

City of Brantford

Economic Development Strategy Review and Update
November 2016



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1 Preamble

The City of Brantford has a strong and effective Economic Development & Tourism program. Successful investment attraction wins include food processor Ferrero Canada Ltd. and advanced manufacturer Mitsui High-tec Inc. With a pending industrial land shortage on the near horizon, Brantford must move quickly with its partners, the Province, the County of Brant and Six Nations of the Grand River, to find a solution. The municipality cannot risk tarnishing the reputation it has built for itself as “Open for Business”. It is important that Brantford continue with the positive momentum it has created attracting new business into the city and retaining key companies that comprise its existing industrial base. These traditional economic development activities need to continue.

Feedback from the community indicates that Brantford is poised to take its economic development program to the next level. Greater integration with tourism, arts culture and heritage and community development is part of this widening of the economic development scope.

Brantford is a vibrant community that is growing and diversifying its traditional manufacturing-based economy with expanding post-secondary institutions and growing tourism, arts, culture and heritage sectors. The arts scene is developing in Brantford and needs to be more fully integrated into other community development activities, including economic development.

2 Economic Development Action Plan Overview

This report has been crafted to outline the process, analysis and consultation that was undertaken to facilitate the development of Brantford's Economic Development Strategy Review and Update, as well as to highlight the economic development strategic themes and actions recommended for Brantford.

To ensure a complete and thorough review of the local economy, this review and update of the Strategy also heavily relied on the information contained within Brantford's Situational Analysis. Prepared under separate cover, the Situational Analysis supports the statistical and data analysis component of the Strategy review and update development process.

An additional component of Brantford's Economic Development Strategy Review and Update is the City's 2016 Community Profile. Prepared as a separate stand-alone report, this document's main purpose is to highlight, and make available, information about Brantford that would be of use to an investor exploring opportunities in the city. This "living" document contains up-to-date statistical and community information that will need to be revised regularly.

3 Process Followed

The following diagram has been prepared to visually demonstrate the process followed during the development of Brantford's Economic Development Strategy Review and Update.



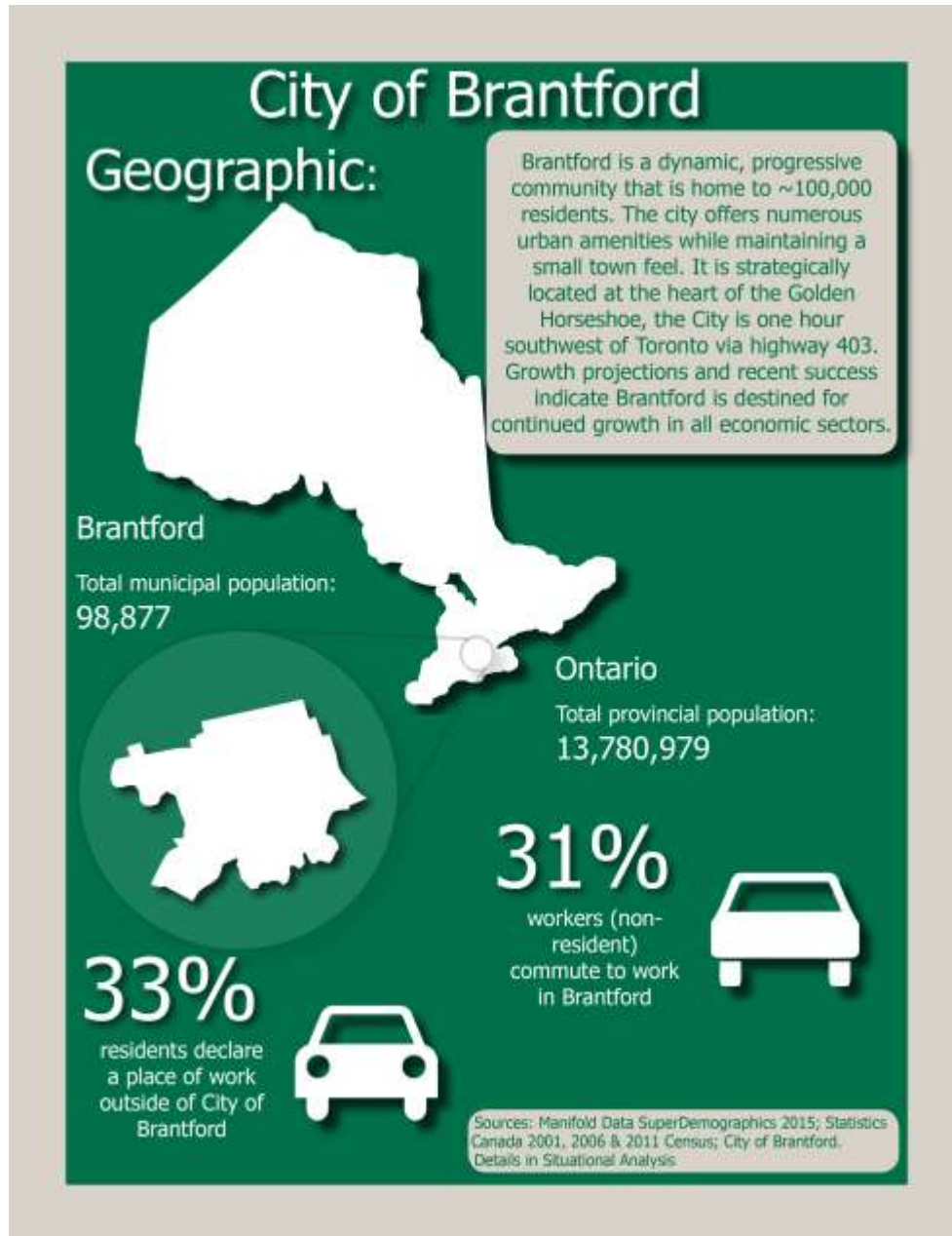
Throughout this robust process there have been several initiatives completed, including:

- Detailed document review (including a review of the 2010 Strategy)
- Stats and data analysis resulting in the creation of a Situational Analysis
- Community Profile
- Stakeholder Consultation through one-on-one interviews, focus groups and an online survey (process details found in Appendix A)
- Strengths, Challenges, Opportunities and Threats Analysis
- An Economic Development Stakeholder Summit
- Consultation on draft Economic Development Strategy Review and Update, including stakeholder feedback and public open house
- Submission of Economic Development Strategy Review and Update

Documents that accompany this report, but are found under separate cover, include the Situational Analysis, Brantford's 2016 Community Profile, and Implementation Plan.

4 Snapshot of Brantford by the Numbers

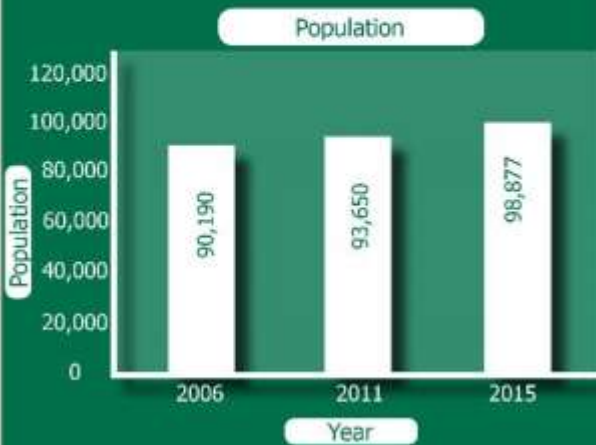
The following section highlights some of the observations and data found through the stats and data analysis. For a more detailed compilation and to source the data, please refer to Brantford's Situational Analysis, which can be found under separate cover.



* Population estimate from Manifold SuperDemographics 2015

Demographic:

Brantford's population has shown a steady increase since 2006. The median and average ages for the community are almost identical to the Ontario numbers. Mobility rates are similar to the provincial figures. There are more women than men residing in the city and housing values are lower than the province.



9.6%

41 Median Age
 Ontario median age is 42

Average value of dwelling **\$369,628**
 Provincial average is \$557,783

Mobility **12.5%**

Residents that had moved within the previous year

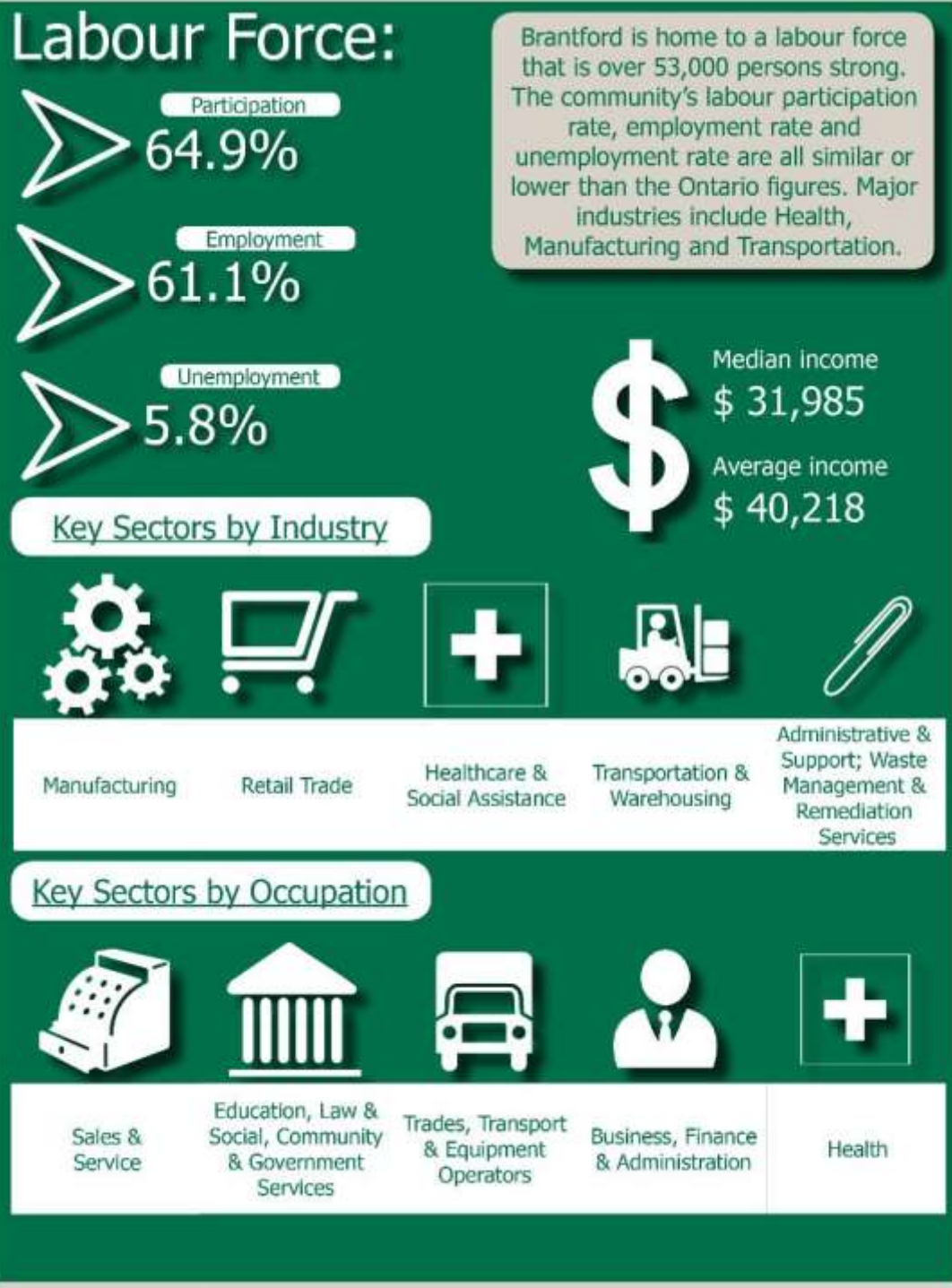
Mobility **39.9%**

Residents that had moved within the previous 5 years

52% **48%**

Population by Gender





4.1 Demographics

The following information is derived from Manifold SuperDemographics 2015 and Census data. Detailed data can be found in the City of Brantford Situational Analysis.

4.1.1 Population

- Brantford's 2015 population is approximately 99,000 residents
- Census years 2006 and 2011 indicate steady growth
- The population has increased 5.6% since 2011

4.1.2 Age Structure

- The 50-54 age segment is the largest of all age segments in Brantford, which is also the largest age segment in Ontario
- Overall, Brantford's age profile is similar to that of Ontario. The median age of 41.4 years is lower than the provincial median of 41.7, while Brantford's average age of 41.2 is just above the provincial average of 41.1

4.1.3 Income

- Compared to Ontario, the percentage of Brantford residents making more than \$50,000 annually was smaller than that of Ontario
- The largest percentage of Brantford's individual income level was the income segment between \$20,000 and \$29,999 annually: This is the same for the province
- In 2014, Brantford's median individual income was \$31,985, while for Ontario it was \$32,968
- The average individual income for Brantford was \$40,218 versus \$47,130 for Ontario

4.1.4 Education

- The percentage of Brantford residents with only a High school diploma or equivalent (29%) is higher than the provincial percentage (24%) in 2015
- Brantford has a higher percentage (10%) of residents with an Apprenticeship of trades certificate or diploma than the province (8%)
- Brantford had a higher percentage of residents with College, CEGEP or other non-university certificate or diploma (28%) than Ontario (24%)

4.1.5 Post-Secondary Education

- The largest field of study by percentage was Architecture, engineering and related technologies¹ - this percentage was slightly smaller than that of Ontario
- Brantford also demonstrated a higher percentage, compared to Ontario, of residents with education in Business, management and public administration

¹ This field includes: Architecture and related services; Engineering; Engineering technologies and engineering-related fields; Historic preservation and conservation; Construction trades; Mechanic and repair technologies/technicians; and Precision production

4.1.6 Migration Patterns

- In 2015, the percentage of Brantford residents that had moved within the previous year (12.5% movers) was higher than the percentage of “movers” in Ontario (11.7%). People moving to Brantford were more likely to be relocating from other parts of Ontario as opposed to moving from outside of the province
- The percentage of Brantford residents that had moved within the past five years was higher than the percentage of “movers” in the province. People moving to Brantford were more likely to be relocating from within the province as opposed to moving from outside of Ontario

4.1.7 Official Languages

- Over 98% of residents in Brantford speak English, which is above the provincial average
- The percentage of residents that speak French (1%) is lower than Ontario (4%)

4.1.8 Other Languages

- Other Home Languages spoken in Brantford besides English and French include:
 - Italian (513)
 - Polish (465)
 - Spanish (216)
 - Portuguese (214)
 - Dutch (175)
 - German (167)
 - Panjabi (Punjabi) (166)

4.1.9 Dwelling Characteristics

- The total number of dwellings in Brantford increased from 35,610 in 2006 to 39,956 in 2015
- The average value of dwellings in Brantford increased from \$200,319 in 2006 to \$369,628 in 2015, which is below the provincial average

4.2 Labour Force

4.2.1 Key Labour Indicators

- In 2006, 2011, and 2015, the labour force participation rates and employment rates were lower in Brantford than the provincial rates
- The unemployment rate is equal to the Ontario rate

4.2.2 Labour Force by Industry

In 2015, a larger percentage of Brantford's resident labour force worked in the following industries as compared to Ontario:

- Manufacturing
- Retail trade
- Transportation and warehousing
- Administrative and support, waste management and remediation services
- Health care and social assistance
- Arts, entertainment and recreation
- Accommodation and food services

4.2.3 Labour Force by Occupation

In comparison to the province, the city has larger percentages of its labour force working in:

- Occupations in manufacturing and utilities
- Trades, transport and equipment operators and related occupations
- Sales and service occupations
- Health occupations

4.2.4 Commuting Patterns

- The majority of the local resident labour force who worked outside of Brantford commuted to work in Brant, Hamilton and Cambridge
- 33% of the workers living in Brantford had a usual place of work outside of the city

4.3 Economic Base Analysis

4.3.1 Employment Profile

- There were 48,132 jobs in Brantford in 2015; with 7,634 jobs, the Manufacturing sector employer was the largest sector in the city

4.3.2 Location Quotient – Sectors

Compared to Ontario and Canada, employment sectors in Brantford with a higher than normal concentration were:

- Manufacturing
- Health care and social assistance
- Arts, entertainment and recreation
- Administrative and support, Waste management and remediation services

4.3.3 Location Quotient – Subsectors

Sub-sectors with high concentrations compared to Ontario and Canada are as follows:

- Warehousing and storage
- Miscellaneous manufacturing
- Food manufacturing
- Chemical manufacturing
- Plastics and rubber products manufacturing
- Miscellaneous merchant wholesalers
- Amusement, gambling and recreation industries
- Nursing and residential care facilities

4.3.4 Location Quotient – Industries

In terms of employment at the industry level, the following industries have very high concentrations:

- Sugar and confectionery product manufacturing
- Fruit and vegetable preserving and specialty food manufacturing
- Gambling industries
- Pharmaceutical and medicine manufacturing
- Other residential care facilities
- Warehousing and storage
- Other miscellaneous manufacturing
- Bakeries and tortilla manufacturing

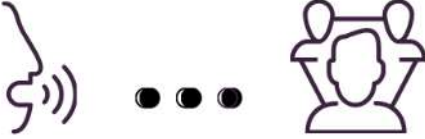





5 Strengths, Challenges, Opportunities, Threats

The following Strengths, Challenges, Opportunities and Threats (SCOT) summary was prepared by analyzing the Situational Analysis, the Community Profile and the input gathered from the 1st round of stakeholder consultations.

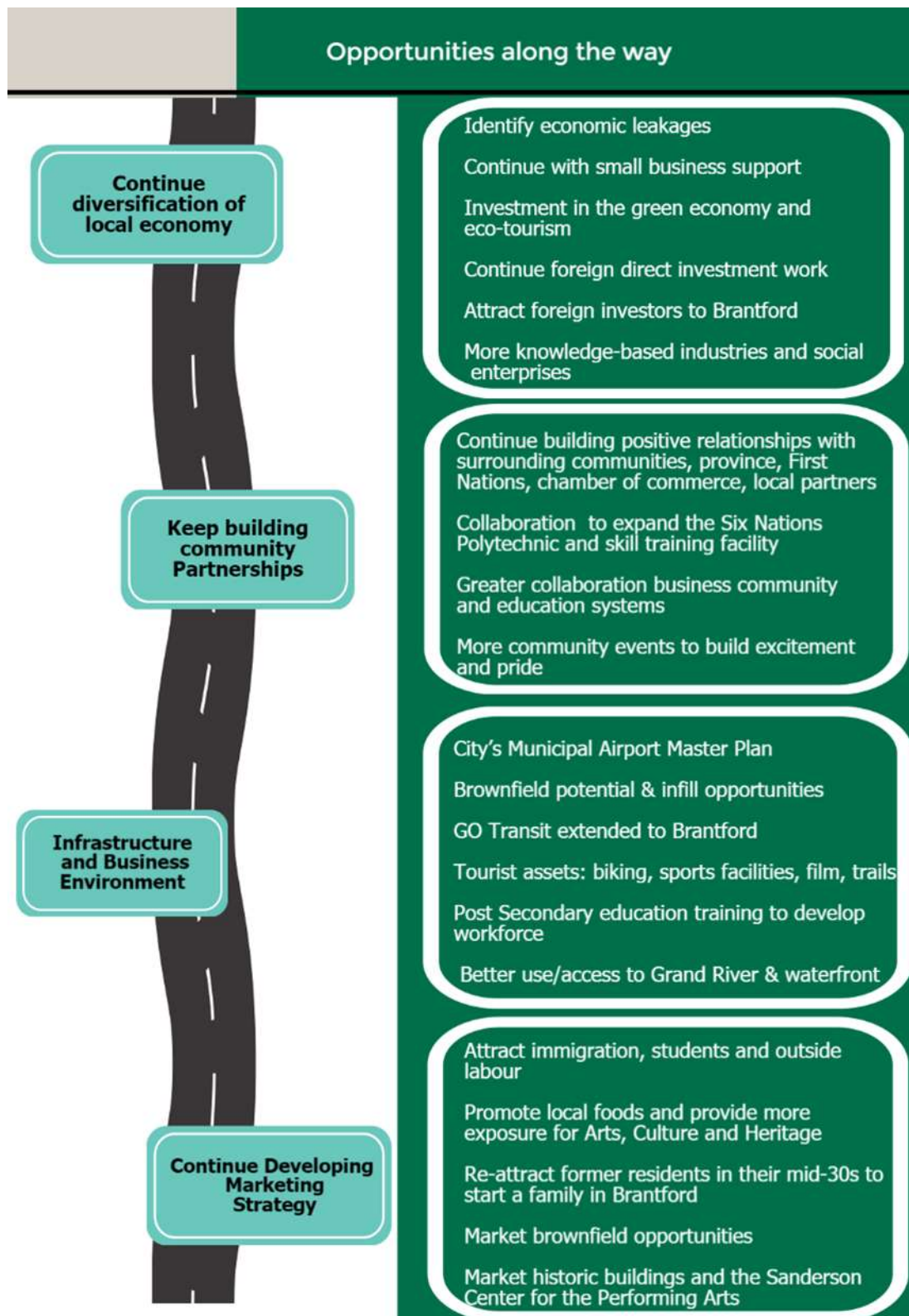
5.1 Strengths

	Strengths of the City
 Business Oriented	<p>Government is pro development</p> <p>Council promotes an "Open for Business" attitude</p> <p>Municipality has a reputation of being business friendly</p> <p>Proven record of Foreign Direct Investment successes</p>
 Growth Oriented	<p>"Smart Brantford"</p> <p>Diverse local economy</p> <p>Strong business sector</p> <p>Brantford-Brant Business Resource Enterprise Centre</p> <p>Enterprise Brant</p> <p>Strong Chamber of Commerce (established in 1866)</p>
 Location	<p>Easy access to highways (403, 400 series), rail (CN) and airports</p> <p>Designated urban growth centre in the Provincial Growth Plan</p> <p>Close major urban centers, markets and US borders</p> <p>Within the Greater Golden horseshoe</p> <p>Close to Great Lakes</p> <p>Rural/natural surroundings</p>
 Infrastructure	<p>Strong water, sewer, transit, power and fiber networks infrastructure</p> <p>Parks, green spaces, rivers, and trail systems available</p> <p>Post-secondary institutions (including programs such LaunchPad)</p> <p>Downtown is a growing community hub</p> <p>Excellent entertainment, sports facilities, restaurants, and hotels that create tourism activity</p> <p>Strong healthcare system</p>
 A balanced city	<p>"Small Town" character in a growing "Big City"</p> <p>Diversified base of arts, culture and heritage assets and activities</p> <p>Affordable compared to the GTA</p> <p>Established industrial sector with capacity to further attract FDI</p>





5.2 Challenges

Challenges facing Brantford	
 <p>Need to continually engage with the community</p>	<p>Running out of shovel-ready land:</p>  <p>The city is literally running out of shovel ready employment land. The city is landlocked and has a limited supply of developable lands. Land transfer agreement has not yet been approved by the province.</p> <p>Enhancing the labour force:</p>  <p>There appears to be a shortage of high skilled workers and skilled trades people. Some training is not available in the city.</p> <p>Retain the most capable workforce:</p>  <p>A lack of permanent jobs, coupled with a communication gap between the education system and local employers is allowing talent to leave. The aging population requires a transition plan.</p> <p>Increase visibility and accessibility:</p>  <p>Further development is still needed attract and retain more consumers in the downtown. Increasing inter regional transportation could lead to more economic activity.</p> <p>Brag, show and tell:</p>  <p>The city needs to come together to support and boast about its assets and how great Brantford has become. External and internal image should be positive. Arts, Culture, and Heritage need more exposure.</p>

5.3 Opportunities



5.4 Threats

	Potential Threats to be Aware of
 <p>Building relationships</p>	<p>Broken relationships between municipal, regional, provincial and federal government, Six Nations, as well as the business community</p> <p>Absentee downtown landlords</p>
 <p>Youth Retention</p>	<p>Retaining graduates through job opportunities and meaningful employment</p> <p>Cost of living rising quickly</p> <p>Lack of available municipal staff to accommodate expected growth</p>
 <p>Image & Marketing</p>	<p>What is Brantford about?</p> <p>Where is Brantford going?</p> <p>Not being able to shake the city's image from the 1980's</p> <p>Succession planning doesn't anticipate impact of "grey tsunami"</p> <p>If Brantford becomes closed for business or too stringent</p>
 <p>Infrastructure</p>	<p>Boundary Adjustment Agreement (no shovel ready employment land)</p> <p>Lack of municipally owned lands</p> <p>Not having sufficient broadband infrastructure to meet business community's growing needs</p> <p>Development of City's new Airport Master Plan</p> <p>Perception of not being able to accommodate growth, including broadband infrastructure</p> <p>Transportation infrastructure not keeping pace with development</p>

6 Economic Development Summit

An Economic Development Summit was used to further engage stakeholders in a conversation in order to help shape and frame the Economic Development Strategy Review and Update. The Summit was hosted on March 31, 2016 with 55 participants, including representatives from the City's business community, political leaders, City staff and the consulting team from McSweeney. The group was led through a presentation on the basics of economic development and a statistical snapshot of the community. The preliminary themes were provided and discussed and the participants had an opportunity to provide feedback and craft draft strategic actions. Final presentations ended the successful event.

The themes and actions from the Summit helped create the basis for the updated Economic Development Strategy.

6.1 Preliminary Themes

In order to best engage the participants of the Brantford Economic Development Summit, the following seven preliminary themes and actions were developed:

- Arts, Culture and Heritage
- Tourism
- Investment Attraction
- Investment Expansion and Retention
- Downtown
- Workforce and Skills Development
- Partnership Development

These strategic themes were developed based on analysis of primary sources of information including the 2010 Economic Development Strategy, Situational Analysis, the Community Profile, previous reports and studies completed by the City, as well input received during the first round of stakeholder engagement phase of the project and the subsequent SCOT.

After presenting these themes, the Summit attendees expanded the themes to also include:

- Infrastructure
- Education

Preliminary actions and ideas were then identified under each theme and all participants of the Summit had an opportunity to discuss, revise and add to the actions. The preliminary themes and actions did not represent the final list of actions, but instead were a starting point for further discussion, brainstorming and prioritizing during the Economic Development Summit.

7 Brantford's Economic Development Strategic Actions

The City of Brantford has done an excellent job implementing their 2010 Economic Development Strategy. In fact, the City has re-emerged as a hotbed of investment in Ontario over the past several years. It has been so successful that it now faces a dilemma in terms of employment land supply. With a growing post-secondary presence in the downtown core and a growing tourism and arts, cultural and heritage base, the City is poised to continue evolving as a well-rounded and diverse economy.

Due to the success Brantford has experienced, this update and refresh of the City of Brantford's Economic Development Strategy is not about making major changes or resetting Brantford's chosen path. Instead, this strategic plan update focuses on continuing the current approach the City has taken towards economic development, with a few adjustments and refinements.

A deliberate continued effort will have to be placed on developing and retaining positive partnerships and relationships in order to strengthen the City's overall ability to successfully implement their economic development program. This will include looking at creating partnerships that help alleviate Brantford's employment land issues, improve the quality and quantity of the workforce and improve the synergies/opportunities generated between tourism activities, arts, culture and heritage offerings and the general Brantford business community. Major local partners include the County of Brant, Six Nations of the Grand River, the Brantford-Brant Chamber of Commerce, local workforce and educational boards and institutions as well as arts, culture heritage and tourism organizations and the business community.

The recommended main areas of focus moving forward include:

- Investment retention and attraction (IRA)
- Infrastructure (including Employment (Industrial) Land Strategy and Brantford's Downtown)
- Tourism
- Arts, culture and heritage (including new media and film)
- Business development (including small business and entrepreneurship)
- Education, skills training and labour development

7.1 Investment Retention and Attraction (IRA)

One of the clear strengths of the City’s economic development program is the ability to retain and attract investment. This is a main priority of the City. Currently, the City has the right team in place and is delivering an effective and complete investment attraction and business retention program (i.e. Advantage Brantford website, profile, trade missions, outreach, visitation program, marketing, etc.). This program is now getting the City deserved attention as a great location for all types of investments primarily in Food Processing, Manufacturing and Logistics.

The new key items that need to be addressed moving forward include:

- Limited supply of shovel ready employment land to accommodate immediate and future investment opportunities
- How to keep the energy and momentum up surrounding the City’s image and proven reputation as a hot spot for investment
- Staffing secession planning to ensure the City’s economic development knowledge surrounding IRA is retained as senior staff members exit the City due to retirement

Investment Retention and Attraction	<p>Ongoing Directions:</p> <ul style="list-style-type: none"> • Continue the active targeting of previously identified sectors for business attraction, including Clean Tech and Logistics sectors • Continue working with key groups that can aid in business attraction efforts, such as realtors, developers, site selectors and senior levels of government • Continue with the positioning statements for the targeted industrial sectors • Focused on those sectors of greatest importance to the City, create industry-specific expertise within the department to enhance the ability to assist existing firms and to demonstrate knowledge when attracting new companies • Treat retention, expansion and attraction as a continuum of activities with staff assigned to specific sectors • Build out Brantford’s investment attraction story to include sector-specific value propositions that showcase Brantford and its unique advantages
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Continue with the City’s existing investment attraction program including current marketing efforts and annual foreign trade mission • Create and strengthen relationships with the Ministry of Economic Development and Growth including a Brantford visit on the itineraries for the annual Ontario conferences of the Senior Economic Officers and International Investment Development Representatives (IIDR) teams • Work to raise the profile of Brantford with the IIDR network by equipping them with key messages, material and information that they can use in their discussions with prospects, and collaborate with them on any upcoming in-market visits by City representatives • Continually update www.AdvantageBrantford.ca to ensure up-to-date data is available to potential investors

- Improve the City of Brantford’s website to streamline the City’s economic development webpages and make it more easy to find information about the City’s economic development services and opportunities including www.AdvantageBrantford.ca
- Create the necessary business processes and staffing secession plan to ensure the City does not lose any of its economic development knowledge specifically pertaining to investment retention and attraction
- Create a focus on regional economic development specifically around investment attractions by:
 - Identifying one political and one senior level staff to coordinate a Brantford-Brant Regional Investment Attraction Working Group with the County of Brant and the Six Nations of the Grand River
 - Creating a regional action plan for investment attraction that identifies at least three joint ventures or projects with the County of Brant and/or the Six Nations of the Grand River focused specifically on investment retention and attraction (i.e. Joint marketing of the region, joint servicing, etc.)

7.2 Infrastructure

The City of Brantford is a fully serviced community that provides all the required necessities to allow for investment into the city's economy.

If the City wishes to continue experiencing positive economic growth, there are some issues that need to be addressed with respect to infrastructure that impacts economic development:

- In order for an investor to determine if there are opportunities in Brantford, they need to know what various sites are available in order for them to locate their businesses as well as the City services and infrastructure available (i.e. Shovel-ready vacant land, buildings, brownfields)
- The City must ensure there is adequate infrastructure in place to continue the positive economic growth its currently experiencing
- Downtown is a vital piece of infrastructure with regards to both economic development and community development that needs to continue its evolution as the core of the city

7.2.1 Industrial Land Strategy

Infrastructure – Industrial Land	<p>Ongoing Directions (Industrial Land Strategy):</p> <ul style="list-style-type: none"> • Continued investment by the City of Brantford in industrial land development is a key strategy component • Infilling existing industrial areas is a priority • Continue to encourage private sector initiatives for new industrial/business park development • Facilitate and encourage reinvestment and revitalization of vacant industrial floor space • Make best use of limited short term supply of industrial land as the city is “landlocked”
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • As a priority, continue working with the County of Brant, the Six Nations of the Grand River and the province to complete current land transfer agreement • Implement the actions found within the Employment (Industrial) Land Analysis (Appendix B) that address industrial land issues: Continue to be active in the industrial land development market to the extent required to ensure a minimum of a five-year supply of serviced employment/industrial lands is on the market at all times • Actively be the leader to seek out shared servicing opportunities with the County of Brant and private sector land owners to bridge the existing industrial land supply gap • Continue with Brantford's Brownfield Incentive Programs (i.e. Community Improvement Plan (CIP), Tax Incentive Program, Development Charges Bylaw) to help guide brownfield developments and intensify land use • Create and maintain inventories of Municipality's physical and social assets to be used as part of the City's infrastructure planning and marketing efforts • Maintain up-to-date and ensure accessible online databases for shovel ready/marketable industrial and commercial land as well as the available City infrastructure

7.2.2 Downtown Economic Development

Infrastructure – Downtown Economic Development	<p>Ongoing Directions (Downtown Economic Development):</p> <ul style="list-style-type: none"> • Revisit the establishment of a working committee to develop a downtown business retention and recruitment strategy, in partnership with the Economic Development Advisory Committee, the Tourism Advisory Committee, the Downtown Business Improvement Area, post-secondary institutions and department staff • Develop marketing tools for the downtown area • Continue the business retention and expansion activities with downtown businesses • Continue to provide capacity-building workshops for downtown businesses
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Continually communicate the positive change and momentum of Brantford’s downtown revitalization to residents • Continue supporting and heavily promoting the City’s Downtown Incentive Programs: <ul style="list-style-type: none"> ○ Downtown Business Performance Grant ○ Design and Façade Grant ○ New Business Grant ○ Relief of Development Charges ○ Parking Exemption Area ○ Cash-in-Lieu for Parking ○ Brownfields CIP and Financial Tax Incentive Program ○ Development Charge By-law (Brownfields) ○ Infrastructure Upgrades • Create and promote a public Wi-Fi hotspot zone covering a designated portion of downtown • Promote downtown tenants like Laurier Launchpad and Brantford-Brant Business Resource Enterprise Centre to create a focal point for innovation and entrepreneurialism • To attract more people: bring attention to Brantford’s downtown; draw consumers to support local downtown businesses; continue the programming at Harmony Square; leverage other local events and promote the expanding Arts, Culture and Heritage attractions, events and festivals downtown • Examine the possibility of increasing the following, to add to the intensification of downtown: 6-storey mixed-use development; higher residential development; and more compact residential developments • Work with the downtown business community to create cross-merchandising opportunities or forums for collaboration • Continue to enforce City bylaws to ensure compliance with property standards • Promote the growing and established arts and culture sector in downtown (i.e. Sanderson Centre for the Performing Arts, Brant Museum and Archives) to bring more people downtown • Consider updating the 2008 Master Plan for Downtown Brantford, this can also be a tool to bring attention to the positive growth of Brantford’s downtown • Continue to update public infrastructure and beautify public amenities (sidewalks, streetscape, signage, public art, etc.) to ensure the continued revitalization of Brantford’s downtown

7.3 Tourism

Tourism is an extremely competitive sector that combines and connects several segments of Brantford’s business community with the many public tourism assets the City has at its disposal. These include heritage, arts, cultural, leisure, attractions, outdoor amenities, meeting and convention space, hotels, restaurants and other community and tourism assets.

The City is well known as the “Tournament Capital of Ontario”. This is a well-deserved title, as the City has the sporting venues, assets and events to back it up. There are other pieces within tourism that complement sports tourism that the City can further strengthen in order to create a well-rounded tourism product offering.

These items include:

- Creating better access points, greater usage and stronger marketing of the Grand River waterfront
- Better use and promotion of the City’s trail system to attract, not only local residents but also tourists
- Eventually upgrade physical links between the City’s trail system and access points along the Grand River
- Building stronger linkages and exposure of the City’s tourism offerings to the business traveler as well as visiting friends and relatives (VFR)
- Intentionally linking sports tourism to other activities occurring in the business community, as well as the broader tourism and arts, culture and heritage sectors

Tourism	<p>Ongoing Directions:</p> <ul style="list-style-type: none"> • Proactively continue to build on the existing relationships with surrounding municipalities and regions as appropriate to leverage opportunities and create broader context • Enhance and develop the relationship with OLG Casino Brantford in order to leverage marketing opportunities • Build on the activities and future tourism-related opportunities of the area's trails and waterways • Continue to support the growth of sports tourism through the strategic marketing of new municipal sports infrastructure and bid and hosting opportunities • Continue to pursue the bid and hosting of corporate meeting and convention events and activities • Develop mechanisms to capture and analyze the Visiting Friends and Family/Leisure market and, through this, review create strategic opportunities for enhanced marketing • Carry out niche tourism market research and segmentation in order to better focus product development and marketing initiatives • Work with the partners from Regional Tourism Organization #3 (RTO 3) to leverage provincial support to enhance the tourism product, experiences and marketing of the area • Continue the implementation of the way-finding signage program
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	<ul style="list-style-type: none"> • Founded in the quality of life and range of amenities in the area, develop an entrepreneur and creative economy investment attraction strategy using the full range of assets that the City and region has to offer • Develop standardized visitor statistics-gathering mechanisms from key attractions in the area to determine why visitors come to Brantford and what else will encourage them to stay longer • Conduct an analysis of current areas of marketing effort and develop opportunities for future growth
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Undertake a Municipal Sports Tourism Strategy that identifies growth opportunities for sport tourism and deliberately links sports tourism with events, culture and heritage, business travel, visiting friends and family, and outdoor active lifestyle opportunities • Continue with the City’s marketing and tourism promotion program within: <ul style="list-style-type: none"> ○ Sports Tourism ○ Corporate (Meetings & Conventions) ○ Trade Travel ○ Cultural Tourism and Development ○ Leisure (including Visitors, Friends and Relatives) ○ Travel Media & Communications ○ Individual Business/Corporate Travel • Update the City’s Tourism website, including reviewing all social media tools being used to promote the City’s tourism offerings • Create an annual tourism event bringing together Brantford’s tourism providers to network and build momentum around this growing sector • Continue the City’s joint marketing efforts with the County of Brant and the Six Nations of Grand River • Undertake an update of the 2010 Waterfront Master Plan. Include an assessment of increasing access points along the Grand River. Identify physical linkages between the Grand River and the City’s trail system • Create a wayfinding program (including signage, trail maps showing supporting infrastructure, access points, parking and business/points of interest) for Brantford’s trail system • Undertake an assessment of the Visitor & Tourism Centre to ensure it is being used to its best and full potential • Consider developing (or finding an existing) a map-based app that focuses on the opportunities to access the City’s local trail system (cycling, hiking, running, etc.) and creating connections to local business and tourist offerings • Create visitor packages to be distributed at all sporting and convention events that outline the City’s business attractions as well as local recreation, arts, culture and heritage attractions – things to do. Make the same packages available online and promote to local residents and businesses

7.4 Arts, Culture & Heritage (Including Film and New Media)

Brantford has a long and storied history, as well as a strong and expanding Arts and Culture sector. Typically, the most challenging aspect of growing the Arts, Culture and Heritage component of an economy is accepting or understanding the economic value of this sector. Is it economic develop or community development or both? Is it a social asset or part of the City’s tourism offerings? In Brantford’s case, this sector is still in the development stage in terms of being treated as a true economic driver, so more work needs to be done to coordinate this sector and link it more closely to the promotion of the City’s tourism activities.

Film and new media have a place within the City’s economic development program and more than likely have a place within Arts, Culture and Heritage if it is not supported as a stand-alone film office.

Some of the new issues affecting Arts Culture and Heritage include:

- Increasing the profile of this sector as a valued economic generator in the city
- Examining how to best incorporate Brantford’s Arts, Culture and Heritage offerings into the City’s sports tourism and overall economic development and tourism program
- Identifying what kind of support the film and new media sector needs

Arts, Culture & Heritage	<p>Ongoing Directions:</p> <ul style="list-style-type: none"> • Continue with the implementation of the Municipal Cultural Plan to increase the creative capacity of the city and to further develop the arts and culture sector • Emphasize the community culture and heritage buildings as attractions • Encourage continued growth of the local cultural sector by integrating economic development strategies with municipal cultural planning
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Complete the investigation of the Mid-Size Performance Space • Hold an annual “State of the Union” Arts, Culture and Heritage event to bring stakeholders together, to celebrate the Arts, Culture and Heritage achievements in the city, give an update on the implementation of the Municipal Cultural Plan and build some continued excitement about this growing sector. • Create a separate Arts, Culture Heritage website or better promote myBrantford.ca through various mediums including social media • Ensure Arts, Culture and Heritage continue to be considered as a valued component in the City’s community and economic development efforts during the implementation of the City’s Economic Development and Tourism program • Continue building Arts, Culture and Heritage as a component into the overall Tourism Brantford Marketing Plan • Undertake a feasibility study to determine the opportunities and impacts of the film industry in Brantford • Create a film and new media action plan to address the business case for the sector. Continue building and updating the inventory of sites and photographs for the film industry, support services as well as a single point of contact for industry inquiries

7.5 Business Development

The City, in collaboration with other agencies, offers numerous resources to assist small business start-ups and expansions. The main client-facing resource is the Brantford-Brant Business Resource Enterprise Centre. The City is responding to the needs of the business start-up community by offering a valued client focused service, including the City’s on-going Economic Development visitation program. Other resources include those found through the Laurier LaunchPad program.

Outside of a continuation of the services already offered through the various business start-up resources, the City’s economic development efforts would be further enhanced if business start-up services were expanded to also focus on:

- A move towards not only business start-ups, but also enhancing services aimed at business retention and expansion
- Social enterprises and social innovation
- Better linkages with the student and entrepreneurship programs offered through Wilfrid Laurier University, Conestoga College, and Six Nations Polytechnic
- Tourism and Arts, Culture and Heritage sectors

Business Development	<p>Ongoing Directions (Business Retention & Expansion):</p> <ul style="list-style-type: none"> • Continue with a proactive approach to business retention and expansion • Continue the Economic Development and Tourism Department’s business visitation program • Conduct workshops with expert presenters • Continue to maintain a comprehensive city-wide directory of businesses and organizations in all sectors • Look for and cultivate synergies amongst existing companies, in order to create internal customer-vendor relationships - a form of “import substitution” • Identify and encourage informal partnerships between firms for mutual gain • Work with retiring business owners to help find successors • Continue to provide information on government programs. Add additional services to assist with the completion of the required applications and plan preparation • Through the utilization of local retirees with business expertise, increase mentorship opportunities available to existing companies, especially the smaller firms, to increase their ability to survive and prosper
	<p>Ongoing Directions (Entrepreneurship and Business Capacity Enhancements):</p> <ul style="list-style-type: none"> • Continue to assist in the business capacity development of the Tourism industry, downtown businesses and smaller industrial companies • Increase the capacity of the Mentorship Program • Continue to support and develop arts and culture entrepreneurship as well as entrepreneurs of the creative economy • Continue to offer support to encourage and develop young entrepreneurs
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Begin moving some in-person business start-up services online by creating and delivering online tools and services to support entrepreneurship and business start-up

- Create new support programs and expand existing mentorship program to assist business retention issues and expansion opportunities
- Create a systematic approach to supporting/responding to the specific business development issues uncovered during the City's business visitation program
- Work with Wilfrid Laurier University, Conestoga College and Six Nations Polytechnic to create new support programs aimed at social entrepreneurs wishing to start-up social enterprises
- Establish a business start-up support network with Wilfrid Laurier University, Conestoga College, and Six Nations Polytechnic to ensure youth entrepreneurship programs are identified and cross promoted
- Research the business development needs of Tourism and Arts, Culture and Heritage sectors to determine if there are specialized business development programs required to support those sectors
- Investigate the demand for and feasibility of an Accelerator Centre/Entrepreneurship Hub

7.6 Education, Skills Training and Labour Development

The availability and the appropriate skillset of the labour force is a critical piece of economic development. Businesses need skilled, able and willing people to drive their operations.

Labour force development normally falls outside of the municipal economic development role, but it is also an area that will benefit from better coordination and collaboration between various public and private sector partners. Brantford is fortunate that they have many of the right players at the table when it comes to labour force development, such as the Workforce Planning Board of Grand Erie, educational boards and institutions (including post-secondary) and the Six Nations of the Grand River. The main issue affecting labour force development is coordination; ensuring the right programs and initiatives are in place to ensure Brantford is helping to develop the labour force their businesses and investors need.

Education, Skills Training and Labour Development	<p>Ongoing Directions (Post-Secondary Education Institutions):</p> <ul style="list-style-type: none"> • Work with the post-secondary Institutions to encourage programming in technology and the sciences that will promote the development of local business clusters • Based upon both the target sectors and existing key sectors, work with the post-secondary education institutions to encourage programming that support these industries • Encourage post-secondary programming that creates higher quality employment opportunities by supporting the attraction and retention of workers in the new economy • Encourage year-round courses at post-secondary institutions in order to provide a more consistent customer base for downtown businesses
	<p>Ongoing Directions (Education, Training and Workforce Development):</p> <ul style="list-style-type: none"> • Establish a Community Task Force, chaired by the Mayor, to bring together all parties to raise the education and skill levels of the community – “Graduate Brantford” • Use continued feedback from businesses to document their present and future skills needs • Encourage local companies to engage in internal workforce training, to benefit both the company and to increase the capacity of employees to meet present and future needs
	<p>New Recommended Actions:</p> <ul style="list-style-type: none"> • Continue to support the Workforce Planning Board of Grand Erie’s workforce development efforts • Open the continued lines of communication between educators, trainers and labour force development support agencies to better coordinate efforts focused on education, skills training and labour development that are Brantford specific

Appendix A - Stakeholder Consultation Process Overview

The first round of consultations consisted of both confidential one-on-one interviews, as well as an online survey and several focus groups. To ensure consistency, the same questions were used throughout the consultations. The following questions were asked during the first round of consultations:

1. What are the City of Brantford's greatest economic strengths?
In other words what makes this community such a great place to do business?
2. What do you feel are the City of Brantford's greatest economic weaknesses? In other words, what makes it challenging to do business in the City?
3. What are the economic opportunities you think the City of Brantford should take advantage of?
4. Are there specific actions you think the City of Brantford should undertake to help improve its business environment or make it easier for businesses to operate or want to locate in Brantford?
5. In an ideal world, please describe the type of businesses and industries you envision Brantford having in 5 to 10 years.
6. What could prevent Brantford from retaining or attracting the businesses and industries you envision?
7. Are there any high priority economic development issues you feel should be addressed by the City of Brantford when developing your new Economic Development Strategy?

Interviews

21 interviews were undertaken with various members of the business community, local stakeholders, council members as well as staff. For consistency, the same open ended questions were used for the interviews, focus groups and online survey.

Focus Groups

55 participants were engaged through focus groups. The group setting allows for participants to debate ideas as well as build on each others' points.

Online Survey

An online survey was created and promoted by the City of Brantford. In total, 49 respondents answered the survey.

Economic Development Stakeholder Summit

A ½ day Economic Development Stakeholder Summit was held with Brantford’s elected officials, partners and stakeholders to discuss the findings of the consultations to date and begin strategizing and crafting actions that would be the foundation of the Economic Development Strategy Review and Update.

Priority Setting Sessions

Two separate priority setting sessions were held to review and prioritize the draft actions found within the 2016 Economic Development Strategy Review and Update. The first session was held with the members of the Steering Committee, elected officials, staff and Brantford’s economic stakeholders. The second session was open to the general public.

Appendix B - Employment (Industrial) Land Analysis



Employment (Industrial) Land Analysis & Strategies For the City of Brantford



Prepared by:



November 2016

Employment (Industrial) Land Analysis & Strategies
For the City of Brantford

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1 Employment (Industrial) Land Development Context

Employment lands are a vital part to the economic health of a City. Generally speaking, employment lands are seen as providing the following attributes:

- A key component of a complete community;
- Tax generators, and crucial for economic stability; and,
- Job providers, necessary to accommodate employment land/employment opportunities¹.

The Greater Toronto Area (GTA) represents the third largest industrial market in North America. Within the GTA, serviced industrial land prices are typically high enough to financially support active and engaged industrial land and building developers, thereby negating the need for municipalities to actively engage as developers of industrial lands.

However, serviced industrial land market prices outside of the GTA are generally lower and provide insufficient profit margins (commensurate with the risks associated with the return on investment) to financially sustain private sector industrial land developers. For municipalities outside of the GTA to remain competitive in the attraction and retention of manufacturing and other industries, municipalities must be actively engaged in the development and servicing of industrial lands.

Lower profit margins on serviced industrial land outside of the GTA has generally meant limited private sector development and that municipalities have been required to actively play a role in the industrial land development market. Municipal involvement is needed to ensure that there is a readily available supply and selection of serviced industrial land on the market at all times.

This is also true for the City of Brantford, which has seen very limited private sector industrial land servicing, and therefore necessitating the active engagement of the City in industrial land development. In fact, for the past 50 years, the municipality has been the principal developer of the vast majority of industrial lands in Brantford.

The City's involvement can be gauged to be very successful in that the City has certainly seen a return of its investment on the acquisition, servicing and sales of industrial land. However, a much more significant measure of return on investment is the very significant property taxes and employment that have resulted. The City also currently enjoys a healthy residential to non-residential assessment ratio of 76%-24% - another significant benefit that partially results from the City's continued active engagement in industrial land development and sales over the years. Appendix A demonstrates the jobs created and retained as a result of developments on industrial lands sold by both public and private sectors.

The last substantial quantity of industrial land (64 net acres) serviced by the City was brought to market in 2007 in its Braneida Phase 9 Business Park. All of these lands have since been sold and developed by industrial users.

¹ City of Brantford Official Plan Review: Our City 2041-Municipal Comprehensive Review of Commercial and Employment Lands, February 2015.

2 Current Brantford Employment (Industrial) Land Supply & Demand Situation

With respect to supply and demand, it is generally held in the Canadian industrial marketplace that a five year supply of available fully serviced ("shovel-ready") industrial land is required at all times to provide balanced market conditions. A five year supply usually provides adequate choice with respect to tenure, location, size, shape and competition in the marketplace.

The City of Brantford currently has a shortfall of available serviced industrial land. From a municipal standpoint, only one parcel of 18 acres remains in the City's Northwest Business Park. The few remaining parcels of available serviced land are owned by a limited number of private owners. These private owners have not demonstrated a willingness to sell these lands as greenfield sites to an end user as their business model is directed towards the more profitable design build to suit/lease arrangements. Further, this diminishing supply of serviced land also means an insufficient choice (if any) of the size, shape, and location of lots suitable for the industrial land user. As a result, these two factors make Brantford less competitive in comparison to surrounding jurisdictions who have greater land availability and lower real estate development costs (i.e. land sale price, development charges). These shortfalls have resulted in the City not being able to satisfy new greenfield investment enquiries and/or existing industrial business expansions in some cases.

2.1 Historical Demand for Industrial Land

To determine historical demand for serviced industrial land in Brantford, records relating to sales and development of public and private industrial lands from 1997-2015 were examined and analyzed.

During the period between 1997 and 2008 for lands purchased from the City:

- An average of 351,000 square feet of industrial building space was constructed annually (initial build) on lands purchased from the City.
- With a typical lot coverage of 15% on initial build, and a 20% coverage with subsequent expansions, the average annual acquisition of industrial land over this period was 54 acres/year.

During the period between 1997 and 2008 for lands developed on lands sold by the private sector:

- An average of 214,000 square feet of industrial building space was constructed annually on lands purchased from the private sector.
- With a typical lot coverage of 24%, the average annual acquisition of industrial land over this period was 21 acres/year.

During the period between 2009 and 2015 for lands purchased from the City:

- An average of 64,000 square feet of industrial building space was built annually;
- With a typical lot coverage of 17%, the average annual acquisition of industrial land was just 9 acres/year.

During the period between 2009 and 2015 for lands developed on lands sold by the private sector:

- An average of 80,000 square feet of industrial building space was constructed annually.
- With a typical lot coverage of 28%, the average annual acquisition of industrial land over this period was 21 acres/year.

Summarizing development on lands sold by both the public and private sector:

- Between 1997 and 2008, an annual average of 719,000 square feet was built, consuming an annual average 75 acres of lands formerly held by both public and private sector;
- Between 2009 and 2015, an annual average of 144,000 square feet was built, consuming an annual average 16 acres of lands formerly held by both public and private sector;
- Developments on industrial lands sold by the City between 1997 and 2013 now generate in excess of \$12 M per year in total property taxation.

The 2008 recession and decline in North American manufacturing output and employment certainly resulted in substantially less construction of industrial space during the 2008-2011 period. The strength in market demand for industrial development in the GTA returned in 2012 however, and has been strong for the past two years. Brantford has not however experienced a return to the level of greenfield industrial development that it experienced prior to 2009.

2.2 Projected Demand for Serviced Industrial Land Supply

Based upon historically normal market cyclical conditions, such as the period between 1997 and 2008, and assuming a similar development pattern in the future, approximately 700,000 square feet of development can be expected on employment/industrial lands, resulting in the consumption of approximately 75 acres per year.

The City of Brantford 2014 Hemson Development Charges Background Study projects development on employment/industrial lands to average 401,838 square feet over the period of 2014 to 2023. This is 44% lower than the actual development during the 1997 – 2008 period. This level of development would consume between 42 and 62 acres per year based upon 1997-2008 historical consumption patterns.

As a result, development on employment/industrial lands can be expected to require a minimum of approximately 42 – 75 acres/year, with a median of 58 acres/year assumed to be safe to ensure an adequate supply of land for planning purposes.

Therefore, the five-year supply of serviced industrial type lands to provide balanced market conditions would require a constant supply of 290 serviced net acres on the market available for development at all times.

2.3 Current Brantford Industrial Land Supply

Currently, there are 12 parcels of serviced industrial land in Brantford, with a net developable acreage of 161.6 acres shown on Brantford's June 10, 2016 map of Vacant Industrial Land (Appendix B). This is theoretically a 2.5-year supply of land based upon a consumption rate of 58 acres per year.

However, the development potential of much of the 162 acres land is limited by:

- Physical features limiting development area, or impacting cost of development;
- Parcel configuration (shape, size, etc.);
- Owner motivations (land not for sale, will only build to suit/lease, etc.)

As a result of these limitations, the effective supply of serviced shovel ready land that is currently available for purchase by an end user is just the one City owned site of 18 acres. This parcel cannot be subdivided, and must be consumed as a single parcel.

2.4 Insufficient Supply of Serviced Employment/Industrial Lands

Brantford finds itself in a position of having substantially less than a five-year supply of serviced industrial land on the market, and with limited possibilities of bringing more land on stream that would satisfy that requirement.

The City of Brantford's inadequate serviced industrial land supply puts Brantford in a very weak position to compete for new investment, and this limited land supply is now a critical limiting factor in greenfield industrial development within Brantford.

With a tightened land supply, a few Brantford companies will expand on their existing sites, and there may be a few infill developments and/or severances that will allow some additional development. However, these individual projects will be small in nature, not sufficient to address the inadequacy of industrial land supply in Brantford, especially over the longer term.

Brantford companies that have outgrown their site, or companies that might have located within Brantford will locate in alternate locations due to the insufficient supply and choices in available land. In addition, a tightening land supply results in less investment enquiries as real estate intermediaries learn of limited land availability. In other words, hard-earned "market momentum" is lost.

It should be noted that the County of Brant inventory of available serviced land is also quickly diminishing². Local industries not able to expand in either Brantford or the County of Brant due to a limited supply of available serviced land may be forced to locate completely out of the region, which would be a loss of employment and taxation to the local economies of both municipalities.

² The County has released a Request for Proposals for consulting services to prepare an employment land needs analysis. The current estimated available land supply is 10 acres.

3 City of Brantford Employment (Industrial) Land Supply Intervention Strategy

It is clearly evident by the current serviced land supply shortage that the private sector alone cannot deliver the required quantity and quality of industrial land required by market demand. As noted earlier, market land price conditions for serviced land compared to land acquisition and servicing costs deter the private sector from active land development unless accompanied by building development. In addition, the majority of the remaining designated unserviced employment/industrial lands are located in areas where the servicing costs alone exceed current serviced market values.

The City of Brantford has a long and successful track record in the acquisition, planning, development, marketing and sales of industrial land – in fact, the City has historically been the principal developer of industrial land in Brantford.

The City's continued direct involvement in the industrial land supply market is required in order to allow Brantford to be competitive again in the Southern Ontario industrial land market for new greenfield investment, and to retain existing Brantford companies that need to expand on a new site.

Proposed Strategy Statement:

That the City of Brantford continue to be active in the industrial land development market (including acquisition, partnerships/collaborations, planning, servicing, marketing and sales), to the extent required to ensure a minimum of a five year supply (approximately 290 acres) of serviced employment/industrial lands are on the market at all times.

3.1 Supply Strategies

To increase the supply of serviced industrial land to the required levels will necessitate short, medium and long-term strategies. It should be noted that the remaining unserviced employment lands in Brantford face a greater number of development constraints than are normally found in greenfield developments. This may require innovative and/or unconventional approaches to ensure that the required land supply is serviced and brought to market, all of which will require a business case outlining the extent of City involvement in land development. A greater consistency and availability of serviced land supply will help maintain market sales and development momentum in a competitive market.

Short term strategy (2016-2017):

- That the City work with industrial land owners to achieve an objective of bringing a minimum of 100 net serviced acres to market in 2017, and that "available for purchase" opportunities exist within that supply.

Medium term strategy (2017-2022):

- That the City of Brantford become as active as required to ensure that lands located north of Highway #403 in the City's northwest industrial area are serviced and brought to market within five years. Actions may include acquisition and/or partnerships/collaborations with the private sector, and would begin with an appraisal of the lands.

Long term strategy (2017- 2028)

- An agreement to adjust the municipal boundary between the City of Brantford and the County of Brant has been agreed upon by the municipalities and is with the Minister of Municipal Affairs for approval. Assuming expeditious approval, the agreement would be effective January 1, 2017, and would result in the transfer of 739 gross hectares of land designated for employment uses. Upon Ministerial approval, it is recommended that the City begin taking an active role in the planning, acquisition (if required), servicing/development, marketing, and sales of designated employment lands in the boundary adjustment area to ensure a continuous sufficient supply of serviced employment/industrial lands per the recommended policy statement on the previous page.
- That in addition to the above strategies, and as indicated by preliminary agreement with the County of Brant, the City should undertake the servicing analysis of employment lands (Cainsville and Brantford Airport areas). Determination of Joint Venture servicing will follow. These actions do not preclude the necessity of implementing the other preceding strategies.

Appendix A: Industrial Land Sales, Development, Jobs

Municipal Industrial Land Sales

Year	Acres Sold	Total Sq.Ft. Built	Total Lot Coverage (Avg)	New Jobs	Retained Jobs
1997	20.379	343,173	25.13%	165	0
1998	39.79	491,354	24.65%	370	94
1999	33.11	197,349	17.53%	258	473
2000	46.065	362,064	17.46%	225	446
2001	99.772	842,222	19.79%	815	298
2002	51.5	410,023	16.20%	539	237
2003	25.35	158,348	14.53%	56	119
2004	191.863	2,422,934	25.41%	1044	117
2005	17.07	106,518	24.00%	80	5
2006	13.139	52,200	21.43%	23	11
2007	31.372	48,500	9.05%	18	17
2008	1.12	55,853	22.00%	50	70
2009	0	0	0	0	0
2010	0	0	0	0	0
2011	10.68	155,288	13.98%	0	25
2012	13.44	40,000	7.00%	16	24
2013	0	0	0	0	0
2014	26.97	74,000	5.00%	17	4
2015	16.13	178,000	18.43%	60	50
Totals	637.75	5,937,826	17.60%	3,736	1,990

Private Industrial Land Sales*

Year	Acres Sold	Total Sq.Ft. Built	Total Lot Coverage (Avg)	New Jobs	Retained Jobs
1997	0	0	0	0	0
1998	0	0	0	0	0
1999	0	0	0	0	0
2000	0	0	0	0	0
2001	0	0	0	0	0
2002	0	0	0	0	0
2003	0	0	0	0	0
2004	218.82	2,348,190	28.05%	918	111
2005	27.87	167,000	13.76%	95	138
2006	0	0	0	0	0
2007	0	0	0	0	0
2008	4.66	55,853	27.50%	50	70
2009	0	0	0	0	0
2010	0	0	0	0	0
2011	0	0	0	0	0
2012	0	0	0	0	0
2013	0	0	0	0	0
2014	1.9	31,200	37.70%	10	5
2015	44.16	531,795	25.08%	150	24
Totals	297.41	3,134,038	26.42%	1,223	348

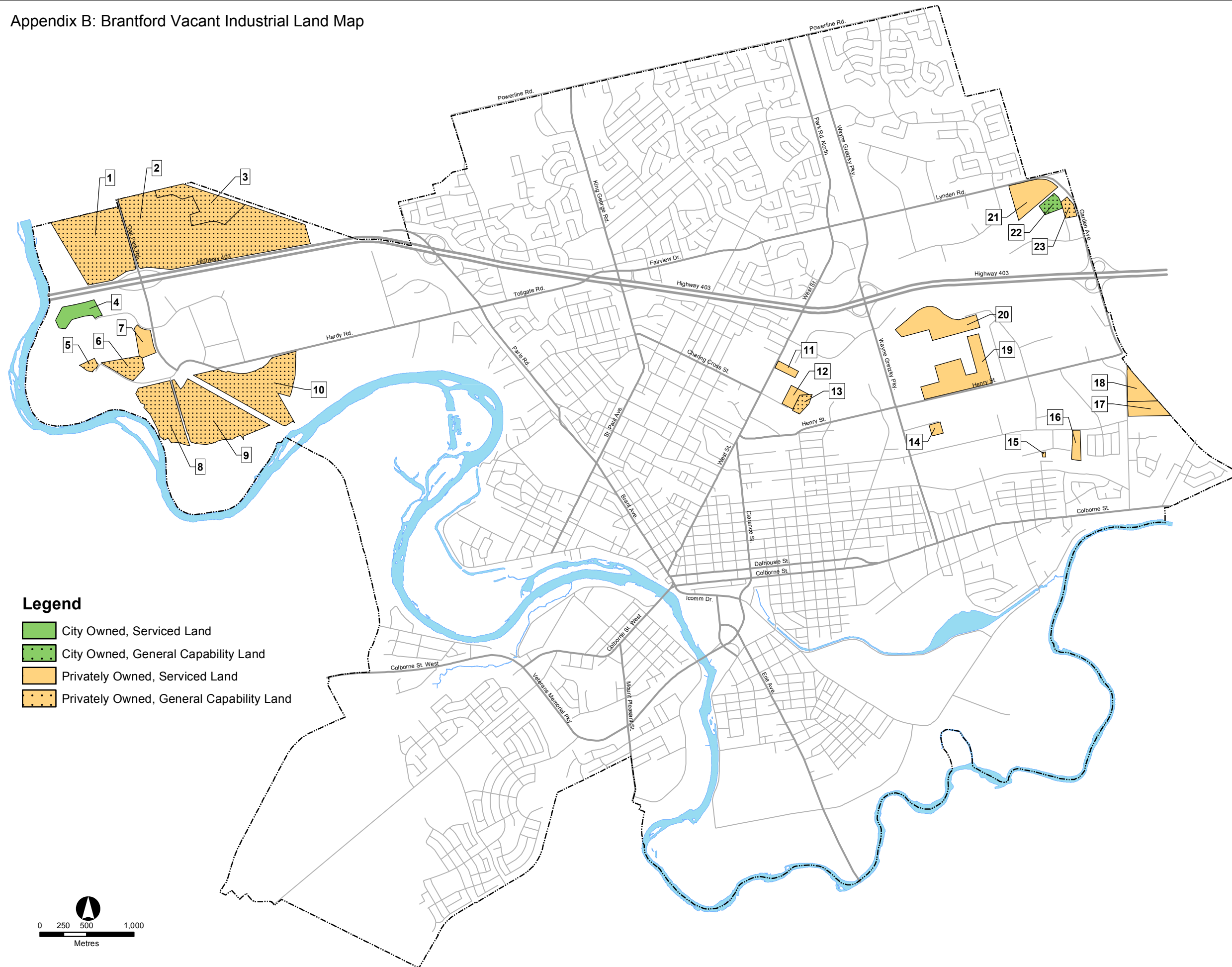
*Only includes industrial lands that have been developed

Source: City of Brantford

Appendix B: Brantford Vacant Industrial Land Map



Vacant Industrial Land



Site No.	Acres	(Net)	Owner	Servicing
Northwest Industrial Area				
1	113.0	93.8	Private	General Capability
2	253.3	207.0	Private	General Capability
3	45.0	30.0	Private	General Capability
4	18.0	18.0	City	Serviced
5	4.0	0.0	Private	General Capability
6	16.2	16.2	Private	General Capability
7	12.3	12.3	Private	Serviced
8	60.5	31.5	Private	General Capability
9	92.2	85.8	Private	General Capability
10	97.6	77.4	Private	General Capability
Total	712.2	572.0		

Braneida Industrial Area - South of 403				
11	4.6	4.6	Private	Serviced
12	7.5	7.5	Private	Serviced
13	6.0	0.0	Private	General Capability
14	4.0	4.0	Private	Serviced
15	0.4	0.4	Private	Serviced
16	8.4	4.0	Private	Serviced
17	15.1	12.9	Private	Serviced
18	14.0	10.0	Private	Serviced
19	37.0	37.0	Private	Serviced
20	43.0	36.8	Private	Serviced
Total	140.1	117.3		

Braneida Industrial Area - North of 403				
21	29.7	14.1	Private	Serviced
22	23.8	8.2	City	General Capability
23	5.8	5.8	Private	General Capability
Total	59.3	28.1		

City-Owned
 18.0 Serviced
 23.8 General Capability
 41.9 Total Acres

Privately Owned
 176.1 Serviced
 693.6 General Capability
 869.7 Total Acres

Total Vacant Industrial Land
 194.1 Serviced
 717.4 General Capability
 911.5 Total Acres

717.4 Estimated Effective Acreage