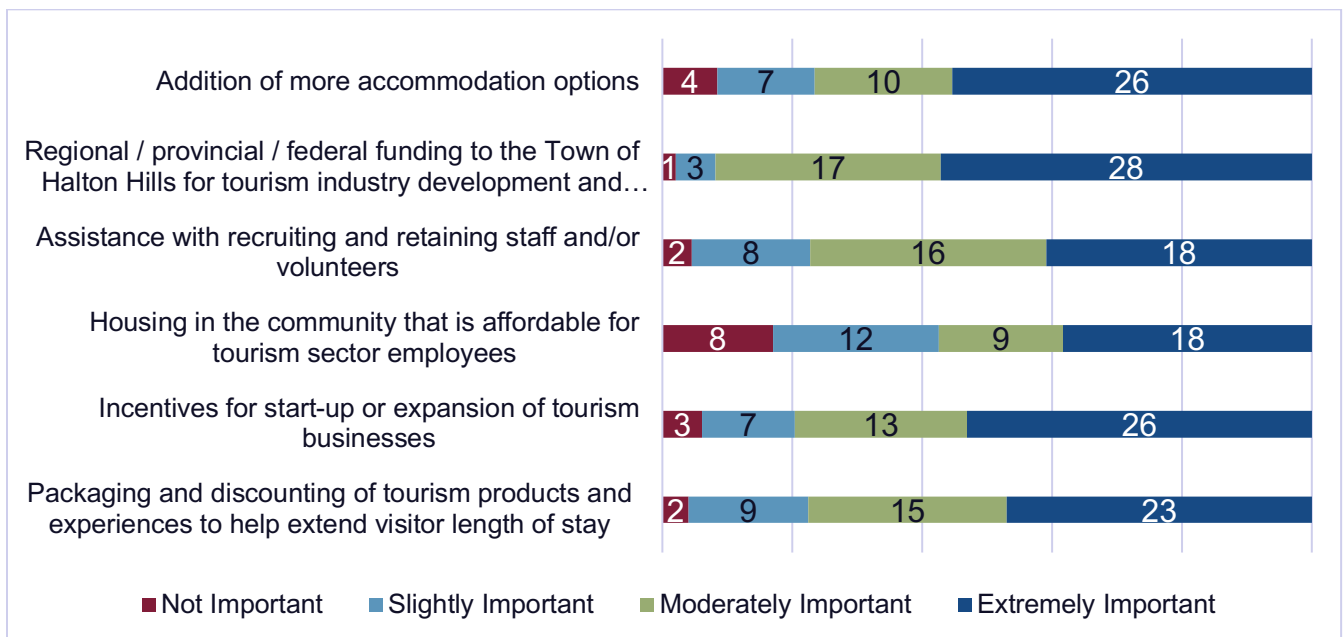
Hills' tourism industry. Public Transit, a consolidated Halton Hills' tourism brand, and large-scale attractions were viewed as lower tourism priorities on a relative scale.

Q9. Do you work (or volunteer) in Halton Hills' tourism industry? (i.e. retail, food service, attractions, accommodations, arts & culture, festivals and events, industry association, etc.) N=89



Approximately 39 percent of the respondents stated they do either work or volunteer in Halton Hills' tourism industry while 61 percent did not.

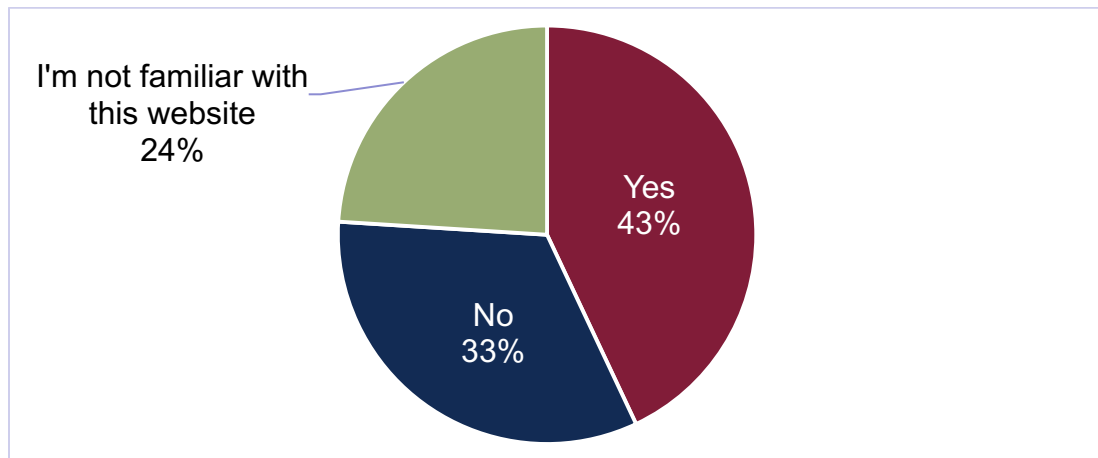
Q10. If you work or volunteer in the industry, how important are the following potential improvements to Halton Hills' tourism industry? N=49





Regional/provincial/federal funding and tourism business incentives were voted the most important potential improvements to Halton Hills' tourism industry, with affordable housing for employees voted as the least important. Additional accommodations, staffing assistance, and packaging/discounting tourism products were seen as moderately important for the tourism industry.

Q11. Have you logged on to www.VisitHaltonHills.ca in the last 6 months? N=91



An estimated 43 percent of the respondents stated that they have visited the Halton Hills tourism website in the last 6 months, while 33 percent stated they have not, and 24 percent were not familiar with the website.

Q12. What is your favorite tourist destination in Halton Hills? N=74

The most popular answers have been consolidated into the following list:

- Bruce Trail and other unnamed conversation areas and trails
- Glen Williams, including Williams Mill
- Toronto Premium Outlets
- Acton Leathertown festival
- Furnace Room Brewery
- Downtown Georgetown and/or Acton
- Chudleigh's
- Farmer's markets
- Hungry Hollow
- Limehouse
- Georgetown Craft Beer Festival
- Lucy Maud Montgomery Gardens
- Prospect Park and Fairy Lake

It is interesting to note that several respondents named destinations outside of Halton Hills in neighbouring communities.



Q13. Do you have any other suggestions or comments that may help to grow tourism in Halton Hills? N=39

- Advertising and promoting Halton Hills, including promoting the hamlets' unique personalities, a better website, itineraries, social media.
- Improved existing offerings, including extended operating hours for retail and restaurants.
- Additional accommodations.
- Continued growth of events and festivals.
- New attractions in town to draw visitors.
- Improved collaboration between industry partners and operators.