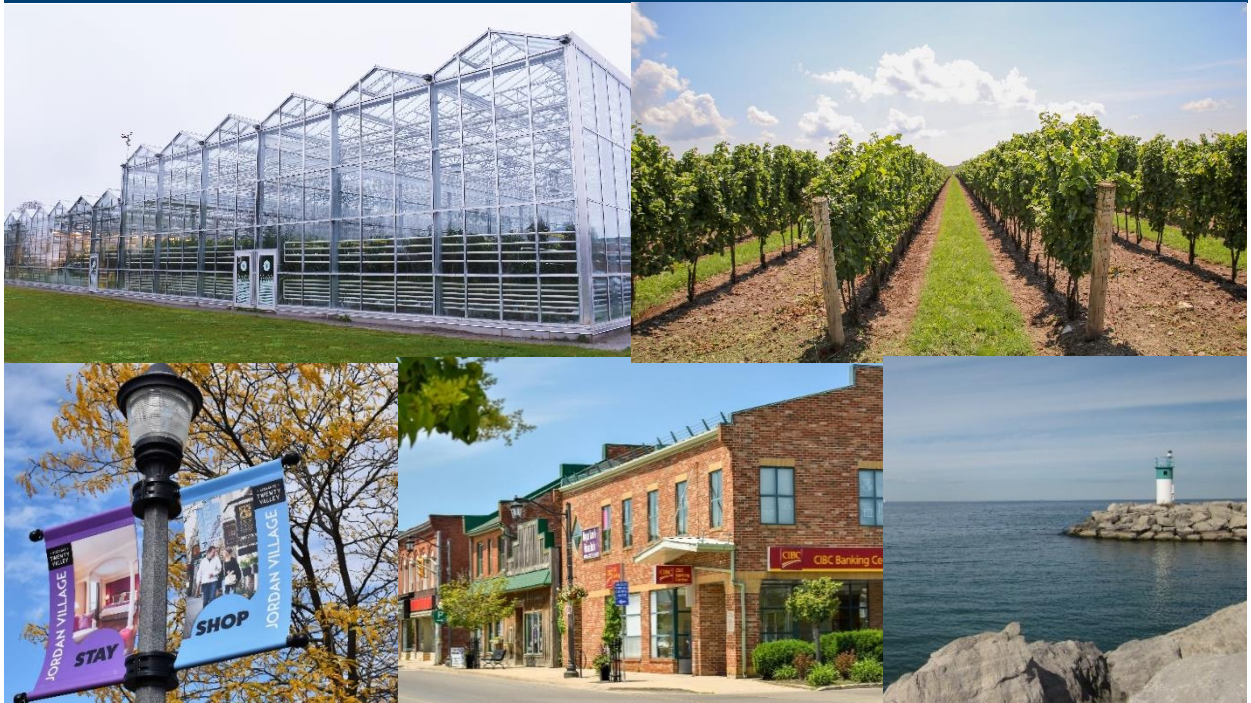


Town of Lincoln Economic Development Strategy and Action Plan

September 2018



Prepared by

GLOBAL
INVESTMENT ATTRACTION
GROUP

Town of Lincoln Economic Development Strategy & Action Plan

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Town of Lincoln Economic Development Strategy & Action Plan

Executive Summary

A. Introduction

The Town of Lincoln has taken a series of initiatives to increase the resources and the focus on economic development. Some of the key building blocks have included:

- A new Official Plan which stresses the Town's vision to be a Centre of Excellence for Agriculture;
- Hiring the Town's first full-time economic development officer;
- Undertaking two missions to provide Council and senior staff with exposure to international contexts relative to the community's interests – greenhouse operations, technology and prospective investors in The Netherlands, and potential partnerships in China and Vietnam for Lincoln's agriculture-based production and value-added products;
- Approval of Secondary Plans for the Prudhommes Landing lakefront area and for the proposed GO Rail Transit station in Beamsville; and
- Introduction of Community Improvement Plans (CIPs) for the commercial business cores in Beamsville and Vineland and for mixed use and residential intensification.

To provide a comprehensive foundation for economic development, the Town engaged Sierra Planning and Management and its partner, the Global Investment Attraction Group (GIAG), in November 2017 to lead the development of three interrelated projects, each involving varied time horizons:

- An Economic Development Strategy and Action Plan (5 years);
- Employment Lands Supply and Demand Analysis (25 years); and
- Employment Lands and Rural Areas Community Improvement Plan (CIP) (up to 10 years).

The Town's economic development program embraces the Vision:

"A Place to Grow, a Place to Prosper, a Place to Belong – The Town of Lincoln"

B. Profile and Outlook

The Town of Lincoln – which includes the communities of Beamsville, Jordan, Vineland, Campden and Rockway – is located in the Niagara region, in close proximity to the Greater Toronto-Hamilton Area (GTHA), along the QEW in a particularly vital cross-border Canada-US corridor. Home to about 24,000 people, the municipality's economic base is its exceptionally productive agricultural sector, complemented by value-added agricultural businesses, tourism, and manufacturing.

| Town of Lincoln – 2016 Census | |
|--|-----------------|
| Population | 23,767 |
| Increase Since 2011 Census | 5.8% |
| Share of Niagara Region's Population | 5% |
| Ranking among Niagara Municipalities | 6 th |
| Resident Labour Force | 12,490 |
| Jobs to Labour Force Ratio | 0.91 |
| Median Age (Niagara = 45.7 years and Ontario = 41.3) | 44.5 years |
| Proportion Who Are Immigrants (Niagara = 16.3% and Ontario = 28.6%) | 13.6% |
| Median Household After Tax Income (2015) | \$75,696 |
| Source: Statistics Canada 2016 Census | |

Lincoln's population grew by 5.8 percent between the 2011 and 2016 Censuses to 23,787, a rate faster than Niagara region (3.8 percent) and Ontario (4.6 percent). The corresponding growth in jobs in Lincoln was 8.0 percent. As a result, the "jobs to labour force" ratio – the number of local jobs compared to the resident labour force – rose to 0.91 or about 9 jobs for every 10 members of the labour force living in Lincoln.

Lincoln's orchards, vineyards, greenhouses and farms registered the highest gross farm receipts (just over a quarter of a billion dollars) of any Golden Horseshoe municipality, according to the 2011 and 2016 Censuses of Agriculture. Cannabis producers seeking to supply the legal recreational market are acquiring greenhouses and undertaking notable expansions.

Much of Lincoln's prosperity is centred on wine and craft beverages, greenhouses, tree fruits and berries, and rapidly expanding cannabis production. Tourists are attracted by Lincoln's winery, craft beverage, culinary, farm gate, artisanal product, cultural, recreational and outdoors experiences. The manufacturing sector – of which beverages are the largest component – has the highest year-round employment levels and registered job growth of 15 percent from 2012 to 2017, outpacing Niagara region and Ontario.

Lincoln hosts Ontario's world-class horticulture research facility, the Vineland Research and Innovation Centre (VRIC), and is proximate to both Brock University and Niagara College. The Town has taken the initiative to develop post-secondary partnerships, of which the Brock-Lincoln Living Lab is an example.

C. Town of Lincoln – Opportunities, Constraints, Indicators and Trends

The Employment Land Supply Study, prepared in parallel to the Economic Development Strategy and Action Plan, concludes that the quantity and quality of vacant industrial land, the majority of which is not "shovel ready," is unlikely to meet demand to 2041. Most of Lincoln's available industrial land is represented by infill opportunities in the Beamsville Business Park and the Durham Industrial Area.

Secondary Plans for the two new signature developments approved by Town Council in 2018 – Prudhommes Landing and the proposed Beamsville GO Rail Station – will attract wide interest and provide the majority of vacant land where office use will be permitted.

The widely consulted comparative analysis of Ontario property tax rates and development charges undertaken by BMA Management Consulting in 2017 indicated that the Town's industrial, commercial and residential property tax rates were generally competitive with Niagara's 11 other municipalities. By contrast, Lincoln's development charges ranked as the highest.

The Employment Lands and Rural Areas Community Improvement Plan (CIP) proposals, presented in conjunction with the Economic Development Strategy, suggest a fuller suite of CIPs to build on the existing CIPs which incented \$2.3 million in construction activity up to October 27, 2017. In particular, the assessment recommends CIPs to encourage full take of the limited remaining industrial land and to accelerate commercial office development around that proposed Beamsville Go Rail station well in advance of the start of service.

Lincoln is relatively well served by high-speed broadband which is now considered essential infrastructure. Some gaps remain, however. Soon, the availability of 5G networks will become the new standard. These

networks will be critical enablers for autonomous vehicles and expanded Internet of Things (IoT) networks in manufacturing, agriculture, services and tourism.

The Town's Economic Development Strategy and Action Plan will be pursued in an environment of lower economic growth, an uncertain international trade and economic scene, cautious foreign direct investment decisions, and societal concerns over workplace compensation and the quantity and quality of jobs in the face of accelerating technological change.

D. Principal Lincoln Economic Development Roles to Drive Results

The overarching goal in economic development is that sustained policies, programs and initiatives will improve the economic well-being of a community and will grow the municipal tax base by retaining and attracting investment and talent and by fostering and sustaining beneficial economic growth and diversity.

1. Open for Business – Town Economic Development Policies and Business Climate

GOAL: Lincoln is an attractive business location that is competitive, responsive and welcoming to job-generating sustainable economic growth.

To build on the Town Council's and administration's commitment to economic development, further important areas for action – which will influence the perceptions of business and developers – are:

- Timely servicing and marketing of designated employment lands, along with associated CIPs;
- Offering a business expeditor service to prospects to support their development approval and other interactions through to final decisions;
- Known and predictable development approval timelines;
- Well-coordinated whole-of-government approaches in areas related to economic development;
- Interaction with the realty and development communities;
- Encouragement and facilitation of employment generating agricultural-related developments;
- Established channels for regular consultation and dialogue with economic development stakeholders; and
- Ensuring new flagship developments demonstrate a progressive approach and signal future opportunities.

An immediate requirement is to make the Town fully investment and economic development ready by:

- Developing site selection databases and a searchable inventory of commercial and industrial land and buildings to enable prompt and comprehensive responses to local business, developers and prospective investors;
- Installing a Customer Relationship Management (CRM) system and developing a Business Directory; and
- Further upgrading the economic development portion of the Town website, later leading to a standalone site.

2. Business Retention and Expansion (BR+E)

GOAL: Existing Lincoln businesses and agricultural enterprises thrive and grow.

Outreach to and support for existing Lincoln businesses must be the backbone for the Town's economic development program. Structured BR+E call programs should be undertaken regularly and summary reports of business intentions, concerns and needs prepared for Council. Close collaboration with other partner organizations that provide service and funding to local enterprises is essential.

3. Innovation and Entrepreneurship

GOAL: Lincoln's businesses and agricultural enterprises embrace innovation and entrepreneurship.

Entrepreneurship and the creation and growth of businesses power vibrant and expanding local economies. Innovation and calculated entrepreneurial risk in established companies are also essential if the companies are to grow and survive in the face rapid technological change and disruption.

A focal point locally is the innovation hub in downtown Beamsville – Spark Lincoln – which was launched in April 2018 in space provided by the Town. Spark Lincoln, whose role should be nurtured, provides co-working and meeting space and focuses on driving entrepreneurship, the establishment and growth of businesses, coaching and mentoring, and coding workshops for students in grades six to twelve.

The Town's economic development program should play a lead "go-to" role in connecting local firms and entrepreneurs to the resources and programs that will support their entrepreneurial and innovation goals.

4. Attracting New Investment

GOAL: New investment is attracted that benefits Lincoln

Given the exceptionally competitive and demanding environment for external direct investment attraction, a collaborative approach with Team Niagara will be the prime channel for highly focused outreach that is founded on well researched Lincoln value propositions in selected sub-sectors.

Liaison with the Lincoln-based operations of foreign-owned companies is of importance in order to be aware of opportunities to support their business cases for new mandates or to counter risks of downsizing or closure. Partners at the Regional, Ontario and Federal levels can often facilitate access to intelligence and headquarters executives.

5. Talent and Workforce Development

GOAL: Available talent and skills are aligned with the needs of existing and new Lincoln businesses and agricultural enterprises.

The availability of highly qualified personnel is inevitably a front-of-mind preoccupation for any company considering an expansion or new facility. As a result, talent attraction and retention, information on university and college co-ops and graduates, retraining and re-skilling, and detailed analysis of talent availability are a fundamental aspect of investment retention, expansion and attraction.

Partnerships with Niagara Region, the Niagara Workforce Planning Board (NWPB), Brock University and Niagara College will be vital, including finding ways to reach out to:

- Lincoln commuters for whom there may be prospects of jobs closer to home;
- Working parents, with young families, wanting an alternative to the cost, housing and congestion issues in the GTA, especially those who have connections to Niagara;
- Entrepreneurs, creative professionals, lone eagles and seasoned seniors attracted by a Lincoln-type lifestyle choice, provided they can access affordable high-speed broadband and major international airports;
- Youth graduating from Brock University and Niagara College; and
- Immigrants, including those who arrive in Toronto, but can be attracted to a more affordable location in Lincoln in which to raise their families.

6. Marketing Lincoln to Attract Talent, Visitors and Investors

GOAL: The marketing of Lincoln differentiates it and makes it the choice of investors, visitors and talent.

In economic development, branding and marketing must be founded on clearly defined and discernable advantages that differentiate and draw attention to the community's unique strengths.

As part of a multi-year marketing plan, the Town needs to hire a professional firm to refine its economic development brand, in the context of the Town's own and its tourism branding.

The further development and evolution of economic development website content and positioning should be a priority, leading ultimately to a standalone website. Social media, videos, success stories, newsletters, marketing automation campaigns and the CRM system also need to be integrated.

Team Niagara initiatives provide direct exposure to visits by media, realty and development professionals, and site selectors to Niagara and Lincoln.

E. Sectors of Focus

With limited resources, focus and discipline is vital, especially as part of efforts to target sectors and technology platforms that align with Lincoln's strengths, opportunities and needs.

Sectors are less relevant as a reference in setting priorities as they may once have been. A prime driver behind the ever more rapid pace of technology change is digitization which has made digitally-based technology skills a common requirement in workplaces. Digitally-based platform technologies such as Artificial Intelligence (AI), the Internet of Things (IoT), Big Data, 3-D Printing, Augmented and Virtual Realty, and robotics are being applied across many once distinct sectors.

Along with the growth of digitization, the relentless shift toward greater service sector employment continues. In Lincoln's case – though likely beyond the five year time span of the Strategy and Action Plan – the town is likely to emerge as a more prominent location for services firms looking to occupy

commercial office space, especially technology firms associated with Lincoln's agricultural-related operations and satellite and regional operations of financial and professional services firms.

In Lincoln, close interrelationships among agriculture, food and beverages, tourism and manufacturing are evident. Overlap has increased among many facets of Lincoln's agriculture, value-added agri-based ventures, and tourism sectors. Lincoln's existing and future manufacturing and service sector companies can also benefit from the serving the needs of the greenhouses, cannabis producers, wineries, vineyards, tree fruit and berry, and tourist operations located in Lincoln and Niagara.

OVERALL GOAL IN THE SECTORS OF FOCUS: The Town of Lincoln's business retention, growth and attraction initiatives are judiciously targeted.

1. Agriculture

GOAL: The Town's stewardship supports the health, prosperity and technological leadership of Lincoln's agricultural production.

Intensive high value-added agriculture is the foundation of Lincoln's economy. The Town is focused on being a Centre of Excellence for Agriculture.

- With 13 percent of all gross farm receipts, Lincoln leads all Golden Horseshoe municipalities.
- Lincoln dominates the greenhouse floriculture sector which continued to grow between the 2011 and 2016 Censuses of Agriculture.
- Farm consolidation continues. The land being farmed in Lincoln dropped by 6 percent over the decade from 2006 to 2016, though number of farms declined by 25 percent. The average farm's acreage grew by 10 percent and gross farm receipts were up 30 percent. Lincoln's on-farm employment grew from 2010 to 2015.

Technology adoption in Lincoln also appears to be broadly based, according to indicators in the 2016 Census of Agriculture. However, Lincoln's agricultural sector faces extreme competitive pressures, such as the increased minimum wage, high energy costs, competition from lower wage countries, and continued intensification of production. In order to sustain competitiveness, growers must have access to and invest in advanced technologies, robotic operations, computerized systems, and plant breeding to optimize returns. For the economic development program, key roles are ensuring productive connections with partners and funding sources. Links with the Vineland Research and Innovation Centre (VRIC), Niagara College and Brock University provide ready technology and research partnership options, along with the University of Guelph. Natural gas and water for irrigation are important infrastructure needs that require planning and funding.

2. Value-Added Agriculture and Food and Beverages

GOAL: Greater added value and financial returns from Lincoln's agricultural production are realized locally.

Wineries dominate the Lincoln businesses that add value to agricultural production. Craft beverage ventures are expanding. The Vineland Research and Innovation Centre (VRIC), Niagara College, and Brock University are showing leadership in research, advisory roles and providing relevant courses.

The ability to provide shared commercial kitchen space should be explored as a means to attract speciality and artisanal food processors to Lincoln, including early stage graduates of GTA food incubators. The Town might also play a lead role in accelerating the attraction of craft beverage producers by pursuing a model for accelerated approvals that was piloted in Peterborough under an Association of Municipalities of Ontario (AMO) initiative.

Opportunities to add value to Lincoln's agricultural production extend beyond further processing to the provision of additional marketing channels, including direct to retail, that enhance the producers' returns. The Town can coordinate and facilitate joint marketing initiatives and feasibility studies for farmers' markets and hubs. As legislated and regulatory limitations on the sale of alcoholic beverages and cannabis products are modified, new retail opportunities will arise to jointly showcase and market Lincoln products.

3. Tourism

GOAL: Lincoln is recognized as being at the centre of a prime Niagara travel destination which capitalizes on the bounty of its land and natural environment.

After post 9/11 decade of decline, the number of international visitors to Canada has shown a strong upturn since 2013, propelled by the lower Canadian dollar and rising middle-class travel from emerging economies.

Lincoln is situated in one of the world's most recognized travel destinations – Niagara. Lincoln's assets are linked to its agriculture and rural character, along with its inviting natural features and its setting along Lake Ontario and the Niagara Escarpment. The large cluster of wineries has been a lead card, but the variety of experiences in Lincoln invite repeat visits.

Tourism marketing for Lincoln has been led since 2001 by the Twenty Valley Tourism Association (TVTA), as the Destination Marketing Organization (DMO). The Town is a founding partner. TVTA membership has grown however to include Grimsby and St. Catharines organizations. The TVTA total outlays for operations, events and marketing initiatives in FY 2017 were just over \$600,000. The Town contributed \$53,730 through its membership and support for TVTA events and initiatives.

With the vital and growing role that tourism is playing in Lincoln and the increased focus on economic development, the Town should develop a comprehensive tourism strategy. The Town needs a multi-year plan for investment in tourism assets, including infrastructure, that will deliver high quality authentic product, memorable and surprising experiences, and sources of information that will welcome and guide visitors. Areas of focus include wayfinding signage, shared mobility arrangements for visitors, e-information for visitors, relevant dimensions of the Parks, Recreation and Cultural Master Plan,

watersports, and cycling and hiking trails. The Town will also need to consider increased expenditures for destination marketing and tourism branding. Decisions about marketing and branding should be based on professional assessment of the approaches which will have the greatest potential impact on the consumer and provide the greatest return on the Town's investment. Investment in additional overnight accommodation is also a priority.

4. Manufacturing

GOAL: Lincoln's manufacturing sector is sustained and grows thanks to firms that capitalize on leading-edge technologies and services that answer Lincoln's, Ontario's and the world's needs.

Manufacturing is Lincoln's largest sector in 2017 in terms of the number of jobs – 1,663 in 2017. Over one-third of the jobs were in beverage manufacturing – dominantly wineries. Among the other manufacturing sub-sectors whose 2017 employment levels represented growth of 10 percent or more from 2012 to 2017 were: general-purpose machinery (employing 135 in 2017); plastics (120 employees in 2017); architectural and structural metals (103 jobs); railroad rolling stock (50 jobs); pesticide, fertilizer and agricultural chemicals (46 jobs); and medical equipment and supplies (45 jobs).

An important focus for the Town is to ensure that Lincoln-based manufacturing operations are well placed to exploit the potential for the further development of manufacturing, service and research-based businesses in Lincoln that capitalize on the town's location; the existing base of greenhouse, viticulture, winery and tree fruit and berry operations; and the extensive research and talent generation offered by VRIC, Niagara College and Brock University.

Vital roles for the Town, working with the Niagara Industrial Association (NIA), are to ensure access to partners and assistance that enhance manufacturers' competitiveness, encourage their growth and viability, and extend their marketing reach.

F. Implementation Overview

Economic development and investment readiness is the immediate priority for the Town's emerging economic development program. This encompasses the establishment of a Customer Relationship Management (CRM) system, a site location database, a searchable inventory of available industrial and commercial lands and buildings, a business directory, an expanded website presence, and an initial approach to social media. Part-time staff and consultants can help kick-start this effort. Also, budgets will need to be developed and presented for 2019.

Early priorities will also include initial personal contact with local businesses and agricultural enterprises, establishing a framework for at least annual round tables with key stakeholder groups, steps to implement the recommendations of the employment land study, and making the Town's Community Improvement Programs (CIPs) known.

A tourism strategy should be a 2019 priority, as the establishment of well-informed discussion and consensus is required on the way forward. Planning should commence for a well-structured BR+E calling program to be conducted in late 2019 or early 2020. Planning and preliminary assessments could be commenced during 2019 in order to proceed as early as 2020 on:

- Development of an all-of-governments approach to reviewing and granting approvals for micro-breweries, micro-distilleries, brew-pubs and licence restaurants;
- The encouragement of retail initiatives to present a full range of Lincoln produced wine, cider, craft beer and craft spirits;
- The viability of a food incubator or shared space in Lincoln;
- Support of signature new developments – Prudhommes Landing and the proposed Beamsville GO Commuter Rail Station area.

In light of the 2019 tourism review, 2020 would also be appropriate timing to strengthen economic development marketing, including creation of a stand-alone website and targeted marketing automation campaigns.

G. Resource and Budget Implications and Timing

The principal budget requirements for the latter part of 2018 into early 2019 will be:

- Establishing data bases and systems to ensure program readiness;
- Expanding the economic development section of the Town's website;
- Updating the Town's economic development marketing collateral, including for the new CIPs; and
- Developing a Lincoln business directory.

The major initiative envisaged for 2019 that will require significant funding is the development of tourism strategy for the Town. Funding should also be available for contributions to research and programs led by partner organizations that will benefit Lincoln.

For 2020, the main budget requirements will centre on:

- Tourism funding that reflects and will enable the new strategy's recommendations;
- Creation of a stand-alone economic development website, and potentially a revisiting of the economic development branding;
- Value propositions; and
- Marketing automation programs.

The hiring of an economic development research and support assistant should be envisaged during 2019. Additional funding should be available to hire part-time staff, co-op students and consultants for specific projects.

Town of Lincoln Economic Development Strategy & Action Plan

A. Introduction

The Town of Lincoln Council and Administration has taken deliberate steps to give added emphasis to the municipality's economic development program. Resources were added in 2017, when the Town hired its first full-time economic development officer.

Council has focused on the goal of Lincoln as a Centre of Excellence for Agriculture as a centrepiece of its vision. It has reached out to partners to invite input and partnership. Two missions – one to The Netherlands in 2016 and another to China and Vietnam with the Ontario Premier in 2017 – were undertaken by elected officials and staff.

To establish a sound basis for economic development activities going forward, the Town engaged Sierra Planning and Management and its partner, the Global Investment Attraction Group (GIAG), to lead the development of three complementary projects, each with varied timeframes:

- An Economic Development Strategy and Action Plan (5 years);
- Employment Lands Supply and Demand Analysis (25 years); and
- Employment Lands and Rural Areas Community Improvement Plan (CIP) (up to 10 years).

These projects commenced toward the end of 2017. The reports were presented to Council on September 19, 2018.

This document is the Economic Development Strategy and Action Plan which presents goals, objectives and actions to guide economic development in Lincoln over the next five years. The Strategy and Action Plan provides the framework within which detailed annual economic development business plans and budgets are prepared.

Working with Sierra Planning and Management and Town staff, the Global Investment Attraction Group (GIAG) took the lead in the development and preparation of the Strategy and Action Plan. Input from the Town Council's Economic Development Committee has been an important aspect of this component of the project. In addition, the project involved a public online survey which was available from February 15 to March 26, 2018, individual meetings with a selection of economic development stakeholders, and a round table open to interested members of the public which was held on March 21, 2018.

The Town Working Group was comprised of Paul Di Ianni, M.A., Economic Development Officer, and Matt Bruder, MCIP, RPP, Associate Director of Planning and Development. Sincerest appreciation is extended to all those who participated in the development of the Economic Development Strategy and Action Plan.

VISION

A Place to Grow, a Place to Prosper, a Place to Belong – The Town of Lincoln

B. Town of Lincoln – Profile and Outlook

The Town of Lincoln, formed in a 1970 amalgamation, is prominently located in Ontario's Niagara peninsula along the Queen Elizabeth Way (QEW) highway and the Niagara escarpment, with frontage on Lake Ontario. The main community in the town is Beamsville, which serves as the administrative centre and main business area. Other population clusters include Vineland, Jordan, Campden, Rockway and Tintern. Lincoln dominates the geography of the tourism destination that has been branded for two decades as Twenty Valley, named for Twenty Mile Creek, which flows above the escarpment before descending at Ball's Falls to enter Lake Ontario at Jordan Harbour.

Lincoln's superior natural beauty includes its Lake Ontario waterfront access, the picturesque Jordan Harbour, fruit trees and vineyards, and conservation areas such as Ball's Falls. Its highly productive agriculture sector – known for its greenhouses, viticulture, and tender tree fruits and berries – benefits climatically from the lands that are set below the Niagara escarpment, an environmentally protected UN World Biosphere Reserve. The wineries, orchards and greenhouse products are important magnets for tourism.

Lincoln is situated in the Greater Golden Horseshoe (GGH), anchored by the City of Toronto and curving around the Canadian northern, western and southern shore of Lake Ontario. The GGH's population concentration of 9.4 million people¹ ranks the metropolitan area fifth among US and Canadian counterparts.² The GGH contains over one-quarter of Canada's population and attracts one in three new immigrants to Canada. As one of North America's fastest growing regions, it is forecast to have a population of 13.5 million by 2041.³

Provincial and municipal land use policies ensure that agriculture and agricultural-related uses will continue to be a principal driver of the town's economy. This means that Lincoln's economic future will be largely dependent upon agriculture and its relationship to value-added and processing activities, tourism, and the opportunities it creates for manufacturers and technology suppliers.

Going forward, the Town has approved the Secondary Plan for Prudhommes Landing, the prominent mixed-use lakefront redevelopment along the QEW in Vineland. Existing Community Improvement Programs (CIPs) target downtown enhancements in Beamsville and Vineland. Council has also approved a Secondary Plan for a proposed GO Transit station and adjacent commercial development in Beamsville, as part of Phase 2 of the GO commuter rail service to Niagara. Phase 2 stations, including Beamsville, are contingent on ridership in Phase 1, scheduled to launch to Niagara Falls by 2023.

Transportation Networks: Lincoln has excellent access to major transportation networks, with ready access via the QEW to the Greater Toronto Hamilton Area (GTHA) and to the US border only 50 kilometers away. This positions Lincoln within a day's drive of 55 percent of the US and 60 percent of the Canadian population. Both Toronto Pearson International and Buffalo International Airports are an equal distance

¹ Canadian Census 2016.

² Based on a comparison with US "Combined Statistical Areas" in the 2015 US Census. New York-Newark NY-NJ-CT-PA, Los Angeles-Long Beach CA, Chicago-Naperville IL-IN-WI, and Washington-Baltimore-Arlington DC-MD-VA-WV-PA are the four ahead, while San Jose-San Francisco-Oakland CA, Boston-Worcester-Providence MA-RI-NH-CT, Dallas-Fort Worth TX-OK and Philadelphia-Reading-Camden PA-NJ-DE-MD follow.

³ Ontario Ministry of Municipal Affairs (<http://www.mah.gov.on.ca/AssetFactory.aspx?did=10852>). Accessed on February 17, 2017.

(85 kilometers) from Lincoln, with Hamilton International, Billy Bishop Toronto City Airport, Niagara District Airport, and Niagara Falls (NY) International Airport even closer. Lincoln businesses are close to the Port of Hamilton, Ontario's largest port, while CN Rail bisects Lincoln.

The overview of socio-economic and economic base factors which is provided in this section, draws on the project's Background Report which contains additional information.

1. Population

The 2016 Census placed Lincoln's population at 23,787, a 5.8 percent increase since 2011. This is a more rapid pace than Niagara region's population growth of 3.8 percent, Ontario's 4.6 percent and Canada's 5.0 percent. Lincoln's population has grown steadily over the last two decades, having increased by 26.5 percent since 1996.⁴

Lincoln ranked sixth among Niagara's 12 municipalities and accounted for 5 percent of Niagara region's population. According to the Phase 3 Summary Report of the Niagara Region Municipal Comprehensive Review (MCR), Lincoln's population is forecast to maintain this 5 percent share, reaching 28,060 in 2031 and 31,590 in 2041, a one-third increase.

Lincoln's median age was 44.5 years in 2016, slightly younger than the Niagara median of 45.7 years, but older than the comparable Ontario figure of 41.3. Lincoln's population profile by age groups showed higher than provincial average portions of its residents are under 20 and over 50 years. For the prime working age group from 25 to 44 years, Lincoln's proportion of the population was 21.7 percent compared to the Ontario average of 25.7 percent. The proportion of the millennial population (aged 15 to 35) was also below the provincial average.⁵

Immigrants (that is, people born in another country) represent a lower proportion of the Lincoln population than either Niagara region or especially Ontario. The 3,245 immigrants residing in Lincoln in May 2016 represented 13.6 percent of the population. The proportions for Niagara region and Ontario were 16.3 percent and 28.6 percent respectively. In Lincoln, those born in the United Kingdom and the Netherlands accounted for 45 percent of immigrants, followed by the US, Italy, Germany, Poland, Portugal, and Hungary.

2. Jobs

Lincoln's resident labour force in May 2016 was 12,490 persons, of which 11,915 were employed. The proportion who were self-employed (14.1 percent) was higher than for Niagara (10.6 percent) and Ontario (11.5 percent).

⁴ See statistical table in Appendix E, Exhibit 1.

⁵ See statistical table in Appendix E, Exhibit 2.

The workforce residing in Lincoln was slightly larger than the total number of jobs in the town, according to the 2016 Census. There were however many commuters to and from Lincoln to other Niagara municipalities, Hamilton and the western GTA. As a consequence, Lincoln employers can readily draw on much of Niagara's workforce (226,590 in 2016) and the Hamilton CMA labour pool of 395,005 as well.

Manufacturing, especially wine production, led all sectors with 1,665 people employed in Lincoln in 2017. It was followed by health care and social assistance (1,486 jobs); agriculture (1,366); administrative and support, waste management and remediation services (1,039); retail (964); wholesale trade (935); construction (894); and accommodation and food services (860).⁶

Commuter Flows: There are significant commuter flows and only about one-third of the jobs in Lincoln ended up being held by local residents. The largest inflows to Lincoln come from nearby St. Catharines (2,040), Grimsby (680), and Hamilton (565). These same communities are also the main destinations for Lincoln residents whose workplace is outside the town: Hamilton (1,605), St. Catharines (1,350), and Grimsby (925).⁷ The commute time was under 30 minutes for the nearly two-thirds of those in Lincoln who commute to work, whether locally or beyond the Town's boundaries.

Workforce Data: Data from the 2016 Census on after-tax income, low income measurements, labour force participation, and full and part-time work showed Lincoln to be doing relatively well compared to Niagara region and Ontario. For example:

- Lincoln had a higher proportion of full-time workers rather than people who worked part-time or only part of the year during 2015;
- Lincoln's workforce participation and employment rates were higher than for the Province and the region at the beginning of May 2016, while the unemployment rate was 2.8 percent lower;⁸
- Lincoln's median household after-tax income in 2015 was \$75,696, compared to \$65,285 for Ontario and \$58,235 for Niagara region;
- Lincoln's median individual after-tax income in 2015 was \$34,127, where Ontario's was \$30,641 and Niagara region's \$29,021.; and
- The two widely-used statistical measurers of low income showed fewer people in these categories in Lincoln than in either Ontario or Niagara region in 2015.⁹

3. Economic Structure

Lincoln's economy is not highly diversified. Key employment segments are agriculture, manufacturing, tourism and farm product distribution. What is absent in Lincoln's sector mix is any notable concentration of jobs in professional and services occupations such as finance and insurance; real estate and rental and leasing; professional, scientific and technical services; information and cultural industries; and utilities. In part, this reflects the fact that Lincoln is not among the largest retail or business hubs for the region. It

⁶ See statistical table in Appendix E, Exhibit 7.

⁷ See statistical table in Appendix E, Exhibit 5.

⁸ Further data is provided in Section D.5 dealing with Talent and Workforce Development.

⁹ According to the 2016 Census, the prevalence of population in private households in 2015 that met the Low-Income Measure, After-Tax (LIM-AT) definition was 7.2% in Lincoln, 14.5% in Niagara region and 14.4% in Ontario. For the Low-Income Cut-Offs, After-Tax (LICO-AT), the prevalence was 2.5% for Lincoln, 7.4% for Niagara region and 9.8% for Ontario. Definitions for LIM-AT and LICO-AT can be found in Statistic Canada's Dictionary, Census of Population, 2016.

merits noting however that the rate of job growth in several of these categories has been high over the 2012 to 2017 period, though it is from a low base which is well below the provincial average.

Agriculture

Lincoln is positioned as one of the premier locations in Canada for high revenue agriculture. Since the mid-1990s, Niagara's agricultural footprint has been marked by the remarkable growth of the winery and viticulture sector, which has developed lesser used land below the escarpment and land dedicated to fruit trees. The floriculture greenhouse sector – buffeted in the mid-2000s by a high Canadian dollar and market shifts – has adjusted and has expanded its growing area in Lincoln from 2011 to 2016. Cannabis producers have purchased and expanded greenhouse space and land to supply the legalized recreational market. Significant hiring is evident.

Lincoln – A Centre of Excellence for Agriculture: The Town's overriding priority – as expressed in the Official Plan – is that Lincoln should be a Centre of Excellence for Agriculture, taken in the broadest sense. Intense and highly productive agriculture is the foundation of Lincoln's economy. Lincoln's agriculture is also a driving force for the town's manufacturing, tourism and distribution sectors.

Lincoln's farms account for \$13 of every \$100 in gross farm receipts in the Golden Horseshoe

Lincoln – Niagara's Agricultural Leader: Though Lincoln's success is much less well known than it should be outside the area, Lincoln's agriculture sector ranks ahead other Niagara region municipalities in most respects. According to the 2016 Census of Agriculture, Lincoln led the Niagara region and Golden Horseshoe municipalities with the highest total gross farm receipts -- \$253,834,638. Lincoln's total represented 13 percent of gross farm receipts in the entire Golden Horseshoe, even though Lincoln accounted for only 3 percent of the farmland acreage. The town has the highest concentration of greenhouses in Niagara region and dominates greenhouse floriculture production in Ontario. In the 2016 Census, Lincoln's tree fruit and berry sector led all Niagara municipalities in the number of farms and the acreage producing pears, apples, sweet cherries, sour cherries, apricots, raspberries and strawberries.

Consolidation of Farm Operations: Consolidation within the Lincoln agriculture sector continued over the decade from 2006 to 2016 in line with national trends. Lincoln's gross farm receipts grew by 30 percent and the average farm size increased by 10 percent. On the other hand, the number of farms declined by 25 percent over the decade, though the absolute amount of land being farmed dropped by only 6 percent. Another indicator of consolidation was that, in terms of gross farm receipts, the only categories that showed steady growth in the number of farms in Lincoln (and elsewhere in Niagara region) were farms with gross receipts of over \$500,000 annually.

Employment Levels in Agriculture: Lincoln's agriculture sector had the highest employment levels in 2016 of any Niagara region municipality, employing 869 full-time year-round and an additional 2,550 in part-time and seasonal roles. The overwhelming proportion of farm operations are family-owned – 94.5 percent, signalling the high level of personal entrepreneurship that is involved. The average age of Lincoln farm operators was 56.9 years, higher than the national average of 55.0 and the southern Ontario average (55.9), although about the same as Niagara region (56.0). The number of farm operators under 35 held steady in 2016 from 2011, while the proportion of female farm operators in Lincoln increased from 28.4 percent in 2011 to 30.2 percent in 2016.

Tourism

Lincoln is part of a region that has long been one of the world's most readily recognized tourism destinations. Niagara region drew 12.7 million visitors who spent nearly \$2 billion in 2014, according to the latest comprehensive data set from the Ontario Ministry of Tourism, Culture and Sport. Tourism statistics for individual Niagara destinations are not available. The tourism data for the region indicates that significant numbers of Niagara visitors seek out experiences well beyond The Falls. Historic sights, outdoor and sports activities, cultural performances, museums and art galleries and Provincial parks all ranked in the top 10 activities in which visitors to Niagara region participated in 2014 (see Exhibit 1). Though only 37 percent of Niagara visitors stayed overnight, they represented almost 70 percent of total visitor spending.

| Exhibit 1 | |
|--|-----------|
| Tourism Visitors to Niagara – Regional Tourism Organization (RTO) 2 | |
| Top 10 Activities in which Visitors Participated – Person Visits - 2014 | |
| 1. Visit Family or Relatives | 2,654,000 |
| 2. Sightseeing | 2,468,200 |
| 3. Historic Sights | 1,742,600 |
| 4. Casinos | 1,599,700 |
| 5. Shopping | 1,582,300 |
| 6. Restaurant or Bar | 1,463,800 |
| 7. Any Outdoor/Sports Activity | 1,432,600 |
| 8. Cultural Performances | 1,357,600 |
| 9. Museums/Art Galleries | 986,900 |
| 10. National/Provincial Nature Parks | 949,300 |
| Source: Ontario Ministry of Tourism, Culture & Sport, based on Statistics Canada microdata | |

Lincoln's Tourism Assets: Tourism in Lincoln benefits from its prominent location on the Queen Elizabeth Way (QEW), proximity to the GTA, its valued Lake Ontario frontage, and the climatic benefits of the Niagara escarpment. Recognition of Niagara's wine country has grown dramatically and emphatically since the pivotal transition in the 1990s from labrusca to vinifera grapes. Today, Lincoln's tourism offering incorporates a combination of wineries, culinary and beverage offerings, festivals, hiking, cycling, water sports, retail, agriculture, conservation areas, culture, and historic sites. Based on a survey by the Town, Lincoln lays claim to hosting more wineries – many family-owned – than any other Niagara municipality. Craft beer, cider and spirits producers have become additional magnets which are attracting visitors and expanding the visitor experience. For wineries and craft beverage operations, the direct sales to visitors are a vital higher margin sales channel. Lincoln also stands out in Niagara region in terms of the number of farms, including greenhouses and tender fruit and berry growers, that sell directly at the farm gate, in farmers' markets, and via pick-it-yourself arrangements. Growers and tourism benefit when consumers are drawn to their farms and local markets.

Tourism's Beneficiaries: A host of smaller Lincoln businesses who do not target tourism also benefit from visitor spending which often provides incremental revenue that may be the difference between profit and loss – for example gas stations, restaurants, or convenience stores. The extent of tourism's reach is evident in the fact that 13 percent of all businesses in Ontario are involved in tourism, and over 90 percent of these are small businesses with fewer than 20 employees.¹⁰

¹⁰ Ontario Ministry of Tourism, Culture and Sport, "Growing Tourism Together: A Strategic Framework for Tourism in Ontario," 2016 (http://www.mtc.gov.on.ca/en/tourism/strategic_framework.shtml). Accessed on April 25, 2018.

Given the dispersion of tourism spending, it is not a simple matter to identify all the jobs associated with tourism. Although they also serve the local market, notable areas in Lincoln that are major beneficiaries from tourism are:

- The travel accommodation sector, where the number of jobs grew to 145 in 2017, a boost of 63 percent from 2012 to 2017;
- Independent artists, writers and performers with 139 jobs in 2017, an 88 percent jump from 2012;
- “Other amusement and recreation industries” which saw an employment growth of 42 percent from the 2012 total to 169 in 2017; and
- Full service restaurants and limited service eating establishments where 712 people were employed in 2017, an increase of 30 percent over 2012.

The five-year rate of growth in each of these areas was higher than the percentage increases for Ontario and Niagara region – significantly so in several cases.

Manufacturing

Manufacturing was Lincoln’s largest sector in terms of the total number of jobs in 2017. It represented slightly over 13 percent of Lincoln’s workforce, compared to under 10 percent for both Niagara region and Ontario. Considerable growth in manufacturing employment was evident over the last five years. The sector had 1,665 employees in 2017, up by 220 jobs or 15 percent since 2012. By comparison, manufacturing employment over the same period showed an increase of 8 percent in Niagara region while remaining essentially level province-wide (see Exhibit 2).

Beverage manufacturing – principally wine production – was the largest component by far, accounting for 602 jobs in 2017. Employment in the segment increased by over 36 percent. The net gain of 161 jobs represents nearly three-quarters of the overall increase in manufacturing jobs in the Lincoln.

| Exhibit 2 | | | | | | | |
|--|--|-------------------|------------------|------------------|--------------------------------------|------------------|------------------|
| Employment in the Principal Manufacturing Sub-Sectors in Lincoln | | | | | | | |
| 2012 - 2017 | | | | | | | |
| NAIC Codes | Description | 2017 Lincoln Jobs | 2012-2017 Change | % Lincoln Change | Location Quotient (LQ) ¹¹ | % Niagara Change | % Ontario Change |
| 3121 | Beverage manufacturing | 602 | 161 | 36.5% | 21.82 | 28.5% | 16.0% |
| 3339 | Other general-purpose machinery manufacturing | 135 | 16 | 13.4% | 5.20 | 34.2% | 9.3% |
| 3261 | Plastic product manufacturing | 120 | 37 | 44.6% | 1.63 | 83.5% | 8.7% |
| 3323 | Architectural & structural metals manufacturing | 103 | 34 | 49.3% | 2.77 | 52.2% | 7.2% |
| 3273 | Cement & concrete product manufacturing | 86 | -13 | -13.1% | 4.78 | 20.0% | -2.4% |
| 3345 | Navigational, measuring, medical & control instruments manufacturing | 85 | -26 | -23.4% | 5.94 | -29.1% | -30.1% |
| 3116 | Meat product manufacturing | 76 | -50 | -39.7% | 2.74 | -28.6% | -10.6% |
| 3365 | Railroad rolling stock manufacturing | 50 | 11 | 28.2% | 10.57 | 26.8% | -2.4% |
| 3253 | Pesticide, fertilizer & other agricultural chemical manufacturing | 46 | 16 | 53.3% | 26.93 | 54.3% | -2.1% |
| 3391 | Medical equipment and supplies manufacturing | 45 | 12 | 36.4% | 2.82 | 25.6% | 7.2% |
| 3329 | Other fabricated metal product manufacturing | 37 | 3 | 8.8% | 2.41 | 17.7% | -0.2% |
| 3353 | Electrical equipment manufacturing | 32 | -16 | -33.3% | 2.79 | -33.3% | -13.7% |
| 3372 | Office furniture (including fixtures) manufacturing | 31 | -9 | -22.5% | 1.34 | -20.9% | 9.6% |
| 3118 | Bakeries & tortilla manufacturing | 18 | 0 | 0.0% | 0.48 | -9.8% | -0.9% |

Source: EMSI Q3 2017

4. Post-Secondary Educational Institutes and Research Centres

Lincoln is fortunate to be proximate to Niagara's two post-secondary institutions, Brock University and Niagara College. The talent that they graduate and have in their co-op programs is critical, as are linkages that provide business with leading edge research, testing and prototyping partners and facilities. Both have programs that align with Niagara's and Lincoln's strengths and economic needs. Within Lincoln's boundaries, the Vineland Research and Innovation Centre (VRIC), Canada's leading applied horticulture research entity, has a close affiliation with the University of Guelph. Lincoln is also near McMaster

¹¹ Location quotient analysis compares the relative concentration of each sector in a community to a reference area (in this case Ontario). The comparison uses a simple ratio of sector employment to total employment. The provincial average for each sector has a location quotient of 1. A location quotient higher than 1 indicates a higher employment concentration in that sector than the provincial average, while less than 1 indicates the concentration is lower than the provincial average. Greater location quotient variances mean higher or lower employment concentrations than provincial averages. In essence, location quotients allow us to identify which sectors are over- or under-represented relative to the province as a whole.

University and Mohawk College in Hamilton, with offerings that in many respects complement Brock and Niagara College.

Brock-Lincoln Living Lab: Brock University and the Town signed an MOU in February 2017 with the goal of creating opportunities for students and of advancing the town's overall development. The MOU is with the Environment Sustainability Research Centre (ESRC), one of five transdisciplinary centres at Brock. The Living Lab brings Brock Master's Degree co-op students to Lincoln in focused and productive placements. Further arrangements of this type will build valuable relationships which will make Lincoln known and, having opened the eyes of students to opportunities, potentially attract graduating talent.

Vineland Research and Innovation Centre: Located in Lincoln, the Vineland Research and Innovation Centre (VRIC) is a world-class research centre dedicated to horticultural science and innovation. VRIC is a major resource centre for the Canada's greenhouse and horticulture sectors. The most recent addition, a new \$10 million 40,000 square foot pre-commercial greenhouse complex, assists the industry and suppliers in developing new technologies to increase competitiveness, such as through robotics, automation, and lighting, irrigation and climatic control systems. Vineland's assets include approximately 90 hectares of experimental tender fruit and other orchards, vineyards, rotation crop areas, ornamental plantings and breeding, greenhouses, a mushroom production unit and ethnic vegetables – dimensions that are of potential interest to specialty food manufacturers. VRIC collaborates with industry, assisting with commercialization, technology scouting, the development of new varieties, consumer taste surveys and tests, and technology transfer activities. Though it has close partnerships with Federal and Ontario researchers and the University of Guelph, Vineland is an independent, not-for-profit organization, with funding support from the Federal and Ontario Canadian Agricultural Partnership program.

5. Benchmarking Lincoln Against Counterpart Municipalities

To get a sense of Lincoln's relative performance over the last five years, eight Southern Ontario communities were selected based on similar populations, employment levels, and economic sector concentrations. Detailed analyses were reported on in the project's Background Report. Within Niagara region, Niagara-on-the-Lake, Grimsby, Pelham and Fort Erie were chosen. From the Windsor-Essex area, Leamington, Kingsville and the Town of Essex were selected. Prince Edward County was also included (see Exhibit 3).

Among these eight communities,

- Lincoln had the highest percentage population growth between 2011 and 2016 (5.8 percent), with the exception of Niagara-on-the-Lake (13.7 percent) and Grimsby (7.9 percent);
- Lincoln's percentage job growth between 2012 and 2017 was strong (8.0 percent), though less than Pelham, Prince Edward County and Grimsby.

In terms of sector concentrations,

- Lincoln ranked highly in agriculture, just behind Leamington which is also known for the strength of its greenhouse sector, concentrated on vegetables rather than flowers;
- Lincoln also had a high concentration for manufacturing, just below only Fort Erie and Kingsville;
- Lincoln had a concentration of jobs in wholesale trade, second only to Kingsville; and

- Four of the eight benchmark communities had higher concentrations than Lincoln in the arts, entertainment and food services sector – most notably Niagara-on-the-Lake and Fort Erie.

| Exhibit 3 | | | | | | |
|---|--------------------|---------------------------|---------------|---------------|---------------------|-----------------------|
| Population and Job Data on Benchmark Communities | | | | | | |
| Community | 2016 Population | 2011-2016 % Pop Change | 2012 Jobs | 2017 Jobs | 2012-2017 Change | 2012-2017 % Change |
| Niagara-on-the-Lake | 17,511 | 13.7% | 11,527 | 12,404 | 877 | 7.6% |
| Fort Erie | 30,710 | 2.5% | 12,011 | 12,973 | 962 | 8.0% |
| Lincoln | 23,787 | 5.8% | 11,323 | 12,225 | 902 | 8.0% |
| Grimsby | 27,314 | 7.9% | 8,563 | 9,516 | 953 | 11.1% |
| Pelham | 17,110 | 3.1% | 4,268 | 5,047 | 779 | 18.3% |
| Essex (Town not County) | 20,427 | 4.2% | 7,077 | 6,624 | -453 | -6.4% |
| Leamington | 27,595 | -2.8% | 14,663 | 14,371 | -292 | -2.0% |
| Kingsville | 21,552 | 0.9% | 7,264 | 7,740 | 476 | 6.6% |
| Prince Edward County | 24,735 | -2.1% | 7,758 | 9,087 | 1,329 | 17.1% |
| Source: EMSI Q3 2017, Statistics Canada 2016 Census | | | | | | |

C. Town of Lincoln – Opportunities, Constraints, Indicators and Trends

1. The Town of Lincoln’s Commitment to Economic Development

Town Council’s Future Focus Corporate Plan 2014-2018: The Town accords priority to economic development, as reflected in the Town Council’s Future Focus Corporate Plan 2014-2018. This Economic Development Strategy and Action Plan is a fulfillment of that goal, particularly “to build capability by creating an investment-friendly environment, securing an economic future, and improving the quality of life for residents.” The Corporate Strategy to be adopted by the next Council can be expected to address the implementation of the Economic Development Strategy and Action Plan.

Official Plan’s Vision: The Town’s Official Plan, approved by the Ontario Municipal Board on November 18, 2016, states at the outset:

“The vision for Lincoln is to be a **Centre of Excellence for Agriculture**; an inclusive community that values diversity, partnerships, entrepreneurial spirit and works collectively to evolve as a vibrant and successful Greenbelt community where rural and urban land uses are managed to foster agriculturally related economic activity, protect resources for future generations and ensure a high quality of life for its residents.”

2. Jobs for a Growing Talent Pool and Workforce

Lincoln’s population grew by 5.8 percent from 2011 to 2016. Over the same period, the jobs in Lincoln grew at an even more robust pace – 8.0 percent – meaning that the town’s “jobs to labour force” ratio – the number of local jobs compared to the resident labour force – rose. The ratio stood at 0.91 or about 9 jobs for every 10 members of the labour force living in Lincoln in 2016.

The “jobs to labour force” gap can be further closed if the pace of job creation by expanding and new businesses in Lincoln continues to exceed the growth in the local workforce. As the Greater Toronto Area (GTA) becomes less affordable and more crowded and congested, Lincoln may become an attractive alternative, even more so if rewarding local jobs are available.

The availability of highly qualified and skilled people is most frequently the foremost requirement for expanding businesses and companies seeking a new location. As a consequence, a community’s ability to attract and retain talent is a critical factor in the economic development equation.

3. Availability of Commercial and Industrial Employment Lands

Lincoln has limited vacant serviced employment land available, according to the Employment Lands Supply Study prepared as a companion to the Economic Development Strategy and Action Plan. Of note however are two major new land areas, for which Secondary Plans were approved in 2018, and which offer prospects for additional commercial office space among other uses which are also employment related, though both are some time from realization for a variety of reasons.

Industrial Land Supply: The vacant Employment Lands Supply Study, undertaken in parallel with the preparation of the Economic Development Strategy and Action Plan, indicates that the quantity and

quality of the vacant industrial land supply in Lincoln is unlikely to meet demand in the period to 2041. Moreover, the majority of vacant employment land is not “shovel-ready,” that is, preparatory site work is required, including servicing.

The majority of Lincoln’s vacant industrial land supply comprises infill opportunities in:

- The Beamsville Business Park, which has parcels ranging from 0.5 hectares to 3 hectares (gross) in its eastern half; and
- The Durham Industrial Area, which is limited to dry industrial uses and which in total amount to no more than 15 hectares (gross).

Direct connections to existing municipal servicing may be possible for smaller infill parcels of land within the Beamsville Business Park.

Prudhommes Landing and Beamsville GO Station Secondary Plans: The Town Council endorsed two Secondary Plans in 2018 which promise signature developments.

- Prudhommes Landing: Lincoln’s Town Council approved the Secondary Plan for the mixed-use Prudhommes Landing development in April 2018. When the construction commences once the upfront servicing upgrades are complete, Prudhommes Landing is expected to attract significant investment and positive attention to Lincoln and its future prospects, as the Prudhommes Landing area is the last prominent block of lakefront land in the Niagara area open for development. It has a storied history and was acquired for comprehensive redevelopment at a favourable time.

The Concept Plan for Prudhommes Landing envisions “a high-quality community with beautiful public green spaces, a public and accessible waterfront, a highly connected pedestrian environment, high-quality architectural design and streetscapes that are underpinned by sustainable design and approaches.” Covering 50 hectares (124 acres), the development is located between the Lake and the QEW and between the QEW’s Victoria Avenue North and Jordan Road interchanges. Prudhommes Landing will strengthen the cluster of development involving Jordan Harbour, Jordan Village and Vineland, including the Charles Daly lakefront public park.

The Prudhommes Landing mixed-use community will include a variety of low, mid and high-rise residential styles and a mixture of employment, commercial, main street and marina development. The envisaged employment lands of 2.74 hectares of land would result in four to six thousand square metres of employment development creating a potential 267 to 600 jobs.¹²

- Proposed Beamsville GO Transit Station Area: In June 2016, the Ontario government committed to GO commuter rail service from Hamilton through to Niagara Falls by 2023, starting with Grimsby in 2021. Beamsville was identified as one of four stations in the 2011 Niagara Rail Service Expansions – Environmental Study Review (ESR). The proposed Beamsville GO Station would be part of the second phase after the start of weekday service in 2023. The Secondary Plan approved in May 2018 covers a 254 hectare area and includes an commercial office zone which replaces a significant area of land previously designated for industrial uses, such as manufacturing and

¹² Town of Lincoln, “Concept Plan Description Report – Prudhommes Secondary Plan,” December 2017.

warehousing, which would no longer be permitted on the largest parcels of vacant land to the north of the safeguarded transit area, along the Ontario Street corridor, and north of the QEW.

Commercial Office Land Availability: The majority of the vacant land where office use will be permitted is in the Beamsville GO Transit Station Secondary Plan area and at Prudhommes Landing. Office development is also permissible in Lincoln's Central Business Districts, but as one of a number of commercial options. Vacant land supply in these locations is limited to small-scale infill opportunities in Beamsville and Vineland.

No vacant employment land has been identified in Jordan, Jordan Station, or Tintern. There is less than one hectare (gross) in Campden for General Commercial Use.

Recommendations have been put forward in the Vacant Employment Lands Supply and Demand Analysis and the Employment Lands and Rural Areas CIP studies for related municipally-led policy responses, including Community Improvement Programs (CIPs). The recommendations that could have impact within the five year span of the Strategy and Action Plan are reflected in Section D.1.

4. Property Taxes and Development Charges

Commercial and Industrial

An annual study, the BMA Management Consulting Municipal Study 2017, that compares commercial and industrial property taxes assessed by Ontario municipalities¹³ indicates that the Town's property tax rates were broadly competitive with other Niagara region jurisdictions. On the other hand however, Lincoln's commercial and industrial development charges ranked as being the highest of all Niagara region municipalities, according to the 2017 study (Exhibit 4).

Property Taxes: The 2017 comparative study indicated that Lincoln's property tax rates for commercial office buildings were the lowest of any municipality in Niagara region, while property tax rates for neighbourhood shopping and commercial uses were third lowest and for hotels fifth lowest. In the case of taxes on standard industrial properties, Lincoln was just below the mid-point at the fifth lowest.

Development Charges: Lincoln's commercial and industrial development charge is the highest among all Niagara region municipalities, though below Hamilton's. New development charges are under consideration, as the current By-law expires on May 26, 2019. The Town's intention is to have different rates for commercial, industrial and institutional development charges.

More detailed information on the comparative data on industrial and commercial property taxes and development charges is in Appendix F.

¹³ BMA Management Consulting Municipal Study 2017.

| Exhibit 4 | |
|---|--|
| Lincoln and Other Niagara Region Municipalities | |
| Comparative Commercial and Industrial Property Taxes and Development Charges | |
| 2017 BMA Municipal Survey | |
| DEVELOPMENT CHARGES¹ | |
| • Commercial (per sq. ft.) | Highest among Niagara region municipalities |
| • Industrial (per sq. ft.) | Highest among Niagara region municipalities |
| COMMERCIAL PROPERTY TAXES² | |
| • Office Buildings (per sq. ft.) | Lowest rate (Tie) among Niagara region municipalities |
| • Neighbourhood Shopping (per sq. ft.) | Third lowest rate among 11 Niagara region municipalities |
| • Hotel (per suite) | Fifth lowest rate among 8 Niagara region municipalities |
| STANDARD INDUSTRIAL² | Fifth lowest rate among 12 Niagara region municipalities |
| Source: BMA Management Consulting Municipal Study 2017 | |
| Notes: Total Development Charges and Property Taxes are used, including Upper Tier and Education levies as appropriate. Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | |
| ¹ Every municipality individually determines the services to be recovered from DCs. The range chosen can have a significant impact on the amount of the charge. | |
| ² The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | |

Municipal Level Concerns of Wineries and Independent Grape Growers: Property taxes, zoning and municipal infrastructure are among the top five challenges identified by Ontario’s independent grape growers and for smaller volume wineries in the \$5 million to \$10 million in sales bracket in a recent report. The 2017 study by VQA Ontario on behalf of the Ontario wine and grape industry¹⁴ asked wineries and independent grape growers to rank up to five challenges impacting their businesses from a list of 15 developed by a project working group. In the case of independent grape growers, property taxation, zoning and municipal infrastructure ranked fifth overall (after rising input, labour and land costs; grape pricing; access to virus-free grape vines; and government regulation and cost of compliance). The same concerns ranked fourth among wineries with \$5 million to \$10 million in sales (after rising input, labour and land costs; government regulation and cost of compliance; and LCBO gross sales margins). Property taxation, zoning and municipal infrastructure did not rank in the top five among wineries in other sales categories.

Residential

Similar to the industrial and commercial situation, Lincoln’s residential property taxes generally compare favourably against other Niagara region municipalities. In contrast, development charges rank as the highest (see Exhibit 5).

¹⁴ VQA Ontario and Deloitte, “Ontario Wine and Grape Industry Performance Study: 2017,” March 2018 (http://www.vqaontario.ca/Library/Documents/OntarioWineandGrapeIndustryPerformanceReport_2017_FINAL_optimized.pdf). Accessed on May 11, 2018.

Property Taxes: The same widely referenced comparative study of municipal property taxes and development charges¹⁵ indicates that the Town’s residential property tax rates generally rank at the lower end compared to other municipalities in Niagara region. Though the rate for a detached bungalow is a bit of an outlier, property taxes for a two storey home, a senior executive residence and a multi-residential high rise all fall in the lowest third of Niagara’s 12 municipalities.

Development Charges: Development charges for residential developments are at the other of the comparative spectrum, being the highest among all Niagara region municipalities. The BMA Municipal Study 2017 indicated that development charges typically amounted to \$30,829 per single detached residential unit and \$22,425 per unit for multi-residential buildings. Like industrial and commercial development charges, new residential development charges are under consideration to replace the current ones which extend to May 26, 2019.

| Exhibit 5 | |
|---|--|
| Lincoln and Other Niagara Region Municipalities Comparative Residential Property Taxes and Development Charges 2017 BMA Municipal Survey | |
| CATEGORIES | Town of Lincoln’s Ranking Compared to Other Niagara Region Municipalities ¹² |
| RESIDENTIAL DEVELOPMENT CHARGES ¹ | Highest among Niagara region municipalities |
| RESIDENTIAL PROPERTY TAXES ² | |
| • Detached Bungalow | Third highest rate among Niagara region municipalities |
| • Two Storey Home | Fourth lowest rate among Niagara region municipalities |
| • Senior Executive Residence | Fourth lowest rate among Niagara region municipalities |
| • Multi-Residential High Rise | Second lowest rate among Niagara region municipalities |
| Source: BMA Management Consulting Municipal Study 2017: | |
| Notes: Total Development Charges and Property Taxes are used, including Upper Tier and Education levies as appropriate. Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | |
| ¹ Every municipality individually determines the services to be recovered from DCs. The range chosen can have a significant impact on the amount of the charge. | |
| ² The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | |

More detailed information on the comparative data on residential property taxes and development charges is in Appendix F.

5. Residential Housing in Lincoln

In line with trends that have extended from the city of Toronto to most of the Greater Golden Horseshoe (GGH) area, Lincoln and other Niagara region municipalities have seen significant price increases for residential properties in the last few years, though average prices levelled off in the latter part of 2017 into 2018. Lincoln attracts wide interest because of its appealing lifestyle and relative proximity to the Greater Toronto and Hamilton Area (GTHA). The average cost of a residential unit in Lincoln exceeded \$500,000 in 2017, following jumps of 14.7 percent in 2016 and 18.1 percent in 2017 (see Exhibit 6).

¹⁵ BMA Management Consulting Municipal Study 2017

Though higher price increases were registered in some other Niagara communities, Lincoln had among the most limited stock of housing on the market (1.3 month's supply in 2017).

| Exhibit 6 | | | | |
|--|----------------------------|----------------------------------|----------------------------|----------------------------------|
| Average Residential Home Sale Prices and Annual Percentage Price Increases Selected Higher Price Bracket Municipalities in Niagara Region – 2016 and 2017 | | | | |
| Municipality | 2016 | | 2017 | |
| | Average Sales Price | Year-Over-Year % Increase | Average Sales Price | Year-Over-Year % Increase |
| Niagara-on-the-Lake | \$626,079 | 23.9% | \$811,549 | 29.7% |
| Grimsby | \$471,376 | 16.5% | \$592,446 | 25.7% |
| Pelham | \$461,127 | 15.2% | \$547,267 | 18.7% |
| West Lincoln | \$433,454 | 16.9% | \$547,094 | 26.2% |
| Lincoln | \$433,465 | 14.9% | \$512,349 | 18.1% |
| Niagara Falls | \$324,527 | 22.3% | \$376,155 | 15.9% |
| Source: Niagara Real Estate Centre, Royal LePage, based on residential statistics NAR & RAHB MLS | | | | |

The Housing Market Outlook for the Niagara CMA released by the Canada Mortgage and Housing Corporation (CMHC) in the Fall of 2017 said that eroding affordability will cause pull-back both in starts and sales and encourage a gradual shift in demand to higher-density housing.¹⁶

For the rental apartment market, the CMHC's Fall 2017 Housing Market Outlook anticipates a tighter market and low vacancy rate of about two percent extending out to at least 2019. Increased rates and lower turnover will be a by-product, says CMHC.

6. Community Improvement Plans

The Town has three existing Community Improvement Plans (CIPs) to assist in promoting investment, improvements, and the revitalization of employment lands and rural areas. These are the Beamsville Commercial Core and Ontario Street Commercial Area CIP (approved November 11, 2011), the Vineland Central Business District CIP (November 17, 2014), and the Mixed Use and Residential Intensification CIP (November 8, 2016). The Beamsville and Vineland CIPs both provide Urban Design Study, Façade Improvement, Building Improvement, Residential, and Revitalization (Tax Increment) Grants. Vineland also includes a Landscape Improvement Grant and a Development Charge Reduction Grant. The Mixed Use and Residential Intensification CIP offers Development Charges Reduction and Tax Revitalization (Tax Increment) Grants. Niagara Region also provides matching funding for many of the Town's incentive programs through its Smarter Niagara Incentive Program (SNIP). Up to October 27, 2017, Regional and Town funding of \$172,166 for completed projects had leveraged \$2,344,137 in construction activity.¹⁷

The existing CIPs and the need for others have been examined in an Employment Lands and Rural Areas Community Improvement Plans (CIPs) study, undertaken in the same time frame as the Economic Development Strategy and Action Plan. It recommends retention of the existing programs and makes recommendations for additional CIPs. The recommendations for additional CIPs are reflected in Section D.1.

¹⁶ Canada Mortgage and Housing Corporation, "Housing Market Outlook – St. Catharines-Niagara CMA," Fall 2017

¹⁷ Town of Lincoln, Memo to Planning Committee, "Summary of Community Improvement Plan Applications," November 13, 2017,

7. Lincoln Commercial and Industrial Building Permit Activity

The commercial and industrial building permit trends are a general indicator of new investment in the community. Over the past ten years, Lincoln has issued an average of just over 10 commercial and industrial building permits a year. The annual value has averaged about \$3.7 million, if the permit for \$12.6 million in 2013 for the new arena and library complex in Beamsville, a large institutional project, is excluded (Exhibit 7).

| Exhibit 7 | | | |
|---|---------------------|---------|--|
| Town of Lincoln Commercial and Industrial Building Permit Activity -- 2007 - 2016 | | | |
| Year | Construction Value | Permits | Major Project Highlights for Year |
| 2007 | \$3,964,000 | 5 | \$2.2 million office building (1,950 m ²) |
| 2008 | \$1,399,000 | 10 | \$1 million permit for addition to industrial building (21,991 ft ²) |
| 2009 | \$2,163,621 | 7 | \$1.3 million retail project (11,755 ft ²) |
| 2010 | \$6,382,537 | 8 | 2 major winery projects of \$2.5 and \$2.2 million |
| 2011 | \$4,282,004 | 13 | \$1.6 million commercial block (18,890 m ²) & \$1.5 million industrial addition (49,080 m ²) |
| 2012 | \$2,219,870 | 13 | \$542,128 new industrial buildings on existing parcel (69,600 m ²) |
| 2013 ¹ | \$3,593,200 | 8 | \$2,500,000 winery, retail and restaurant project (1,077 m ²) |
| 2014 | \$3,306,644 | 18 | \$800,000 commercial development (339 m ²) & \$700,000 industrial addition (1,142 m ²) |
| 2015 | \$4,375,125 | 10 | \$2 million addition to industrial building (1,282 m ²) |
| 2016 | \$5,587,300 | 12 | \$3 million greenhouse addition (7,940 m ²) |
| TOTAL | \$37,273,301 | | |
| ¹ Note: Data for 2013 does not include \$12.6 million permit for the Town of Lincoln arena and library complex, an institutional project | | | |
| Source: Town of Lincoln | | | |

8. High-Speed Broadband and 5G Networks

High-Speed Broadband: High-speed broadband has become an essential part of community infrastructure, just like electricity, roads, water and waste water disposal have long been. The Canadian Radio-television and Telecommunications Commission (CRTC) declared in December 2016 that broadband was a basic telecommunications service.

Access to affordable, reliable broadband is a vital consideration in the attraction of new investment and talent, and the competitiveness and further expansion of existing businesses and agricultural enterprises. Virtually every aspect of the economy and people's lives have become digitized. The availability of affordable broadband is critically important to entrepreneurial individuals, creative professionals who are attracted to a lifestyle, such as that offered in Lincoln, provided they have reliable broadband connections and ready personal access to the GTA when a business need arises.

Niagara region, including Lincoln, is relatively well served as major Canada-US fibre-optic trunks run through the peninsula. However, some gaps in coverage are reported in parts of Lincoln. An online public survey was undertaken as part of the development of the Lincoln Economic Development Strategy. "High-speed internet availability and coverage" was chosen as a "top five weakness and challenge related to

economic development” by 34 percent of the respondents who worked in Lincoln. On the other hand, “high speed broadband” was chosen by only 2 percent as a “top five economic development strengths.”¹⁸

To bring additional capacity to less well served rural areas, the Region is participating in the SouthWestern Integrated Fibre Technology (SWIFT) Network, \$180 million initiative spearheaded by the Western Ontario Wardens’ Caucus and supported by the Ontario and Federal governments. The Region also applied in March 2017 for additional funding under the Canadian government’s Connect to Innovate program, with Niagara Regional Broadband Network (NRBN) as a partner.

The capacity and speed requirements of businesses grows at an exponential rate. The Canadian Radio-television and Telecommunications Commission (CRTC) has indicated that between 2011 and 2016 Canadians’ monthly data consumption increased by an average of 40 percent each year. That parallels Nielsen’s Law of Internet Bandwidth which states that a high-speed user’s connection speed grows by 50 percent a year. This rate of growth is only slightly less than the 60 percent a year postulated by Moore’s Law which addresses computing speed.¹⁹

5G Networks: In the near future, availability of 5G cellular networks will become the new standard. 5G networks are needed to support autonomous vehicles and the expanded use of the Internet of Things (IoT). The importance of 5G networks to Lincoln is evident in a trial project which was started at a Niagara winery by a major telecommunications company in late 2017, using an advanced wireless network to remotely monitor temperature and water levels in the vineyards, and to prevent vine disease.²⁰ The ability to monitor conditions allows improvements in the health of vines, lower operating costs, and provides for years of maintenance-free data gathering. As this technology is well suited to the intensive higher value agriculture found in Lincoln and Niagara, Lincoln should be at the forefront in encouraging early installation of networks.

9. Sustainability

Ontario government planning policies that govern development, such as the Greenbelt plan, the Niagara escarpment and provincial conservation areas, have set a framework that supports retention of lands for agriculture and agriculture-related and recreation use and favours environmentally sensitive development. As a community bound by those policies, sustainability is a fundamental goal for Lincoln. A reputation for sustainability can be part of the reason that people choose Lincoln as a place to visit, live or pursue agricultural ventures and business.

Lincoln’s Official Plan defines a sustainable community as one which “balances social well-being, resource protection, economic opportunities and environmental responsibility to meet the needs of the present without compromising the quality of life for future generations.”

¹⁸ Full results and an explanation of the online public survey are in Appendix A.

¹⁹ Nielsen Norman Group, “Nielsen’s Law of Internet Bandwidth,” (<https://www.nngroup.com/articles/law-of-bandwidth/>). Accessed on April 10, 2017.

²⁰ Bell Canada Media Release, “Bell, Huawei and BeWhere Bring New Internet of Things Solution to Ontario Winery.” November 9, 2017 (<https://www.newswire.ca/news-releases/bell-huawei-and-bewhere-bring-new-internet-of-things-solution-to-ontario-winery-656383253.html>). Accessed on June 23, 2018.

In Lincoln’s case, the Official Plan goes on to link sustainability directly to “the vision of being a Centre of Excellence for Agriculture where the outstanding agricultural land base is the foundation for a vibrant and progressive local economy.”

The Official Plan lists ways in which the goal of being a sustainable community will be achieved. The list comprises:

- Protection of agricultural lands and areas;
- Supporting the production of locally grown foods;
- Promoting “buy-local” initiatives;
- Promoting agricultural diversification and innovation;
- Conservation of agricultural and natural landscapes;
- Carefully managing natural resources including agricultural lands and soil;
- Providing choices and opportunities for housing, employment, transportation, social, recreational and cultural amenities;
- Building on the agricultural resources within the town to generate economic prosperity;
- Promoting environmental stewardship and sustaining a healthy natural environment;
- Making efficient use of its infrastructure by focusing on a compact, mixed-use, walkable, bikeable and connected community;
- Promoting a healthy cohesive community and quality of life;
- Having vibrant downtowns and attractive public spaces;
- Promoting urban design guidelines to ensure a high quality of building and site design;
- Enhancing the existing sense of place and small town character;
- Providing access and opportunity to the decision making-process;
- Encouraging design practises that address the accessibility needs of residents with disabilities;
- Reviewing opportunities for reducing the impact of climate change and improving air quality;
- Identifying specific opportunities for promoting energy conservation and reducing waste; and
- Promoting the adaptive re-use of existing buildings and structures and the redevelopment of brownfields and greyfields.

10. External Developments and Trends

Economic Policies, Trends and Outlook: The Economic Development Strategy and Action Plan will be implemented during a period of international policy uncertainty, significantly greater global competitive pressures (especially from the US), and lower economic growth than prevailed prior to the Great Recession in 2008 and 2009. Broader societal concerns have arisen with respect to job quality, higher levels of part-time work (the gig economy), and stagnant levels of worker compensation and associate income inequality. Considerations include:

- Economic growth rates in the US and Canada are anticipated to be in the 2 percent to 3 percent range.
- The Conference Board of Canada forecasts growth of 1.2 percent in 2018 and 1.4 percent in 2019, similar to 2016 and 2017 and below the rates for other mid-sized Ontario cities.²¹

²¹ Conference Board of Canada, Media Release, “A Slowdown in Economic Growth Expected for Most Ontario Cities in 2018,” August 22, 2018 (<https://www.conferenceboard.ca/press/newsrelease/2018/08/22/a-slowdown-in-economic-growth-expected-for-most-ontario-cities-in-2018>). Accessed on August 24, 2018.

- The accelerating pace of technological change is disrupting the many workplaces where adaptation is a major challenge.

Foreign Direct Investment: International greenfield foreign direct investment (FDI)²² flows – though significant in absolute terms – remain uneven and well below the annual levels registered prior to the global downturn. Key points include:

- Unpredictable circumstances lead business to delay, defer or proceed very cautiously with new investment decisions.
- US competitiveness has been enhanced by the recent corporate tax cuts, making Canada’s international FDI attraction efforts more challenging.
- China’s investment abroad has become more cautious and selective following earlier significant increases.
- FDI flows into Canada slowed notably in 2016 and in 2017.²³ The total stock of manufacturing FDI in Canada in 2017 was slightly less than in 2008.
- Expansions of existing foreign-owned enterprises in Canada appear, based on anecdotal evidence, to have been the most notable source of increased FDI in Canada in recent years, underscoring the significance of giving priority to business retention and expansion activities.

International Economic and Trade Agreements: NAFTA renegotiations and protectionist actions by the US Administration have been highly aggressive and frequently unpredictable. Meanwhile, the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) and the Comprehensive and Progressive Trans-Pacific Partnership (CPTPP) accord Canada advantages in attracting investment as a Canadian location offers preferential access to Europe and Asia not available to US locations. Implications include:

- Export-oriented Lincoln firms should be aggressively pursuing opportunities to diversify their export markets, with support from Federal and Ontario government initiatives and programs.
- Outreach to expose Lincoln businesses – especially US-owned facilities – to opportunities opened up by CETA and CPTPP.
- Niagara’s Foreign Trade Zone provisions, which are available to Lincoln businesses, can facilitate cross-border business.
- Canada’s immigration policies favour the entry of immigrants needed to respond to business and economic needs. This differentiates Canada positively from the US.

²² “Greenfield” investment projects involve investment at entirely new locations or involve an expansion of an existing investment. Greenfield investment does not include mergers and acquisitions (M&A).

²³ Statistics Canada, “The Daily,” April 25, 2018.

11. Strengths, Weakness, Opportunities and Threats

This overview of Lincoln's strengths, weaknesses, opportunities and threats (SWOT) for economic development is based on the analysis, observations, stakeholder surveys and interviews, the round table, and other sources.

A SWOT analysis in strategic economic development planning is a tool for identifying the most important factors that could impact a community's economic growth. It is important to keep in mind that only a portion of these will be within the direct control of the municipality and stakeholders. The strengths and weaknesses are relative statements about Lincoln as compared to averages and norms. They are not specifically linked to particular outcomes – some may contribute negatively or positively to outcomes, where in other cases weaknesses may offset strengths or vice versa. The SWOT serves as a starting point for identifying advantages and opportunities upon which it may be possible to capitalize, and issues and threats that may be capable of being countered as part of the Economic Development Strategy and Action Plan.

Strengths

- With the hiring of an economic development officer in 2017, the Town has a full time economic development presence and individual to lead the implementation of the Economic Development Strategy and Action Plan.
- Key strategic documents will be in place in 2018 to guide economic development and support land use planning related to economic development including an Economic Development Strategy and Action Plan, Employment Lands Study, and Employment Lands and Rural Areas Community Improvement Plan, along with the Town's recently updated Official Plan.
- Lincoln is strategically located along the QEW and midpoint between the US border and Hamilton, and 100 kilometers from downtown Toronto.
- Lincoln is centrally located and can access workforce from the neighbouring Niagara and Hamilton areas. Niagara has a large workforce of about 214,000 persons, while the adjacent Hamilton CMA has 435,000 persons in its workforce.
- Given its location along Lake Ontario and the Niagara escarpment in a recognized UNESCO Biosphere, Lincoln has an attractive 'quality of place' for residents, visitors and businesses.
- Lincoln's population growth rate of 5.8 percent between 2011 and 2016 is higher than the Niagara region growth rate (3.8 percent) and Ontario (4.6 percent) and higher than most of the similar sized benchmarked communities.
- Lincoln had a higher portion of persons aged 25 to 64 years in 2016 that had attained college, CEGEP or other non-university certificate or diploma at 30.5 percent compared to 29.1 percent for Niagara and 24.7 percent for Ontario.
- Lincoln had strong job growth between 2012 and 2017 at 8.0 percent, which is higher than Niagara (7.1 percent) and consistent with Ontario (8.1 percent).
- Primary agricultural production is a significant sector in Lincoln, with relatively high growth in the number of farming jobs between 2011 and 2016 (9.2 percent) while there has been a loss in farming jobs in Niagara (3.9 percent) and Ontario (17.4 percent).
- There is a high job concentration in farming in Lincoln. The community accounts for a substantial portion of agricultural production in Niagara, with 30 percent of farm receipts, 40 percent of the total area of greenhouses, 36 percent of tender fruit farms (with 57 percent of that in grapes).

- Lincoln's notable agricultural cluster includes extensive related activities in areas such as food wholesaling and wineries.
- Lincoln is home to the Vineland Research and Innovation Centre (VRIC) which was created to be a world-class centre for horticulture science and innovation, and benefits from proximity to research and innovation facilities associated with Brock University and Niagara College.
- Beverage manufacturing, particularly wine-making, is a very significant industry in Lincoln, accounting for 602 jobs in 2017, with a growth of 37 percent from 2012, and location quotient of 21.8.
- Lincoln has a large number of wineries, reported by the Town as over 50 within the municipal boundaries. The number appears to be comparable or possibly larger than the number in Niagara-on-the-Lake, and significantly more than anywhere else in Niagara.
- The Town has outlined its vision to be a Centre of Excellence for Agriculture, including in its recently updated Official Plan, confirming its support for the agricultural sector.
- The agri-food sector in Lincoln has diverse industries supplying and supporting the agriculture and food sectors with a mix of foreign-owned and domestic firms.
- High job growth has occurred in the tourism-related sectors: the arts, entertainment and recreation sector and the accommodation and food services sector, with 56.7 percent and 34.2 percent job growth respectively between 2012 and 2017.
- Lincoln is among the attractive Niagara housing areas in terms of relative affordability, lifestyle, and smaller town and rural experiences.
- Lincoln has appealing areas and historic villages such as Jordan Village with boutiques, inns, wineries and high quality restaurants that are a draw for tourists. Some of the attractions in Lincoln which serve local markets and tourists include: Ball's Falls (Conservation Area), craft beverages (in addition to wine), artisanal foods and crafts, cycling, hiking, water sports areas, farm-gate sales and fresh markets, and festivals – Winter WineFest, Get Fresh in the Valley, Wrapped Up in the Valley, and Roots on the Twenty.
- An approved Secondary Plan for Prudhommes Landing is in place, which facilitates the development process. Prudhommes Landing, the last prominent large block of lakefront land along the QEW open for development in Niagara, is expected to attract significant investment and economic benefits for Lincoln.

Weaknesses

- Lincoln and Niagara have older populations compared to Ontario – 21 percent of the Lincoln population (and 21.4 percent of the Niagara population) was over 65 years in 2016, compared to 16.7 percent in Ontario. Lincoln and Niagara have a lower portion of population in the prime working age group of 25 to 44 years, at 21.7 percent and 22.2 percent respectively compared to Ontario's 25.7 percent.
- There were lower levels of higher educational attainment on the part of the Lincoln and Niagara populations aged 25 to 64 years in 2016, compared to Ontario. Compared to Ontario's 31.9 percent, 23.7 percent and 20.7 percent of the Lincoln and Niagara population respectively in this cohort had attained a bachelor's degree or higher.
- Branding associated with Lincoln needs greater clarity and, ultimately, greater recognition, based on professional advice that considers Lincoln's desire to attract tourists, talent and investment to the area.

- There is an inadequate supply of vacant industrial land to meet the demand to 2041. The majority of vacant land where commercial offices are permissible is within the new Secondary Plan areas where detailed development proposals are yet to be brought forward.
- The local economy is not well diversified in terms of breadth and depth of employment opportunities, especially in service sub-sectors and is significantly below average for its portion of jobs in several sectors such as information and cultural industries; finance and insurance; real estate; professional, scientific and technical services; management of companies and enterprises; utilities; and public administration. As such, it may have a lower than optimal level of jobs for knowledge based workers, resulting in the need for such workers to commute elsewhere for work.
- As elsewhere among Niagara region municipalities, Lincoln has not seen a level of immigration attraction that begins to match levels elsewhere among Greater Golden Horseshoe communities, and as such, its labour force is less diverse culturally and linguistically.
- The minimal supply of accommodations for overnight stays in Lincoln limits the length of visitor stays in the community.
- Lincoln's investment readiness has not yet been fully developed given that the economic development function in the Town is relatively new (although efforts are underway to improve investment readiness, building on the Strategy and Action Plan's recommended actions).
- Lincoln's land development approval process includes many stakeholders (Town, Region, NEC, NPCA, and Province) and layers of land use planning which may result in additional time and complications for development approvals processing, which can be a source of frustration for developers and businesses, particularly compared to other areas with fewer layers.
- Much of Lincoln is impacted by development restrictions associated with the Greenbelt and escarpment areas, which complicate the approvals process by restricting the types of development.
- Many agricultural operations and other industrial/commercial uses in the rural areas of Lincoln do not have access to Regional/municipal water and waste water servicing or permits to take water from Lake Ontario due largely to provincial policy restrictions, which limits growth potential and increases operating costs and water truck traffic (to access water) for such operations.
- Heavy traffic and congestion on the QEW, particularly during the summer tourist season, creates additional delays and costs for Lincoln agricultural producers in transporting products. Heavy trucks pass through the downtowns of Beamsville and Vineland.
- There is an inadequate supply of rental housing in Lincoln for farm workers and other lower income employees.
- Broadband internet is not uniform across the town and, based on the stakeholder consultation interviews, some businesses have had to spend substantial funds to upgrade internet services.

Opportunities

- Prudhommes Landing will introduce a significant and attractive mixed-use development between Lake Ontario and the QEW, which will positively impact Lincoln through additional development charges, increased tax base, and residential and employment opportunities.
- The 200,000 vehicles that the Twenty Valley Tourism Association (TVTA) says pass by Lincoln each day carry people who could potentially visit Lincoln and spend money.
- The sale of recreational Cannabis will be legalized in Canada in October 2018. Cannabis production, the development of value-added products, and the supply of equipment, systems and services represent significant opportunities for the Lincoln and Niagara economies, provided producers work with communities and operate within regulatory boundaries.

- A Secondary Plan for the proposed GO Rail Station in Beamsville has been approved. If this becomes part of Phase 2 of the promised introduction of GO commuter rail service through the Niagara region to Niagara Falls, this may increase the attractiveness of Lincoln for new residents as they will have the option to commute by GO train, as well as enabling ease of business access to the GTA for local operations, facilitating student access to post-secondary institutions, and tourism/visitor flows.
- Climate change may lessen frost risk for grapes and other fruits in Niagara (though more pronounced weather extremes which accompany climate change represent a heightened risk, and warmer winter temperatures could adversely affect ice wine production).
- Lincoln has the most significant concentration of greenhouses in Niagara, creating related opportunities for the manufacture and supply of greenhouses and related systems. Continued cross-sector growth opportunities exist in the horticulture, greenhouse and agri-food sector including adoption and creation of technology. The existing concentration of firms in agriculture and manufacturing can create supply chain-based investment attraction opportunities including new crops such as ethnic foods and beverages such as cider.
- Lincoln firms and production facilities can capitalize on the advantages that the Canada-European Union Comprehensive Economic and Trade Agreement (CETA) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) provide Canadian locations vis a vis the US, to attract investment and to capitalize on expanded trade opportunities with Europe and Asia-Pacific.
- Lincoln has potential to attract professionals, 'lone eagles' and the creative class who prefer the lifestyle of a smaller community provided they can access affordable high-speed broadband to allow them to work from home.
- Further development of creative industries, accommodation services and niche food and beverage manufacturing will attract and appeal to tourists.
- The lower Canadian dollar exchange rate vis a vis the US dollar enhances the export competitiveness of Lincoln firms in the U.S., attracts U.S. visitors, and encourages Canadian travellers to vacation at home.
- The "fit" of the labour force with industry needs could be enhanced through working with secondary and post-secondary entities in workforce development including the Niagara Workforce Planning Board that will provide the skills required by local companies and processes for continued learning that responds to today and future technology requirements.
- Collaboration with Niagara Economic Development on economic development initiatives will further regional economic benefits and in turn Lincoln's. This includes making the case for investment in Lincoln and providing meaningful value propositions for Lincoln to fit with the Region's economic development and investment attraction strategies.
- The role of sustainability and environmental opportunities that naturally align with existing agriculture, tourism and recreational sectors could be explored, including access to senior government funding and incentive programs.
- Opportunities may exist for local innovation in adapting or developing technology for a broader scale in select sectors.

Threats

- An ongoing threat is competition from other communities that offer similar quality of life attributes to attract new residents.
- Competition for resident retail spending from big box, outlet and retail malls in nearby communities could adversely impact the viability of some commercial establishments in Lincoln.
- Employment lands offerings and incentives in other municipalities including in Niagara (Gateway Economic Zone) may impact the attractiveness and marketability of employment lands in Lincoln.
- Competition and constraints on the availability of labour, including seasonal employees for the agriculture and hospitality sectors, may adversely impact some existing businesses. Minimum wage increases have substantially raised costs for agri-food and tourism and hospitality businesses which are significant in the Lincoln economy.
- Technological change is accelerating rapidly, particularly through digitization, and disruptive technologies are challenging existing business models and most business segments.
- Competitive pressures will continue in the manufacturing sector.
- Protectionist and nationalist policies and tendencies may affect Lincoln businesses' access to international markets, especially the US.
- Lower rates of global growth appear to be the norm subsequent to the 2008-2009 recession.
- Congestion on the Queen Elizabeth Way (QEW) and lack of alternative routes may adversely impact Lincoln's attractiveness for businesses that require substantial highway travel.
- Cannabis – as a rapidly emerging growth industry – is subject to volatility. Cannabis expansion will impact the greenhouse sector, including exerting cost pressures. Though it is widely expected that there will be initial supply shortages, there are also predictions that there could be notable oversupply leading to a significant dislocation in the market as production adjusts. Public concerns will be expressed over regulatory breaches and unwanted side effects.
- The proposed new Beamsville GO Rail Station in Phase 2 of the GO rail Niagara service is contingent on ridership in Phase 1 and could, in any event, be subject to delays in implementation.

Online Public Survey: An online public survey was conducted as part of the development of the Lincoln Economic Development Strategy and Action Plan. Among the sections, the online survey asked respondents to choose Lincoln's top five economic development strengths and its top five economic development weaknesses and challenges. The survey also asked about sectors that will drive growth, and factors that differentiate Lincoln from other Niagara communities. The full results and an explanation of how the survey was undertaken are available in Appendix A.

D. Principal Lincoln Economic Development Roles to Drive Results

The overarching goal in economic development is that sustained policies, programs and initiatives will improve the economic well-being of a community and will grow the municipal tax base by retaining and attracting investment and talent and by fostering and sustaining beneficial economic growth and diversity. Economic development does not equate simply to economic growth; rather, it seeks to encourage an enhanced quality of life and a qualitative balance with other community goals such as sustainability.

1. Open for Business – Town Economic Development Policies and Business Climate

Assessments by the business, agriculture and realty and development communities about the business climate in a municipality are influenced by the degree to which a jurisdiction has a consistent vision, clear goals, and predictable policies that are applied transparently and in a balanced and timely fashion. These constituencies appreciate municipalities that demonstrate that they want a vibrant and growing economy and are receptive to constructive dialogue.

The online public survey undertaken as part of the preparation of the Economic Development Strategy and Action Plan provided some feedback about the preoccupations of Lincoln people who work or operate businesses or agriculture ventures in Lincoln.

Asked about the “top five weaknesses and challenges related to economic development in Lincoln,” the ranking of the ones which fall at least partly within the Town’s jurisdiction (and their ranking) were:

- Public Transportation (1);
- Development Approvals Process/Timelines (5);
- Lack of Development Incentives (7);
- Development Charges (9); and
- Infrastructure (10).²⁴

Being – and perceived as being – “open for business” also involves supporting local businesses. The online survey also asked what tools would be the most useful to the Town staff to encourage businesses to locate or expand operations in community (see Exhibit 8). In addition to programs to support the retention and expansion of local businesses (#1), and to attract external investment to Lincoln (#3), grants, community improvement plans, creation of business improvement areas, development applications fees exemptions or reductions, and tax or development charge deferral programs were also prominently mentioned.

²⁴ For full results and an explanation of the public online survey methodology see Appendix A.

| Exhibit 8 | | |
|--|-------------------|--------|
| Online Public Survey – Lincoln Economic Development Strategy Choices by Respondents about Tools That Would Be Most Useful to Town of Lincoln Staff to Encourage Businesses to Located or Expand Operations in the Community | | |
| Answer Choices | Response Percent | |
| | Worked in Lincoln | Others |
| Programs to Support the Retention & Expansion of Operations in the Community | 66% | 57% |
| Grants to Business | 54% | 29% |
| Programs to Attract External Investment to Lincoln | 48% | 45% |
| Targeted Community Improvement Plans | 43% | 48% |
| Creation of Business Improvement Areas | 39% | 41% |
| Development Applications Fees Exemption or Reduction | 39% | 22% |
| Tax/Development Charge Deferral Programs | 38% | 17% |
| Business Incubators | 24% | 19% |
| Increase Supply of Vacant Land Zoned for Industrial Development | 18% | 21% |
| Note: An online public survey, posted on the Lincoln Economic Development website, was open to the public from February 15 to March 26, 2018. A total of 314 persons accessed the survey. About 80% (248) were Lincoln residents, including 117 who were residents and also operated or worked at a farm, business or organization in Lincoln. A total of 163 respondents operated or worked at a farm, business or organization in Lincoln. Full details are in Appendix A. | | |

Projecting a Lincoln is “Open for Business” Message

Availability of Suitable Commercial and Industrial Lands and Buildings: The limitations on the availability of commercial and industrial sites and buildings impact economic development activities. Initiatives involving many priority economic development roles – marketing, investment attraction, and business expansion, among others – will be dictated by whether, where, when and what categories of commercial and industrial lands and buildings are available. Close on-going collaboration will be required with the Town’s planning and other colleagues to encourage the appropriate designation and timely servicing of employment lands and their subsequent marketing.

Land zoned for commercial office will be relatively more available in the future in Lincoln than industrial properties. The most notable commercial office developments – related to the proposed Beamsville GO rail station and at Prudhommes Landing – may only begin to be realized beyond the five year span of the Economic Development Strategy and Action Plan. When it occurs, a consequence will be a shift in development and business attraction toward the service sector, including service firms allied to Lincoln’s manufacturing base, as well as financial and professional services operations.

Additional Community Improvement Plans (CIPs): Community Improvement Plans (CIPs) are proactive tools designed to prompt and guide investment decisions by developers and businesses which align with the Town’s vision and economic development priorities and which would not have occurred or are taken sooner than would otherwise be the case.

The Employment Lands and Rural Areas Community Improvement Plan recommends additional CIPs as a complement the existing ones. In the case of the industrially-zoned land, a principal objective of the new CIP would be to ensure that the limited remaining industrial land is fully utilized to support manufacturing

sector growth. For the lands that are zoned for office commercial, a key goal of the recommended CIP would be to accelerate new development well in advance of the actual commencement of GO Rail service to the proposed Phase 2 Beamsville station. In addition, to encourage agricultural-related developments, a new Rural Areas CIP is recommended.

As the CIPs are a lever to achieve Economic Development Strategy goals and objectives, it is vital that the CIPs are assertively promoted and marketed to local businesses and prospective developers and investors. The Town's economic development officer will play a lead role in conjunction with Town colleagues.

On-going Town decisions about CIPs need to be informed by a sound understanding of the market and investors' perceptions and objectives. The Town's economic development officer can bring important on-going perspectives and assessments about the most effective and appropriate use of CIPs.

Downtown Areas: A major objective for the Town is to encourage the transformation of Lincoln's downtown business areas into attractive and vibrant community centres. Many people stressed the importance of the revitalization of downtowns during the consultations which were a part of the development of the Strategy and Action Plan. In addition to the existing Beamsville and Vineland CIPs, this currently involves strengthening the Beamsville BIA, including By-law amendments. Further steps to support growth and revitalization of downtowns should follow.

Agriculture-Related Development: Given the employment land limitations, encouragement and facilitation of employment generating agriculture-related developments should be another area of special attention, including ancillary facilities at wineries and craft beverage producers and retail markets for agricultural products. Close liaison with the Vineland Research and Innovation Centre (VRIC) to support and strengthen the agri-tech cluster associated with its Lincoln presence should be an on-going priority.

Outreach to the Realty and Development Community: Contacts with the realty and development community active in the industrial, commercial and agricultural fields are vital to inform developers, investors, companies and entrepreneurs of opportunities and to facilitate their interest, plans and decisions. These contacts are also sources of feedback on how Lincoln is perceived in terms of its competitive position vis a vis other jurisdictions. Team Niagara mounts events to expose the GTHA realty and development community to Niagara region.

Major projects, such as Prudhommes Landing and the planned Beamsville GO Transit station area, will be centrepieces that stand to draw favourable attention and excitement to Lincoln's development potential.

Adopting a Whole-of-Government Approach: Economic development is linked to and benefits from various other municipal programs and strategies. An example is the Town's Parks, Recreation and Cultural Master Plan which has been initiated in 2018. Many dimensions of parks, recreation and cultural policies and development impact tourism, the attraction and retention of talent, and the economic vibrancy of urban centres. Identifying and supporting areas that will make a contribution involve adoption of an all-of-government approach.

Town staff and business units which are the key points of interface with the public – especially with business and entrepreneurs – should be briefed to ensure they are familiar with the Town's economic development role and the related services that are available. The Town Library is an example. It could be a repository for current statistical data and material relevant to starting a business, publications for

exporters, and so forth, with a staff member specialized in advising business and entrepreneurs on research sources and techniques.

Business Expeditor Role: The widely accepted gold standard for economic development agencies is to treat investors, developers and expanding local businesses as clients who merit responsive, predictable and transparent processes, and timely and understandable decisions, along with needed information, advice and introductions. To ensure the seamless handling of each prospect's needs through to a final decision, economic developers act as business expeditors who provide clients with single point concierge service to:

- Facilitate all arrangements and contacts;
- Connect the client with CIPs and other appropriate programs and incentives;
- Ensure the client's plans are fully understood and taken into account by those whose approvals are required;
- Lend the Town's support to the client's interactions and advocacy with the Region, NEC, NPCA and others; and
- Track and encourage the honouring of timelines for decisions.

The support of the Town's management team is critical, meaning that they must be appropriately informed and brought aboard.

A Development Approval Flow Chart: For prospects seeking to expand or invest in Lincoln, an important tool that supports the business expeditor role, conveys a forthcoming approach, and enhances transparency is the creation of a Development Approval Flow Chart. Such a chart outlines in accessible language the procedures, processes and people involved in development approvals both at the Town and Regional levels, with indicative timelines for decisions that will be honoured. The creation of such a Development Approval Flow Chart requires close collaboration among Town staff and between the Town and Regional planning officials. It is also desirable that the flow chart and the processes associated with it include mention of all provincial requirements and other entities which can be involved (e.g. the Niagara Peninsula Conservation Authority and the Niagara Escarpment Commission). The Flow Chart should be prominently posted online as evidence of the Town's interest in attracting new development, investment and expansions.

The Town already adopts the best practice of arranging an initial round table pre-qualification meeting with the proponent involving a two-way dialogue with all the key people who may be involved to establish a shared understanding of the requirements and approval time lines and processes, thereby avoiding surprises later. Delegation of some approval authorities to staff also serves to increase the predictability of timelines.

Economic Development and Investment Attraction Readiness

A fundamental requirement in economic development and investment attraction is to be fully ready from the outset to provide prompt and comprehensive responses and assistance, including detailed information about locating and growing businesses in the community.

The Town's website requires a separate tab for Economic Development and Investment. Other areas of the website needing near-term attention are addressed in greater detail in Section D.

Customer Relationship Management (CRM) System: The Economic Development Department requires a Customer Relationship Management (CRM) system as soon as possible to manage information on local companies, prospects, influencers and partners. The system will provide lead tracking and reporting capabilities. A CRM system offers significant efficiencies as well as evident organizational and operational benefits. As the central storehouse for all contacts, it will be the basis for the development of distribution lists for newsletters, media releases and marketing collateral and targeted initiatives (see also Section D.6).

Upfront effort and costs will be involved to reach the required standard of economic development and investment attraction readiness in a timely fashion. Part-time or shared staff or contracted resources are typically required to put forward the initial effort to get matters up and running.

Regular Dialogue and Consultation with Economic Development Stakeholders

An on-going framework for regular dialogue between the Town and its principal economic development stakeholders is needed. With the increased focus by the Town on economic development, steps have already been taken to reach out more deliberately to various stakeholder groups.

The most logical and manageable approach to dialogue and consultation would be to formalize at least annual round tables with the main business groups that have a substantial stake and role in Lincoln's prosperity:

| Sector | Associations |
|--|--|
| • Greenhouse Growers | The Ontario Greenhouse Alliance |
| • Wineries | The Wine Council of Ontario (VQA) Winery & Grower Alliance of Ontario |
| • Grape Growers | Grape Growers of Ontario |
| • Tender Tree Fruits, Berries and Vegetables | Niagara Peninsula Fruit & Vegetable Growers' Association Ontario Tender Fruit Growers |
| • Manufacturers | Niagara Industrial Association |

and

- The Lincoln Chamber of Commerce
- The Beamsville Business Improvement Area (BIA)

In addition, the North Niagara Federation of Agriculture should be considered for appropriate involvement.

The approach with the agricultural producers groups and the manufacturing sector would be to invite representatives of the appropriate sector organization(s) and all of the Lincoln companies or agriculture ventures (irrespective of whether they are members of the sector association or not).

The tourism sector invites a somewhat different approach given the Town’s membership in the Twenty Valley Tourism Association (TVTA). The Town has an ongoing relationship through the participation in TVTA’s Board meetings of a Council member and a senior member of staff as liaisons. The TVTA, following its recent strategy review, is developing regular surveys and opening channels of communication with its members. A round table with representatives from Lincoln’s tourism-oriented businesses could be tied into the cycle of the surveys and could also involve TVTA Board members. Precise mechanisms should be discussed.

The objectives of the round tables would be to:

- Obtain an update on current business prospects involving the respective groups;
- Hear out and understand their issues and concerns, directly within the Town’s mandate and where the Town can be an advocate on their behalf;
- Discuss and build a shared consensus around Lincoln’s value proposition, opportunities and challenges; and
- Build collaborative approaches that empower community leadership.

Lincoln shares many common economic attributes with other Niagara communities that are hosts to greenhouses, wineries and vineyards, cannabis producers, orchards and berry fields, and the associated value-add opportunities. Consideration could be given to whether there sufficient underlying shared interests to provide the basis for an annual or biennial Niagara Agriculture Conference. It could include a tourism dimension as part of the program to bring forward the importance of ties to tourism and how to further them.

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | |
|--|--|----------------------------|---|--|
| D.1 OPEN FOR BUSINESS – TOWN OF LINCOLN ECONOMIC DEVELOPMENT POLICIES AND BUSINESS CLIMATE | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.1 | <p>GOAL: Lincoln is an attractive business location that is competitive, responsive and welcoming to job-generating sustainable economic growth.</p> <p>1. OBJECTIVE: To attract, encourage and promote new development initiatives to foster Lincoln’s economic growth</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Pursue a business expeditor role to facilitate all aspects of a prospect’s requirements through to a final decision, supported by a Development Approval Flow Chart 2. Participate in realizing initiatives to upgrade and revitalize Lincoln’s downtowns 3. Contribute to implementation of the recommendations of the employment lands study | <p>A</p> <p>A</p> <p>A</p> | <p>On-Going</p> <p>On-Going</p> <p>On-Going</p> | <p>LEcDev LPlan NED NEC NPCA</p> <p>LEcDev LPlan BBIA LPlan LEcDev</p> |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|---|---|-----------------------|----------|---|
| D.1 | 4. Participate in the establishment of an adequate supply and market choice of serviced employment lands in appropriate locations | A- | On-Going | LPlan LEcDev |
| | 5. Support development of and promote the signature Prudhommes Landing area and other areas offering employment lands and/or economic development and tourism related commercial opportunities | B | On-Going | LPlan LEcDev LComm |
| | 6. Contribute to advocacy and the shaping of policies to realize the Beamsville GO Rail station | B | On-Going | LPlan LEcDev LComm |
| | 7. Explore the potential for partnerships and policies which could encourage development of additional lands that would cater to agri-tech ventures | B | On-Going | LEcDev LPlan |
| | 8. Contribute to the monitoring of existing Community Improvement Programs (CIPs) and the development of new programs, as well as to monitoring the competitiveness of Lincoln's Development Charges, property taxes and fees | A- | On-Going | LPlan LEcDev |
| | 9. Promote economic development dimensions of other Town strategies, plans and activities | B | On-Going | LEcDev LCD LPlan LPW |
| | 10. Evaluate the merits of an Annual or biennial Niagara Agricultural Forum | C | 2019 On | LEcDev NED GGO NPFVGA OTFG WCO WGAO |
| Funding: <ul style="list-style-type: none"> General Budget | | | | |
| Performance Metrics: <ul style="list-style-type: none"> Take actions indicated Timeliness of the Town's processes and decisions related to new developments Earned media coverage outside of Region for the steps to realize signature projects such as Prudhommes Landing and proposed GO commuter rail station area | | | | |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|--|--|----------------------------|--|---|
| D.1 | 2. OBJECTIVE: To equip the Town of Lincoln to be economic development and investment ready Actions: <ol style="list-style-type: none"> 1. Establish a comprehensive and robust economic development website, with associated social media and other features 2. Establish and populate a Customer Relationship Management (CRM) system to handle lead and prospect tracking and reporting, and to build and manage contact and distribution lists 3. Gather, inventory, and regularly update in-depth site location information, to be available on the website and to respond to enquiries and opportunities, supplemented with readily-interpretable maps 4. Create a searchable inventory of industrial and commercial land and buildings, to be available on the website 5. Establish a Lincoln business directory 6. Update and refresh marketing collateral, including a fact sheet and a community profile | A A | 2018-19 2018-19 | LEcDev LComm LEcDev LEcDev LPlann LEcDev LEcDev |
| Funding: <ul style="list-style-type: none"> • Establishing economic development and investment readiness will involve upfront expenditures for part-time or contract staff or consultants • Part-time or contract staff or consultants may need to be engaged to assist with CRM set-up and training, if the Town chooses not to introduce CRM system for all municipal staff | | | | |
| Performance Metrics: <ul style="list-style-type: none"> • The economic development program will meet the economic development and investment readiness criteria by early 2019 • CRM systems will be established by early 2019, including to be a source of performance data | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.1 | 3. OBJECTIVE: To establish frameworks for productive on-going dialogue and consultations between the Town and economic development stakeholders Actions: <ol style="list-style-type: none"> 1. Establish a pattern of regular meetings with the principal producers and business groups | A | 2019 On | LEcDev BBIA GGO LCoC NIA NPFVGA OTFG TOGA WCO WGAO |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|------------------|--|-----------------------|----------|------------------------------|
| D.1 | <div>2. Sustain dialogue with the tourism sector through involvement on the Twenty Valley Tourism Association (TVTA) Board and direct contact with the principal stakeholders</div> <div>3. Use the consultative mechanisms to build consensus around Lincoln’s value proposition, opportunities and challenges</div> <div>4. Work with other clusters of businesses in Lincoln wishing to explore the formation of BIAs</div> | A | On-Going | LecDev TVTA LPlan LPW |
| | | B | 2019 On | LecDev LComm |
| | | B | 2019 On | LecDev LPlan |

Funding:

- Possible incidental costs related to hosting meetings

Performance Metrics:

- Plan established for systematic and productive annual consultations with stakeholder groups

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; A- + Highest Priority, But Partially Responsive to Others’ Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

| | |
|---|--|
| BBIA = Beamsville Business Improvement Area | NED = Niagara (Region) Economic Development |
| GGO = Grape Growers of Ontario | NIA = Niagara Industrial Association |
| LCD = Lincoln Community Development | NPCA = Niagara Peninsula Conservation Authority |
| LCoC = Lincoln Chamber of Commerce | NPFVGA = Niagara Peninsula Fruit & Vegetable Growers Association |
| LComm = Lincoln Senior Communications Advisor | OTFG = Ontario Tender Fruit Growers |
| LecDev = Lincoln Economic Development | TOGA = The Ontario Greenhouse Alliance |
| LPlan = Lincoln Planning & Development | TVTA = Twenty Valley Tourism Association |
| LPW = Lincoln Public Works | WCO = Wine Council of Ontario |
| NEC = Niagara Escarpment Commission | WGAO = Winery & Growers Alliance of Ontario |

2. Business Retention and Expansion

Initiatives to reach out to existing businesses to support the retention and expansion of jobs are an essential and fundamental priority for any community's economic development program. The accepted wisdom is that as many as 70 to 80 percent of new jobs may be generated through expansions within the local business base. It is easier and less expensive to keep and grow relations with existing clients, as compared to identifying and attracting new ones. In two-tier municipal structures, the lead for business retention and expansion activity rests with the lower-tier municipalities as they are closest to local firms and have a front line role in serving their taxpayers' needs.

Nearly 900 Enterprise Locations in Lincoln:

The existing local enterprise base in Lincoln is oriented to smaller firms. Micro and small enterprises with fewer than 100 employees accounted for 98 percent of all businesses in Lincoln in 2016, if "indeterminate" establishments that had no employees or only contracted workers were excluded. Micro-enterprises (1 to 4 employees) represented virtually half or 49.8 percent.

In the online public survey undertaken as part of the development of the Lincoln Economic Development Strategy, respondents chose "business expansion/growth of existing businesses" as the number one area where the Town of Lincoln should focus efforts to support growth of the economic base and businesses. (See Appendix A)

Small enterprises (5 to 99 employees) accounted for a further 48.2 percent. Only 28 locations had 100 or more employees. Overall, the number of locations (excluding indeterminate) grew by 9.0 percent from 2014 to 2016 (see Exhibit 9).

Business Retention and Expansion (BR+E)

Outreach: Lincoln's new economic development officer has given priority to meeting with local firms, including as part of the outreach related to the development of the Economic Development Strategy and Action Plan. This is a timely and appropriate approach to becoming acquainted with a spectrum of employers that have valuable perspectives and insights.

Lincoln's fastest growing firms are the major source of additional jobs should be accorded a degree of priority. The annual employment survey undertaken by the Region will provide useful data. A watch should also be kept for firms facing pressures.

| Exhibit 9 | | | |
|---|------|------|--------|
| Growth in the Number of Locations of Lincoln Enterprises – 2014 to 2016 | | | |
| # of Employees | 2014 | 2016 | + or - |
| 1-4 | 410 | 447 | +37 |
| 5-9 | 172 | 185 | +13 |
| 10-19 | 100 | 108 | +8 |
| 20-49 | 103 | 109 | +6 |
| 50-99 | 31 | 31 | 0 |
| 100-199 | 11 | 14 | +3 |
| 200-499 | 2 | 4 | +2 |
| 500+ | 0 | 0 | 0 |
| Total, excluding Indeterminate | 824 | 898 | 74 |
| Source: EMSI Q3 2017 | | | |
| Note: Also see statistical table in Appendix E, Exhibit 9. | | | |

The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) provides tools and advises communities on tailoring structured BR+E programs to local needs. The report on the calls summarizes the views of local businesses and agricultural enterprises and alerts the Town's leadership and Niagara Region counterparts to areas of opportunity, concerns and needs, hiring plans, workforce requirements, and plans to expand or retrench. Some segments that have strong and well-focussed associations may lend themselves to regular group sessions (see D.1) which might reduce the need for individual engagement or a structured set of calls that adopts the OMAFRA approach.

A key dimension of a BR+E program is to develop and support programing and follow-through with contacts and programs that can address the verified needs of local businesses and agricultural enterprises in areas such as export assistance, business financing, government funding programs, workforce development, and post-secondary research partnerships. Extensive resources and programs are available to be tapped into, something that is facilitated by the Town's having dedicated economic development resources that local businesses see as the "go to" source for meaningful and timely assistance.

A specific focus on foreign-owned firms is merited. Where local management may be competing within their companies for new or expanded product mandates or forced to justify existing operations, avenues to corporate headquarters through Federal and Ontario representatives abroad can often be opened working with Niagara Region Economic Development and Ontario and Federal representatives. Prospective new investors will also want to talk to local businesses – especially foreign firms – to obtain frank insights about their experiences. It is vital therefore to be well acquainted with prominent local firms and their management, both to be informed of their perspectives and to facilitate access for visiting firms.

Ontario government officials based in Niagara region should be included in regular outreach to Lincoln businesses to increase impact, make best use of the private sector's time, and facilitate follow-through,

especially with respect to funding programs. Both the Ontario Ministry of Economic Development, Job Creation and Trade (MEDJCT) and the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) have a Niagara presence.

Other useful partnerships can be forged with local representatives of the National Research Council's Industrial Research Assistance Program (IRAP-NRC) and Ontario's OCE Inc.

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | |
|---|---|-------------------------------------|--|--|
| D.2 BUSINESS RETENTION AND EXPANSION | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.2 | <p>GOAL: Existing Lincoln businesses and agricultural enterprises thrive and grow.</p> <p>OBJECTIVE: To reach out, engage, understand, convey and support the preoccupations, intentions and needs of existing Lincoln businesses and agricultural enterprises</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Meet with larger employers to understand their preoccupations, capabilities, plans and needs 2. Be alert to firms whose situations may present risks or opportunities 3. Regularly mount structured BR+E calling programs 4. Arrange and support initiatives to connect local businesses to sources of assistance and funding | <p>A</p> <p>B</p> <p>A</p> <p>A</p> | <p>On-Going</p> <p>On-Going</p> <p>2019 On</p> <p>On-Going</p> | <p>LEcDev OMAFRA MEDJCT</p> <p>LEcDev NED MEDJCT OMAFRA GAC LEcDev OMAFRA MEDJCT</p> <p>LEcDev OMAFRA MEDJCT SCEC VN</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • OMAFRA assists in organizing BR+E calling programs • The need for additional funding for events can be avoided or mitigated if local events for Lincoln companies hosted by the economic development program are conducted on a cost recovery basis | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none"> • The basic metrics are numbers of BR+E calls and meetings; businesses retained; expansion projects; value of investment retained or invested in new projects; and jobs retained and created (in situations where Lincoln's economic development program has influenced outcomes) | | | | |
| <p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; A- = Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <p>GAC = Global Affairs Canada LEcDev = Lincoln Economic Development MEDJCT = Ministry of Economic Development, Job Creation & Trade NED = Niagara (Region) Economic Development</p> <p>OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs SCEC = St. Catharines Enterprise Centre VN = Venture Niagara</p> | | | | |

3. Innovation and Entrepreneurship

Business creation and entrepreneurship are central factors in vibrant and growing local and regional economies. An orientation toward innovation and calculated entrepreneurial risk is also essential on the part of established companies if they are to grow, earn acceptable returns and survive in businesses segments that are subject to rapid change and disruption.

Entrepreneurship, the growth of young ventures, and innovation are interlinked, but each has distinct characteristics.

Entrepreneurship involves a willingness to accept risk. Entrepreneurs put jobs, careers and financial security on the line to pursue an idea or uncertain venture. Although age is no barrier, the peak ages for entrepreneurship are people in their 30s and 40s.²⁵ Within existing businesses, entrepreneurship takes the form of intrapreneurship – referring to individuals within the corporate structure who risk the business’s resources to solve a problem, develop and introduce different products or services, or set new directions for the business.

In the case of innovation, a widely accepted definition is that “an innovation is the implementation of a new or significantly improved product (good or service), or process, a new marketing method, or a new organizational method in business practices, workplace organization or external relations.”²⁶ Innovation therefore extends beyond just novel products or processes.

Given the challenges which emerging firms face in successfully scaling their operations rapidly, economic development and innovation initiatives are placing special emphasis on fostering innovation ecosystems that enable companies to scale up. Analysis indicates that young companies across all sectors – generally those in existence for fewer than five years – drive job creation. The critical and most challenging growth phase tends to be from a few employees, through 20, 50 or 100 staff members. The disciplines of greatest need to scale successfully are sales, marketing, organization design, product management and internationalization – all difficult skillsets to find.

In the online public survey undertaken as part of the development of the Lincoln Economic Development Strategy, respondents ranked “support entrepreneurship” second and “support business innovation” fourth among the choices where the Town of Lincoln should focus efforts to support the growth of the economic base and business.
(See Appendix A)

Innovation related to Lincoln’s and Niagara’s agriculture-based strengths needs to be escalated markedly, in light of the competitive pressures that the sector faces. Increased minimum wages, high energy costs, and competition from countries with lower cost structures are among the more prominent challenges. Cannabis production and vertical farming are introducing advanced new technologies and systems. Niagara College and the Vineland Research and Innovation Centre (VRIC), along with Brock University, are

²⁵ Stangler, Dane, Ewing Marion Kauffman Foundation, “The Age of the Entrepreneur: Demographics and Entrepreneurship,” Presentation to the Innovation for Jobs Summit, March 2013 (<http://i4j.info/wp-content/uploads/2013/05/i4jDaneStanglerDemographicsandEntrepreneurship-1.pdf>). Accessed on August 4, 2017.

²⁶ Oslo Manual: Guidelines for Collecting and Interpreting Innovation Data, 3rd edition (OECD, 2005)

engaged in world-class research and development that can further advance capabilities of Lincoln companies and agricultural enterprises.

A key role for Lincoln's economic development program is to forge connections for local firms and entrepreneurs with programs and resources in Niagara region and beyond that can support business establishment and growth.

Spark Lincoln: Officially launched in April 2018, Spark Lincoln is a collaborative innovation hub in downtown Beamsville which occupies 1,000 square feet of renovated co-working and meeting space provided by the Town. The focus is on driving entrepreneurship, venture creation and business growth, including through coaching and mentoring. Programs are also directed to encouraging youth retention and attraction through coding workshops for students in grades six to twelve. Spark Lincoln provides an important base for the creation of an innovative and entrepreneurial ecosystems that can welcome other resources and programs into the community. Agri-tech will be given special attention.

Among the organizations in Niagara region that are well equipped to assist entrepreneurship and innovation and with which close links should be established are:

- The St. Catharines Enterprise Centre (SCEC), one of 52 community-based Ontario government supported centres which target assistance to entities that have been in business for five years or less and which offer programs such as Summer Company and Starter Company funded by the Ontario government;
- Innovate Niagara in St. Catharines, the Regional Innovation Centre (RIC) for the Niagara region, one of 17 supported by the Ontario government;
- The National Research Council's Industrial Research Assistance Program (IRAP-NRC);
- Ontario's OCE Inc.;
- Venture Niagara in Thorold, a Community Futures Development Corporation which falls under FedDev Ontario; and
- The research and innovation and business development offices at Brock, Niagara College and the Vineland Research and Innovation Centre.

The Brock-Lincoln Living Lab is an example of the type of productive and practical initiative that Lincoln can develop with post-secondary institutions (see also B.4). Beyond Niagara region, McMaster University, Mohawk College and the University of Guelph are also priority candidates.

Selected high impact opportunities should be sought out to attract representatives of these organizations to visit Lincoln to make the services and programs of these organizations known and to facilitate ready access. In addition to direct individual contact, a Lincoln economic development e-newsletter could play a key role in keeping Lincoln businesses and agricultural enterprises informed (see D.6).

Procurement and Innovation: Opportunities are open to the Town to consider procurement policies that cater to emerging technology providers whose technology still needs initial public sector procurement partners to establish the technology's worth.

Finding first customers is a critical preoccupation of emerging companies. The design of the innovator-friendly government procurement processes therefore focuses on creating a process for requests for proposals where the government agency can be the first public sector client for what is often a less than

fully proven product or service. Proposals are typically invited for technologies or approaches that can provide solutions for defined areas of need.

At the Federal and Ontario levels, programs are in place:

- **Innovative Solutions Canada**, announced in the 2017 Federal Budget with an initial \$50 million commitment, allocates a portion of funding from federal departments to early-stage research and development, late-stage prototypes, and other goods and services from Canadian entrepreneurs and innovators. The Budget indicates that the program will be designed to be scalable, so that other Canadian jurisdictions can take part in the future, if they so wish.
- **Build in Canada Innovation Program (BCIP)**, created in 2010 and made permanent after a two-year trial, seeks to bridge the pre-commercial gap faced by emerging companies, by buying pre-qualified late-stage research and development innovations for Federal departments to test. After testing, the BCIP provides feedback to suppliers on the performance of their products or services.
- **Small Business Innovation Challenge (SBIC)**, introduced in 2017 and delivered by Ontario Centres of Excellence (OCE Inc.), is directed to high-potential, technology-driven start-ups and SMEs able to offer solutions to public sector business challenges. The first two areas of interest identified were “digital identity” from the Ministry of Government and Consumer Services (MGCS), and “vehicle occupancy detection” from the Ministry of Transportation (MTO).

At the municipal level, an example is provided by the City of Guelph which launched a pilot initiative in 2016. The **Guelph Civic Accelerator** program called for proposals from “solution partners” to address specific complex municipal problems (e.g. enabling citizens to detect water leaks and reduce use; maximizing the value of downtown parking space; and how to facilitate public feedback on planning decisions). The Guelph Civic Accelerator involves partnerships with the University of Guelph, the Chamber of Commerce, Innovation Guelph, and Canada’s Open Data Exchange.

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | |
|--|--|-----------------------|---------------------------------|--|
| D.3 INNOVATION AND ENTREPRENEURSHIP | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.3 | <p>GOAL: Lincoln’s businesses and agricultural enterprises embrace innovation and entrepreneurship.</p> <p>OBJECTIVE: To encourage and support the development of a dynamic ecosystem with an innovative and entrepreneurial culture</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Support and grow the partnership with Spark Lincoln 2. Connect Lincoln entrepreneurs and businesses to resources in Niagara and the Greater Golden Horseshoe which support innovation and entrepreneurship | <p>A</p> <p>A-</p> | <p>On-Going</p> <p>On-Going</p> | <p>LEcDev</p> <p>Spark</p> <p>LEcDev</p> <p>Brock Guelph IN</p> <p>IRAP OCE NCC VN</p> <p>VRIC</p> |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|---|---|-----------------------|----------|------------------------------|
| D.3 | 3. Attract events, including in collaboration with Spark Lincoln, that will stimulate, support and highlight local innovation, scaling and entrepreneurship | A | On-Going | LEcDev Spark |
| Funding: <ul style="list-style-type: none">The Town is providing space for Spark Lincoln at no charge. The growth or expansion of the Spark Lincoln program may invite further matching funding | | | | |
| Performance Metrics: <ul style="list-style-type: none">Other than tracking referrals specific external resources, the performance metrics will largely be gathered by the organization(s) with which the Lincoln economic development program is partnering (such as Spark Lincoln). In addition to tracking its own referrals, the Town should monitor these metrics closely – especially outcomes rather than just activities – and ensure that they drive the organization’s strategy and operations | | | | |
| NOTES AND ABBREVIATIONS ¹ Priorities: A = Highest Priority & Very Time-Sensitive; A- + Highest Priority, But Partially Responsive to Others’ Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive ² Abbreviations Brock = Brock University Guelph = University of Guelph IN = Innovate Niagara IRAP = Industrial Research Assistance Program - NRC LEcDev = Lincoln Economic Development NCC = Niagara College Canada OCE = Ontario Centres of Excellence (OCE) Inc. Spark = Spark Lincoln VN = Venture Niagara VRIC = Vineland Research & Innovation Centre | | | | |

4. Attracting New Investment

Proactive external direct investment attraction is exceptionally competitive. Throughout the world, there are tens of thousands of economic development organizations actively seeking to attract new investment to their jurisdictions. Success depends on:

- Well-researched value propositions for a few selected sub-sectors and niches where the location can clearly differentiate its offering from most other suitors; and
- Carefully prepared and highly targeted outreach to companies that are prospects to establish new ventures in North America or Ontario in those sub-sectors and niches.

A Collaborative Regional Approach: In two-tier municipalities like Niagara region, the division of prime responsibilities is to have the Regional level take the lead role in coordinating and spearheading external investment attraction, while the front line municipalities have prime responsibility for business retention and expansion.

Team Niagara, involving the Region and the 12 municipalities, has been formulated with that in mind. In addition, having appointed a full-time economic development officer, Lincoln is one of the six partner Niagara municipalities, along with Niagara Region Economic Development, in the Niagara Development Corridor Partnership which supports business attraction, retention and expansion and has a website.

Collaborations Beyond Niagara Region: The benefits of collaboration – often labelled “co-opetition” or “compete-mating” – extend beyond just Niagara region relationships. The Hamilton-Niagara Partnership, Invest Hamilton Niagara, was established in 2015 to market the broader area to prospects and influencers attending the PanAm Games which featured both Hamilton and St. Catharines events. The goals are to

present a mega-region of one million people and a skilled workforce, with four significant post-secondary educational institutions and multiple ports and border crossings, willing to work together to stimulate economic development. Subsequent marketing efforts have focused on South American countries such as Columbia. A source of matching funding has been Global Affairs Canada's Invest Canada Community Initiatives (ICCI).

Niagara Region Economic Development has participated in shared-cost pan-regional foreign investment attraction collaborations with sister economic development organizations in Ontario. These have included the Ontario Food Cluster (OFC) and the Ontario Manufacturing Communities Alliance (OMCA). These groups tend to focus on engaging specialized consultants to generate investment leads and on participation in selected international events that promise access to prospective investors. It is important to be highly selective. Though providing some economies, participation involves time and expenses.

Niagara Region Economic Development also maintains memberships in the Society of Industrial and Office Realtors (SIOR) and the Automotive Parts Manufacturers' Association (APMA).

Why Adopt Collaborative Approaches: The reasons for adopting a regional or wider pan-regional approach to external investment attraction are well accepted.

First, the regional approach aligns with the way in which site location searches are undertaken. Prospective investors (or site selectors working their behalf) will initiate their search for a new location by looking to select larger economic regions or at states or provinces in the first instance, probably moving fairly quickly to a short list of three to five locations. They will then begin to evaluate sites, talent availability, local taxes and incentives, and the fit of the region. The prospect wants to deal with economic development professionals who are equipped to provide comprehensive information on the region tailored to the specific requirements that have been set for the project. Investors openly welcome collaborative regional approaches.

Second, external investment attraction is an inherently more expensive aspect of economic development requiring extensive research, preparation and targeting and higher travel costs. It makes abundant sense to share costs on a regional basis as a first step to getting a foot-in-the-door, mounting more impactful initiatives, screening and responding in the first instance to enquiries, and coordinating local visits by influencers and prospects. Often the regional level can take out a membership or be the partner in a wider collaboration in which the other municipalities have an opportunity to participate without having to pay another fee or contribute a basic share.

An important further reason supporting collaborative regional efforts has been the ability to access matching funding from the Federal and Ontario governments. Both make it clear that they favour cooperative approaches. This is reflected in the ground rules and decisions associated with their programs that support municipalities in their foreign investment attraction efforts. Federal and provincial officials based in Canada and their representatives outside Canada also make it clear that they will devote more time and offer more tactical support when Canadian economic development organizations come together to mount international initiatives.

Lincoln's Role in External Investment Attraction: Lincoln's interests related to external investment attraction lie in ensuring that Lincoln's assets, interests, differentiators and sites are incorporated in the broader regional investment attraction effort, that Lincoln's attributes as a place to locate are reflected

prominently in the Region's pitches, and that opportunities that match Lincoln's strengths and priorities are taken up and pursued. The Town will also be able to work with Regional colleagues to ensure prospective investors are informed of how Lincoln meets their requirements and to host prequalified prospects when they visit Niagara.

Prospective investors and site selectors interested in Lincoln will want to meet privately with the heads of local companies to benefit from their perspectives and experiences. This should be anticipated and planned for by developing trusting relationships with the management of local companies, including those which are foreign-owned.

Robust value propositions that deliver in-depth information on the selected high priority Lincoln sub-sectors and niches are an important tool toward ensuring that Lincoln is identified as a prime location on the part of Regional colleagues and Federal and Ontario government officials. At the provincial level, regional and local investment attraction programs are supported by the Ontario Ministry of Economic Development, Job Creation and Trade (MEDJCT); the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA); and the Ontario Ministry of Tourism, Culture and Sport (MTCS).

Lincoln can also benefit from working with Regional colleagues and Federal and provincial officials as a complement to its interface locally with foreign-owned companies with operations in Lincoln. Especially where contact with the firm's local management suggests that there may opportunities to win a new mandate or expansion – or a risk that cutbacks or a closure are possible – the Region and Federal and Ontario officials in Canada and abroad are often positioned to obtain helpful information and insights on corporate strategies and direction. This sometimes extends to being able to gain access to senior executives at the firm's international headquarters. The same contacts can also be brought into play if a Lincoln firm is acquired by a foreign company, so that the future of the local firm can be better assessed and, if necessary, supported.

Supportive Systems and Collateral: Especially in the case of external investment attraction, it is vital to have a Customer Relationship Management (CRM) system operational and to have high quality marketing collateral, a full range of site location data, value propositions, and information on suitable sites (see D.1 and D.6).

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | | | | | | | | | | | |
|---|---|--|--|--|-----------------------------|---|-------------------------------|--------------------------------------|---------------------------------------|--|---|-------------------|---|--|
| D.4 ATTRACTING NEW INVESTMENT | | | | | | | | | | | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² | | | | | | | | | | |
| D.4 | <p>GOAL: New investment is attracted that benefits Lincoln.</p> <p>OBJECTIVE: To target and pursue new investment prospects within the Team Niagara framework</p> <p>Actions:</p> <ol style="list-style-type: none">1. Identify, develop and keep current compelling value propositions for high priority sub-sectors and niches2. Provide information, as part of Team Niagara investment attraction efforts, on Lincoln’s assets, workforce, priorities, differentiating factors, sites and buildings, and value propositions3. Participate in Team Niagara investment attraction initiatives and pursue leads facilitated through Team Niagara4. Host and demonstrate to investment prospects how Lincoln meets their requirements5. Identify opportunities for expansion and work with the local management of externally-owned firms to make the business case for existing or new mandates | A A A A- B | 2019 On 2019 On On-Going On-Going On-Going | LecDev LecDev GAC MEDJCT NDCP NED OMAFRA TN LecDev IHN NED TN LecDev NED GAC MEDJCT OMAFRA LecDev NED GAC MEDJCT OMAFRA | | | | | | | | | | |
| <p>Funding:</p> <ul style="list-style-type: none">• Travel budget will be required for participation in selected Team Niagara initiatives that align with Lincoln’s strategic priorities, and for other targeted travel• Federal and Ontario government financial support for investment attraction is generally provided to upper-tier municipalities or regional economic development agencies• Note: The preparation of two or three in-depth value propositions is addressed in Section F.1 | | | | | | | | | | | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none">• Performance Metrics should concentrate on outcomes (the number of new investments and the jobs and amounts and how they continue to grow), supplemented by measures of activities likely to lead to the outcomes (investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where Lincoln’s economic development program has influenced outcomes) | | | | | | | | | | | | | | |
| <p>NOTES AND ABBREVIATIONS</p> <p>¹ Priorities: A = Highest Priority & Very Time-Sensitive; A- = Highest Priority, But Partially Responsive to Others’ Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive</p> <p>² Abbreviations</p> <table><tr><td>GAC = Global Affairs Canada</td><td>NED = Niagara (Region) Economic Development</td></tr><tr><td>IHN = Invest Hamilton Niagara</td><td>NIA = Niagara Industrial Association</td></tr><tr><td>LecDev = Lincoln Economic Development</td><td>OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs</td></tr><tr><td>MEDJCT = Ministry of Economic Development, Job Creation & Trade</td><td>TN = Team Niagara</td></tr><tr><td>NDCP = Niagara Development Corridor Partnership</td><td></td></tr></table> | | | | | GAC = Global Affairs Canada | NED = Niagara (Region) Economic Development | IHN = Invest Hamilton Niagara | NIA = Niagara Industrial Association | LecDev = Lincoln Economic Development | OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs | MEDJCT = Ministry of Economic Development, Job Creation & Trade | TN = Team Niagara | NDCP = Niagara Development Corridor Partnership | |
| GAC = Global Affairs Canada | NED = Niagara (Region) Economic Development | | | | | | | | | | | | | |
| IHN = Invest Hamilton Niagara | NIA = Niagara Industrial Association | | | | | | | | | | | | | |
| LecDev = Lincoln Economic Development | OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs | | | | | | | | | | | | | |
| MEDJCT = Ministry of Economic Development, Job Creation & Trade | TN = Team Niagara | | | | | | | | | | | | | |
| NDCP = Niagara Development Corridor Partnership | | | | | | | | | | | | | | |

5. Talent and Workforce Development

The Prized Resource: Human Capital: Highly qualified personnel are the assets that global firms frequently seek above all and want to access for expansions and new investments in developed countries such as Canada, the US, and western Europe. The World Economic Forum's (WEF's) 2017 Human Capital Report points to the important role of talent by starting the report with the declaration, "How nations develop their human capital can be a more important determinant of their long-term success than virtually any other factor."²⁷

The workplace is increasingly knowledge-based, technology-driven and globalized, with change occurring at an exponential pace. Rapid technology shifts are causing dislocation. Adaption is more challenging than during previous periods of change. It is less and less possible to accurately forecast what the jobs of tomorrow will look like. Life-long learning and adaptability therefore become imperatives. Cognitive skills – such as team work and critical thinking – are in high demand.

| Exhibit 10 | | | | |
|---|----------------|-----------------|-----------------|-----------------|
| Highest Level of Educational Attainment – Population Aged 25 to 64 Years 2016 Census for Lincoln, Niagara Region and Ontario | | | | |
| Highest Certificate, Diploma or Degree | Lincoln Number | Lincoln Percent | Niagara Percent | Ontario Percent |
| Population Aged 25 to 64 Years | 11,575 | | | |
| No Certificate, Diploma or Degree | 910 | 7.9% | 10.2% | 10.4% |
| Secondary (High) School Diploma or Equivalent Certificate | 3,240 | 28.0% | 29.8% | 24.5% |
| Post-Secondary Certificate, Diploma or Degree | 7,435 | 64.2% | 60.0% | 65.1% |
| • Apprenticeship or Trades Certificate or Diploma | 940 | 8.1% | 8.4% | 6.2% |
| ○ Trades Certificate or Diploma Other than Certificate of Apprenticeship or Certificate of Qualification | 400 | 3.5% | 4.0% | 3.0% |
| ○ Certificate of Apprenticeship or Certificate of Qualification | 540 | 4.7% | 4.4% | 3.1% |
| • College, CEGEP or Other Non-University Certificate or Diploma | 3,525 | 30.5% | 29.1% | 24.7% |
| • University Certificate or Diploma Below the Bachelor Level | 225 | 1.9% | 1.7% | 2.4% |
| • University Certificate, Diploma or Degree at Bachelor Level or Above | 2,745 | 23.7% | 20.7% | 31.9% |
| ○ Bachelor Degree | 1,925 | 16.6% | 14.3% | 21.0% |
| ○ University Certificate or Diploma Above Bachelor Level | 230 | 2.0% | 1.4% | 2.1% |
| ○ Degree in Medicine, Dentistry, Veterinary Medicine or Optometry | 45 | 0.4% | 0.6% | 0.9% |
| ○ Master's Degree | 500 | 4.3% | 3.9% | 6.9% |
| ○ Earned Doctorate | 50 | 0.4% | 0.5% | 1.0% |

Source: Statistics Canada 2016 Census

²⁷ World Economic Forum, "The Human Capital Report 2017," September 13, 2017, (<https://weforum.ent.box.com/s/dari4dktg4jt2g9xo2o5pksjpatvawdb>). Accessed on May 12, 2018.

Levels of Educational Attainment in Lincoln: The level of educational attainment of the Lincoln population is relatively high compared to the Niagara region as a whole, according to the 2016 Census (Exhibit 10). Over 64 percent of the Lincoln population had a post-secondary certificate, diploma or degree, a proportion that is less than one percent below the Ontario level.

The proportion of Lincoln residents who have apprenticeship or trades qualifications or who have a college certificate or diploma -- 38.6 percent -- is nearly eight percentage points above the provincial level of 30.9 percent.

On the other hand, the percentage of the people in Lincoln who have graduated with a bachelor or higher degree is about eight percentage points less than Ontario's norm, though ahead of Niagara's.

Exhibit 11 provides a cross-section of the major fields of study in which Lincoln individuals completed post-secondary programs, as reported in the 2016 Census.

| Exhibit 11 | | |
|--|--------------|-------------------|
| Post-Secondary Completion by Programs – Town of Lincoln | | |
| 2016 Census | | |
| Programs of Study | Total | % of Total |
| Architecture, Engineering & Related Technologies , of which | 2,400 | 23.5% |
| • Engineering technologies & engineering-related fields | 705 | |
| • Mechanic & repair technologies/technicians | 570 | |
| • Construction trades | 400 | |
| • Precision production | 330 | |
| • Engineering | 325 | |
| • Architecture & related services | 65 | |
| Business, Management and Public Administration , of which | 1,890 | 18.5% |
| • Business, management, marketing & related support services | 1,720 | |
| • Public administration and social service professions | 180 | |
| Health & Related Fields | 1,680 | 16.5% |
| Social & Behavioral Sciences & Laws | 1,005 | 9.9% |
| Personal, Protective & Transportation Services , of which | 765 | 7.5% |
| • Personal & Culinary Services | 375 | |
| • Security & Protective Services | 225 | |
| • Transport & Materials Moving | 165 | |
| Education | 760 | 7.5% |
| Humanities | 530 | 5.2% |
| Physical & Life Sciences & Technologies | 320 | 3.1% |
| Agriculture, Natural Resources & Conservation | 300 | 2.9% |
| Visual & Performing Arts & Communications Technologies | 300 | 2.9% |
| Mathematics, Computer & Information Sciences | 225 | 2.2% |
| Source: Statistics Canada 2016 Census | | |

Data from the 2016 Census paints a positive picture for Lincoln's workforce relative to averages for Niagara region and Ontario. For instance, a higher proportion of those who worked in Lincoln during 2015 occupied full-time positions for the entire year (52.8 percent) than Niagara region (50.1 percent) and

Ontario (52.2 percent). Lincoln also had comparatively high participation and employment rates, accompanied by a low unemployment rate (Exhibit 12).

| Exhibit 12 | | | |
|--|---------|----------------|---------|
| Comparative Participation, Employment and Unemployment Rates | | | |
| Lincoln, Niagara Region and Ontario – May 2016 | | | |
| Measure | Lincoln | Niagara Region | Ontario |
| Participation Rate | 66.1% | 61.0% | 64.7% |
| Employment Rate | 63.1% | 56.5% | 59.9% |
| Unemployment Rate | 4.6% | 7.4% | 7.4% |
| Source: Statistics Canada, 2016 Census | | | |

Talent attraction and retention are critical areas for economic development. Sustained multi-year efforts are required. The challenge is significant and should involve collaborative initiatives in partnership with Niagara Region and other Niagara municipalities. The low Lincoln unemployment rate (4.6 percent) in May 2016 at the time of the Census (Exhibit 12) underlines the importance of initiatives to attract suitable talent to meet the requirements of existing, expanding and new business in Lincoln. The unemployment rate in the St. Catharines-Niagara CMA as a whole was two full percentage points lower in April 2018 than at the time of the May 2016 Census, meaning that Lincoln's rate could well be even lower than two years previously.

Important skills shifts have been occurring in agricultural production, where the need has been growing for technical skills associated with the increasingly computerized systems and operations. This will be further spurred by cannabis operations and by vertical farming of fresh herbs and greens. Niagara College has responded with new programs and research facilities focused on precision agriculture.

Among respondents working in Lincoln, a lack of suitable employment opportunities was chosen second among the weaknesses and challenges to economic development in Lincoln, while labour availability ranked fourth. (See Appendix A)

Niagara Workforce Planning Board (NWPB): One of 26 workforce planning boards in Ontario, the NWPB facilitates workforce solutions, provides workforce data, and collaborates with Niagara's public, private, and non-profit sectors to enhance Niagara's economic prosperity. The NWPB is a valued partner for Lincoln, as evidenced by the preliminary analysis of 2016 Census data for Lincoln Economic Development. The NWPB also collaborates with Brock University's Niagara Community Observatory to produce insightful reports, examples of which include youth employment, trends in manufacturing employment, skills gaps, aging, and the needs of the knowledge economy.

A key role for Lincoln Economic Development is to understand the workforce needs and the issues that should be a local priority. In addition to analysis drawing on the data that NWPB can access, the necessary insights about the Lincoln situation will come through regular business retention and expansion outreach among Lincoln firms that identifies employer needs, pain points, experiences, and areas for collaboration. The NWPB can provide additional research and analysis, and partner in mounting joint efforts to address the problems.

Several avenues are employed by economic development programs to proactively attract talent.

- **Commuters Who Could Work Closer Home:** Identify the major occupational categories of Lincoln residents that are commuting to jobs elsewhere and present this information on available local talent to existing employers who could expand and to prospective new employers who are looking to harness these skills. The analysis could include immediately adjacent municipalities, given their close proximity to Lincoln places of work.
- **Reach Out to Parents with Young Families:** Even more productive than trying to retain youth and new graduates are programs – often driven by social media campaigns – that attract skilled and talented young breadwinners looking for an alternative to the cost, housing and congestion pressures of the GTA. Young families with relatives living in Lincoln are prime candidates. Spousal employment opportunities can be important.
- **Welcome Back Previous Residents:** Though they may have left for education, attractive entry-level jobs, or just to see the world, many previous residents are interested to return to their roots, especially to rejoin family. Techniques that are employed – again using social media extensively – involve establishing and sustaining connections around homecoming events and school reunions. Lincoln's first Homecoming Festival, a sesquicentennial project held at the end of September 2017, may have provided some insights about mounting such events.
- **Attract Entrepreneurially-Oriented Individuals:** Creative professionals and lone eagles are attracted to locations matching their lifestyle preferences, provided that they can access reliable, affordable high-speed broadband and, when needed, can readily get to one or more major airports. Knowledge workers who have the option to work from home several days a week are a similar target group who have more freedom to choose where they live if they can depend on broadband access. Residential zoning that permits working-from-home is important. The availability of shared office space will also enhance a location's attractiveness.
- **Seniors, the Silver Generation:** Those leaving their principal careers behind represent an opportunity, particularly if they wish to remain engaged and start, invest in or mentor new early-stage ventures.
- **Youth Retention:** Though challenging, talent retention programs can focus on youth, especially those graduating from local post-secondary institutions. Recent reports by Brock's Niagara Community Observatory, undertaken in conjunction with the Niagara Workforce Planning Board,²⁸ have analyzed the issues, isolated some areas for action, and suggested next steps, including the creation of an expert panel on youth employment in Niagara. As part of enhancing Niagara's global attractiveness and attracting 10,000 people, Niagara Region has committed to coordinating the creation of a comprehensive, multi-partner strategy aimed at retaining and attracting youth, including by addressing and bridging the skills gap between local economic demands and post-second training and career readiness. The new Spark Lincoln innovation hub in downtown Beamsville is also focused on youth retention, among other things by exposing secondary students to coding.
- **Immigration:** Given the plateauing of the growth in the Canadian-born workforce, immigration is critical to growing the Canadian labour pool. In Lincoln, immigrants currently represent a lower proportion of the population (13.6 percent) than in Niagara as a whole (16.3 percent) or in Ontario

²⁸ Brock University and the Niagara Workforce Planning Board, "Youth in Niagara: Highly Skilled, Highly Mobile," Policy Brief #32, March 2018; and Brock University, "Youth Employment in Niagara: Mapping the Opportunities," Policy Brief #28, October 2017.

(28.6 percent). It is assumed that many of those who live in Lincoln but who were born outside of Canada probably landed first in a major Canadian metropolitan area, most likely the GTA, and later moved to Lincoln. Exceptions are likely to be those, like many of those born in the Netherlands, who are engaged in agriculture. As part of Lincoln and Niagara Region programs to attract needed talent, one target constituency should be newer immigrants who are residing in the GTA and whose skill sets match employer needs.

Public Transit: Lincoln has launched a public transit initiative which will help define community needs and invite evolutionary solutions. Public transit is vital to economic development. Employees need to get to work affordably and reliably. This is especially important to entry level workers and staff in the retail, hospitality and accommodation sectors who do not have personal transport.

Dedicated transit models are also important for tourism to facilitate travel from the GTA and Hamilton and movement among wineries, culinary destinations and downtowns.

In the online public survey undertaken in conjunction with the development of the Lincoln Economic Development Strategy, respondents who work in Lincoln identified public transportation as the top weakness and challenge related to economic development in Lincoln. (See Appendix A)

Some communities launching new public transit initiatives or seeking to enhance last mile connections have turned to Uber/Lyft style on demand models.

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | |
|--|---|---|--|---|
| D.5 TALENT AND WORKFORCE DEVELOPMENT | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.5 | <p>GOAL: Available talent and skills are aligned with the needs of existing and new Lincoln businesses and agricultural enterprises.</p> <p>OBJECTIVE: To develop, encourage and support initiatives to attract, retain and adapt Lincoln's talent pool to align with the evolving requirements of existing and new businesses and agricultural enterprises</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Liaise and work with the Niagara Workforce Planning Board (NWPB) and others on research projects and workforce initiatives that align with Lincoln's priorities, including financial contributions to such initiatives 2. Identify and quantify occupational groupings where a significant number of people commute to work from Lincoln or its immediately neighbouring communities, as these talent pools will be attractive to prospective new investors or to local companies that are expanding 3. Maximize the benefits to Lincoln of Niagara Region's strategies to improve Niagara's global attractiveness and to attract at least 10,000 people in line with Niagara's projected population growth, including immigrants 4. Involve seniors with business and entrepreneurial experience in mentoring and advisory roles with those aspiring to start, sustain and expand businesses 5. Support the education offerings by SPARK Lincoln (such as its after-school coding and entrepreneur tool-kit workshops) | <p>A</p> <p>B</p> <p>A-</p> <p>C</p> <p>B</p> | <p>On-Going</p> <p>2019</p> <p>On-Going</p> <p>2019 On</p> <p>On-Going</p> | <p>LEcDev Brock NCC NED NWPB</p> <p>LEcDev NED NWPB</p> <p>LEcDev NED</p> <p>LEcDev</p> <p>LEcDev Spark</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • Lincoln involvement in joint studies and projects with the NWPB will require financial contributions to share costs • Projects involving workforce attraction, retention and development may be eligible under OMAFRA's Rural Economic Development (RED) program. OMAFRA encourages collaborative projects involving more than one municipality • The Ontario Ministry of Citizenship and Immigration helps fund local programs to attract and integrate new immigrants, though MCI is likely to prefer Region-wide projects that involve multiple municipalities | | | | |

Performance Metrics:

- The key product sought in terms of talent and workforce information is compelling, detailed data that identifies attractive and accessible talent pools that align with the interests of new investors or local business seeking to expand
- Initiatives to attract talent, entrepreneurs, creative professionals and immigrants should include metrics that set goals and measure the response

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; A- = Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

Brock = Brock University

LEcDev = Lincoln Economic Development

NCC = Niagara College Canada

NED = Niagara (Region) Economic Development

NWPB = Niagara Workforce Planning Board

Spark = Spark Lincoln

6. Marketing Lincoln to Attract Talent, Visitors and Investors

The branding and marketing of a community to attract businesses and people is based on defining meaningful and discernable advantages. The central objective is to present a unique and authentic identity that differentiates the offering and draws the attention of companies, talent and tourists whose interests align with the community's strengths. The community must broadcast – to both internal and external audiences – what is happening in the community that reflects its assets, aspirations and goals. Storytelling that highlights differentiators, underlines the key economic development messages, and captures the community's essence makes the messaging more compelling.

Marketing supports the Town's economic development goals to:

- Attract, retain and expand businesses;
- Promote a vibrant innovation ecosystem;
- Attract highly qualified and skilled talent, immigrants, entrepreneurs, creative professionals and risk-takers; and
- Make the town known as a tourism destination.

Branding, as the centrepiece for marketing efforts, brings coherence and delivers a credible and carefully crafted promise on which the community must be capable of delivering.

Branding: Lincoln should accord a high priority to hiring a qualified firm to shape an economic development brand that builds on the Town's branding and takes into account tourism branding. The areas of notable convergence are talent and workforce attraction, tourism sector investment attraction, and portrayal of the Lincoln lifestyle.

Associated with brand development should be a multi-year marketing plan. A key aspect of the marketing plan will be prioritization and integration of many tools that are available.

An important but difficult and complex aspect of branding to explore will be how to address the multiple identities or labels that are associated with the community: the Town, its communities (Beamsville, Jordan, Vineland, Campden and Rockway), Twenty Valley (as advertised for tourism), and the globally-recognized Niagara brand. Decisions should not be taken in isolation. Account needs to be taken of the

Town's brand, along with other brands and branding activities, including by tourism partners and Niagara Region Economic Development. For example, a key objective in the Twenty Valley Tourism Association's Strategic Plan 2017-2020 is to define and grow the Twenty Valley brand. In the first year (2017), the proposed TVTA activities include a brand essence session, steps to clearly position and differentiate the brand, and development of brand guidelines and a user guide.

Website: In economic development, websites are the marketing centrepieces. When looking to expand or make new investments, companies and site selection professionals initiate their searches for information on the web. Estimates say that 90 percent of the site selection process starts online.²⁹ This makes Search Engine Optimization (SEO) essential. The ability think through and understanding who your ideal prospects are and what they require is critical. It is also important to measure success. Many analytical tools are available – some free of charge – to determine effectiveness.

The online public survey undertaken as part of the preparation of this Economic Development Strategy asked respondents opinions on the top three factors that differentiate Lincoln from other communities in Niagara. The top five choices were:

- Wineries
 - Strong Agricultural Base
 - Waterfront and Natural Environment
 - Higher Quality of Life/Lifestyle Opportunities
 - Quality of Tourism Offer
- (See Appendix A)

The overwhelming preference is for standalone websites for economic development and tourism. The economic development website should include the following features and information:

- Adaptation to mobile devices;
- Ability to download information, including PDFs of marketing collateral;
- Ability to translate material;
- A specific tab for site selection professionals giving access to detailed downloadable data;
- Integration with social media tools and e-marketing initiatives;
- Detailed socio, economic, and demographic information;
- Detailed information on workforce availability;
- Strong value propositions for the most promising sub-sectors and niches, containing comprehensive factual information;
- Area, provincial and North American maps with concentric circles showing distances from major cities;
- Searchable real estate data base, with its profiles of available sites and industrial and commercial buildings;
- A fact sheet and more detailed community profile;
- In-depth information on post-secondary institutions, including numbers of graduates, co-op programs, research centres and facilities;
- Potential for impactful and cost-effective research, development and commercialization operations, especially in partnerships with universities and colleges;
- A Business Directory and list of major employers, along with profiles of foreign-affiliated companies and the largest private-sector employers;
- Applicable municipal, Regional, Ontario and Federal tax rates and incentives;

²⁹ Atlas Advertising

- Information on water, sewage and utilities, including charges;
- Road, rail, air, water and transportation infrastructure, with maps;
- Functioning links to websites of key partners; and
- Contact information for the Economic Development team.

Attention should be given to the user experience (UX), ease of navigation, ensuring a fresh look, and staffing arrangements that ensure at least weekly updates.

Plans should be laid and pursued and budget resources identified that will lead to a distinct website location – the norm for economic development organizations – along with comprehensive site location data sets and capability that will enable and integrate social media and marketing automation.

Proactive marketing of a jurisdiction should only be launched once the community is fully investment ready. There is no benefit – indeed there are definite downsides – in generating interest and not being able to promptly and fully respond to the interest and enquiries that result.

Niagara Development Corridor Partnership Website: As part of collaborative Niagara economic development efforts, a Niagara Development Corridor Partnership website has been established, which includes St. Catharines, Welland, Fort Erie, Niagara Falls, Port Colborne and Niagara Region – all of whom have full time economic development staff. The website concentrates on half-a-dozen high-level messages. What seems to be missing, however, are links to the websites of the participating organizations and actionable contact information. Lincoln should explore being part of the Partnership website, subject to evaluation of benefits.

Tourism: The Lincoln economic development website should, as the Town site now does, devote a page on the site that briefly highlights the major tourism attractions in Lincoln and provides a link to the Twenty Valley Tourism website and any other secondary sites.

Marketing Automation: The use of marketing automation in business-to-business situations is growing and offers economic development organizations the potential to better prequalify the prospects on which to focus. Data analytics bring a level of sophistication that enables CRM, email, social media and web-based marketing initiatives to identify and appropriately nurture the more receptive and sales-ready prospects who signal a degree of interest. These software platforms capitalize on interactive website material, value propositions, downloadable white papers and special reports or other marketing collateral as a means to entice interest, gain feedback and qualify and narrow the prospect pool. Marketing automation can be utilized to supplement and, in some cases, replace contracted lead generation in pre-mission and trade show contact and follow up. These platforms offer a non-obtrusive process of maintaining contact and building relationships for ongoing investment attraction. Performance metrics can be established to measure the effectiveness of programs, materials and campaigns.

Social Media: In addition to email, the use of social media is a critical means to disseminate information and drive traffic to a website, potentially involving platforms such as Twitter, Facebook, LinkedIn and YouTube. Regularly updated blogs remain an option. Care needs to be exercised to avoid utilizing too many tools and spreading efforts too thin. Disciplined, consistent and regular use is required. There are opportunities to draw attention to information and announcements from partners in the community and region, Niagara Region Economic Development, post-secondary educational institutions, and Federal and Ontario partners.

Advertising: Mirroring overall trends, economic development marketing has rapidly moved to deliver its messages electronically and online. Across the board, digital media advertising spending in the US is the fastest growing segment, surpassing TV in 2016 to represent 38 percent of all ad spending. Digital will reach half of the total in 2021. Mobile will be the main driver of digital ad growth, comprising 70 percent of digital spending in 2017. Google will grab 42 percent of the digital spend in 2017, with Facebook garnering 21 percent. Meanwhile, print will continue to drop, from 13 percent to 9 percent over the 2016-2021 period.³⁰ Digital has proven to be a cost effective vehicle, including for lead generation, but it is a rapidly changing environment that requires constant adaptation.

Value Propositions: Lincoln requires robust in-depth value propositions focused on the selected sub-sectors and niches where it can differentiate its offering and make a compelling fact-based case to prospective investors. A high-level overview of Lincoln's strengths is required that positions Lincoln in the Canadian, Ontario and Niagara context. Relevant factual information lends credibility.

The value proposition responds to the invitation, "Tell me more," and needs to explain the distinct benefits that a Lincoln location can promise to deliver. The value propositions that are developed will frequently need to be tailored to specific situations and prospects. They must also be kept up-to-date.

The need to be able to differentiate Lincoln and make a world-class case means the number of sub-sectors or niches selected for the development of in-depth value propositions will be very limited. A rigorous process is needed to narrow down and select the sub-sectors and niches. For each, target firms need to be identified, along with the strategies to reach them. The sectors of focus are outlined and addressed in Section E.

Testimonials to the City's Success – Shared Messaging: Local economic development marketing needs to reach out the local community to establish and sustain a dialogue with the local businesses and stakeholders and ensure that they are informed of important developments, policies, opportunities and successes. This serves as well to build a common base of information so that the community more and more speaks with a similar voice about opportunities and challenges (see D.1). Word of mouth, especially testimonials from the business, post-secondary and institutional leadership, is the most credible and therefore persuasive messaging for Lincoln. The community's leaders have privileged insights because of their positions and connections. Their observations and insights benefit from being from an independent and authentic source.

Communities that develop a shared understanding of their strengths and a clear vision of where they are headed impress visitors – not least journalists and prospective investors – in building a community's reputation. And the visitor is not left to weigh and assess varying perspectives; the messaging comes through loudly, clearly and consistently.

Media and Site Selector Visits: Economic development organizations regularly target US-based site selection firms and invite them to be part of VIP visits the region. Niagara's international reputation as a destination increases the appeal of its invitations. The objective is to be sure that the region and its

³⁰ eMarketer.com, "Us Ad Spending: The eMarketer Forecast for 2017," March 15, 2017 (<https://www.emarketer.com/Report/US-Ad-Spending-eMarketer-Forecast-2017/2001998>). Accessed on November 10, 2017.

municipalities are front-of-mind with these firms that advise companies evaluating new locations. In tourism, there are parallel efforts to bringing in influencers.

The cost of such initiatives is lower and impact much higher if such efforts are undertaken collaboratively on a Niagara region-wide basis. Similarly, there are opportunities to host visiting media groups. Some of these opportunities arise directly, others through partners such as the Federal and Ontario governments.

Customer Relationship Marketing (CRM) System: All marketing, outreach and relationship building needs to be inventoried into a comprehensive CRM system (as noted in D.1 and D.4). The system must also be designed to be the principal source of key performance metrics, including the nature and status of qualified leads.

| D. PRINCIPAL ECONOMIC DEVELOPMENT ROLES TO DRIVE RESULTS | | | | |
|---|--|--|--|---|
| D.6 MARKETING LINCOLN TO ATTRACT TALENT, VISITORS AND INVESTORS | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| D.6 | <p>GOAL: The marketing of Lincoln differentiates it and makes it the choice of investors, visitors and talent.</p> <p>OBJECTIVE: To establish consistent, targeted and current messaging that raises awareness and differentiates Lincoln</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Establish a stand-alone Lincoln Economic Development website 2. Develop greater depth of messaging in marketing collateral, including compelling value propositions for the priority sub-sectors and niches 3. Expand communication vehicles to incorporate video, newsletters, media releases, and corporate success stories 4. Develop targeted lead generation initiatives based on marketing automation 5. Collaborate with Team Niagara on site selection and media visits to include Lincoln | <p>B</p> <p>A</p> <p>B</p> <p>B</p> <p>B</p> | <p>2020</p> <p>2019 On</p> <p>2019 On</p> <p>2019 On</p> <p>On-Going</p> | <p>LEcDev LComm LEcDev</p> <p>LEcDev LComm</p> <p>LEcDev</p> <p>LEcDev LComm NED TN</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • Two or three in-depth value propositions, contracted to consultants, should be anticipated in 2020, 2021 and 2022 • Budgets are required for the websites, video content, social media and marketing collateral, marketing automation campaigns, a good portion of which will involve upfront costs • Some projects may be eligible under OMAFRA's Rural Economic Development (RED) program. OMAFRA encourages collaborative projects involving more than one municipality | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none"> • Website, social media, marketing automation campaigns, media releases, and earned media coverage | | | | |

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; A- = Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

LComm = Lincoln Senior Communications Advisor

NED = Niagara (Region) Economic Development

LEcDev = Lincoln Economic Development

TN = Team Niagara

E. Sectors of Focus

The Town Council and staff are acutely aware that, despite the growing priority that has been accorded to economic development, the resources available to the program are not unlimited. This underlines the need for Lincoln to judiciously focus its efforts.

Focus begins by limiting and carefully targeting the sectors to those where Lincoln has demonstrable strengths, can truly differentiate its offering, and where it can support local expansions and/or mount highly targeted, well-researched and sustained initiatives that will reach and have impact on prospects considering new business locations.

Lincoln can bear witness to how sectors that were once quite distinct are now converging. One driver of this is the digitization and digitalization of nearly everything, thereby making digitally-based technology skills a common requirement for many jobs. Digitalization has also been behind the ever more rapid pace of technology change. Platform technologies such as Artificial Intelligence (AI), the Internet of Things (IoT), Big Data, 3-D Printing, Augmented and Virtual Reality, and robotics are being applied across many once distinct sectors.

Along with the growing pervasiveness of digital technologies, the pronounced shift toward increased services employment continues, representing a host of areas for future job growth. This includes a broad range of finance, insurance, professional, scientific and technical services occupations such as engineers, architects, designers, bankers, accountants and technicians. Lincoln does not yet have a notable concentration of employment among these attractive service sector areas of employment. Indeed, the location quotient for professional, scientific and technical services in Lincoln was under half of the provincial average in 2017, while finance and insurance was less than one-third³¹. The pace of job growth from 2012 to 2017 has been stronger than the Ontario average for finance and insurance, but below for professional, scientific and technical services. Over time – likely beyond the five year span of this Economic Development Strategy – Lincoln is likely to emerge as a more prominent location for firms in the professional and financial services spaces. Lincoln has a locational advantage, being among the Niagara municipalities which are closest to the GTHA. Access will be heightened when all-day two-way GO Rail transit with Beamsville is realized. In the coming years, prospective situations involving a Lincoln location could potentially include:

- Satellite operations for significant GTA-based financial, engineering, accounting, human resource, and design firms;
- Niagara regional offices for accounting, legal, and planning firms; and
- Technology-oriented service providers that are part of agriculture-related supply chains for greenhouses, precision agriculture, cannabis and tourism.

The availability of quality commercial office space will be a prerequisite. A premise of Community Improvement Plan (CIP) programs that are being recommended for commercial office zoned land is to encourage office developments as far in advance of the commencement of GO Rail service to Beamsville as possible.

³¹ See statistical table in Appendix E, Exhibit 7.

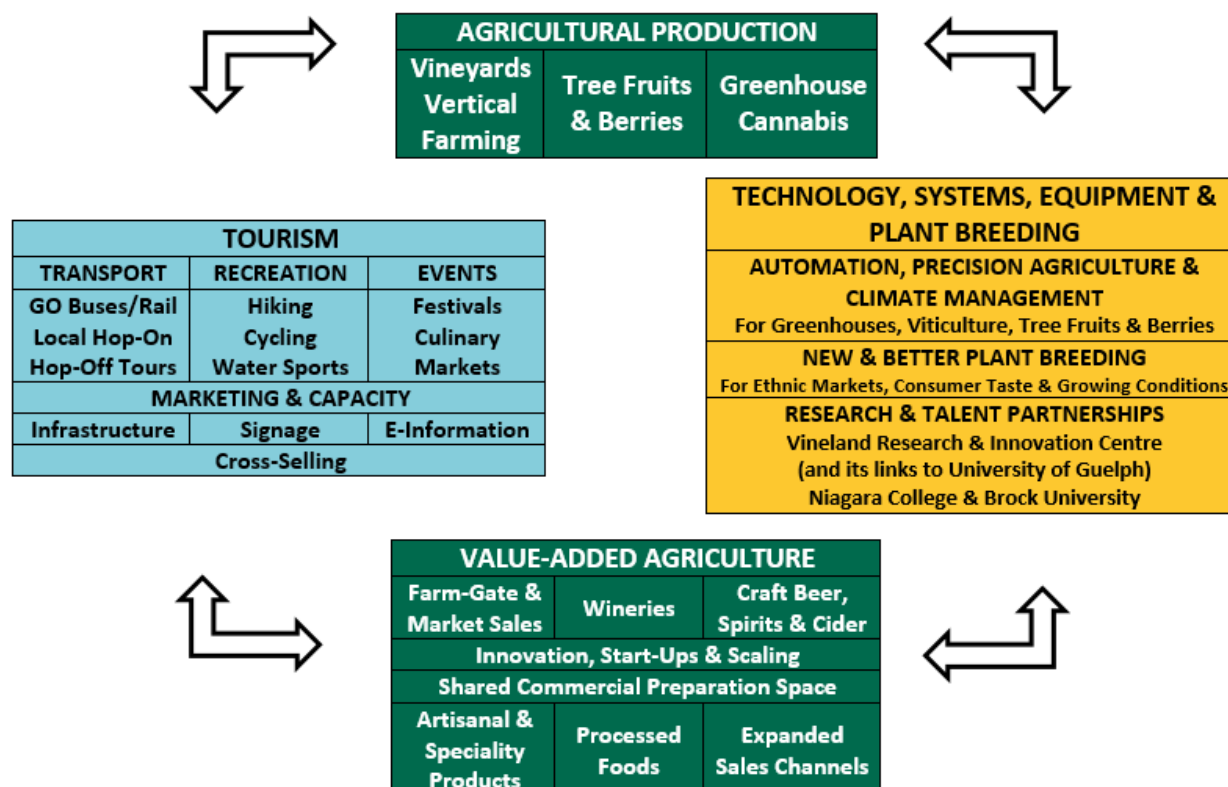
In Lincoln’s case, increased overlap is also evident among many facets of its agriculture, value-added agri-based ventures, and tourism sectors. Lincoln’s existing and future manufacturing and service sector companies can also benefit from the serving the needs of the greenhouses, cannabis producers, wineries, vineyards, tree fruit and berry, and tourist operations located in Lincoln and Niagara. These circumstances mean that much of what Lincoln is good at is encompassed by Town Council’s vision of the town as a “Centre of Excellence for Agriculture.”

Broader public policies also have close relationships to the Town Council’s vision’s themes, including sustainability, innovation, border transportation corridors, and infrastructure.

OVERALL GOAL FOR SECTORS OF FOCUS
The Town of Lincoln’s business retention, growth and attraction initiatives are judiciously targeted

Online Public Survey: In the online public survey undertaken in association with the development of the Lincoln Economic Development Strategy and Action Plan, there was a strong consensus that wineries, followed by agriculture and agri-business, will drive growth in Lincoln. Restaurants and catering, accommodation, and manufacturing were a notch below the two leaders in third, fourth and fifth places. Full details of the online public survey are provided in Appendix A.

CENTRE OF EXCELLENCE FOR AGRICULTURE Value Chains, Linkages & Collaboration Opportunities



1. Agriculture

Lincoln's primary agricultural sector, which has almost one billion dollars (\$881,955,309) invested, grows high value produce in its vineyards, greenhouses, and tender fruit orchards and berry fields.

- Grapes were grown by 143 Lincoln farms on 4,534 acres in 2016, according to the 2016 Census of Agriculture, an 11 percent decline in acreage from 2011;
- Peaches were the single largest tree fruit crop, with production from 1,635 acres on 62 farms (Exhibit 13);
- Lincoln dominates greenhouse floral production in Niagara and Canada, with 48 operations with production area that continued to expand from the previous 2011 Census to over 8 million square feet in 2016; and
- Greenhouse vegetables have shown growth as well, with 10 operations having 180,000 square feet under cover in Lincoln.

| Exhibit 13 | | | | |
|--|--------------|--------------|--------------|--------------|
| Lincoln Tree Fruit and Berry Production 2011 and 2016 Censuses of Agriculture | | | | |
| Tree Fruit & Berry Crop | 2011 | | 2016 | |
| | Farms | Acres | Farms | Acres |
| Peaches | 69 | 1,816 | 62 | 1,634 |
| Pears | 66 | 425 | 51 | 450 |
| Plums | 61 | 339 | 55 | 313 |
| Apples | 53 | 139 | 47 | 263 |
| Cherries (Sweet) | 64 | 253 | 49 | 124 |
| Cherries (Sour) | 12 | 161 | 18 | 196 |
| Apricots | 29 | 50 | 26 | 55 |
| Raspberries | 16 | 21 | 17 | 12 |
| Strawberries | 9 | 14 | 10 | 94 |

Source: Census of Agriculture 2016

Lincoln also hosts 23 poultry, 21 oilseed and grain, 8 horse and equine, and 8 vegetable and melon farms, according the 2016 Census of Agriculture.

On-Farm Employment: Lincoln leads all Niagara region municipalities in farm employment levels. In 2015, Lincoln farms employed 3,419 people in full and part-time capacities, a 6 percent increase since 2010 (see Exhibit 14).

Cannabis: Cannabis production represents a major economic development opportunity which is

expected to have a significant impact on the Niagara greenhouse sector. In contrast with the family character of greenhouse ownership, the cannabis sector is dominated by publicly-held companies, the

| Exhibit 14 | | | | |
|--|------------------------|-------------|-------------------|--------------------------|
| Lincoln On-Farm Employment 2015 | | | | |
| | Farms Reporting | | Employment | |
| | 2010 | 2015 | 2010 | 2015 |
| Total Number of Employees | 245 | 191 | 3,233 | 3,419¹ |
| Of which: | | | | |
| • Seasonal/Temporary | 202 | 157 | 2,117 | 2,292 |
| • Full Time/Year Round | | 101 | | 869 |
| • Part Time/Year Round | | 62 | | 258 |

¹ Note: 354 of the 3,419 employees in 2016 were family members.

Source: Census of Agriculture 2016

larger proportion of which are based in Ontario. By 2020, the legal market for non-medical cannabis in Canada will be over 800,000 kilograms with a retail value of \$6.5 billion – greater than the market for spirits and approaching that for wine. The pace at which the market scales may prove to be volatile and disruptive. Supply shortages are anticipated in the initial years as recreational sales begin. Observers say however that surpluses can be expected, as production plans in place in May 2018, if executed, will substantially exceed expected demand.³² As an early-mover in liberalizing cannabis sales, Canada is also well positioned to export to countries that are legalizing medical use. In markets that have been liberalized for recreational use, derivative products – such as oils and edibles – are growing their market share rapidly at the expense of flower, opening up opportunities for further processing and added value.

There are many unknowns about the evolution of the related opportunities for the sales of derivative and related products. An example is hemp which the Ontario government decided will not be regulated the same as cannabis, leaving it to regulation by agricultural authorities. Retail locations in Niagara are certain to be seen as access points by US visitors.

Cannabis production occurs in computer-controlled growth environments that offer a high degree of security. Facilities incorporate advanced precision agriculture technologies such as LED lighting, climatic controls, irrigation and nutrient supply, and monitoring and testing.

Technology Adoption: The 2016 Census of Agriculture indicated that seven in ten Lincoln farms use computers or laptops for farm management, while more than half employ smartphones and tablets. Over 83 percent of Lincoln greenhouse operations were reported to be automated. These levels of technology adoption were higher in Lincoln than other Niagara region municipalities.

Competitiveness: Lincoln's agricultural sector faces extreme competitive pressures which are unlikely to lessen. The increased minimum wage, high energy costs, competition from lower wage countries, and continued intensification of production are among the major challenges. In order to sustain competitiveness, growers must have access to and invest in advanced technologies, robotic operations, computerized systems, and plant breeding to optimize returns. Plant breeding by the Vineland Research and Innovation Centre (VRIC) is creating opportunities to locally grow Asian vegetable varieties for which the Canadian demand among several diasporas is commercially appealing. Greenhouse strawberries are an emerging opportunity, as are vertical farming operations growing leafy greens near major metropolitan areas.

The Netherlands' technological achievements represent an example to which Lincoln should aspire. The Lincoln mission to The Netherlands in 2016 opened doors and connections and has led to an investment.

Funding and Programs: The full suite of funding programs offered by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) should be reviewed regularly to ensure that Lincoln organizations and producers benefit. This includes the five-year Federal-Provincial Canadian Agricultural Partnership launched in April 2018, most programs of which are delivered at the provincial level.

Technology and Talent Requirements: Technology adoption means that talent requirements have shifted to people with technical, science, and computing skills. Niagara College has been a first-mover among Canadian institutions in offering specialized training, and demonstration projects. The development of a

³² CIBC World Markets Inc., Institutional Equity Research, "Cannabis: Almost Showtime," May 7, 2018.

first-of-its-kind program for the cannabis industry is the most recent example. Brock University's Cool Climate Oenology and Viticulture Institute (CCOVI) has extensive taste research programs developed in partnership with the grape growers and wine industry. CCOVI also provides expert counsel on climate change and climatic influences, along with advice regarding optimal harvesting times and when and how to counter potentially damaging freezing temperatures. The Vineland Research and Innovation Centre (VRIC), affiliated with the University of Guelph, is a global-class horticulture research organization which continues to make contributions that keep Niagara and Ontario on the leading edge. The presence of these institutions and their programs and achievements are magnets for new investment and for the expansion of Lincoln's primary, processing and manufacturing sectors. Ensuring that the Lincoln community and prospective investors are aware of avenues and are encouraged to participate in the dialogue about needs, solutions and applications should be a preoccupation for Lincoln's economic development program. There may also be ways in which technology trials and adoption can be supported in Lincoln.

Natural Gas: The availability of natural gas is extremely important to the greenhouse sector. In certain areas, the need for larger mains has become apparent. The Ontario government has had periodic programs – such as 2017's Ontario Natural Gas Grant program – to provide supportive funding for natural gas trunk expansion. What is important is to identify and have full details of needs in readiness for provincial funding initiatives that might help realize them.

Water for Agriculture: Access to water by Lincoln agricultural operations (greenhouses, wineries, vineyards, and orchards) outside of urban boundaries is an on-going issue that is complicated by the number of Federal, Ontario and Municipal regulatory bodies that have influence with respect to water.

Town staff are already liaising with Niagara Region regarding the seeming conflict between the Town's and Niagara Region's application of policies with respect to connections to existing water and sewage mains that extend outside the urban areas. The Town's policy has been to be accommodating where connection costs are met by the users; whereas Regional approaches to connections are inclined to be less availing, possibly in part because of concerns regarding wider precedents. Finding some resolution between the two levels would be highly desirable.

Another aspect that received renewed attention beginning in 2017 is water for irrigation. Concerns were prompted by the serious drought during the summer of 2016. The Niagara Region Agriculture Policy and Action Committee has taken steps to develop a Niagara Region Irrigation Strategy Action Plan which was presented in January 2018. The Irrigation Strategy Action Plan draws attention to the complexities and the fact that there are no one-size-fits-all solutions throughout Niagara. A key recommendation is that a full-time Niagara Region position be created for a three-year trial period to raise the profile of the issue, identify funding sources, and move the matter forward – effectively acting as an “irrigation point person” or “ambassador.”³³ In the case of Lincoln, the presentation recommends that the near-term focus for Lincoln should be for the Town and growers to assess the option of a common intake from Lake Ontario.

As part of the 2016 Census of Agriculture, 63 Lincoln farms – or 17.3 percent of total – reported that they irrigated 2,140 acres (866 hectares) of land, or 9.1 percent of the total area farmed during 2015. In Niagara-on-the-Lake, where there is a system of irrigation ditches, the number of farms (59) was similar

³³ Niagara Region Agriculture Policy and Action Committee, “Niagara Region Irrigation Strategy Action Plan,” Presentations on January 26, 2018 and September 22, 2017.

though the reported area irrigated was more extensive (3,334 acres). The other Niagara municipalities reported much more limited use of irrigation.

Together with other Town colleagues, Lincoln Economic Development will need to be an advocate for appropriate and viable irrigation solutions.

Round Tables: Systematic dialogue with those who are involved in primary agriculture is important in light of the sector's dependence on the land, infrastructure, and community initiatives which advance their common interests. Dialogue with the producer groups is important, including opportunities to increase the return from their crops through the expansion of markets and the adoption of technology and plant science (see D.1).

| E. SECTORS OF FOCUS | | | | |
|---------------------|--|--|--|--|
| E.1 AGRICULTURE | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| E.1 | <p>GOAL: The Town's stewardship supports the health, prosperity and technological leadership of Lincoln's agricultural production.</p> <p>OBJECTIVE: To mount and support initiatives to grow the Lincoln agricultural sector's revenues, competitiveness, innovation, adaptation and reputation</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Use regular meetings with the principal producers groups to be informed of issues, concerns, opportunities and challenges, advocating where appropriate on their behalf 2. Review OMAFRA's suite of funding programs to determine where Lincoln producers and organizations may benefit 3. Contribute to resolution of policy conflicts between Town and Region for access in areas outside the urban boundaries to water and sewage mains 4. Monitor and support work of the Irrigation Working Group of the Niagara Agricultural Policy Action Committee 5. Identify needed natural gas trunk expansion for greenhouse sector in readiness for provincial funding initiatives that will support realization | <p>A</p> <p>A</p> <p>B</p> <p>B</p> <p>B</p> | <p>On-Going</p> <p>2018 On</p> <p>On-Going</p> <p>On-Going</p> <p>On-Going</p> | <p>LEcDev GGO NPFVGA OMAFRA OTFG TOGA WCO WGAO</p> <p>LEcDev OMAFRA</p> <p>LEcDev LPlan NED</p> <p>LEcDev LPlan NRAPAC</p> <p>LEcDev LPlan</p> |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|--|---|-----------------------|----------|---|
| E.1 | 6. Promote linkages among the agriculture sector, VRIC, post-secondary educational institutions, Federal and Ontario officials and programs, and suppliers of equipment, technology and systems, including entities outside Niagara involved in sector-related innovation | A | On-Going | LEcDev Brock Guelph NCC OMAFRA VRIC Spark |
| Funding: <ul style="list-style-type: none"> The need for additional funding for events can be avoided or mitigated if local events for Lincoln companies hosted by the economic development program are conducted on a cost recovery basis Monitor opportunities to access Ontario government funding to support natural gas trunk line expansion | | | | |
| Performance Metrics: <ul style="list-style-type: none"> Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR&E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where Lincoln's economic development program has influenced outcomes) | | | | |
| NOTES AND ABBREVIATIONS ¹ Priorities: A = Highest Priority & Very Time-Sensitive; A- + Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive ² Abbreviations <div style="display: flex; justify-content: space-between;"> <div> Brock = Brock University GGO = Grape Growers of Ontario Guelph = University of Guelph LEcDev = Lincoln Economic Development LPlan = Lincoln Planning & Development NCC = Niagara College Canada NED = Niagara (Region) Economic Development NPFVGA = Niagara Peninsula Fruit & Vegetable Growers Association </div> <div> NRAPAC = Niagara Region Agricultural Policy & Action Committee OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs OTFG = Ontario Tender Fruit Growers Spark = Spark Lincoln TOGA = The Ontario Greenhouse Alliance VRIC = Vineland Research & Innovation Centre WCO = Wine Council of Ontario WGAO = Winery & Growers Alliance of Ontario </div> </div> | | | | |

2. Value-Added Agriculture and Food and Beverages

The Niagara peninsula is Ontario's largest wine producing region, accounting for 90 percent of Ontario's grape production. Overall, the Ontario wine and grape industry had an economic impact of \$4.36 billion in 2015, including revenue of \$2.97 billion, tax revenues of \$522 million and wages of \$870 million. Over 18,000 full-time equivalent jobs are supported directly and indirectly. For every dollar spent on Canadian wine in Ontario, \$3.95 in GDP is generated across the province.³⁴

Wineries dominate the Lincoln businesses which add value to agriculture production. A May 2016 Town of Lincoln inventory listed 51 wineries within the municipal boundaries. According to the inventory, all but two of Lincoln's wineries are sited on agricultural land, rather than within urban boundaries.

³⁴ Frank, Rimerman + Co. LLP, "The Economic Impact of the Wine and Grape Industry in Canada: Canada's Wine Economy – Ripe, Robust, Remarkable," March 2015 (<http://www.canadianvintners.com/wp-content/uploads/2017/06/Canada-Economic-Impact-Report-2015.pdf>). Accessed on November 12, 2017.

Beverage manufacturing – a very significant portion being wine – accounted for 602 jobs in 2017, amounting to 36 percent of all manufacturing employment in Lincoln. The concentration of beverage manufacturing jobs in Lincoln is twenty-two times the Ontario average.³⁵

Most wineries produce at least a portion of their own grapes, and many are situated in the growing areas. Direct sales of wine to the public represent a higher margin retail opportunity than sales through the LCBO. Restaurants which showcase the wine are frequently part of the offering. Private events, weddings, cooking schools, wine tastings and lectures, wine clubs, and winery and vineyard tours are further means to augment the economic return. They are a principal contributor to tourism and visitor attraction, and welcome other offerings that draw people to Lincoln.

The concentration of beverage manufacturing jobs in Lincoln is twenty-two times the Ontario average.

The comprehensive 2017 Ontario Wine and Grape Industry Performance Report³⁶ indicates that larger wineries are more likely to be profitable, with only 44.4 percent of wineries with annual sales of under half-a-million dollars reporting a pre-tax profit, compared to 100 percent in the segment with sales over \$10 million. Overall, just over half of all the wineries included in the survey had a pre-tax profit. This emphasizes the importance of expanded retail traffic and opportunities, especially to the smaller wineries. Consolidation within the industry also seems probable. Many analysts also anticipate that cannabis will become a competitor to wine and alcoholic beverages.

Micro-Breweries and Distilleries, Brew Pubs and Cider Producers: The beverage sector has been expanding with the launch of micro-distillers and micro-breweries. Cider production is also growing. Visitor traffic, local on-site sales, food service and special events are also critical factors for these operations. The extent to which retailing of cannabis and cannabis-related products in Niagara region flourishes remains to be seen, but it is likely become another aspect of the Lincoln retailing scene.

Craft beverage production in Niagara can benefit greatly from the leadership that Niagara College, Brock University and the Vineland Research and Innovation Centre (VRIC) have shown in developing courses, research and advisory roles.

Lincoln has established a presence in the micro-brewery, brew-pub, micro-distillery and cider segments, but could accelerate the attraction of additional operations if it made a bold decision to pursue a model program for approvals that has been piloted in Peterborough under an Association of Municipalities of Ontario (AMO) initiative. The Peterborough program's goals were to create process maps and a checklist and to increase staff efficiency in navigating the multilevel approvals process. With expert process facilitation from the local College, a round table of the regulatory and licencing authorities and businesses developed a framework to re-engineer and streamline the process of obtaining approvals from municipal, regional and Ontario permitting and licencing authorities. This provided a basis to develop a better coordinated all-of-governments approach to the multiple requirements facing a venture that produces alcoholic beverages.³⁷

³⁵ See Exhibit 1.

³⁶ VQA Ontario and Deloitte, "Ontario Wine and Grape Industry Report," March 2018.

³⁷ Association of Municipalities Ontario, "Reducing Business Burdens: Great Ideas from Five Innovative Ontario Municipalities," May 31, 2017.

Retail Outlets Showcasing Lincoln Products: As legislated and regulatory constraints for alcohol are modified, great benefit could come from being leaders in launching prominent well-advertised locations in Lincoln offering as full a range of local produced wines, cider, craft beer and craft spirits as possible – both bottled and by the glass in licenced establishments. Town-supported marketing collateral, developed with proponents, with maps showing the locations where of the wineries and other facilities would provide impact and highlight just how extensive the range of production is throughout Lincoln.

Direct Marketing to the Consumer: For agriculture producers, direct marketing to the consumer represents a profit opportunity. What is needed are the collaborative marketing initiatives and vehicles that will attract the buyers – wayfinding signage to farm gate, self-pick operations, farmers’ markets, and cooperative hubs and other joint ventures.

Initiatives of this type appear likely to find traction in Lincoln. Among Niagara municipalities, Lincoln had the largest number of farms that reported getting additional income from selling agricultural products directly to consumers in 2015, the year prior to the 2016 Census of Agriculture (Exhibit 15). The availability of direct to the consumer arrangements for farm produce and processed products is also a driver of tourism. Typically, these channels benefit from wayfinding signage, websites that identify vendors and locations, social media and predicable hours. Town led feasibility studies could address whether Lincoln farmers’ markets and/or food hubs could be viable as a means to provide further higher margin sales for Lincoln growers.

| Exhibit 15 | |
|---|----|
| Lincoln Farms Selling Directly to Consumers 2015 | |
| All Farms Reporting | 88 |
| Unprocessed Agricultural Products Sold | 79 |
| Value-Added Products Sold | 17 |
| Use Farm Gate Sales, Stands, Kiosks, U-Pick | 65 |
| Use Farmers’ Markets | 39 |
| Use Community Supported Agriculture (CSA) | 2 |
| Use Other Methods | 2 |
| Source: Statistics Canada, Census of Agriculture 2016 | |

Entrepreneurship and Food Incubators: Successful speciality and artisanal food processing is occurring locally, centred on Lincoln’s agricultural production. A key constraint that food entrepreneurs often face as they seek to launch a new business is access to commercial kitchens that have government health approval. Food incubators – often initially started in under-utilized community facilities – can provide shared space that meets this need. Given the costs and congestion in Toronto, there may also be opportunities to work with Toronto food incubators to provide space in shared facilities that would allow them to expand and scale, while being closer to inputs. The existence of potentially developable locations in Lincoln should be explored.

The growth of diversified value-added ventures in Lincoln is encouraged by forthcoming decisions by the Town on development applications for agricultural-related uses. Whether this may need to be further clarified or facilitated through zoning by-law updates could be explored.

| E. SECTORS OF FOCUS | | | | |
|--|---|---|---|---|
| E.2 VALUE-ADDED AGRICULTURE AND FOOD AND BEVERAGES | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| E.2 | <p>GOAL: Greater added value and financial returns from Lincoln's agricultural production are realized locally.</p> <p>OBJECTIVE: To expand marketing channels and outlets, achieve greater economic returns, and attract and grow local food and beverage ventures</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Adopt the best practices demonstrated in the Peterborough AMO Pilot Project which developed an expedited all-of-governments approach to reviewing and granting approvals for micro-breweries, micro-distilleries, brew-pubs and licenced restaurants 2. Encourage the development of an agri-food incubator with shared space and approved commercial food preparation and testing facilities 3. Work with Toronto area food incubators and other partners, such as Niagara College, to offer their graduates growth space in Lincoln for their start-ups 4. Facilitate collaborative marketing efforts (e.g. food map, wayfinding signage, website, social media, etc.) 5. Undertake a feasibility study for a Lincoln Farmers' Market and/or a Food Hub 6. Assess feasibility of arranging collaborative retailing for alcoholic beverages produced in Lincoln | <p>B</p> <p>A</p> <p>A</p> <p>A</p> <p>B</p> <p>C</p> | <p>2019</p> <p>2019</p> <p>2019 On</p> <p>2019 On</p> <p>2019</p> <p>2029</p> | <p>LEcDev LPlan NED</p> <p>LEcDev LPlan NCC OMAFRA</p> <p>LEcDev LPlan NCC</p> <p>LEcDev BBIA GGO LCoC NPFVGA OTFG TOGA WCO WGAO LEcDev GGO NPFVGA OTFG TOGA LEcDev WCO</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • Funding could be required for feasibility studies and/or the establishment of an agri-food incubator or farmers' market or food hub. Projects may be eligible under OMAFRA's Rural Economic Development (RED) program. • The five-year Federal-Provincial Canadian Agriculture Partnership launched April 2018 may have programs from which Lincoln organizations or producers and growers may benefit. | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none"> • Realization of an all-of-government approach for micro-breweries, micro-distilleries, brew-pubs and licenced restaurants that gains attention and attracts new ventures to Lincoln • Progress toward "go or no-go" decisions on an agri-food incubator or farmers' market or food hub, and, then, realization of projects where there is a favourable decision and game plan developed • Realization of collaborative retailing for alcoholic beverages, if and to the extent permitted by regulation | | | | |

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; A- + Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² Abbreviations

BBIA = Beamsville Business Improvement Area

GGO = Grape Growers of Ontario

LCoC = Lincoln Chamber of Commerce

LEcDev = Lincoln Economic Development

LPlan = Lincoln Planning & Development

NCC = Niagara College Canada

NED = Niagara (Region) Economic Development

NPFVGA = Niagara Peninsula Fruit & Vegetable Growers Association

OMAFRA = Ontario Ministry of Agriculture, Food & Rural Affairs

OTFG = Ontario Tender Fruit Growers

TOGA = The Ontario Greenhouse Alliance

WCO = Wine Council of Ontario

WGAO = Winery & Growers Alliance of Ontario

3. Tourism

Lincoln is situated in one of the world's most recognizable travel destinations – Niagara. Forty-three percent of Americans polled in a recent survey indicated that they were aware of the brand name "Niagara, Canada."³⁸

The growth in the reputation, variety and extent of Niagara's wineries – a central feature of Lincoln's offering – has made the region's wine country experience a growing visitor draw which complements "The Falls" and expands visitors' choice. In total, Ontario wine industry tourism generated \$311.3 million in revenue to the Ontario economy, with an estimated 2.4 million tourists visiting Ontario wineries in 2015.³⁹ Lincoln's offering has burgeoned with the expansion of culinary, craft beverage, cultural, recreational, food and agricultural offerings. Importantly from an economic development point of view, tourism generates varied benefits for numerous Lincoln businesses, many being small businesses for whom tourism revenues may be an especially needed source of additional revenue (as noted in Section B.3).

The challenge for Lincoln and area is to raise the level of awareness of its Niagara-leading offerings. Lincoln has a documented population of over 50 wineries to support its ranking not just as Niagara's but as Ontario's most significant cluster. This distinction is not widely known, though individual wineries in Lincoln are well recognized.

A Growth Opportunity: Tourism represents a significant growth opportunity. In 2017, international tourism notched a seven percent increase, the eighth straight year of sustained growth. For Canada, following a decade of decline, a strong upturn in international visitors commenced in 2013, culminating with International arrivals in Canada exceeding 20 million in 2017, surpassing the previous peak reached fifteen years earlier (2002).⁴⁰ Ontario is benefiting from the strong growth in middle-class travel from emerging economies such as China, South Korea, India, Mexico and Brazil.

³⁸ Tourism Partnership of Niagara, "2015-2016 Business and Marketing Plan: Moving Forward Together," (https://www.niagarasrto.com/sites/default/files/pages/tpn_2015-2016_business_and_marketing_plan.pdf). Accessed on April 23, 2018.

³⁹ Frank, Rimerman + Co. LLP, "The Economic Impact of the Wine and Grape Industry in Canada: Canada's Wine Economy – Ripe, Robust, Remarkable," March 2015 (<http://www.canadianvintners.com/wp-content/uploads/2017/06/Canada-Economic-Impact-Report-2015.pdf>). Accessed on April 25, 2018.

⁴⁰ Destination Canada, "Welcoming the World: 2016 Annual Report" (https://www.destinationcanada.com/sites/default/files/2017-05/AboutUs_Publications_AnnualReport_2016_EN.pdf). Accessed on April 25, 2018.

Niagara region attracted 12¾ million visits in 2014, the most recent year for which comprehensive statistics are available. Visitor spending was \$1.94 billion dollars.⁴¹ Tourism accounts for nearly 12 percent of Niagara region's employment, more than 8 percent of its GDP, and in excess of 5 percent of municipal revenues.⁴²

Destination Marketing: Tourism marketing and promotion for the area centred on Lincoln has been led since 2001 by the Twenty Valley Tourism Association (TVTA), as the local Destination Marketing Organization (DMO). The Twenty Valley area's signature aspects are that it is the gateway to Niagara; home to over 50 award-winning, largely family-run winery estates; and located along the Niagara escarpment.

The Town was the founding municipal member. The TVTA membership of 110 is made up of tourism-associated business, including wineries. Geographically, the Twenty Valley comprises the town of Lincoln with additional members in Grimsby and St. Catharines.

Twenty Valley Tourism has traditionally had three signature events – the Winter WineFest in January, April's Get Fresh in the Valley, and November's Wrapped Up in the Valley. The Winter Winefest attracted more than 11,000 people in 2017. The combined attendance for Twenty Valley events was 15,617 in 2017, up from just under 12,000 in 2016. The economic impact in 2017 was reported at \$3.4 million in total visitor spending, as compared to \$2.15 million in 2016.

For 2018, the TVTA has increased its offerings with the Summer Passport program with special offers from shops, wineries, craft beverage producers and restaurants, and plans Roots on the Twenty at Ball's Falls in 2019. In 2018, a Guide will replace the map as the main comprehensive information piece for visitors.

The TVTA is one of the sub-regional partners of the Tourism Partnership of Niagara (TPN). TPN is one of the thirteen non-profit industry-led Regional Tourism Organizations (RTOs) funded by the Ontario Ministry of Tourism, Culture and Sport (MTCS). TPN ranks second to the Toronto RTO in its share of the visitor spending in Ontario by travel regions.⁴³ As indicated by TPN, the province's overriding goal for RTOs is that they "leverage and maximize the region's tourism assets, activities and resources already in place . . . and then . . . use (their) provincial funding to expand . . . destination development and marketing efforts."

⁴⁴

TVTA Strategic Plan 2017-2020 and Budgets: The focus of the Twenty Valley Tourism Association's recent strategic review and update that resulted in its Strategic Plan 2017 – 2020⁴⁵ is to market the destination as an authentic and compelling compilation of experiences and stories. Key thrusts in the strategy over the 2017 to 2020 period are improvements to brand personality and positioning, identifying product gaps, and the funding mechanism. The new TVTA strategy indicates that the brand personality and positioning

⁴¹ Ontario Ministry of Tourism, Culture and Sport, based on Statistics Canada microdata.

⁴² Based on 2012 Data cited in Ontario Chamber of Commerce, "Closing the Tourism Gap: Creating Long-Term Advantage for Ontario," 2016.

⁴³ Tourism Partnership of Niagara, "2015-2016 Business and Marketing Plan: Moving Forward Together," (https://www.niagarasrto.com/sites/default/files/pages/tpn_2015-2016_business_and_marketing_plan.pdf). Accessed on February 18, 2017.

⁴⁴ Tourism Partnership of Niagara website <https://www.niagarasrto.com/frequently-asked-questions>. Accessed on November 12, 2017

⁴⁵ Twenty Valley Tourism Association, "Twenty Valley Strategic Plan 2017-2020" (<https://www.twentyvalley.ca/files/TVTAStrategicPlan2017-2020.pdf>). Accessed on March 1, 2018.

needs to be shaped into an authentic compilation of emotional and intellectual experiences and stories, rather than a collection of hotels, restaurants, attractions and retail. The new TVTA strategy also seeks to shift from a winery focus and emphasize the tourism destination as a whole, including its unique experiences, personalities, artists, distillers, brewers, winemakers, chefs, culture and heritage, farmers, shopkeepers, and outdoor activities.

In its new strategy, TVTA is moving to adopt a “Destination Management and Marketing” approach – a broader scope than the “Destination Marketing” focus pursued in the past. The additional consideration – the “Management” component – is to involve timely interaction and collaboration between public and private sector stakeholders to address product gaps and opportunities in order to build a stronger offering for the future visitor to the Twenty Valley area. Board governance is also being updated. The new strategy also focuses on the improvement of communications with members and stakeholders, including reports on key performance indicators and economic impact.

The TVTA’s total outlays for its operations, events and marketing initiatives were just over \$600,000 during FY 2017 (April 2016 to March 2017). TVTA revenue sources include memberships (about \$100,000), augmented memberships for the craft beverage committee and Jordan Village marketing (\$54,000), contributions from partners for marketing, special events and programs (slightly more than \$150,000), and revenues from events.⁴⁶

Town of Lincoln’s Financial Contribution to Tourism: In 2018, the Town contributed \$53,730 to the TVTA. This included the \$23,730 annual membership fee and \$30,000 of allocated support for the Twenty Valley map (\$10,000); Winter WineFest, the major annual event (\$12,500); and marketing and sales missions (\$7,500). As the anchor municipality, the Town’s contributions represented less than 10 percent of the TVTA outlays.

Detailed expert analysis that considers the host of variables is required, but an informal survey of 2018 municipal tourism spending by some selected comparable Ontario municipalities indicated that Lincoln’s direct tourism spending for its TVTA membership and project support is at the lower end on a per capita basis. On the other hand, the Town’s partnership with TVTA serves to lever valuable additional funding that appears to bring the total expenditures for the Twenty Valley destination more in line with Headwaters Tourism, and St. Catharines, though still below Prince Edward County and Niagara Falls, for example. These are but two possible benchmarks, however. A full comparison needs to understand the nuances of the various models and assess each tourism destination’s prominence, its potential to sustain and grow tourism, the extent to which partner funding is and can be levered, the municipal investments in infrastructure that benefit tourism, and special funding sources that some municipalities can call upon (e.g. casino hosting and other reserve funds).

Private-Public Destination Marketing Models: The TVTA-style private-public sector destination marketing model is often chosen for tourism regions. Financial arrangements can be facilitated when administered by a purpose-driven arm’s length organization rather a government entity with standardized procedures. Tourism promotion typically involves in-kind contributions and matching and shared funding with private sector partners. Flexibility to carry forward financial surpluses and losses over year ends can be important. Having a separate entity also facilitates staffing and allows pay scales, part-time work, and hours to be tailored to industry standards. A shared public and private sector governance model enhances

⁴⁶ Twenty Valley Tourism Association, “Niagara’s Twenty Valley – 2017 Financial Overview – Future Sustainability.”

on-going cooperation and makes a powerful statement about the strength of industry-government collaboration. All participants contribute financially. As a stand-alone entity governed by a Board, the organization has a degree of freedom to be creative and business-oriented in developing innovative initiatives, while being held accountable to stakeholders for results, including a demonstrable return on investment. Importantly as well, the organization can identify with a geography that matches the tourism offering, rather than one that is defined by sometimes-artificial political boundaries. Tourism industry participants are also likely to favour a private-public partnership model as it is less directly subject to election cycles.

Desirability of a Town of Lincoln Tourism Strategy: In light of tourism’s vital and growing role and the Town’s increased focus on economic development, the Town requires the guidance of a comprehensive tourism strategy that will be the basis for the Town to confidently commit and invest in the development and marketing of its tourism assets, based on authentic product, memorable and surprising experiences, the required infrastructure, and notable and welcoming levels of service.

The new strategy will need to address two distinct but interrelated aspects:

- Destination marketing, including branding; and
- Lincoln’s tourism assets and the Town’s role in tourism capacity building.

Budget and any staffing needs for the Town – both for destination marketing and tourism development – will obviously be a matter to scrutinize carefully as part of the strategy development, as already noted.

Other issues and choices to be addressed in a tourism strategy – all of them inter-related – include:

- Tourism volumes, sources, trends and forecasts;
- Lincoln’s assets, differentiators, strengths, weaknesses, opportunities and threats;
- The Town’s primary potential roles in support of the development of the Town’s tourism capacity and infrastructure;
- How jurisdictions like Lincoln can attract a growing share of Niagara visitor traffic;
- Tourism sector workforce needs and performance, and how to achieve them;
- The most promising travel segments (e.g. millennials, Asia’s emerging middle-class, etc.) and the principal sources to target to attract visitors to Niagara and Lincoln;
- Relationships and linkages with local partners (e.g. wineries, tender fruit growers, greenhouses, farmers, the cannabis industry, food service and accommodations, SMEs, etc.);
- The most effective models for destination marketing and tourism development;
- The branding which will be optimal in terms of a return on investment for Lincoln’s tourism sector; and
- Anticipated results and the related performance metrics.

The branding that will best serve Lincoln will be an especially challenging aspect which must be founded on solid research and experienced professional advice. The TVTA and Lincoln now have a close to a 20 year investment in the Twenty Valley brand. The TVTA reviewed branding as part of its recent strategy update and chose to retain the Twenty Valley brand, though with some tweaks. In the end, the Town’s assessment should be based on what will have the greatest potential impact with the consumer and produce the greatest return on investment. It must be developed with the input of partners. As the

branding adopted for tourism could also influence the Town's overall economic development branding, the assessment will need to be developed in a context that considers possible collateral impacts beyond tourism.

A full and open on-going dialogue among the Town, the many beneficiaries of tourism, and the Twenty Valley Tourism Association (TVTA) would be a beneficial prelude to the development of a Town-centred tourism strategy, especially as the TVTA recently completed its own strategy review that revisited branding.

Typical Tourism Development and Marketing Structures: Identifying the tourism-related responsibilities that the Town should seek to pursue needs to take account of the typical segmentation of roles among levels of government, interspersed with certain special purpose entities. A typical hierarchy of tourism roles involving various types of entities and levels of government is set out in Exhibit 16.

Typical Municipal Level Responsibilities: The basic functional municipal tourism level responsibilities concentrate on identifying the community's tourism assets, inventorying and assisting the readiness of operations that can benefit from tourism-related business, ensuring the infrastructure that caters to visitors is in place, building capacity, and attracting investment in accommodations and visitor experiences. In this connection, the strategy should involve the full range of the Town's administrative units – economic development, planning, public works, culture, parks and recreation, and communications. A whole-of-municipal-government approach is required.

Destination Marketing: Destination marketing is typically seen as a separate, though related, component. Destination Marketing Organizations (DMOs) are sometimes departments within municipal governments or are municipally-controlled entities. Often however, they may be arm's length regional organizations which promote a wider geographic area with common attributes extending beyond the borders of a single municipality.

Immediate Priorities: Pending the development of the comprehensive strategy, Lincoln should give priority to creating and enhancing Lincoln's tourism product and capacity by focusing on evidently needed investments in infrastructure and on programs that will enhance the attractiveness and visitor experience associated its principal offerings. Near-term possibilities include:

- Making major arteries and downtowns within Lincoln more appealing and vibrant, through downtown CIPs, the restructuring and expansion of the Beamsville BIA, and the creation of additional BIAs as desired;
- Supporting investment by wineries and others in accommodations, restaurants, banquet space, and related retail;
- Advocating for more frequent GO buses and commuter and weekend rail, while offering suitable connecting services locally, including capitalizing on innovative shared service models to provide transport for events; and
- Taking into account the tourism benefits that can be realized in association with other Town projects and initiatives.

| Exhibit 16 | |
|---|--|
| Typical Tourism Roles for Various Entities and Levels of Government | |
| Level/Nature of Organization | Functions/Roles |
| National Tourism <ul style="list-style-type: none"> • Destination Canada | <ul style="list-style-type: none"> • Research and Data • Branding and Positioning of Canada • Integration of Provincial and Territorial Experiences into National Strategy • International Marketing • Public and Private Partnership Development • Development of Canadian Signature Experience Collection |
| Ontario Provincial Tourism <ul style="list-style-type: none"> • Ministry of Tourism, Culture and Sport • Ontario Tourism Marketing Partnership • Regional Tourism Organizations | <ul style="list-style-type: none"> • Research and Data Support • Funding Opportunities • Province-wide Marketing Opportunities • Partner Programs for Marketing • Integration of Regional Tourism into Provincial Strategies • Integration of Ontario Experiences into National and International Marketing • Workforce Development Support • Investment Attraction Support |
| Destination Marketing Organizations | <ul style="list-style-type: none"> • Identify Regional Demand Generators • Identify Significant Product Clusters/Experiences • Regional Branding and Positioning • Regional Tourism Portal • Regional Marketing and Communications Strategy to Support Local Initiatives and Regional Product Clusters • Identify Funding and Partnership Opportunities to Support Regional and Local Initiatives • Facilitate Industry Partnerships to Support Package Development • Build Capacity for Premier Ranked Market-Readiness with Operators and Local Agencies |
| Municipalities, Economic Development Organizations, BIAs | <ul style="list-style-type: none"> • Determining the Priority to Accord to Support for the Tourism Sector • Identification of Tourism Assets • Inventory of Tourism Businesses • Providing and/or Encouraging Streetscape and Façade Improvements, Wayfinding Signage, Parking, Public Wash Rooms, Trails and other Tourism Infrastructure • Tourism Business Retention and Expansion • Attraction of Tourism-Related Investment |
| Tourism Businesses | <ul style="list-style-type: none"> • Recognize Business as a Tourism Business • Be Ready to Receive Guests (e.g. Regular Hours of Operation (Seasonality), Signage, Customer Service Requirements, etc. • Work with Other Businesses in Area to Create Critical Mass of “Visitor Friendly” Sites • Develop Partnerships and Packages to Encourage “Destination” Visits • Identify and Pursue Opportunities for Engagement and Partnerships with Local and Regional Tourism Initiatives |

Lincoln's Parks, Recreation and Cultural Master Plan: The Town has embarked on a Parks, Recreation and Cultural Master Plan which will address areas that are also of importance to tourism, such as the growth of the creative sector, parks, and active transportation. The Strategy is targeted for completion in late 2018. Relevant areas that it may deal with include opportunities and ways to grow the performing arts, galleries, artisanal crafts, cycling and hiking trails, lakefront recreation, and historical sites. The intention is that the Master Plan will provide the basis for a 10-year infrastructure investment plan. The benefits to the tourism sector should be integrated into the Master Plan as a prominent consideration. There is evidence, for example, that artists and performance and exhibits spaces are choosing to move out of the Greater Toronto Area (GTA) in the face of high-costs, presenting opportunities for arts-welcoming communities with an attractive quality of life. Though it may be a future possibility, an emerging and growing arts, cultural and theatre scene could benefit Lincoln, as the Shaw Festival has in Niagara-on-the-Lake, and the new Norm Foster Festival may in the case of St. Catharines.

Wayfinding Signage: Comprehensive wayfinding signage is very much needed in Lincoln to assist visitors to find attractions and businesses and to establish and build Lincoln's identity along with its constituent communities. An issue to be considered, however, is that any major investment needs to take into account possible branding decisions flowing from the recommended tourism strategy.

Cycling Trails: Cycling has been widely identified as a growth area for Niagara tourism. Province-wide, 1.7 million cycling tourists in Ontario spend nearly half a billion dollars.⁴⁷ Cycling tourists are an attractive demographic, being predominantly between the ages of 35 and 64 and well educated. Related activity preferences are culinary experiences, wine tasting, and cultural sites and museums.⁴⁸ Cycling is a priority for the Twenty Valley Tourism Strategic Plan. Lincoln should develop a multi-year plan to become bike-friendly and join other municipalities which have obtained related certifications. Clear and consistent signage, parking and dedicated bike lanes and trails are the welcoming signs that attract cyclists. "Tour by Bike: Ontario's Cycling Tourism Plan" became part of the Province's Strategic Framework for Tourism in 2017. In Niagara, opportunities exist to work with those who are promoting the segment such as Venture Niagara and the Niagara Cycling Tourism Centre.⁴⁹

Attraction of Tourism Investment: The limited number of accommodation options in Lincoln precludes most visitors from including overnight stays that would extend their time and increase their spending. This makes the attraction and facilitation of expansions and new facilities an economic development priority, to the extent that suitable sites can be found. Prudhommes Landing and sites associated with wineries are the most obvious prospects. The acquisition of the Inn on the Twenty represents potential which the Town could support. As part of the overall mix, bed-and-breakfast and Airbnb-type accommodations should be encouraged.

In its June 2016 Ontario Tourism Action Plan, the Ontario Ministry of Tourism, Culture and Sport (MTCS), which committed to work with economic development partners, indicated that it would use results from an Ontario Attractions Study to strengthen Ontario's value proposition and strategically target new investment in large-scale demand generators, along with further strategic research to attract private sector investment. The Ministry of Tourism, Culture and Sport (MTCS) has an investment and

⁴⁷ Economic Development Council of Ontario (EDCO), "Ministry of Tourism, Culture and Sport – 2017 Year in Review."

⁴⁸ Transportation Options, "From Niche to Now: Cycle Tourism in Ontario," February 2015

(https://www.ontariobybike.ca/images/stories/docs/From_Niche_to_Now-Cycle_Tourism_In_Ontario.pdf). Accessed on April 25, 2018.

⁴⁹ Tourism Partnership of Niagara, "Niagara Cycling Tourism Report," February 2016.

Development Office focused on investment attraction, with which Lincoln should connect. The new Ontario government's priorities and plans will need to be monitored.

Increased Visitor Mobility Options: The development of transportation options for visitors – to and from the GTA and within the local area – would substantially enhance the Lincoln tourism offering. In 2018, the Town partnered with Twenty Valley Magic Winery Bus, providing available parking spaces in a municipal lot in Jordan. Additional hop-on hop-off routes to wineries and major attractions, connecting with GO the bus services, should be explored and encouraged. Other communities and event promoters are developing partnerships with shared-ride services, including using mini-bus-type vehicles.⁵⁰

Hotel Tax? As of December 1, 2017, Ontario municipalities can opt to apply a tax on overnight accommodations to raise money for tourism promotion and development by the Town and its Destination Marketing Organization (DMO). Limited funding would be realized as Lincoln has relatively few rooms. The tax is also controversial as the formula singles out just one type of visitor expenditure. The options require informed review by Council, possibly as part of the broader tourism strategy.

Post-Secondary Partnerships: Niagara's institutions of higher learning – Brock University and Niagara College – are important partners in the development of tourism, as sources of talent, lifelong training, research, innovation, and scholarship. Both Brock and Niagara College have a notable focus on tourism, in light of its importance to the regional economy.

The Brock-Lincoln Living Lab agreement is of special interest in this connection as it provides a direct link to Environment Sustainability Research Centre (ESRC), one of Brock's five transdisciplinary centres. ESRC offers a Master's degree in Sustainability which involves either a thesis or a co-op assignment. Tourism, especially rural tourism, is the area of focus for some of the students. The offerings from Niagara College's School of Hospitality, Tourism and Sport focus, among other things, on business development, a dimension that set it apart from other tourism management programs in Ontario.

⁵⁰ See for example (1) "Los Angeles Metro chooses RideCo (a Kitchener, Ontario, company) for on-demand transit service," April 3, 2018 (<https://blog.rideco.com/los-angeles-metro-chooses-rideco-for-on-demand-transit-service-a54e32860a77>) . Accessed on May 9, 2018; and (2) Live Nation's partnership with Uber (<https://www.prnewswire.com/news-releases/fans-travel-to-and-from-the-show-like-rockstars-live-nation-and-uber-kick-off-marketing-partnership-with-venue-and-festival-focused-ride-program-300083343.html>). Accessed on April 25, 2018.

| E. SECTORS OF FOCUS | | | | |
|--|---|--|---|--|
| E.3 TOURISM | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| E.3 | <p>GOAL: Lincoln is recognized as being at the centre of a prime Niagara travel destination which capitalizes on the bounty of its land and natural environment.</p> <p>1. OBJECTIVE: To develop a comprehensive, focused, Lincoln-centred tourism strategy and action plan to provide needed infrastructure, expand capacity, increase visitor accommodations, and create memorable destinations, value and services to be enjoyed by increased numbers of visitors to Lincoln</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Issue RFP and select a qualified consultant to develop a comprehensive, focused, Lincoln-centred tourism strategy and action plan to assess current strengths and weaknesses, opportunities and constraints, competitiveness, ways to increase visits, revenues and overnight stays, and how best to serve Lincoln's interests 2. Develop an action plan to attract investment in new and expanded accommodations 3. Based on branding and identity recommendations arising from the tourism strategy, undertake a comprehensive wayfinding signage program 4. Expand e-information for visitors, through WiFi networks, social media, websites and other approaches that the tourism strategy may recommend 5. Explore models for shared transportation and hop-on hop-off visitor transit – locally and with links to the GTA, as may be recommended or align with the tourism strategy | <p>A</p> <p>B</p> <p>A</p> <p>A</p> <p>C</p> | <p>2019</p> <p>2019 On</p> <p>2020 On</p> <p>2020 On</p> <p>2019 On</p> | <p>LEcDev TVTA MTCS</p> <p>LEcDev NED MTCS TVTA</p> <p>LEcDev LComm LPlan LPW NED TVTA</p> <p>LEcDev LComm LPlan TVTA</p> <p>LEcDev LCD TVTA</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • Funding will be required in 2019 for a Lincoln-centred tourism strategy and action plan • Funding will be required in 2020 (continuing into future years) for a comprehensive wayfinding signage program, e-information initiatives for visitors, and visitor transit projects • Funding may be available from the Ontario Tourism Development Fund | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none"> • A key deliverable as part of the tourism strategy and action plan should be appropriate performance metrics | | | | |

| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
|---|--|-------------------------|---|---|
| E.3 | 2. OBJECTIVE: To initiate action on local tourism-related needs that lend themselves to immediate action Actions: <ol style="list-style-type: none"> 1. Monitor the development of the Town's Parks, Recreation and Culture Master Plan and encourage consideration of aspects that will benefit tourism 2. Develop tools and establish links with Niagara Region and the Ministry of Tourism, Culture and Sport to be able to seek out and attract investment in accommodation and signature destination attractions in Lincoln 3. Assess and consider possible improvements to the existing wayfinding signage program operated by the Town's Public Works group for tourism-related businesses and agricultural enterprises | B B A | 2018-2019 2018-2019 2018-2019 | LCD LEcDev LEcDev NED MTCS LEcDev LPW TVTA |
| Funding: <ul style="list-style-type: none"> • General budget | | | | |
| Performance Metrics: <ul style="list-style-type: none"> • Higher level of satisfaction on the part of tourism-related operators with the wayfinding signage program operated by Lincoln Public Works • Initiatives to attract tourism sector investment may be eligible for funding from the Ontario Tourism Development Fund | | | | |
| NOTES AND ABBREVIATIONS ¹ Priorities: A = Highest Priority & Very Time-Sensitive; A- + Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive ² Abbreviations LCD = Lincoln Community Development LComm = Lincoln Senior Communications Advisor LEcDev = Lincoln Economic Development LPlan = Lincoln Planning & Development LPW = Lincoln Public Works MTCS = Ontario Ministry of Tourism, Culture & Sport NED = Niagara (Region) Economic Development TVTA = Twenty Valley Tourism Association | | | | |

4. Manufacturing

Manufacturing employed more people in Lincoln in 2017 than any other sector. The number of jobs in manufacturing grew by 15.2 percent from 2012 to reach 1,665. This is nearly double the rate of growth for Niagara region, while Ontario showed no growth over the same 2012 to 2017 period. Also, over the past decade, Lincoln manufacturing employment does not appear to have suffered as much from the 2008-2009 recession as many other parts of Niagara region, in good part due to the growth trend of the beverage manufacturing sub-sector.

Beverage manufacturing – principally wineries and craft beverage producers – account for the largest concentration of jobs in the sector – 36.2 percent (see E.2). Other quite diversified manufacturing sub-

sectors showing the number of jobs in 2017 and the percentage employment growth from 2012 to 2017⁵¹ were:

| | |
|---|-------------------------------|
| • General-Purpose Machinery | 135 jobs, a 13.4 percent gain |
| • Plastic Products | 120 jobs, a 44.6 percent gain |
| • Architectural & Structural Metals | 103 jobs, a 49.3 percent gain |
| • Railroad Rolling Stock | 50 jobs, a 28.2 percent gain |
| • Pesticide, Fertilizer & Other Agricultural Chemicals | 46 jobs, a 53.3 percent gain |
| • Medical Equipment & Supplies | 45 jobs, a 36.4 percent gain |
| • Fabricated Metal Products | 37 jobs, an 8.8 percent gain |

Over the same period, declines occurred in cement and concrete products; navigational, measuring, medical and control instruments; meat products; electrical equipment; and office furniture. Another distinct survey, the annual Employment Survey undertaken by Niagara Region in mid-2017, indicated that there were 26 manufacturing locations in Lincoln with 20 or more employees. A comprehensive directory of Lincoln manufacturers is needed, based on the Regional survey data that is now available, including from the Region's employment survey.

The main medium- to long-term constraint to further growth and attraction of new manufacturing investment in Lincoln will be the availability of suitable industrial sites. More intensive use of existing sites is to be encouraged, especially for expansions. Beverage manufacturing is generally less constrained, as it can be located on land zoned for agriculture.

Leading firms in the manufacturing sector are moving with increasing rapidity to adopt advanced digitally-based technologies and systems, as reflected for example in the software systems that drive robotics and programmable manufacturing processes; 3D printing; and the adoption of the Internet of Things (IoT) incorporating imaging and sensing. A consequence is that services have been a fast growing component in manufacturing. Many firms in the supply chains are centred on providing services, engineering systems and research and development rather than actually making products. As a result, many enterprises associated with manufacturing can locate in commercial office space rather than in areas zoned for industrial operations. Looking to the future, it will therefore make sense for the Town to target manufacturing-related firms that are service-oriented, given that commercial office space may be somewhat more readily available in Lincoln than industrial sites or buildings in the future. In this context, there may be potential for greater intensification over time of the agri-tech cluster associated with the Vineland Research and Innovation Centre (VRIC).

Agri-Tech Manufacturing: Lincoln-based manufacturing operations are ideally positioned to exploit the potential for the further development of manufacturing, service and research-based businesses in Lincoln that capitalize on the town's location, the existing base of greenhouse, viticulture, winery and tree fruit

⁵¹ Source: EMSI Q3 2017

and berry operations, and the extensive research and talent generation offered by VRIC, Niagara College and Brock University. The focus should be to:

- Further support local manufacturers and participants in the manufacturing and precision agriculture supply chain to grow and deepen their involvement in leading edge agricultural technology and systems;
- Encourage foreign companies with an existing Lincoln presence to expand manufacturing, design, systems development and research, ideally as their principal North American location; and
- Attract additional foreign companies who are leaders in their field to establish in Lincoln.

Greenhouse-Related Manufacturing and Services: Lincoln has the most significant floriculture greenhouse concentration in Canada. In addition, the greenhouse vegetable segment is also taking root and becoming a more prominent component locally. Cannabis production, meanwhile, is a major and rapidly growing consideration in Niagara region, including Lincoln. This is spurring the expansion and construction of new greenhouses. Some Lincoln manufacturers are already catering to the needs of the greenhouse sector, cannabis operations, wineries, viticulture, and the tender fruit and berry segment.

Lincoln is fortunate to host the Vineland Research and Innovation Centre (VRIC) where a range of companies and organizations associated with the agricultural sector are co-located. The development and exploitation of new technologies by companies based in Lincoln can benefit from VRIC and its expanding programs to research and commercialize new technological solutions for the greenhouse industry. VRIC's close relationship with the University of Guelph can also be capitalized upon, to assist Lincoln-based operations to access Guelph's agri-tech resources. In addition, close at hand, Niagara College is focused on precision agriculture and computer-controlled greenhouse and horticulture operations, aquaponics and related fields in its Agriculture and Environment Innovation Centre and Augmented Reality Research Centre. The College has an enrolment of over 160 students in Greenhouse Technician and Horticulture Technician programs.⁵² With the addition of its year-long cannabis program, Niagara College has forged very close relationships with all of the major cannabis producers.

The adoption of new technologies will continue to accelerate. Both the floral and vegetable segments of the greenhouse industry are facing strong competitive pressures to introduce and apply new technologies and systems that can optimize output, ensure consistent quality, mitigate risk to plants, and mechanize repetitive tasks. The emerging vertical farming segment has similar requirements. The rapidly scaling cannabis producers are adopting state-of-the-art technology to ensure high efficiency, quality control and security. Sophisticated computer-controlled, automated environment and irrigation control systems are common. Many systems can be monitored and controlled remotely via the internet. The introduction of LED lighting, which can be controlled by computers, including to respond to external conditions, is growing.

The greenhouse sector offers existing and future Lincoln-based manufacturing operations opportunities to cater to the requirements of this significant sector for structures and systems; racking; robotic and software driven handling and packaging systems; computerized sensing, monitoring and lighting; heating and cooling; and water and nutrient supply systems. The cannabis industry is adopting highly advanced technology. In addition to growing and harvesting systems, specialized testing equipment and highly security environments are required by the cannabis industry.

⁵² Ontario College Enrolment Statistics for 2015-2016 report 161 students.

The marketplace for Lincoln-based manufacturers serving the greenhouse and cannabis sectors extends well beyond the Niagara region. In Ontario, Lincoln is proximate to the complementary sister greenhouse sector in the Leamington and Kingsville area near Windsor. Though dominated by vegetables (rather than flowers) and by owners of Italian (rather than Dutch) descent, requirements are similar.

Beyond Canada, the Niagara region can be a North American hub for manufacturing businesses that cater to the greenhouse and cannabis industries and that can benefit from ready access to the US market. There is already significant integration with many Niagara region suppliers to the greenhouse industry selling into the US market. Canada's new Comprehensive Economic and Trade Agreement (CETA) with the European Union provides benefits to the Canadian operations of European firms that are not available to them from a US base. European business people often are inclined to prefer a location in Canada, other things being equal, because the Canadian business and social environment is somewhat more European than the US.

The Netherlands is a dominant source of materials and technology for greenhouse operators. The extensive involvement in the Niagara region of people of Dutch heritage makes Lincoln a comfortable fit culturally for Dutch companies. The European – especially Dutch – scale for greenhouses is greater and frequently more specialized, with many large greenhouses devoted to the production of a single species. Niagara region – and Canada more generally – has some large scale single crop operations but mixed production has tended to be more common.

Winery, Viticulture and the Tree Fruit and Berry Sector Requirements: Like the greenhouse and cannabis industry needs, important opportunities are present for the Lincoln manufacturers to meet the growing, harvesting, processing and other equipment needs of Ontario's burgeoning wine, viticulture, tree fruit and berry industries in which Niagara region remains the dominant centre.

Business Expansion and Investment Attraction: The challenge for the Town is to dedicate economic development resources to fully define the town's opportunity and value proposition in these specialized fields, reach out to encourage technology adoption and expansion by existing Lincoln-based firms, carefully research and target new prospects, and bring together existing resources that will attract and support new manufacturing opportunities for local firms and attract new investment, including from Europe, the US and elsewhere in Canada.

As noted, VRIC and post-secondary partnerships are major assets. The Niagara Industrial Association (NIA) is a broadly based and collaborative regional business group through which connections and outreach can be facilitated. The Canadian Greenhouse Conference which is held annually in October in Niagara Falls brings together a comprehensive cross-section of the supply base, including foreign suppliers, and is therefore an important source of intelligence and contacts, especially for supply of equipment and services for the greenhouse sector.

| E. SECTORS OF FOCUS | | | | |
|--|--|--|---|--|
| E.4 MANUFACTURING | | | | |
| Strategy Section | Goals, Objectives & Actions | Priority ¹ | Timing | Lead & Partners ² |
| E.4 | <p>GOAL: Lincoln's manufacturing sector is sustained and grows thanks to firms that capitalize on leading-edge technologies and services that answer Lincoln's, Ontario's and the world's needs.</p> <p>OBJECTIVE: To support the competitiveness, retention, growth, and attraction of new investment in manufacturing and technological systems in Lincoln</p> <p>Actions:</p> <ol style="list-style-type: none"> 1. Meet with and gather information on the principal Lincoln manufacturing firms and their needs 2. Develop and support initiatives to connect Lincoln manufacturers, especially those oriented to export and to technology development and adoption, with programs and sources of assistance and funding 3. Map manufacturing supply chains to identify gaps that represent opportunities for new investment or expansion locally 4. Meet with Lincoln-based suppliers to the greenhouse, cannabis, wine and viticulture, and tree fruit and berry sectors to identify opportunities to develop in-depth business cases to increase local research and development, manufacturing, and the supply of services 5. Liaise with the Niagara Industrial Association and its members to monitor opportunities and concerns and to ensure Lincoln locations and suppliers are known to them | <p>A</p> <p>A-</p> <p>B</p> <p>A</p> <p>A-</p> | <p>On-Going</p> <p>On-Going</p> <p>2019 On</p> <p>2019 On</p> <p>On-Going</p> | <p>LEcDev</p> <p>LEcDev GAC MEDJCT Brock Guelph IN IRAP OCE NCC NIA VN VRIC</p> <p>LEcDev</p> <p>LEcDev Brock IRAP NIA NCC OCE VRIC GGO NPFVGA OTFG TOGA</p> <p>LEcDev NIA</p> |
| <p>Funding:</p> <ul style="list-style-type: none"> • General budget | | | | |
| <p>Performance Metrics:</p> <ul style="list-style-type: none"> • Performance Metrics should concentrate on outcomes (the number of businesses retained; expansion projects; new investments and the jobs and amounts involved), supplemented by measures of the activities likely to lead to the outcomes (BR&E calls and meetings; investment-related events; contacts established by category; and categorization of leads in terms of demonstrated degree of interest) (in situations where Lincoln's economic development program has influenced outcomes) | | | | |

NOTES AND ABBREVIATIONS

¹ **Priorities:** A = Highest Priority & Very Time-Sensitive; A- = Highest Priority, But Partially Responsive to Others' Initiatives; B = Important & Time-Sensitive; and C = Desirable & Less Time-Sensitive

² **Abbreviations**

Brock = Brock University

GAC = Global Affairs Canada

GGO = Grape Growers of Ontario

Guelph = University of Guelph

IN = Innovate Niagara

IRAP = Industrial Research Assistance Program - NRC

LEcDev = Lincoln Economic Development

MEDJCT = Ministry of Economic Development, Job Creation & Trade

NCC = Niagara College Canada

NED = Niagara (Region) Economic Development

NIA = Niagara Industrial Association

NPFVGA = Niagara Peninsula Fruit & Vegetable Growers Association

OCE = Ontario Centres of Excellence (OCE) Inc.

OTFG = Ontario Tender Fruit Growers

TOGA = The Ontario Greenhouse Alliance

VN = Venture Niagara

VRIC = Vineland Research & Innovation Centre

WGAO = Winery & Growers Alliance of Ontario

F. Implementation Overview

Investment and economic development readiness is the overriding priority when establishing a new economic development program – almost to the exclusion of other activities. Being fully equipped and prepared to pursue opportunities and to deal with enquiries and prospects promptly is an essential prerequisite. Proactive initiatives should be deferred to avoid the risk that enquiries that are generated will not be responded to adequately or in a timely manner. An economic development maxim is that it is better that your community is not known to a prospective investor than to have a permanently damaged reputation through having been contacted and having failed – through a late, inadequate or lack of response – to have met their requirements.

In practical terms, this means that, for Lincoln's economic development program, the remainder of 2018 and the earlier part of 2019 will be focussed on:

- Establishing in a Customer Relationship Management (CRM) system;
- Creating a comprehensive site location database replete with comprehensive data including links to planning related information on zoning, access, and servicing;
- Gathering information and working toward a searchable inventory of available industrial and commercial lands and buildings;
- Making the Town's Community Improvement Plans (CIPs) and their objectives known as part of a comprehensive approach to incentivising property development in support of economic development goals;
- Establishing a Lincoln business directory;
- Building out the economic development section of the Town's website, especially to include a robust database and the real estate directory; and
- Designing an initial approach to social media.

A significant part of resources to kick-start the establishment of these systems and tools can be contracted out to consultants or done by part-time staff. Concurrent involvement and training of economic development staff is essential, however, as they will be using these databases, tools and systems on an on-going basis, and must ensure that the data and systems are maintained and have up-to-date information.

The economic development program will also need to be closely associated in the latter part of 2018 with the steps to move forward in implementing the recommendations of the employment lands study, especially with a view to the provision of an adequate supply of marketable and serviced employment lands in appropriate locations.

The initial personal contact with the principal Lincoln businesses and agricultural enterprises, mentioned under the business retention and expansion role, is also foundational and should be given the highest priority. Fortunately, much of this outreach has been accomplished through participation of the economic development officer in calls related to the development of the Economic Development Strategy. Further engagement with individual companies and enterprises should continue in 2019 through on-going individual business retention and expansion calls.

Round tables with the key business and agriculture stakeholder groups should be pursued during the last half of 2018, based on a plan that envisages at least annual get-togethers involving Town Council representation. The Town's Parks, Recreation and Culture Master Plan will need to be monitored for economic development implications and opportunities for economic development input. Further near-term steps are needed as well to accomplish the desired by-law changes that will enhance to role and impact of the Beamsville BIA.

As soon as the initial phase of the business directory is established and the CRM system is populated with enquiries, leads, and the principal economic development contacts (by early 2019), a series of regular e-newsletters and other communication initiatives can be launched.

During the remainder of 2018, in time to provide input to the Town's 2019 budget, the economic development program should have forward-looking discussions with key partners to identify opportunities that will invite investment or important resource commitments from the Town during 2019. These will include Team Niagara investment attraction initiatives; Spark Lincoln and its innovation, entrepreneurship and youth training initiatives; and financial contributions to collaborative research and projects with the Niagara Workforce and Planning Board and others.

A full tourism strategy should be a priority for 2019, as the establishment of a well-informed discussion and consensus among all interested parties is needed as to the most appropriate way forward. It would be highly desirable if the strategy is completed by mid-year 2019 to allow Town Council to consider appropriate funding in the 2020 budget. Moving forward with the agreed tourism strategy would become a major priority in 2020 and 2021.

By mid-2019, planning could be commenced for a well-structured BR+E calling program in late 2019 or the first half of 2020 on Lincoln companies and agriculture enterprises using the OMAFRA model and targeting selected sectors or groups. Such an initiative can be linked to enhanced supply chain mapping and refocussing of programs and initiatives to respond to the priority needs of Lincoln businesses. Further structured BR+E calling programs should be envisaged every 18 to 24 months.

The development of in-depth value propositions for an initial one or two selected sub-sectors could be commenced in the latter part of 2019. In addition, assuming resources permit, planning and preliminary assessments could be initiated during 2019 with a view to proceeding as early as 2020 on:

- Development of an expedited all-of-governments approach to reviewing and granting approvals for micro-breweries, micro-distilleries, brew-pubs and licence restaurants;
- The establishment of one or more retail sites featuring a full range of Lincoln produced wine, cider, craft beer and craft spirits;
- An assessment of the viability of a food incubator or shared space in Lincoln and the forging of relationships with Toronto area food incubators and other partners to offer growth space for start-ups; and
- Support of signature new developments for which Secondary Plans have been approved, notably Prudhommes Landing and the proposed Beamsville GO Commuter Rail Station area.

In light of the 2019 tourism review, 2020 would also be appropriate timing to revisit and strengthen economic development marketing. Specific initiatives would include the creation of a stand-alone website

for economic development, accompanied by enhanced social media, videos, and corporate success stories. The economic development branding may also need to be revisited or at least refreshed.

Proactive initiatives that might be undertaken in 2020 include:

- Targeted attraction and expansion of hotel and other accommodations; and
- Targeted marketing automation campaigns.

The timelines for the proposed Beamsville GO Rail station and Prudhommes Landing will also begin to come into clearer focus during the latter part of this five year Strategy and Action Plan, inviting refinement of plans to focus on the attraction commercial office development.

G. Resource and Budget Implications and Timing

The principal budget requirements for the latter part of 2018 into early 2019 will be:

- Establishing data bases and systems that will ensure economic development and investment attraction readiness;
- Expanding and enhancing the content and look-and-feel of the economic development section of the Town's website;
- Updating Lincoln's economic development marketing collateral, including for the new CIPs; and
- Establishing a Lincoln business directory.

The major initiative envisaged for 2019 that will require significant funding is the development of Lincoln tourism strategy. Funding should also be available for contributions to research and programs led by partner organizations that will benefit Lincoln.

For 2020, the main budget requirements will centre on:

- Tourism funding that reflects and will enable the new strategy's recommendations;
- Creation of a stand-alone economic development website, and potentially a revisiting of the economic development branding;
- Value propositions; and
- Marketing automation programs.

The Town's commitment to economic development, the hiring of an economic development officer in 2017, and the development of a multi-year economic development strategy create growing operational requirements. The hiring of an economic development research and support assistant should be envisaged during 2019. The role would centre on updates to and the maintenance of databases, the CRM system and the website; the development of proposals and replies to enquiries; and scheduling and event organization. In addition, funding should be available to hire part-time staff, co-op students and consultants for specific projects, research, database enhancements, website upgrades, social media initiatives, marketing automation initiatives, researching and developing value propositions, and corporate targeting.

Appendices

Appendix A

Online Public Survey

An online public survey for the Economic Development Strategy was undertaken using Survey Monkey and a link posted on the Lincoln Economic Development landing page on the Town’s website. The survey also included some questions to be used in the Employment Lands Analysis and Rural Areas CIP studies being undertaken at the same time. The survey was open to the public between February 15 and March 26, 2018.

A total of 314 persons accessed the survey although the number of respondents varied by question. About 80 percent (248) of respondents were Lincoln residents, including 117 who were residents and also operated or worked at a farm, business or organization in Lincoln. A total of 163 respondents operated or worked at a farm, business or organization in Lincoln. There was broad representation of respondents across all business sectors with the highest number in Wineries (23) followed by an equal number (13) in each of the following sectors: Agriculture (as well as an additional 11 in Greenhouses), Retail, and Health Services. The number of respondents in other sectors ranged from 2 to 11.

As the survey was a public online survey which could be accessed by any person, the results cannot be assumed to be completely representative of the Lincoln population or businesses, and only represents the views of a limited sample.

An overview of the key findings from the survey is provided in this section for the total sample and the subsample of respondents that operate or work at a farm, business, or organization in Lincoln. The focus of the following discussion is on respondents that operated or worked at a farm, business, or organization in Lincoln as the views of this group are the most relevant for economic development.

Lincoln's Top Economic Development Strengths

Respondents were asked in the survey to identify Lincoln's top five economic development strengths from a wide range of options. A summary of the responses is provided below.

The strengths chosen as being in the top five by the largest percentage of respondents included:

- Highway accessibility;
- Proximity to the GTA;
- Agriculture lands and farms, including greenhouse and wineries;
- Location in Niagara region; and
- Tourism.

Lincoln's Top Five Economic Development Strengths

| Answer Choices | Work in Lincoln Subsample Response Percent | Number of Responses | Total Sample Response Percent | Number of Responses |
|--|--|---------------------|-------------------------------|---------------------|
| Highway accessibility | 72% | 87 | 71% | 156 |
| Proximity to the GTA | 69% | 83 | 61% | 134 |
| Agricultural lands and farms, including greenhouses and wineries | 68% | 82 | 70% | 155 |
| Location in Niagara Region | 54% | 65 | 54% | 120 |
| Tourism | 54% | 65 | 50% | 111 |
| Proximity to the United States | 37% | 45 | 39% | 87 |
| Easy access to larger centres in the region | 27% | 33 | 29% | 64 |
| Room to grow | 27% | 33 | 29% | 64 |
| Lifestyle opportunities | 24% | 29 | 24% | 52 |
| Housing affordability | 16% | 19 | 21% | 47 |
| Level of entrepreneurship | 12% | 15 | 8% | 17 |
| Recreation opportunities | 12% | 14 | 13% | 29 |
| Health care | 7% | 9 | 5% | 10 |
| Diversified economic base | 7% | 8 | 6% | 13 |
| Housing availability | 3% | 4 | 5% | 10 |
| Availability of skilled labour force | 2% | 3 | 6% | 13 |
| Employment lands | 2% | 3 | 2% | 5 |
| Manufacturing base | 2% | 2 | 4% | 9 |
| High speed broadband | 2% | 2 | 2% | 4 |
| Total Number of Respondents | | 121 | | 221 |

Lincoln's Top Weaknesses and Challenges Related to Economic Development

The top weaknesses/challenges selected by the highest percentage of respondents that operated or worked at a farm, business, or organization in Lincoln included:

- Public transportation;
- Lack of suitable employment opportunities;
- Energy costs;
- Labour availability; and
- Development approval process/timelines.

These were closely followed by 'aging population' and 'lack of development incentives'.

See the below exhibit for percentage of respondents selecting specific weaknesses and challenges as being within the top five.

Lincoln's Top Five Weaknesses & Challenges Related to Economic Development

| Answer Choices | Work in Lincoln Subsample | | Total Sample | |
|---|---------------------------|---------------------|------------------|---------------------|
| | Response Percent | Number of Responses | Response Percent | Number of Responses |
| Public transportation | 55% | 67 | 57% | 125 |
| Lack of suitable employment opportunities | 53% | 64 | 64% | 142 |
| Energy costs | 46% | 56 | 44% | 97 |
| Labour availability | 45% | 55 | 37% | 82 |
| Development approvals process/timelines | 44% | 53 | 33% | 73 |
| Aging population | 42% | 51 | 42% | 93 |
| Lack of development incentives | 41% | 50 | 41% | 90 |
| High speed internet availability/coverage | 34% | 41 | 36% | 80 |
| Development charges | 23% | 28 | 19% | 41 |
| Infrastructure | 22% | 27 | 24% | 52 |
| Lease space availability | 17% | 21 | 15% | 34 |
| Lease space costs | 14% | 17 | 12% | 26 |
| Water costs | 13% | 16 | 18% | 40 |
| Employment lands availability | 9% | 11 | 15% | 33 |
| Employment lands costs | 9% | 11 | 7% | 16 |
| High speed internet costs | 7% | 8 | 14% | 30 |
| Total Number of Respondents | | 121 | | 221 |

Vision for Economic Development in Lincoln

An open ended question was included in the online survey about vision for economic development in Lincoln - “What is your Vision for economic development in Lincoln for the next five years? What words or phrases come to mind?”

Some of the statements made by the respondents that operate or work at farm, business, or organization in Lincoln pertained to the following:

- Improvements – downtown, roads, commercial curb appeal, smart land development
- Sustainability and protecting green space
- Agri-businesses, greenhouses, Cannabis, wineries (‘Sonoma/Napa Valley of the North’)
- Tourism and agri-tourism
- More jobs and economic growth
- Balanced growth and diversification
- Business friendly – remove barriers, less ‘red-tape’, business friendly bylaws
- Increase interest for younger generation to live and work in Lincoln
- Increased entrepreneurship
- Robust, diverse, reflects our MVV statement, innovative and exciting
- Contributes to research and intelligence of community
- Creates opportunities for youth and all levels of employment income
- Business growth to employ local youth and those that don't drive
- Becoming a centre of excellence for value-added agriculture and agri-tourism
- Small but close knit communities that support each other
- Everything Niagara has to offer in one location

Where the Town of Lincoln Should Focus Efforts

Fifty percent or more of the respondents that operate or work at a farm, business, or organization in Lincoln selected the following areas where the Town of Lincoln should focus its efforts to support growth of the economic base and businesses:

- Business expansion/growth of existing businesses;
- Support entrepreneurship;
- Promote area/expand tourism sector;
- Support business innovation; and
- Support and expand agricultural/agri-business sector.

See below exhibit for number and percentage of respondents selecting specific areas of focus.

Where Town of Lincoln Should Focus Efforts to Support Growth of Economic Base and Businesses

| Answer Choices | Work in Lincoln Subsample | | Total Sample | |
|---|---------------------------|---------------------|------------------|---------------------|
| | Response Percent | Number of Responses | Response Percent | Number of Responses |
| Business expansion/growth of existing businesses | 59% | 71 | 51% | 113 |
| Support entrepreneurship | 57% | 69 | 51% | 112 |
| Promote area/expand tourism sector | 56% | 68 | 52% | 115 |
| Support business innovation | 55% | 67 | 48% | 106 |
| Support and expand agricultural/agri-business sector | 50% | 61 | 54% | 119 |
| Marketing Lincoln's competitive advantages as a business location | 42% | 51 | 42% | 93 |
| Business retention | 37% | 45 | 38% | 83 |
| Investment attraction | 31% | 37 | 33% | 73 |
| Diversify economy | 26% | 32 | 27% | 60 |
| Workforce development | 26% | 32 | 28% | 62 |
| Total Number of Respondents | | 121 | | 220 |

Sectors That Will Drive Growth

There was a strong consensus that wineries, followed by agriculture and agri-businesses, will drive growth in Lincoln as shown in the following exhibit.

Top Three Sectors That Will Drive Growth in Lincoln

| Answer Choices | Work in Lincoln Subsample | | Total Sample | |
|---------------------------------|---------------------------|---------------------|------------------|---------------------|
| | Response Percent | Number of Responses | Response Percent | Number of Responses |
| Wineries | 76% | 92 | 72% | 159 |
| Agriculture and Agri-businesses | 64% | 77 | 64% | 141 |
| Restaurants and catering | 25% | 30 | 29% | 65 |
| Accommodations | 24% | 29 | 24% | 52 |
| Manufacturing | 21% | 26 | 22% | 49 |
| Retail | 17% | 21 | 20% | 44 |
| Construction | 16% | 19 | 15% | 34 |
| Professional services | 15% | 18 | 15% | 32 |
| Other tourism-related | 14% | 17 | 11% | 24 |
| Health services | 12% | 14 | 13% | 29 |
| Education services | 3% | 4 | 4% | 9 |
| Government | 3% | 4 | 3% | 7 |
| Non-profit | 2% | 2 | 2% | 5 |
| Total Number of Respondents | | 121 | | 221 |

How Lincoln is Different from Other Communities in Niagara

Wineries and a strong agricultural base were considered to be Lincoln's key differentiators from other communities in Niagara, as shown below.

Top Three Factors That Differentiate Lincoln from Other Communities in Niagara

| Answer Choices | Work in Lincoln Subsample | | Total Sample | |
|--|---------------------------|---------------------|------------------|---------------------|
| | Response Percent | Number of Responses | Response Percent | Number of Responses |
| Wineries | 74% | 89 | 72% | 159 |
| Strong agricultural base | 63% | 76 | 67% | 149 |
| Waterfront and natural environment | 47% | 57 | 48% | 105 |
| Higher quality of life/lifestyle opportunities | 36% | 44 | 40% | 88 |
| Quality of tourism offer | 29% | 35 | 25% | 56 |
| Entrepreneurship | 17% | 21 | 13% | 28 |
| Recreation opportunities | 14% | 17 | 15% | 32 |
| Labour and talent | 4% | 5 | 7% | 15 |
| Total Number of Respondents | | 121 | | 221 |

Tools the Town of Lincoln Can Use to Encourage Businesses to Locate or Expand in the Community

The majority (66 percent) of respondents that operate or work at a farm, business, or organization in Lincoln indicated that programs to support the retention and expansion of Lincoln businesses would be a useful tool that the Town could use to encourage businesses to locate or expand in the community. Other tools which between 43 percent and 54 percent of this subsample selected were:

- Grants to businesses;
- Programs to attract external investment to Lincoln; and
- Targeted community improvement plans.

Tools that would be Most Useful to Town of Lincoln Staff to Encourage Businesses to Locate or Expand Operations in the Community

| Answer Choices | Work in Lincoln Subsample | | Total Sample | |
|---|---------------------------|---------------------|------------------|---------------------|
| | Response Percent | Number of Responses | Response Percent | Number of Responses |
| Programs to support the retention and expansion of Lincoln businesses | 66% | 78 | 62% | 134 |
| Grants to businesses | 54% | 64 | 43% | 93 |
| Programs to attract external investment to Lincoln | 48% | 57 | 46% | 101 |
| Targeted Community Improvement Plans | 43% | 51 | 45% | 99 |
| Creation of Business Improvement Areas | 39% | 46 | 40% | 87 |
| Development applications fees exemption or reduction | 39% | 46 | 32% | 69 |
| Tax / development charge deferral programs | 38% | 45 | 28% | 62 |
| Business incubators | 24% | 29 | 22% | 48 |
| Increase supply of vacant land zoned for industrial development | 18% | 22 | 20% | 43 |
| Total Number of Respondents | | 119 | | 218 |

Appendix B

Stakeholder Interviews

GIAG provided the Steering Committee with a draft Consultation Plan that would be used with stakeholders to confirm/discuss specific findings of the Situational Analysis work and to solicit input on issues that needed to be addressed in the Economic Development Strategy and Action Plan, and strategic directions for specific areas.

A list of stakeholders for interviews was developed by GIAG in consultation with, and approved by, the project Steering Committee. The selected stakeholders from the key businesses, associations, post-secondary education, research and levels of government were then contacted by the Town to introduce GIAG and to request an interview. GIAG followed up directly with selected stakeholders to set up interview dates.

The stakeholders represented a full range of the local economy, broadly broken into ten sector categories. A total of 40 interviews were conducted between January and March 2018. Paul Di Ianni, Economic Development Officer of the Town of Lincoln, attended some of the interviews.

Interviews Completed by Sector

| Sector | # Interviews |
|----------------------|--------------|
| Food & Beverage | 8 |
| Greenhouse | 2 |
| Farming/Tender Fruit | 4 |
| ICT | 1 |
| Manufacturing | 4 |
| Real Estate | 2 |
| Tourism/Hospitality | 4 |
| Post-secondary | 3 |
| Government | 9 |
| Association | 3 |
| Total | 40 |

To stimulate discussion, the following questions were submitted to each stakeholder at the time of the interview request. It should be noted these questions were not applicable to all stakeholders and in many cases discussion evolved beyond these topics:

- What are the economic development related competitive strengths associated with Lincoln?
- What are Lincoln's greatest weaknesses and challenges related to economic development?
- What are the greatest external threats to future economic growth, prosperity and sustainability in Lincoln?
- Are there external and global linkages that provide international leverage for Lincoln and Niagara and its businesses to exploit?

- What future opportunities are there for Lincoln to grow its economic base and its businesses?
- Is Lincoln's workforce and talent aligned with the future requirements of businesses? If not, what improvements are needed?
- How do you perceive Lincoln as a location for new businesses, investment and expansion? How does this vary by type of investment or sector?
- Where and how can Lincoln play a greater role in fostering economic development?
- What is your vision for Lincoln's economy?

The responses to the stakeholder interviews were used to inform development of the Economic Development Strategy and Action Plan.

Appendix C

Public Round Table Summary

A public round table for community stakeholders was held on March 21, 2018, between 2 and 4 p.m. at the Fleming Centre. The round table was made known through advertising and direct contact by the Town with potentially interested organizations and individuals. More than twenty people attended the facilitated session to offer their views and visions of Lincoln's economic development. The following summarizes the principal points made by residents and businesses as part of an interactive discussion on what they perceive to be some of the key strengths and weaknesses of Lincoln's economy; threats and opportunities; and vision for economic development in Lincoln.

Lincoln's Economic Development-Related Strengths

- Location, especially Queen Elizabeth Way (QEW) highway access, and Lincoln's proximity to Hamilton and Toronto and to the US border
- Tourism, benefiting from Lincoln's rural setting, the Greenbelt, escarpment, parks, trails, waterfront, marinas, wineries, restaurants, farm markets, destination events and locations, and collaborative tourism promotion
- Lifestyle, quality of life, and uncrowded environment
- Safe, minimal crime
- Climate
- Growing economy
- Forward thinking Town Council, staff and Town staff member dedicated to economic development
- Availability of Community Improvement Programs (CIPs)
- Productive agricultural soils and growing conditions
- Access to institutions of higher learning (e.g. Brock University, Niagara College, McMaster University, Mohawk College and Sheridan College)
- Sector diversity, including farms, greenhouses and manufacturing
- Relative affordability of residential real estate
- Public transit accessibility and the prospect of GO Rail service

Lincoln's Weaknesses and Challenges Related to Economic Development

- Appearance of some downtown areas is not inviting, affecting investment potential
- Traffic flow, including a heavy vehicle presence, in downtown Beamsville, and the need for better mountain access
- Lack of serviced employment land
- Gaps in access to high-speed broadband
- Development approvals and other administrative challenges arising from multiple layers of government and provincial bodies, including the Greenbelt, Niagara Escarpment Commission (NEC) and Niagara Peninsula Conservation Authority (NPCA)
- Limitations on the provision of water for farms
- Lack of clear identity for Lincoln as a whole, or for its individual urban areas

- Underdeveloped tourism infrastructure, including limited overnight accommodation for visitors, rural roads requiring maintenance, and the need for improved cycle routes
- The town has perhaps yet to gain as much as other municipalities in the region from the US tourism that a lower dollar should stimulate
- Limitations on workforce availability
- Lack of availability of affordable housing and rental accommodation for the local workforce
- Difficulty retaining the next generation
- Greenbelt land that is not viable for farming is underutilized and is not eligible for other uses under existing zoning
- The cost to get 3-phase power hook-ups for businesses

External Threats to Economic Growth in Lincoln

- Provincial minimum wage hike
- Regional Development Charges and fees
- Zoning limitations and administrative difficulties, as per existing weaknesses, arising from the Greenbelt, Niagara Escarpment Commission (NEC) and Niagara Peninsula Conservation Authority (NPCA) designations
- Insufficient Regional investment in infrastructure, such as roads, and perceived Regional favouritism to municipalities with larger populations
- Competition from neighbouring communities for tourism, retail and manufacturing investments
- Congestion on the Queen Elizabeth Way (QEW)
- Uncertain international trade climate and currency volatility

Further Opportunities and Sectors and Sub-Sectors that will drive Future Growth in Lincoln

- Sectors and Areas of Opportunity
 - Tourism, including overnight accommodation that will support longer stays
 - Cannabis industry
 - Wineries, craft beverages and agriculture-related attractions, especially driven by tastings and tours
 - Seniors services
 - Capitalize on being part of a cross-border corridor, especially for tourism
- Increased adoption of technology and connectivity, including to support tourism
- Theatre, arts and culture
- Light industry and manufacturing
- Enhanced branding and marketing (speaking with a single voice)
- Making Beamsville's Ontario Street a more attractive environment

Vision for Town of Lincoln's Economic Development

- Growth of agriculture and tourism
- Creation of a "complete community" where residential housing offerings, together with services and infrastructure, align with the requirements of the local workforce
- Economic development founded on longer-term planning
- Marketing and infrastructure investments

- Enhanced and cohesive identity for Lincoln

Appendix D

An Overview of the Rationale and Approaches to Performance Measurement

Performance measurement is an important part of economic development that is used for:

1. measuring and benchmarking the economic performance of regional and local economies;
2. measuring the progress toward achieving the goals and objectives of an economic development strategy; and
3. measuring the performance of the organization.

The metrics will vary for the three purposes, with the first one generally consisting of best practice metrics in economic dashboards; the second consisting of metrics explicitly linked back to the objectives and actions in the Economic Development Strategic Plan and annual business or action plans; and the third addressing metrics associated with the internal functioning of the organization and performance of its employees.

1. Metrics for Economic Dashboards

An economic performance dashboard is a useful way to monitor economic trends and growth in a region over time and could include comparative data on GDP growth, employment, labour force, population, construction activity, housing starts, etc.

These are broad economic measures which are effected by many factors which municipal level economic development activities do not directly impact or influence.

When developing an Economic Dashboard, consideration needs to be given to the type of data to be collected, format, sources, frequency of updates, responsibilities for data collections and updates, and reporting. Data sources for an Economic Dashboard for the Town of Lincoln include the Town, Niagara Region/St. Catharines-Niagara CMA, Statistics Canada, EMSI (via OMAFRA), the Conference Board of Canada, etc. The availability of Statistics Canada data is constrained by the fact that data for the Town generally is only provided in the Census.

2. Metrics for Economic Development Strategies

Performance measurement of economic development strategies is important not only for measuring progress in implementation and meeting goals and objectives, but also for assessing where the strategy needs to be tweaked or fine-tuned. As these metrics are linked to the economic development strategy and annual plans, they are ones that the organization's activities aspires to influence.

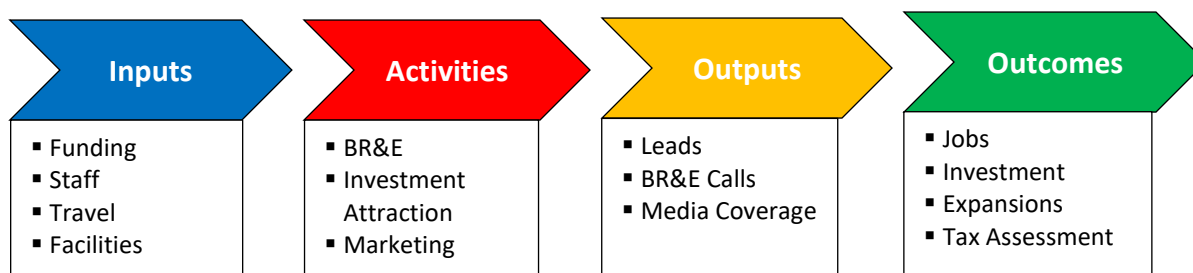
While it is important to objectively assess the progress in meeting key goals and objectives of an economic development strategic plan, it is not realistic to measure the progress toward every single objective particularly when there are a multitude of objectives and the measurement would be onerous, and involve

substantial time and resources. Rather, the most important objectives, in terms having a significant effect on the progress toward achieving the key goals, should be measured.

Metrics used for measuring the progress of the economic development strategy need to be SMART:

SMART Metrics
Specific – Measurable – Achievable – Relevant – Time-based

The focus of measurement should be on Outcome metrics, that is on changes that show progress toward achieving the Economic Development Strategy's objectives (such as the new investments or expansions in which the organizations was involved, along with the jobs and tax assessments associated with the projects). In addition, selected Activity metrics (actions and initiatives taken to achieve results) should be tracked and reported upon, along with Output metrics (such leads generated, calls and earned media coverage).



In addition to choosing which objectives should be the focus of performance measurement and what data will be collected to measure performance, it will be important to develop a sound, yet practical, performance measurement plan to identify how often the data will be collected and updated, the origin of the data, a definition of each metric, responsibilities for data collection and updates, and the reporting processes. Some of the data can be generated by the organization's Customer Relationship Management (CRM) system.

3. Other Metrics

In addition to metrics for measuring progress toward meeting the goals and objectives of the Economic Development Strategy, Lincoln economic development may want to consider some organizational performance metrics not directly associated with the strategic plan. In this regard, a useful reference includes: *Making It Happen - Metrics for High Performing EDO's*, IEDC, 2011

Appendix E

Statistical Tables

Statistical Tables

Note on Data Sources

This appendix includes key statistical information for Lincoln using data from the 2016 Census of Population and 2016 Census of Agriculture available from Statistics Canada, as well as the EMSI Analyst Program. The EMSI Analyst program combines employment data from the Statistics Canada Survey of Employment, Payrolls and Hours (SEPH) with data from the Labour Force Survey (LFS), Census, and Canadian Business Counts database to form geographic estimates of employment. Projections are based on the latest available EMSI industry data at the time of the analysis, and 10-year past local trends in each industry and growth rates from national industry projections from the Canadian Occupational Projection System (COPS) produced by Human Resources and Skills Development Canada. The EMSI Analyst program offers the most current and comprehensive available data and enables comparison of a community with other communities. However, data available through the program are estimates and employment projections do not take into account any locally specific economic development initiatives, or market changes that may materially impact the level of future growth in any sector in a region or community. The EMSI Analyst program was made available on a complimentary basis to the Town by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA).

The following exhibits include population and demographic data and data pertaining to Lincoln's economic base. Additional statistical information is documented in the Background Report for the project.

Population and Demographic Data

| Exhibit 1 Population Growth in Lincoln and Niagara Municipalities | | | | | | |
|--|--------------------|--------------------|--------------------------|-------------------------------|------------------------------------|------------------------------------|
| Community | 2011 Population | 2016 Population | 2011 - 2016 Change | 2011-2016 % Pop. Growth | % of Niagara Population 2011 | % of Niagara Population 2016 |
| St. Catharines | 131,400 | 133,113 | 1,713 | 1.3% | 30.5% | 29.7% |
| Niagara Falls | 82,997 | 88,071 | 5,074 | 6.1% | 19.2% | 19.7% |
| Welland | 50,631 | 52,293 | 1,662 | 3.3% | 11.7% | 11.7% |
| Fort Erie | 29,960 | 30,710 | 750 | 2.5% | 6.9% | 6.9% |
| Grimsby | 25,325 | 27,314 | 1,989 | 7.9% | 5.9% | 6.1% |
| Lincoln | 22,487 | 23,787 | 1,300 | 5.8% | 5.2% | 5.3% |
| Thorold | 17,931 | 18,801 | 870 | 4.9% | 4.2% | 4.2% |
| Port Colborne | 18,424 | 18,306 | -118 | -0.6% | 4.3% | 4.1% |
| Niagara-on-the-Lake | 15,400 | 17,511 | 2,111 | 13.7% | 3.6% | 3.9% |
| Pelham | 16,598 | 17,110 | 512 | 3.1% | 3.8% | 3.8% |
| West Lincoln | 13,837 | 14,500 | 663 | 4.8% | 3.2% | 3.2% |
| Wainfleet | 6,356 | 6,372 | 16 | 0.3% | 1.5% | 1.4% |
| Niagara Region | 431,346 | 447,888 | 16,542 | 3.8% | 100.0% | 100.0% |
| Source: Statistics Canada 2016 Census | | | | | | |

| Exhibit 2 Population by Age Distribution, 2016 | | | | |
|---|-----------------------|--------------------|-----------------------|--------------------|
| Age Cohort | Lincoln Population | Lincoln Percent | Niagara Population | Niagara Percent |
| 0 to 14 years | 4,070 | 17.1% | 66,760 | 14.9% |
| 15 to 19 years | 1,470 | 6.2% | 25,710 | 5.7% |
| 20 to 24 years | 1,360 | 5.7% | 28,155 | 6.3% |
| 25 to 29 years | 1,140 | 4.8% | 25,130 | 5.6% |
| 30 to 34 years | 1,245 | 5.2% | 24,005 | 5.4% |
| 35 to 39 years | 1,330 | 5.6% | 23,950 | 5.3% |
| 40 to 44 years | 1,445 | 6.1% | 26,150 | 5.8% |
| 45 to 49 years | 1,560 | 6.6% | 29,145 | 6.5% |
| 50 to 54 years | 1,910 | 8.0% | 35,335 | 7.9% |
| 55 to 59 years | 1,740 | 7.3% | 34,995 | 7.8% |
| 60 to 64 years | 1,525 | 6.4% | 32,715 | 7.3% |
| 65 years + | 5,000 | 21.0% | 95,845 | 21.4% |
| Prime Working Age Group (25 to 44 Yrs.) | 5,160 | 21.7% | 99,235 | 22.2% |
| Source: Statistics Canada 2016 Census | | | | |

| Exhibit 3 Labour Force by Occupation, 2016 | | | | |
|---|-------------------|--------------------|-------------------|--------------------|
| Occupation Category | Lincoln Number | Lincoln Percent | Niagara Number | Niagara Percent |
| Sales and service occupations | 2,695 | 21.8% | 64,735 | 29.1% |
| Trades; transport and equipment operators and related occupations | 2,000 | 16.1% | 33,180 | 14.9% |
| Business; finance and administration occupations | 1,845 | 14.9% | 29,220 | 13.2% |
| Management occupations | 1,555 | 12.6% | 23,885 | 10.8% |
| Occupations in education; law and social; community and government services | 1,395 | 11.3% | 23,585 | 10.6% |
| Health occupations | 855 | 6.9% | 15,885 | 7.2% |
| Natural and applied sciences and related occupations | 640 | 5.2% | 10,120 | 4.6% |
| Occupations in manufacturing and utilities | 575 | 4.6% | 10,200 | 4.6% |
| Natural resources; agriculture and related production occupations | 565 | 4.6% | 5,785 | 2.6% |
| Occupations in art; culture; recreation and sport | 260 | 2.1% | 5,485 | 2.5% |
| All occupations (excludes not applicable category) | 12,385 | 100.0% | 222,080 | 100.0% |
| Source: Statistics Canada 2016 Census | | | | |

| Exhibit 4 Labour Force by Sector, 2016 | | | | |
|--|---------------------------|----------------------------|---------------------------|----------------------------|
| NAIC/Sector | Lincoln Number | Lincoln Percent | Niagara Number | Niagara Percent |
| 31-33 Manufacturing | 1,615 | 13.1% | 21,100 | 9.5% |
| 62 Health care and social assistance | 1,440 | 11.6% | 25,920 | 11.7% |
| 44-45 Retail trade | 1,155 | 9.3% | 27,325 | 12.3% |
| 23 Construction | 1,000 | 8.1% | 16,065 | 7.2% |
| 61 Educational services | 870 | 7.0% | 16,455 | 7.4% |
| 11 Agriculture; forestry; fishing and hunting | 810 | 6.5% | 5,790 | 2.6% |
| 72 Accommodation and food services | 790 | 6.4% | 24,915 | 11.2% |
| 54 Professional; scientific and technical services | 655 | 5.3% | 10,505 | 4.7% |
| 41 Wholesale trade | 650 | 5.3% | 7,805 | 3.5% |
| 81 Other services (except public administration) | 620 | 5.0% | 10,025 | 4.5% |
| 91 Public administration | 600 | 4.8% | 10,685 | 4.8% |
| 48-49 Transportation and warehousing | 510 | 4.1% | 9,440 | 4.3% |
| 56 Administrative and support; waste management and remediation services | 510 | 4.1% | 11,900 | 5.4% |
| 52 Finance and insurance | 440 | 3.6% | 6,715 | 3.0% |
| 71 Arts; entertainment and recreation | 230 | 1.9% | 9,100 | 4.1% |
| 51 Information and cultural industries | 175 | 1.4% | 2,845 | 1.3% |
| 53 Real estate and rental and leasing | 170 | 1.4% | 3,425 | 1.5% |
| 22 Utilities | 95 | 0.8% | 1,370 | 0.6% |
| 21 Mining; quarrying; and oil and gas extraction | 25 | 0.2% | 515 | 0.2% |
| 55 Management of companies and enterprises | 15 | 0.1% | 180 | 0.1% |
| Total (excludes not applicable category) | 12,385 | 100.0% | 222,080 | 100.0% |
| Source: Statistics Canada 2016 Census | | | | |

| Exhibit 5 Commuting Flows – Place of Work of Employed Lincoln Residents & Place of Residence of Persons Commuting to Work In Lincoln, 2016 | | |
|--|-------------------------|---------------------------|
| Community | Lincoln Resident | Working in Lincoln |
| Lincoln | 2,805 | 2,805 |
| Hamilton | 1,605 | 565 |
| St. Catharines | 1,350 | 2,040 |
| Grimsby | 925 | 680 |
| Burlington | 635 | 105 |
| Oakville | 290 | 40 |
| Niagara Falls | 285 | 360 |
| Mississauga | 210 | 20 |
| Niagara-on-the-Lake | 165 | 100 |
| Toronto | 160 | 45 |
| West Lincoln | 145 | 390 |
| Welland | 135 | 355 |
| Thorold | 80 | 280 |
| Brampton | 60 | - |
| Pelham | 60 | 215 |
| Haldimand County | 60 | 105 |
| Milton | 50 | - |
| Vaughan | 40 | - |
| Fort Erie | 25 | 70 |
| Port Colborne | 25 | 95 |
| Wainfleet | - | 80 |
| Source: Statistics Canada - 2016 Census. Catalogue Number 98-400-X2016325. Note: Employed labour 15 years and older having a usual place of work; Flows < 20 not reported | | |

Economic Base

| Exhibit 6 Lincoln Jobs by Sector as a Portion of Jobs in Niagara Region, 2017 | | | | |
|--|---|----------------|----------------|--------------------------------|
| NAIC Codes | Description | Lincoln | Niagara | Portion of Niagara Jobs |
| 21 | Mining, quarrying, and oil and gas extraction | 101 | 287 | 35.1% |
| 11 | Agriculture, forestry, fishing and hunting | 1,366 | 5,027 | 27.2% |
| 41 | Wholesale trade | 935 | 8,041 | 11.6% |
| 31-33 | Manufacturing | 1,665 | 17,982 | 9.3% |
| 56 | Administrative and support, waste management and remediation services | 1,039 | 11,789 | 8.8% |
| 48-49 | Transportation and warehousing | 449 | 6,879 | 6.5% |
| 62 | Health care and social assistance | 1,486 | 25,426 | 5.8% |
| 23 | Construction | 894 | 15,915 | 5.6% |
| 54 | Professional, scientific and technical services | 449 | 8,924 | 5.0% |
| 71 | Arts, entertainment and recreation | 365 | 8,550 | 4.3% |
| 61 | Educational services | 599 | 14,617 | 4.1% |
| 44-45 | Retail trade | 964 | 27,630 | 3.5% |
| 72 | Accommodation and food services | 860 | 25,927 | 3.3% |
| 91 | Public administration | 302 | 10,292 | 2.9% |
| 52 | Finance and insurance | 183 | 6,263 | 2.9% |
| 81 | Other services (except public administration) | 275 | 9,780 | 2.8% |
| 53 | Real estate and rental and leasing | 82 | 4,815 | 1.7% |
| 51 | Information and cultural industries | 30 | 2,025 | 1.5% |
| 22 | Utilities | <10 | 1,335 | - |
| 55 | Management of companies and enterprises | <10 | 1,334 | - |
| X0 | Unclassified | 169 | 3,349 | 5.0% |
| All | All Industries | 12,225 | 216,186 | 5.7% |
| Source: EMSI Q3 2017 | | | | |

| Exhibit 7 Lincoln Job Growth – 2012-2017 – By Sector | | | | | | |
|---|---|--------|--------|--------------------|----------------|-------------------|
| NAIC Codes | Description | 2012 | 2017 | 2012 - 2017 Change | Percent Change | Location Quotient |
| 11 | Agriculture, forestry, fishing and hunting | 1,251 | 1,366 | 115 | 9.2% | 9.45 |
| 21 | Mining, quarrying, and oil and gas extraction | 109 | 101 | -8 | -7.3% | 2.30 |
| 22 | Utilities | 12 | <10 | Insf. Data | Insf. Data | - |
| 23 | Construction | 869 | 894 | 25 | 2.9% | 1.10 |
| 31-33 | Manufacturing | 1,445 | 1,665 | 220 | 15.2% | 1.48 |
| 41 | Wholesale trade | 1,063 | 935 | -128 | -12.0% | 1.51 |
| 44-45 | Retail trade | 1,005 | 964 | -41 | -4.1% | 0.74 |
| 48-49 | Transportation and warehousing | 510 | 449 | -61 | -12.0% | 0.82 |
| 51 | Information and cultural industries | 41 | 30 | -11 | -26.8% | 0.11 |
| 52 | Finance and insurance | 159 | 183 | 24 | 15.1% | 0.30 |
| 53 | Real estate and rental and leasing | 60 | 82 | 22 | 36.7% | 0.27 |
| 54 | Professional, scientific and technical services | 421 | 449 | 28 | 6.7% | 0.48 |
| 55 | Management of companies and enterprises | <10 | <10 | Insf. Data | Insf. Data | - |
| 56 | Administrative and support, waste management and remediation services | 850 | 1,039 | 189 | 22.2% | 1.50 |
| 61 | Educational services | 482 | 599 | 117 | 24.3% | 0.72 |
| 62 | Health care and social assistance | 1,459 | 1,486 | 27 | 1.9% | 1.11 |
| 71 | Arts, entertainment and recreation | 233 | 365 | 132 | 56.7% | 1.41 |
| 72 | Accommodation and food services | 641 | 860 | 219 | 34.2% | 1.02 |
| 81 | Other services (except public administration) | 286 | 275 | -11 | -3.8% | 0.54 |
| 91 | Public administration | 270 | 302 | 32 | 11.9% | 0.42 |
| X0 | Unclassified | 149 | 169 | 20 | 13.4% | 0.89 |
| | Total | 11,323 | 12,225 | 902 | 8.0% | |
| Source: EMSI Q3 2017 | | | | | | |

| Exhibit 8 Projected Job Growth In Lincoln | | | | | |
|--|---|-----------|-----------|--------------------|----------------------|
| NAIC Codes | Description | 2017 Jobs | 2022 Jobs | 2017 - 2022 Change | 2017 - 2022 % Change |
| 62 | Health care and social assistance | 1,486 | 1,670 | 184 | 12.0% |
| 31-33 | Manufacturing | 1,665 | 1,773 | 108 | 6.0% |
| 72 | Accommodation and food services | 860 | 961 | 101 | 12.0% |
| 56 | Administrative and support, waste management and remediation services | 1,039 | 1,129 | 90 | 9.0% |
| 41 | Wholesale trade | 935 | 988 | 53 | 6.0% |
| 61 | Educational services | 599 | 646 | 47 | 8.0% |
| 71 | Arts, entertainment and recreation | 365 | 407 | 42 | 12.0% |
| 44-45 | Retail trade | 964 | 999 | 35 | 4.0% |
| 23 | Construction | 894 | 921 | 27 | 3.0% |
| 54 | Professional, scientific and technical services | 449 | 471 | 22 | 5.0% |
| 11 | Agriculture, forestry, fishing and hunting | 1,366 | 1,387 | 21 | 2.0% |
| 91 | Public administration | 302 | 321 | 19 | 6.0% |
| 52 | Finance and insurance | 183 | 197 | 14 | 8.0% |
| 53 | Real estate and rental and leasing | 82 | 96 | 14 | 17.0% |
| X0 | Unclassified | 169 | 182 | 13 | 8.0% |
| 21 | Mining, quarrying, and oil and gas extraction | 101 | 102 | 1 | 1.0% |
| 81 | Other services (except public administration) | 275 | 274 | -1 | 0.0% |
| 51 | Information and cultural industries | 30 | 26 | -4 | -13.0% |
| 48-49 | Transportation and warehousing | 449 | 420 | -29 | -6.0% |
| 22 | Utilities | <10 | <10 | Insf. Data | Insf. Data |
| 55 | Management of companies and enterprises | <10 | <10 | Insf. Data | Insf. Data |
| | Total | 12,225 | 12,981 | 756 | 6.0% |
| Source: EMSI Q3 2017 | | | | | |

Exhibit 9
Change in the Number of Locations of Enterprises in Lincoln, Excluding Indeterminate

| NAICS Code | Description | 2014 | 2016 | Change |
|------------|--|------|------|--------|
| 56 | Administrative and support, waste management/remediation | 31 | 45 | 14 |
| 23 | Construction | 115 | 128 | 13 |
| 41 | Wholesale trade | 47 | 57 | 10 |
| 44-45 | Retail trade | 62 | 72 | 10 |
| 72 | Accommodation and food services | 40 | 46 | 6 |
| 53 | Real estate and rental and leasing | 23 | 28 | 5 |
| 62 | Health care and social assistance | 67 | 71 | 4 |
| 61 | Educational services | 11 | 14 | 3 |
| 48-49 | Transportation and warehousing | 33 | 35 | 2 |
| 22 | Utilities | 0 | 1 | 1 |
| 11 | Agriculture, forestry, fishing and hunting | 115 | 115 | 0 |
| 21 | Mining, quarrying, and oil and gas extraction | 2 | 2 | 0 |
| 91 | Public administration | 3 | 3 | 0 |
| 51 | Information and cultural industries | 7 | 6 | -1 |
| 54 | Professional, scientific and technical services | 56 | 55 | -1 |
| 71 | Arts, entertainment and recreation | 7 | 5 | -2 |
| 31-33 | Manufacturing | 77 | 74 | -3 |
| 52 | Finance and insurance | 21 | 17 | -4 |
| 55 | Management of companies and enterprises | 11 | 6 | -5 |
| 81 | Other services (except public administration) | 68 | 79 | 11 |
| | Total | 829 | 898 | 69 |

Source: EMSI Q3 2017

Exhibit 10
Number of Farms in Lincoln Classified by NAICS Codes

| Description/ NAICS Code | 2011 | 2016 | Change |
|---|-------------|-------------|---------------|
| Fruit and tree nut farming [1113] | 241 | 208 | -33 |
| Greenhouse, nursery and floriculture production [1114] | 67 | 71 | 4 |
| Floriculture production [111422] | 46 | 43 | -3 |
| Poultry and egg production [1123] | 24 | 23 | -1 |
| Oilseed and grain farming [1111] | 25 | 21 | -4 |
| Nursery and tree production [111421] | 18 | 21 | 3 |
| Other animal production [1129] | 16 | 16 | 0 |
| Other crop farming [1119] | 10 | 12 | 2 |
| Broiler and other meat-type chicken production [112320] | 13 | 10 | -3 |
| Other grain farming [111190] | 5 | 9 | 4 |
| Chicken egg production [112310] | 5 | 8 | 3 |
| Horse and other equine production [112920] | 11 | 8 | -3 |
| Vegetable and melon farming [1112] | 6 | 8 | 2 |
| Other vegetable (except potato) and melon farming [111219] | 6 | 8 | 2 |
| Soybean farming [111110] | 11 | 7 | -4 |
| All other miscellaneous crop farming [111999] | 5 | 7 | 2 |
| Other food crops grown under cover [111419] | 3 | 6 | 3 |
| Cattle ranching and farming [1121] | 5 | 5 | 0 |
| Beef cattle ranching and farming, including feedlots [112110] | 3 | 4 | 1 |
| All other poultry production [112399] | 4 | 4 | 0 |
| Apiculture [112910] | 3 | 4 | 1 |
| Animal combination farming [112991] | 2 | 4 | 2 |
| Hay farming [111940] | 2 | 4 | 2 |
| Wheat farming [111140] | 0 | 3 | 3 |
| Corn farming [111150] | 9 | 2 | -7 |
| Dairy cattle and milk production [112120] | 2 | 1 | -1 |
| Turkey production [112330] | 2 | 1 | -1 |
| Mushroom production [111411] | 0 | 1 | 1 |
| Tobacco farming [111910] | 0 | 1 | 1 |
| Hog and pig farming [1122] | 1 | 0 | -1 |
| Fruit and vegetable combination farming [111993] | 3 | 0 | -3 |
| Total number of farms | 395 | 364 | -31 |
| Source: Census of Agriculture, 2016 | | | |

Appendix E

Property Tax and Development Charge Comparisons

Non-Residential – Commercial & Industrial

| Exhibit 1 | | |
|--|---------------------------|---------------------------|
| 2017 Total Non-Residential Comparison of Commercial and Industrial Development Charges ¹ For Selected Niagara Region and Ontario Communities (Charges Per Square Foot) | | |
| Municipality | Non-Residential | |
| | Commercial Per Sq. Ft. | Industrial Per Sq. Ft. |
| Lincoln | \$18.90 | \$12.70 |
| Fort Erie | \$16.08 | \$4.43 |
| Grimsby | \$18.10 | \$7.76 |
| Niagara Falls | \$14.30 | \$4.43 |
| Niagara-on-the-Lake | \$17.47 | \$11.27 |
| Pelham | \$17.22 | \$11.02 |
| Port Colborne ² | \$10.63 | \$4.43 |
| St. Catharines ² | \$10.63 | \$4.43 |
| Thorold | \$14.85 | \$6.27 |
| Wainfleet | \$13.66 | \$7.46 |
| Welland | \$16.43 | \$10.23 |
| West Lincoln | \$13.58 | \$7.38 |
| Hamilton ³ | \$20.67 | \$12.89 |
| Brant ³ | \$6.30 | \$6.30 |
| Leamington | Nil | Nil |
| Kingsville | \$0.71 | \$0.71 |
| Prince Edward County ³ | \$3.89 | \$3.89 |
| Source: BMA Management Consulting Municipal Study 2017 | | |
| Notes: Total Development Charges are used, including Upper Tier and Education levies as appropriate. Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | |
| ¹ Every municipality individually determines the services to be recovered from DCs. The range chosen can have a significant impact on the amount of the charge. | | |
| ² Niagara Region Development Charges Only. | | |
| ³ Single-Tier Municipality. | | |

| Exhibit 2 | | | | |
|---|-----------------|-----------------|----------------------|----------------------|
| 2017 Total Comparative Commercial Property Taxes ¹ for Office Buildings For Selected Niagara Region and Ontario Communities (Municipal, Education and Total Property Taxes Per Square Foot) | | | | |
| Municipality | Municipal Taxes | Education Taxes | Total Property Taxes | Ranking ² |
| Lincoln | \$1.25 | \$0.77 | \$2.03 | Low |
| Fort Erie | \$1.60 | \$0.70 | \$2.30 | Low |
| Grimsby | \$2.78 | \$1.77 | \$4.55 | High |
| Niagara Falls | \$1.59 | \$0.88 | \$2.47 | Low |
| Niagara-on-the-Lake | \$1.70 | \$1.37 | \$3.07 | Mid |
| Port Colborne | \$1.87 | \$0.82 | \$2.69 | Low |
| St. Catharines | \$1.80 | \$0.91 | \$2.71 | Low |
| Thorold | \$1.86 | \$0.92 | \$2.78 | Mid |
| Welland | \$1.40 | \$0.63 | \$2.03 | Low |
| Hamilton | \$1.99 | \$1.04 | \$3.03 | Mid |
| Brant | \$1.76 | \$1.49 | \$3.25 | High |
| Leamington | \$0.98 | \$0.66 | \$1.63 | Low |
| Prince Edward County | \$1.10 | \$0.83 | \$1.93 | Low |
| Source: BMA Management Consulting Municipal Study 2017 | | | | |
| Notes: Total Property Taxes are used, including Upper Tier and Education levies as appropriate. Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | | | |
| ¹ The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | | | | |
| ² The BMA Study ranking is based on dividing the list of municipalities from low to high into as equal as possible tranches of one-third – Low, Mid and High | | | | |

| Exhibit 3 | | | | |
|---|-----------------|-----------------|----------------------|----------------------|
| 2017 Total Comparative Commercial Property Taxes for Neighbourhood Shopping ¹ For Selected Niagara Region and Ontario Communities (Municipal, Education and Total Property Taxes Per Square Foot) | | | | |
| Municipality | Municipal Taxes | Education Taxes | Total Property Taxes | Ranking ² |
| Lincoln | \$2.07 | \$1.28 | \$3.35 | Mid |
| Fort Erie | \$2.39 | \$1.17 | \$3.56 | Mid |
| Grimsby | \$2.25 | \$1.38 | \$3.63 | Mid |
| Niagara Falls | \$2.47 | \$1.37 | \$3.84 | Mid |
| Niagara-on-the-Lake | \$1.75 | \$1.41 | \$3.17 | Mid |
| Pelham | \$2.24 | \$1.30 | \$3.54 | Mid |
| Port Colborne | \$2.92 | \$1.27 | \$4.19 | High |
| St. Catharines | \$2.82 | \$1.42 | \$4.24 | High |
| Thorold | \$2.16 | \$1.08 | \$3.24 | Mid |
| Welland | \$2.80 | \$1.27 | \$4.07 | High |
| West Lincoln | \$1.66 | \$1.08 | \$2.75 | Low |
| Hamilton | \$3.34 | \$1.75 | \$5.09 | High |
| Brant | \$1.93 | \$1.64 | \$3.56 | Mid |
| Leamington | \$1.68 | \$1.08 | \$2.75 | Low |
| Kingsville | \$1.03 | \$1.15 | \$2.18 | Low |
| Prince Edward County | \$1.22 | \$0.92 | \$2.14 | Low |
| Source: BMA Management Consulting Municipal Study 2017 | | | | |
| Notes: Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | | | |
| ¹ The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | | | | |
| ² The BMA Study ranking is based on dividing the list of municipalities from low to high into as equal as possible tranches of one-third – Low, Mid and High | | | | |

| Exhibit 4 | | | | |
|---|-----------------|-----------------|----------------------|----------------------|
| 2017 Total Comparative Commercial Property Taxes for Hotels ¹ For Selected Niagara Region and Ontario Communities (Municipal, Education and Total Property Taxes Per Suite) | | | | |
| Municipality | Municipal Taxes | Education Taxes | Total Property Taxes | Ranking ² |
| Lincoln | \$926 | \$573 | \$1,498 | Mid |
| Fort Erie | \$694 | \$339 | \$1,033 | Low |
| Grimsby | \$855 | \$543 | \$1,398 | Mid |
| Niagara Falls | \$1,749 | \$967 | \$2,717 | High |
| Niagara-on-the-Lake | \$2,011 | \$1,618 | \$3,629 | High |
| St. Catharines | \$830 | \$419 | \$1,248 | Low |
| Thorold | \$1,144 | \$570 | \$1,714 | Mid |
| Welland | \$974 | \$440 | \$1,414 | Mid |
| Hamilton | \$1,375 | \$719 | \$2,094 | High |
| Source: BMA Management Consulting Municipal Study 2017 | | | | |
| Notes: Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | | | |
| ¹ The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | | | | |
| ² The BMA Study ranking is based on dividing the list of municipalities from low to high into as equal as possible tranches of one-third – Low, Mid and High | | | | |

| Exhibit 5 | | | | |
|---|-----------------|-----------------|----------------------|----------------------|
| 2017 Total Comparative Property Taxes for Standard Industrial ¹ For Selected Niagara Region and Ontario Communities (Municipal, Education and Total Property Taxes Per Square Foot) | | | | |
| Municipality | Municipal Taxes | Education Taxes | Total Property Taxes | Ranking ² |
| Lincoln | \$1.17 | \$0.59 | \$1.77 | Mid |
| Fort Erie | \$0.92 | \$0.37 | \$1.28 | Low |
| Grimsby | \$1.36 | \$0.71 | \$2.07 | High |
| Niagara Falls | \$1.15 | \$0.52 | \$1.67 | Mid |
| Niagara-on-the-Lake | \$1.46 | \$0.96 | \$2.42 | High |
| Pelham | \$1.07 | \$0.53 | \$1.60 | Mid |
| Port Colborne | \$1.42 | \$0.51 | \$1.93 | Mid |
| St. Catharines | \$1.32 | \$0.55 | \$1.87 | Mid |
| Thorold | \$1.43 | \$0.58 | \$2.01 | High |
| Wainfleet | \$1.02 | \$0.44 | \$1.46 | Mid |
| Welland | \$0.86 | \$0.32 | \$1.18 | Low |
| West Lincoln | \$1.22 | \$0.66 | \$1.89 | Mid |
| Hamilton | \$2.03 | \$0.69 | \$2.72 | High |
| Brant | \$0.84 | \$0.53 | \$1.37 | Low |
| Leamington | \$0.90 | \$0.40 | \$1.30 | Low |
| Kingsville | \$0.93 | \$0.59 | \$1.53 | Mid |
| Prince Edward County | \$0.66 | \$0.74 | \$1.40 | Mid |
| Source: BMA Management Consulting Municipal Study 2017 | | | | |
| Notes: Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | | | |
| ¹ The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | | | | |
| ² The BMA Study ranking is based on dividing the list of municipalities from low to high into as equal as possible tranches of one-third – Low, Mid and High | | | | |

| Exhibit 6 | | | | |
|---|-----------------|-----------------|----------------------|----------------------|
| 2017 Total Comparative Taxes for Vacant Industrial Land ¹ For Selected Niagara Region and Ontario Communities (Municipal, Education and Total Property Taxes Per Acre) | | | | |
| Municipality | Municipal Taxes | Education Taxes | Total Property Taxes | Ranking ² |
| Lincoln | \$2,497 | \$1,217 | \$3,630 | High |
| Fort Erie | \$985 | \$392 | \$1,377 | Mid |
| Grimsby | \$3,288 | \$1,704 | \$4,992 | High |
| Niagara Falls | \$2,288 | \$1,032 | \$3,319 | Mid |
| Niagara-on-the-Lake | \$2,532 | \$1,661 | \$4,193 | High |
| Pelham | \$243 | \$115 | \$358 | Low |
| Port Colborne | \$605 | \$215 | \$820 | Low |
| St. Catharines | \$4,418 | \$1,817 | \$6,235 | High |
| Thorold | \$2,497 | \$1,013 | \$3,510 | High |
| Wainfleet | \$243 | \$105 | \$348 | Low |
| Welland | \$800 | \$295 | \$1,094 | Low |
| West Lincoln | \$864 | \$458 | \$1,322 | Mid |
| Hamilton | \$7,601 | \$2,498 | \$10,098 | High |
| Brant | \$777 | \$492 | \$1,269 | Low |
| Leamington | \$1,519 | \$668 | \$2,188 | Mid |
| Kingsville | \$635 | \$402 | \$1,037 | Low |
| Source: BMA Management Consulting Municipal Study 2017 | | | | |
| Notes: Comparisons do not take into account incentive programs such as Community Improvement Plans (CIPs). | | | | |
| ¹ The survey seeks to undertake “like” property comparisons across each municipality and across various property types. The relative taxes are calculated by taking current value assessment of the sample properties and applying the total property tax rates for each classification of property. Current value assessment is defined as the amount of money a property would realize if sold at arm’s length. The results should be used to provide the reader with overall trends rather exact differences. | | | | |
| ² The BMA Study ranking is based on dividing the list of municipalities from low to high into as equal as possible tranches of one-third – Low, Mid and High | | | | |

Residential

| Exhibit 7 | | | | | |
|--|--------------------------------|--------------------------|-----------------------------|---------------------------|------------------------------|
| 2017 Total Residential Development Charges For Selected Niagara Region and Ontario Communities (Charges Per Unit) | | | | | |
| Municipality | Single Detached Per Unit | Multiples 3+ Per Unit | Multiples 1 & 2 Per Unit | Apartment > 2 Per Unit | Apartment < 2 Per Unit |
| Lincoln | \$30,829 | \$22,425 | \$22,425 | \$19,979 | \$13,118 |
| Fort Erie | \$27,229 | \$20,803 | \$20,803 | \$18,641 | \$11,699 |
| Grimsby | \$31,363 | \$21,988 | \$21,988 | \$19,454 | \$12,666 |
| Niagara Falls | \$27,313 | \$17,567 | \$17,567 | \$15,819 | \$12,184 |
| Niagara-on-the-Lake | \$25,685 | \$18,626 | \$18,626 | \$16,459 | \$10,625 |
| Pelham | \$29,474 | \$21,052 | \$21,052 | \$19,043 | \$12,482 |
| Port Colborne ¹ | \$15,544 | \$11,324 | \$11,324 | \$10,043 | \$6,408 |
| St. Catharines ¹ | \$15,544 | \$11,324 | \$11,324 | \$10,043 | \$6,408 |
| Thorold | \$27,783 | \$19,763 | \$19,763 | \$17,600 | \$11,511 |
| Wainfleet | \$21,673 | \$14,989 | \$14,989 | \$13,577 | \$8,891 |
| Welland | \$23,121 | \$17,264 | \$17,264 | \$15,099 | \$9,780 |
| West Lincoln | \$23,504 | \$16,156 | \$16,156 | \$14,277 | \$9,200 |
| Hamilton ^{2 4} | \$39,337 | \$28,964 | \$28,964 | \$24,767 | \$17,815 |
| Brant ⁴ | \$22,567 | \$15,886 | \$15,886 | \$13,139 | \$10,316 |
| Leamington ³ | \$305 | \$305 | \$305 | \$305 | \$305 |
| Kingsville ³ | \$9,248 | \$6,831 | \$6,831 | \$5,558 | \$4,374 |
| Prince Edward County ⁴ | \$6,396 | \$5,683 | \$4,494 | \$5,136 | \$3,543 |
| Source: BMA Management Consulting Municipal Study 2017 | | | | | |
| Notes: (1) Niagara Region Development Charges Only; (2) Includes Education Development Charge of \$1,924 per unit; (3) Education Development Charge is \$305 per unit; and (4) Single Tier Municipality. | | | | | |

| Exhibit 8 | |
|--|----------------|
| 2017 Residential Property Tax Comparisons for a Detached Bungalow In Niagara Region and Hamilton | |
| Municipality | Property Taxes |
| Pelham | \$3,146 |
| Port Colborne | \$3,163 |
| Thorold | \$3,200 |
| Fort Erie | \$3,222 |
| West Lincoln | \$3,239 |
| Niagara Falls | \$3,256 |
| Wainfleet | \$3,358 |
| Niagara-on-the-Lake | \$3,445 |
| Welland | \$3,533 |
| Lincoln | \$3,635 |
| Grimsby | \$3,691 |
| St. Catharines | \$3,719 |
| Hamilton | \$4,036 |
| Average | \$3,434 |
| Median | \$3,358 |
| Source: BMA Management Consulting Municipal Study 2017 | |

| Exhibit 9 | |
|--|----------------|
| 2017 Residential Property Tax Comparisons for a Two Storey Home In Niagara Region and Hamilton | |
| Municipality | Property Taxes |
| Niagara-on-the-Lake | \$3,344 |
| West Lincoln | \$4,207 |
| Pelham | \$4,415 |
| Lincoln | \$4,457 |
| Niagara Falls | \$4,551 |
| Fort Erie | \$4,582 |
| St. Catharines | \$4,821 |
| Grimsby | \$4,824 |
| Thorold | \$4,875 |
| Hamilton | \$4,988 |
| Welland | \$5,009 |
| Port Colborne | \$5,068 |
| Average | \$4,595 |
| Median | \$5,702 |
| Source: BMA Management Consulting Municipal Study 2017 | |

| Exhibit 10 | |
|---|----------------|
| 2017 Residential Property Tax Comparisons for a Senior Executive Residence In Niagara Region and Hamilton | |
| Municipality | Property Taxes |
| Grimsby | \$5,717 |
| Welland | \$6,005 |
| Niagara Falls | \$6,018 |
| Lincoln | \$6,089 |
| Pelham | \$6,133 |
| Port Colborne | \$6,211 |
| Thorold | \$6,321 |
| Niagara-on-the-Lake | \$6,351 |
| Hamilton | \$6,475 |
| St. Catharines | \$6,768 |
| Average | \$6,209 |
| Median | \$6,172 |
| Source: BMA Management Consulting Municipal Study 2017 | |

| Exhibit 11 | |
|--|----------------|
| 2017 Residential Property Tax Comparisons for a Multi-Residential High-Rise In Niagara Region and Hamilton | |
| Municipality | Property Taxes |
| Pelham | \$1,271 |
| Lincoln | \$1,364 |
| Grimsby | \$1,445 |
| Fort Erie | \$1,626 |
| Port Colborne | \$1,761 |
| Thorold | \$1,815 |
| Niagara Falls | \$1,830 |
| Hamilton | \$2,114 |
| St. Catharines | \$2,138 |
| Welland | \$2,235 |
| Average | \$1,760 |
| Median | \$1,788 |
| Source: BMA Management Consulting Municipal Study 2017 | |