

Clause 3 in Report No. 11 of Committee of the Whole was adopted, without amendment, by the Council of The Regional Municipality of York at its meeting held on June 23, 2016.

3

Economic Development Marketing and Communications Strategy

Committee of the Whole recommends:

1. Receipt of the presentation by Doug Lindeblom, Director, Economic Strategy.
2. Adoption of the following recommendation contained in the report dated June 3, 2016 from the Commissioner of Corporate Services and Chief Planner:
 1. This report be received for information.

Report dated June 3, 2016 from the Commissioner of Corporate Services and Chief Planner now follows:

1. Recommendation

It is recommended that Council receive this report for information.

2. Purpose

This report outlines a new economic development marketing and communication strategy to facilitate the attraction of new office employment and development in York Region.

3. Background

Growth in knowledge-based office jobs is essential for York Region's economic vitality

Economic vitality remains a strategic priority and cornerstone for building a prosperous Region. The importance of a strong economy is identified in strategic guiding documents of Council including Vision 2051, the York Region Official Plan, 2010 (YROP-2010), current and previous Strategic Plans and the 2016 to 2019 Economic Development Action Plan.

York Region's economy continues to demonstrate a successful shift from goods-producing to service-producing industry sectors. Services now account for roughly 80 per cent of both jobs and business establishments locally, with most recent growth taking place in office and institutional work environments.

As well, over 85 per cent of York Region's resident labour force is in services and knowledge-based occupations such as financial services, business and office administration, information technology, engineering, healthcare, management and professional services. The Region's resident labour force is also one of Canada's most educated, with 73% having post-secondary education. However, a large share of York Region's labour force (over 205,000 residents) travels to work outside the Region. Most commute to office or institutional jobs in Toronto.

Continued growth in office jobs in York Region, along with the office properties to accommodate those, will not only strengthen economic resilience but is also needed to create complete communities and ensure that those living in York Region also have the opportunity to work here.

The 2015 office market analysis identified opportunities and challenges in achieving office employment growth in York Region

The Regional employment forecast calls for an increase in major office jobs in York Region to up to 168,000 total jobs by 2041, more than double the 72,000 major office jobs in the Region in 2011. Most of these forecast jobs will be accommodated in office space located in regional centres and corridors.

In an effort to better understand the opportunities and challenges of attracting office jobs and office development in the future, a comprehensive Office Space Financial/Market Analysis and Marketing Plan Study was undertaken. The study was endorsed by Regional Council in April 2015.

The study found that generally, York Region is an attractive and cost-competitive location for future office growth in the Greater Toronto Area (GTA) context. However while York Region's office market is growing, its share of total new office development in the GTA has been declining over the past fifteen years. The majority of new office construction in the GTA in recent years has occurred primarily in the City of Toronto's downtown core, driven by demand in financial services and technology sectors. Market demand in the 905 municipalities, including York Region, remains limited at present.

Despite strong economic and labour force fundamentals, impediments to growth in York Region's office market continue. Many of these relate to macro-economic issues the Region has no direct influence over. On a local level, while major new office employers continue to relocate to York Region, there have also been recent high-profile outbound relocations as well as relocations across municipal boundaries in York Region. This underscores the competitive nature of GTA's office market and challenges of attracting new office development.

As per recommendations outlined in the 2015 office market analysis, Regional Council approved a plan to develop and execute a marketing strategy that will create awareness and influence behaviours regarding office location decisions in York Region. The goal of the strategy is to facilitate retention and attraction of quality office employers and, in turn, facilitate demand in the local office market, primarily in growth centres and along major transit corridors across York Region.

Regional services and marketing for facilitating retention, expansion and attraction of growth businesses are currently delivered through the "Invest in York" program

The current Investment and Marketing program (Invest in York) is specifically focused on facilitating Business Retention, Expansion and Attraction (BRE&A) in York Region. The program is a core activity that directly supports the Economic Vitality strategic priority area of the Region's Corporate Strategic Plan.

Working in collaboration with local municipalities and an extensive external partnership network the Invest in York program delivers region-wide services to help retain, expand and attract growth businesses in York Region, with a focus on knowledge-based sectors and companies.



Key services delivered by the Invest in York program consist of the following:

- Identification, assessment and business advisory support of established growth companies in York Region that are positioned to expand or re-invest
- Targeted identification, qualification and support of external domestic and foreign companies that may consider a new business presence in York Region
- Development and maintenance of a network of client support contacts and business attraction multipliers in York Region, the Greater Toronto Area (GTA), Canada and select international markets
- Promotion and marketing of York Region and its area municipalities as the location of choice for business and technology investment in the GTA
- Business intelligence and focused economic research to support Regional and local-municipal BRE&A and marketing initiatives

The existing marketing strategy promotes York Region as a top business location in the GTA, focused on the technology sector

In response to market needs and opportunities, regional economic development marketing communications has evolved significantly over the last 15 years. Marketing has evolved from tourism-driven messaging -- “Ontario’s Rising Star” - in the late 1990’s, to targeted strategies focusing on green business in 2010, to the technology sector as of 2013.

As directed by the previous Economic Development Action Plan (2012-2015), Invest in York implemented a targeted marketing strategy focused on the significant local Information and Communications Technology (ICT) business cluster and the clusters’ role as a connecting innovation thread between key industry sectors in York Region. This strategy distinguished York Region as an enterprise-scale (business-to-business) technology hub, impacting client investments and driving media exposure.

At the core of the Invest in York program is an integrated marketing strategy that successfully promotes York Region as a top location for business and technology investment. Key components of the strategy include an economic development website, business social media, client presentation package and print material.

The Invest in York website (www.investinyork.ca), a dedicated source for business news and economic data from across York Region, continues to experience strong growth since its 2011 rollout. The Program also interacts with business stakeholders via dedicated social media channels including Twitter (@investinyork) and LinkedIn, with over 7,000 followers combined.

Since 2010 Invest in York’s business advisory services and the program’s marketing strategies, facilitated the creation of over 1,000 new and expansion jobs in York Region. As well, a local business client base with combined employment of about 20,000 jobs has been supported.

4. Analysis and Options

A new marketing and communications strategy promoting York Region to office employers is grounded in the Region’s 2015 office market analysis

The office market analysis study endorsed by Regional Council in April 2015 concluded that promoting York Region’s strengths and advantages relative to office users would assist in efforts to grow local jobs, attract quality employers and, in turn, facilitate demand in the local office market. A key action area under the 2016 to 2019 Economic Development Action Plan calls for the development and execution of a collaborative office attraction marketing and communication strategy.

The new strategy will target employers across knowledge-based services sectors in the context of Greater Toronto Area’s competitive office market. It aims to build awareness, address perceptions and influence behaviours regarding office location decisions in York Region, primarily within the Region’s mixed-use urban growth centres and along major transit and transportation corridors.

The following table outlines key differences between the current marketing strategy (Invest in York) and the new marketing direction (York Link):

Current marketing strategy (Invest in York)	New marketing direction (York Link)
<ul style="list-style-type: none"> • Brand focus on industry clusters and service identity • Technology and innovation positioning • Messaging focused on York Region’s position as a top location for enterprise-scale (business-to-business) technology companies • Highlighting York Region’s national-leading technology cluster as the connecting thread through other major industry sectors including life sciences, financial services, engineering, environmental technologies, creative industries and advanced 	<ul style="list-style-type: none"> • Brand focus on community ‘placemaking’ and access to talent • Growth and prosperity positioning • Will highlight York Region as a success connector for businesses and people across knowledge-based office sectors • Position York Region as leader in connecting fast growing communities and urban centres where innovative businesses can thrive • Messaging will tell the story why York Region is uniquely positioned as the intersection of talent and opportunity in the

<p>manufacturing</p> <ul style="list-style-type: none">• Emphasis on the concentration of GTA-leading talent in technology, business, management and related fields living in York Region• Message amplification via tech-focused business attraction multipliers, tech industry media etc.	<p>Greater Toronto Area (GTA)</p> <ul style="list-style-type: none">• Amplifying York Region's investments in building highly desirable communities that will continue to attract the top talent in the GTA to live and work• Message amplification via office real estate stakeholders, cross-sector business multipliers, mainstream media etc.
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The new marketing strategy was developed with the help of top creative and office real estate consultants

In October 2015, following a competitive Request for Proposals process, a joint bid from creative advertising agency Shikatani Lacroix and commercial real estate services firm Jones Lang LaSalle was selected to develop the office attraction marketing and communication strategy.

Project deliverables consisted of a set of marketing messages, creative artwork, media tactics and high-level implementation guidelines. The creative direction aims to promote targeted business expansion and attraction in York Region, while intersecting with a range of office market stakeholders from commercial office developers and brokers to corporate tenants.

Development of the new marketing strategy involved extensive input from office market stakeholders and target audiences

The development phase of the new marketing and communication strategy was a rigorous process that took place between November 2015 and March 2016. Shikatani Lacroix used a proprietary three phased process to develop the strategy. The process was designed to identify common marketing messages, with extensive input from the target audience and office market stakeholders.

Included in the process was a comprehensive comparative analysis of the current marketing position of other jurisdictions both in the GTA and globally. Additional research was conducted analyzing best practices in international business attraction marketing in jurisdictions such as London, Tel Aviv, Amsterdam, and Fairfax County (Virginia). Additionally, local and regional GTA municipal brands as well as developer-driven office attraction brands (e.g. Toronto's 'South Core', Mississauga's 'Spectrum Square' etc.) were also reviewed and benchmarked.

In the final phase, a strategy and communication plan was developed and the creative standards and final artwork for communication campaigns were finalized.

Consultative tools such as one on one interviews, focus groups, and surveys were leveraged throughout all phases to validate and ensure that messaging and creative resonate with target audience perceptions of the advantages of being located in and around major business office nodes in York Region.

Office market stakeholders engaged through the process included:

- regional and local municipal economic development officers and planners
- the development industry
- commercial office brokers
- office property management companies
- prominent office tenants located in regional centres and corridors

The marketing strategy's preferred creative direction resonated with ninety-four percent of office market stakeholders engaged

The new marketing and communications strategy builds on key regional assets and advantages to promote growth in knowledge-based office jobs in York Region, within the competitive GTA marketplace.

The strategy reflects what resonated with the target audience and dozens of office market stakeholders engaged during the consultation process. The creative approach positions York Region as a success destination for progressive businesses that are looking for higher returns on investment, because its' existing and future connected office nodes provide "the most convenient access to the most talented people."

The visual direction - "York Link" - features an icon that implies themes of "connecting" and "linking" people, businesses and communities. The essence of the new visual icon projects a community that is forward thinking, progressive, leading, optimistic and welcoming. The creative is flexible and can apply across a range of office market stakeholders.

A tagline was developed and validated extensively to support the new creative direction. The tagline "Where Talent and Opportunity Intersect" is consistent with why the target audience considers York Region an attractive office location. Based on stakeholder feedback this messaging can also be leveraged beyond centres and corridors to reflect other emerging employment areas in the region.



The use of bold colours and intersecting lines and nodes in the icon allow the “York Link” identity to be interpreted in different ways by various target groups: Connected (407/404/400 highways grid and/or 7-Yonge VIVA corridors), growth centres, office nodes, quality of life, diversity and geographic features.

Ninety-four percent of office employers, office real estate industry representatives and economic development stakeholders who responded to the consultants’ survey chose the “York Link” icon and tagline as the preferred option.

The new visual icon focuses on office business ‘placemaking’ under the wider Regional government brand

‘Placemaking’ economic development marketing concepts leverage unique attributes of a community to strengthen the connection between people and the place, with the ultimate goal of attracting businesses and/or talent.

The “York Link” icon and tagline are designed to focus on office business ‘placemaking’ in the context of York Region’s economic and urban growth, under the wider Regional government brand. Furthermore, it will target exclusively local and external decision makers and office market stakeholders in the business community rather than the region’s resident base.

The new icon is also designed to serve as a linking thread between existing local office market brands such as “Vaughan Metropolitan Centre,” “Downtown Markham,” “Markham Centre”, “Allstate Corporate Centre,” as well as future brands such as the Town of Newmarket’s corridor marketing strategy. The “York Link” campaign can be applied to any existing or planned office employment location across the Region, where the message of intersecting talent and opportunity resonates with companies. Local municipalities and private sector office market stakeholders will be able to leverage the “York Link” umbrella icon as needed to enhance their individual value proposition with the regional value proposition and economies of scale.

The new marketing direction presents an opportunity to consolidate regional economic development growth icons

The new strategy presents an opportunity to consolidate separate regional economic development icons, specifically “Invest in York” and “Centres and Corridors,” as multiple brands dilute market reach and target audience impact.

The “Invest in York” icon used by York Region’s Economic Strategy division has not been refreshed since first established 2010. The program has evolved significantly over recent years and now delivers a wide range of services in collaboration with local municipalities and external stakeholders. Transitioning from “Invest in York” to “York Link” icon will shift the emphasis from program-focused branding to placemaking, and better position Economic Strategy to deliver the new strategy.

Similarly, the term “Centres and Corridors” has not been refreshed since first established in 2002 to describe a strategy that coordinates municipal policies, infrastructure investments and programs that drive intensification and joint city building efforts forward in York Region. While originally used as a policy framework the term has evolved over the years into a brand identifier utilized for the engagement of residents and stakeholders on the Region’s urban growth vision. While “Centres and Corridors” remains a professional policy term, the opportunity exists for public and business engagement on York Region’s urban growth to be undertaken jointly under the new “York Link” icon so as to maximize exposure opportunities and ensure alignment with the new strategy.

Execution of the new marketing strategy is scaled for annual delivery with existing resources

The execution phase of the new marketing and communications strategy is expected to begin in the third quarter of 2016. It will be delivered annually as part of the 2016 to 2019 Economic Development Action Plan.

A range of external marketing tools and tactics will be utilized for the delivery of the strategy including campaigns via dedicated on-line business channels, advertising, public relations, earned and paid media, direct marketing, multimedia and print material.

A detailed execution plan, along with applicable performance metrics, will be developed and scaled for annual delivery to fit existing budget and resources. Key examples of proposed action areas include a partnered launch event, on-line transition from investinyork.ca to “York Link” domains (yorklink.com, yorklink.ca and yorklink.org), public transit advertising, media placements, press releases highlighting new corporate and growth investments, corporate testimonial videos,

digital advertising, targeted social media campaigns (Twitter, LinkedIn, Facebook, YouTube) and client/community engagement displays.

“YorkLink” was previously a Community and Health Services program with an associated URL that was discontinued several years ago and it now has been transferred for use by Economic Strategy for the “YorkLink” office attraction campaign. The www.yorklink.ca URL has already been redirected to the www.investinyork.ca website while the campaign is being developed.

A range of external marketing tools and tactics will be utilized for the delivery of the strategy including campaigns via dedicated on-line business channels, advertising, public relations, earned and paid media, direct marketing, multimedia and print material.

A detailed execution plan, along with applicable performance metrics, will be developed and scaled for annual delivery to fit existing budget and resources. Continued delivery beyond the scope of the current Economic Development Action Plan will be assessed and considered as per market requirements.

The new marketing strategy and supporting business advisory services will be delivered through a phased targeting approach

Office space expansion, relocation and rationalization by existing companies in the Greater Toronto Area (GTA), in knowledge-based services sectors, represent most of the office market activity in the GTA. As per the consultants’ recommendations, the new marketing strategy and associated business advisory services will therefore target primarily executive decision makers living or doing business in York Region and the GTA, followed by other Canadian business hubs and, to a lesser extent, select international markets.

While the primary focus of the new marketing strategy is the GTA and domestic market, it will also reinforce the foreign business presence in York Region. The Region is home to an estimated 500 foreign companies and subsidiaries with a total of 50,000 jobs - about one in ten local jobs. The United States (U.S.), representing 60% of Foreign Direct Business Investment (FDI) in York Region, has traditionally been a target for regional level business development and marketing, thus complementing other markets targeted by the Region’s local municipalities such as China, India, Israel, Italy and Scandinavia.

Link to key Council-approved plans

The 2016-2019 Corporate Strategic Plan, Regional Official Plan and Vision 2051 all recognize as a priority growth in knowledge-based jobs, supported by growth and new development in the local office market. In particular, focusing major

office employment growth within mixed-use and transit-oriented regional centres and corridors is a policy in the Regional Official Plan.

5. Financial Implications

The consultant undertaking the development of the new marketing and communications strategy was retained through a formal Request for Proposal. All costs associated with the work have been included in various department approved budgets. Execution costs of the new strategy will be addressed through existing budget allocations or appropriate budget requests in future budgets.

6. Local Municipal Impact

Growth in knowledge-based office jobs and mixed-use commercial development in the regional centres and corridors plays a key role in meeting the Region's population and employment growth targets. All of York Region's municipalities recognize the importance of realizing the right mix of quality jobs and commercial office development in order to realize the shared vision of complete communities.

The new marketing direction was influenced early on by extensive discussions with local municipalities and commercial office stakeholders. Opportunities were identified to leverage a regionally scaled marketing and communications strategy that will complement and align with individual office placemaking brands and value propositions.

The new "York Link" umbrella icon and associated messaging is designed to serve as a linking thread between multiple local office market brands across York Region driven by local municipalities and/or office market stakeholders. Preliminary discussions have already started regarding specific collaboration tactics such as cross-promotion, exchange of multimedia and sharing of business data and statistics for marketing purposes.

The new office attraction marketing and communications strategy will direct research and analysis, business advisory services, and awareness building marketing undertaken by York Region's Economic Strategy division in collaboration with the local municipalities. All local municipalities have been engaged in the development of the strategy's new creative direction, and will continue to be engaged in the execution phase in order to augment and align business retention, expansion and attraction efforts in York Region.

7. Conclusion

York Region's economy and resident labour force continue to shift to knowledge-based services sectors such as financial services, business administration, technology, engineering, healthcare and professional services. Continued growth in major office jobs, along with the office properties to accommodate those jobs, is therefore needed to strengthen economic resilience and ensure that those living in York Region also have the opportunity to work here.

A comprehensive Office Space Financial/Market Analysis and Marketing Plan Study, endorsed by Regional Council in April 2015, concluded that promoting the strengths and advantages of York Region relative to office users would assist in efforts to retain and attract quality employers and, in turn, facilitate demand in the local office market. The subsequent development of a new office attraction marketing and communication strategy was completed in March 2016 with execution starting in the third quarter of this year.

The key objective of the new marketing and communications strategy is to facilitate growth in office employment and demand for new office space in York Region, primarily within mixed-use regional centres and along major transit corridors. It will target knowledge-based office employers in the context of GTA's competitive marketplace and build awareness, address perceptions and influence behaviours regarding office location decisions in York Region.

A new visual icon, validated extensively by dozens of office market stakeholders through a comprehensive consultation process, is themed around "connecting" and "linking" people, businesses and communities. The creative approach focuses on office business placemaking marketing of York Region under the wider regional government brand. It also presents an opportunity to consolidate other regional economic development growth icons, specifically "Invest in York" and "Centres and Corridors."

Expansion, relocation and space rationalization by existing growth companies in the Greater Toronto Area (GTA) represents most of the office market activity in the GTA. Therefore, the new marketing strategy, and associated business advisory services, will target executive decision makers living or doing business in York Region and the GTA, followed by other Canadian business hubs and, to a lesser extent, select international markets.

For more information on this report, please contact Doug Lindeblom, Director, Economic Strategy at ext. 71503.

Economic Development Marketing and Communications Strategy

The Senior Management Group has reviewed this report.

June 3, 2016

#6796151

Accessible formats or communication supports are available upon request



Economic Development Marketing and Communications Strategy

Presentation to
Committee of the Whole

Doug Lindeblom

June 16, 2016

Purpose

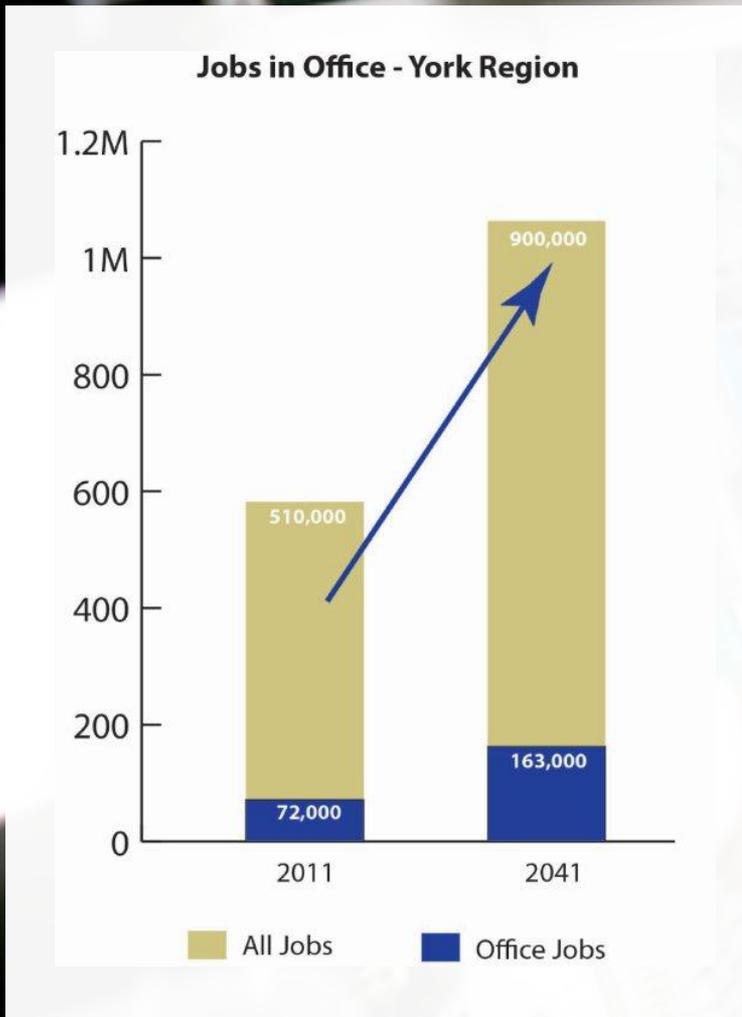
- Inform Committee of the rationale for refocusing marketing and communications on knowledge based office job retention and attraction
- Introduce the new YorkLink campaign

The Office Attraction Journey

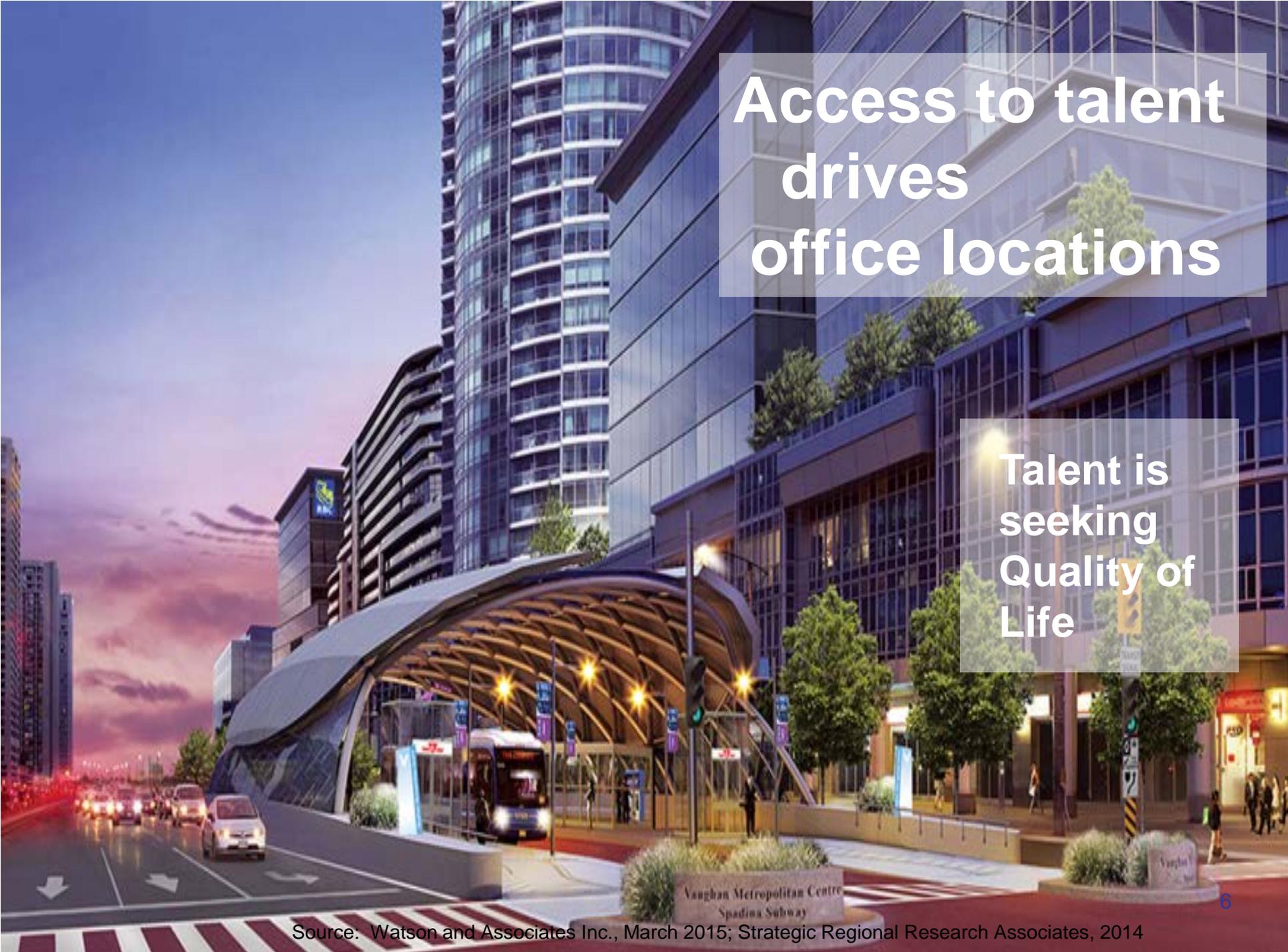
- Office Market Analysis – 2014
- Labour Force internal research – 2015
- Marketing Campaign - 2016



Office Market Analysis



Office development accommodates high quality jobs the Region is looking to attract and retain

An architectural rendering of a modern city street at dusk. The scene features a multi-story office building with a curved glass facade on the left, and a modern subway station with a curved, ribbed roof structure in the foreground. A subway train is visible under the station. The street is illuminated by streetlights, and there are cars and pedestrians. The sky is a mix of purple and blue. Two semi-transparent text boxes are overlaid on the image.

Access to talent drives office locations

Talent is
seeking
Quality of
Life

Vaughan Metropolitan Centre
Spadina Subway

*“The talent in this Region is really exciting.
...Engineers with diverse backgrounds can create
technologies that can be used for all cultures...”*

Mr. Michael H. Yuan, Executive Vice President
CleNet International (U.S. / China)

Markham Board of Trade Luncheon | May 31, 2016



*“Our new location
better links us to our
905 clients, downtown
staff, and like minded
professionals and
talent”*

Mr. Sean McCormick
Executive Director Procurement & Real Estate
KPMG Canada



York Region is on the Right Track

Attracting Office	What we've done
Office Supportive Policy	✓
Investment in Infrastructure	✓
Promoting Live-Work mix of uses	✓
Promoting university campus in Downtown Markham	✓

Regional Council has been diligent in laying the ground work to ensure economic success

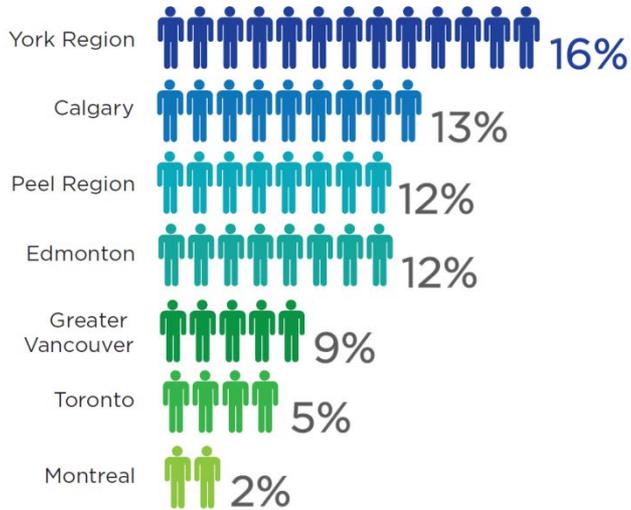
Future Opportunities

Opportunities Going Forward	What we will do
Official Plan Review	Refine office supportive policies
Continue Investment in Infrastructure	Build cities
Communication and Marketing (creating awareness)	Get the message out

Opportunities remain to advance York Region's ability to attract office employers

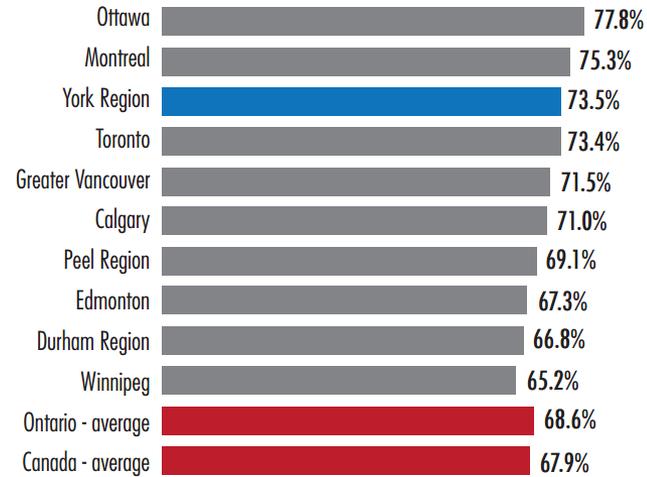
Labour Force Analysis

Population Growth 2006-2011
Canada's Largest Municipal Census Divisions



Source: Statistics Canada, 2006-2011

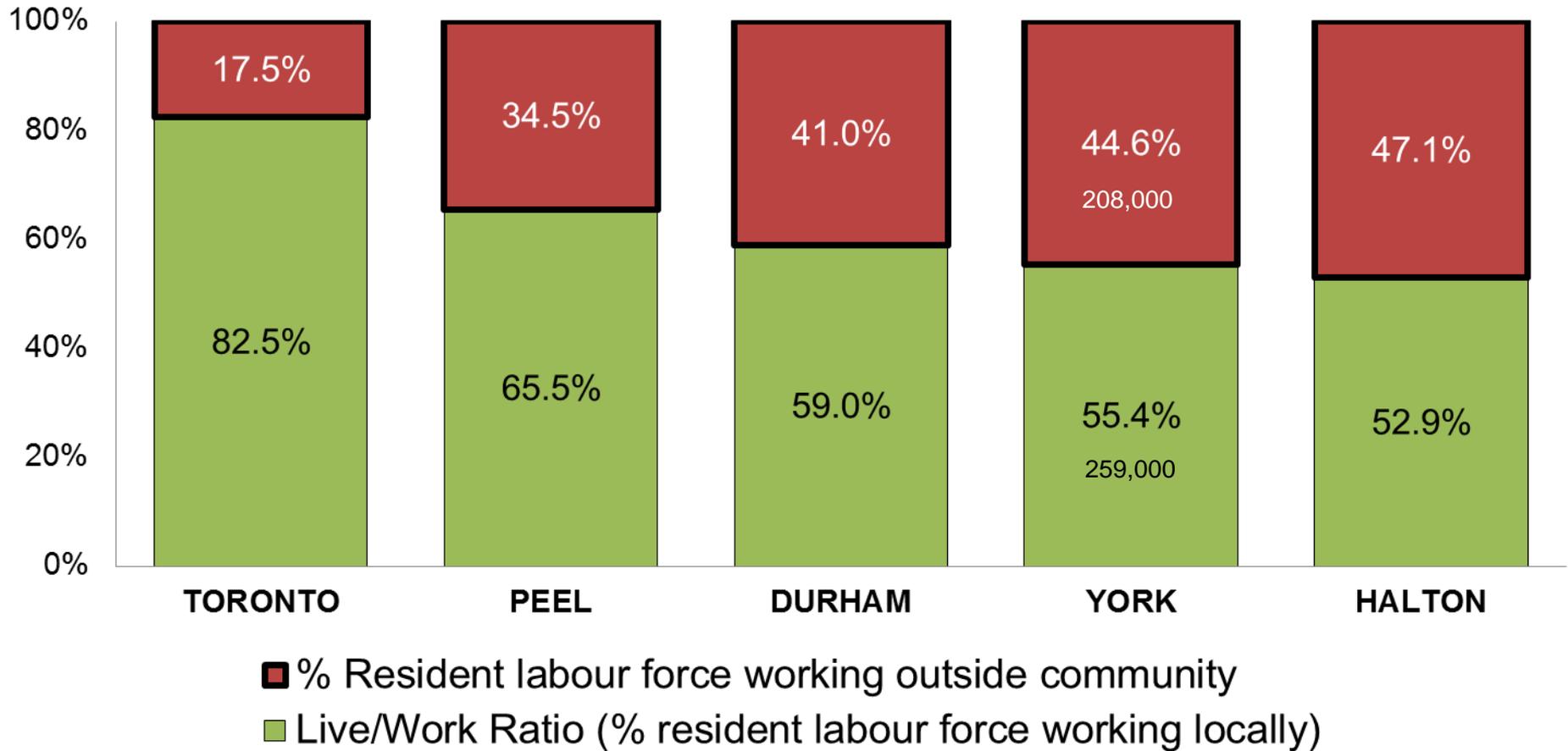
Percentage of Population with Postsecondary Education
aged 25-64 in the labour force



Source: Statistics Canada, National Household Survey, 2011

York Region's labour force is among
Canada's fastest growing, most educated

Live/Work Ratio Employed Labour Force Aged 15 years and Over



York Region has GTA's 2nd lowest Live/Work ratio
208,000 residents work elsewhere

Bottom line:

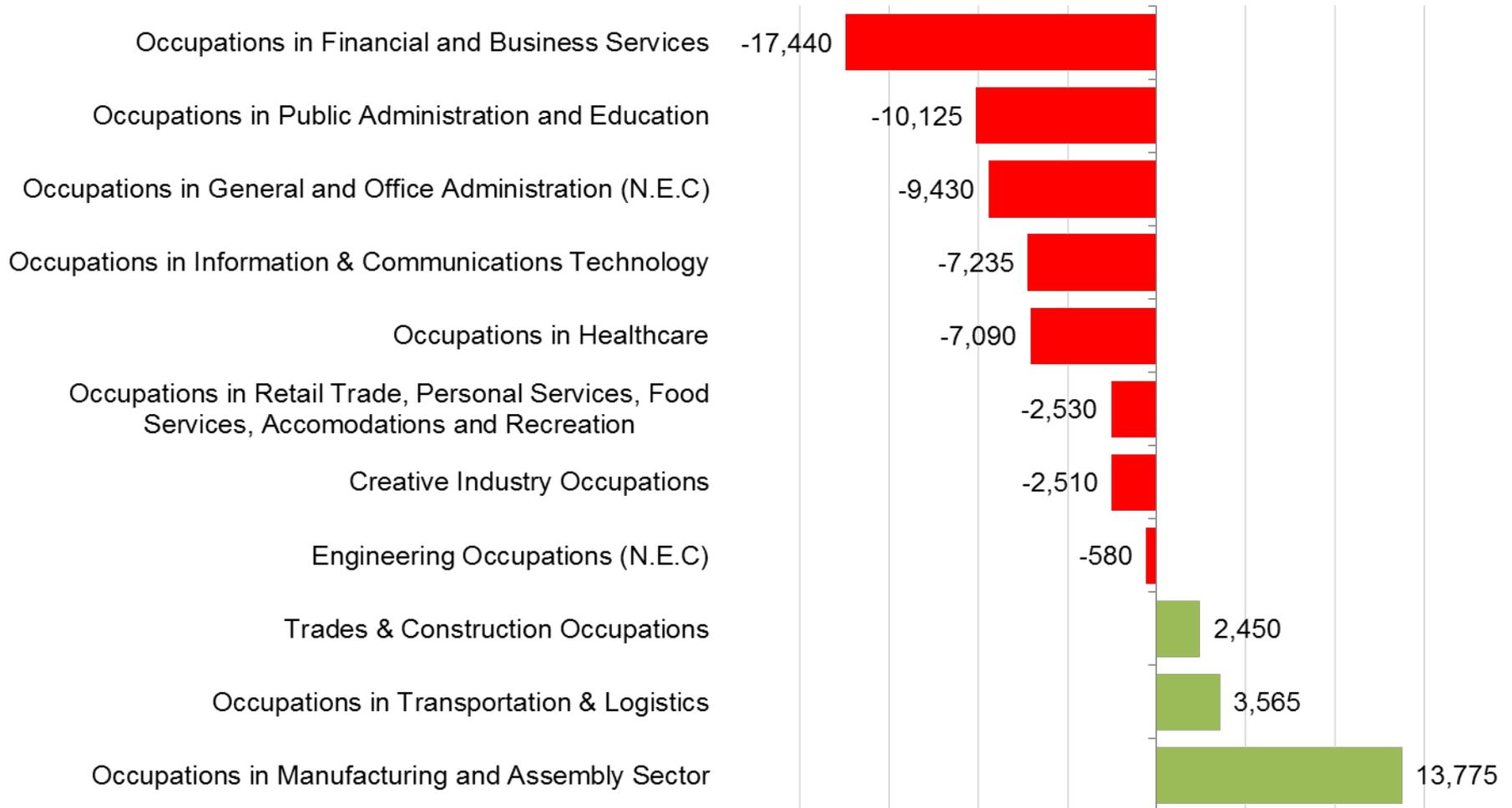
“A low Live/Work Ratio indicates that the local labour force is not well served by the opportunities available in the local employment market...”

Watson & Associates Economists



Residents' demand for high-skilled jobs far exceeds local supply – we are 'exporting' talent

York Region Jobs Shortage or Excess Demand in Occupational Clusters

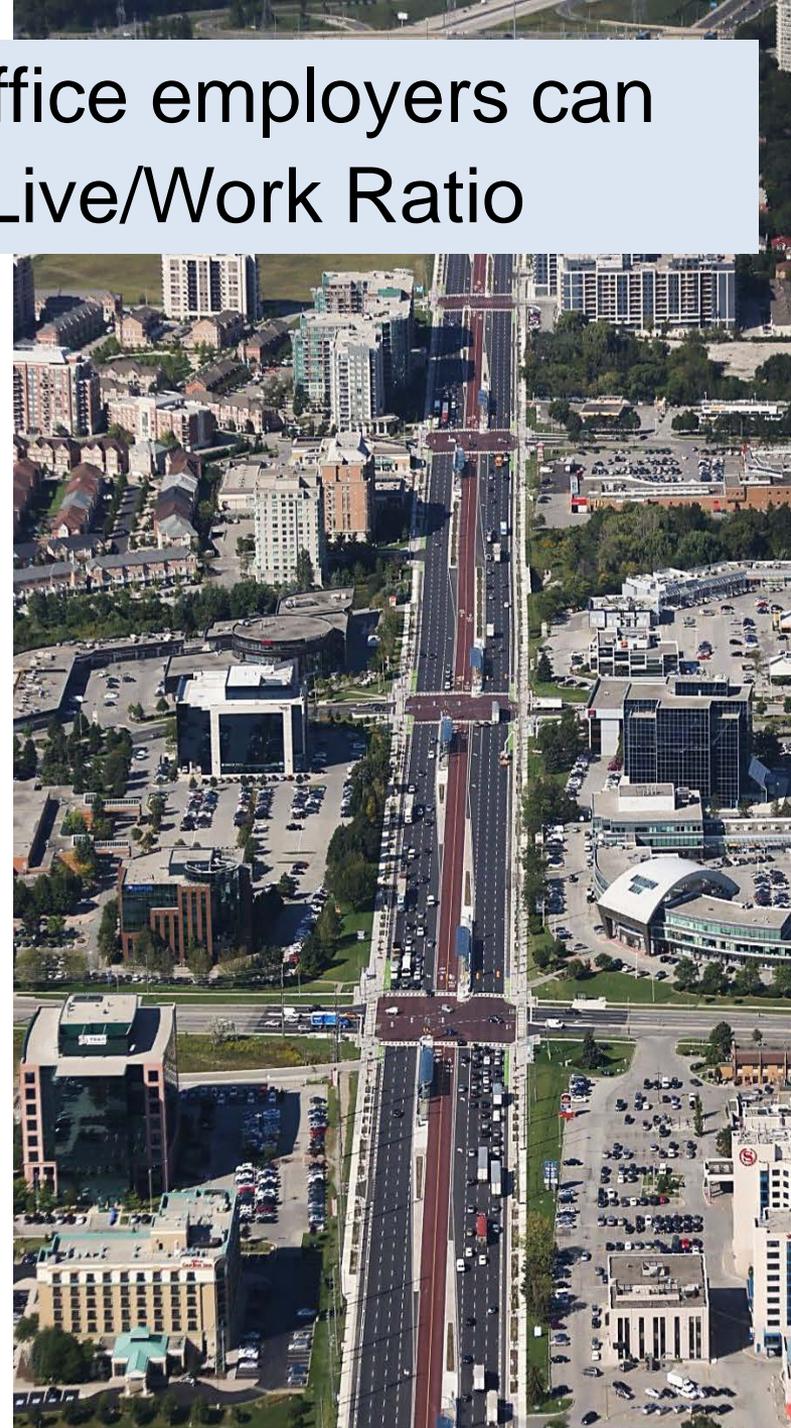


Targeting knowledge based office employers can address York Region's lower Live/Work Ratio

Sector focus strategy

Geographic focus strategy

Labour force/business connection strategy



Office Attraction Campaign

Developing the Campaign

shikatani **Lacroix** 

Clients - Creative



Seneca

Tim Hortons



Clients - Office Real Estate



UNISYS

T-Mobile



YAHOO!



accenture

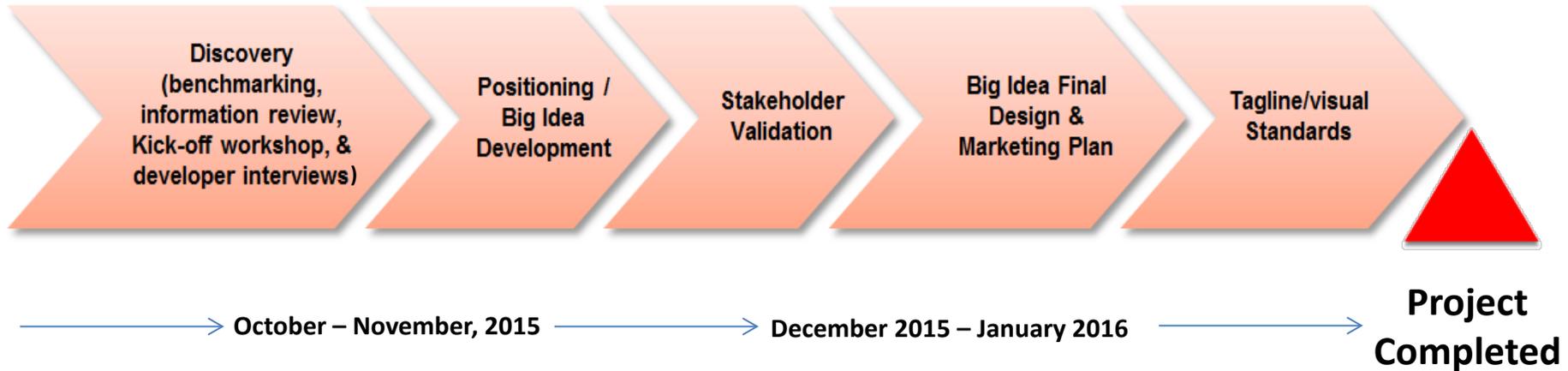
citibank



SNC-LAVALIN



Process



The target audience was engaged extensively to develop the campaign

Consultations



Local municipalities, major office tenants, brokers and building owners provided input and feedback

Validation



Validation Survey: 94% of respondents preferred
YORK LINK



WHERE TALENT AND OPPORTUNITY INTERSECT

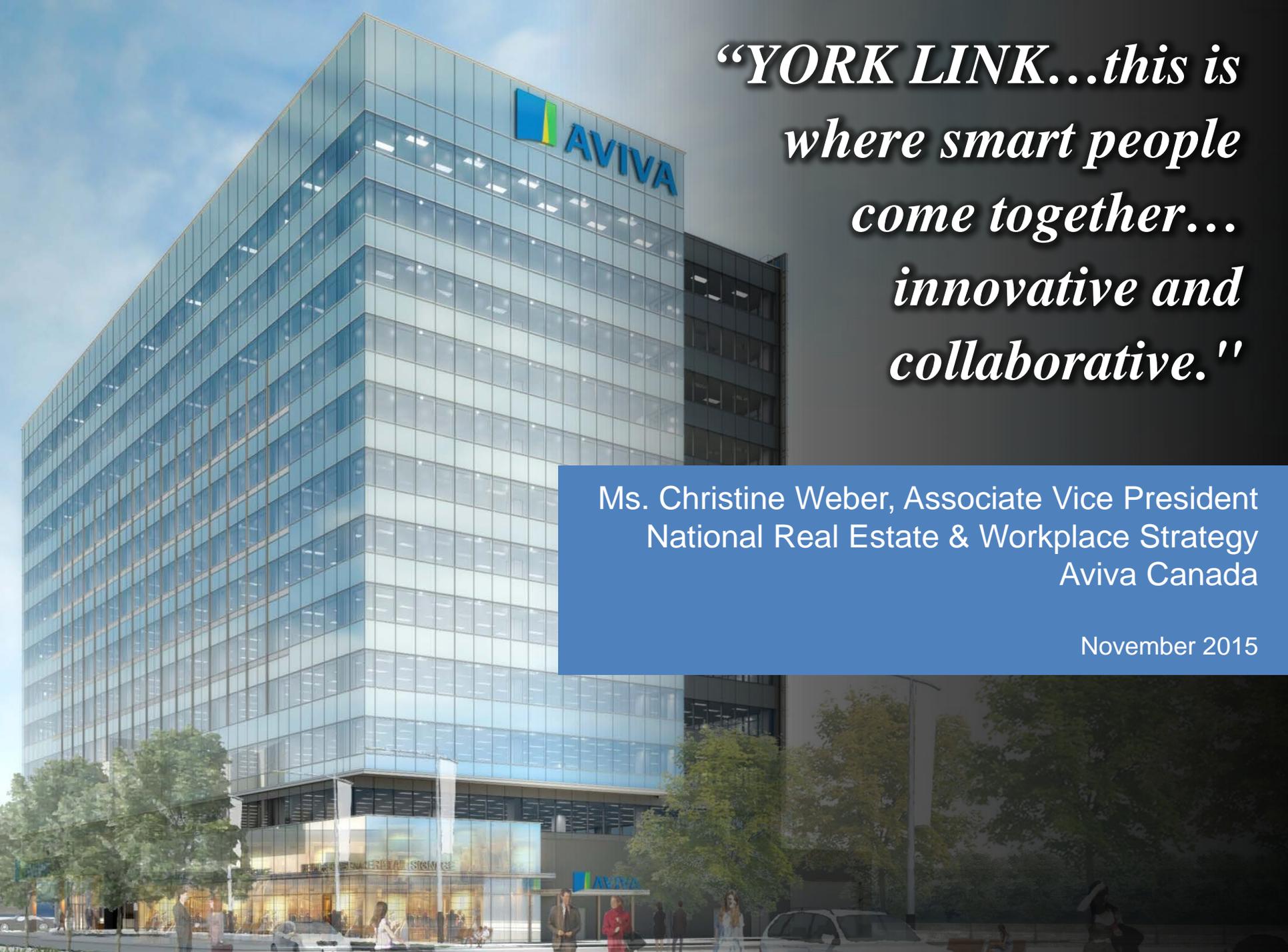
YORK LINK represents an evolution in messaging that responds to emerging marketing opportunities

“...I really like what they are planning in York Region for promoting office development...”

Mr. Les Miller, Managing Partner
Crown Realty Partners

NAIOP Toronto Conference – Suburban Office Investment
February 25, 2016



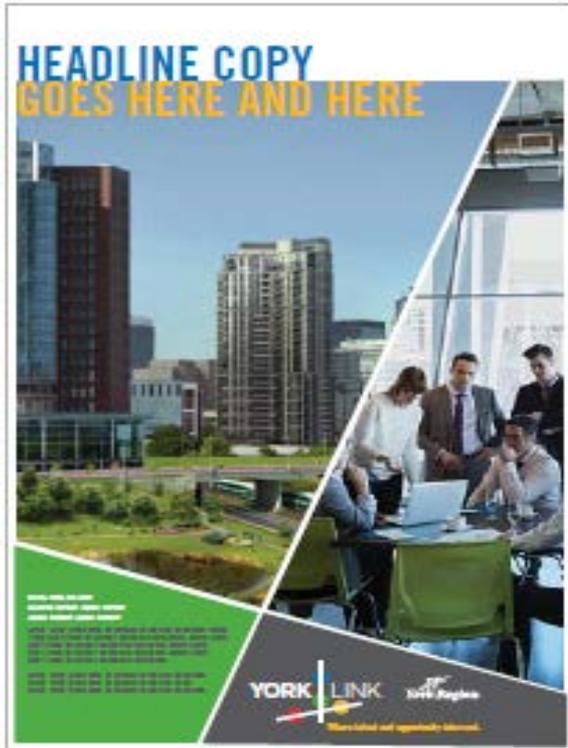


***“YORK LINK...this is
where smart people
come together...
innovative and
collaborative.”***

Ms. Christine Weber, Associate Vice President
National Real Estate & Workplace Strategy
Aviva Canada

November 2015

Campaign Personality



The campaign is designed to complement local initiatives



Located in the heart of the Greater Toronto Area (GTA), York Region is home to over 1.1 million residents, 565,000 jobs and 48,910 business establishments (employers) – the second largest business centre in Ontario, Canada. In partnership with local municipalities, York Region's economic development team facilitates business expansion and attraction in the City of Markham, City of Vaughan, Town of Richmond Hill, Town of Newmarket, Town of Aurora, Town of Whitby, Town of Shelburne, Town of East Gwillimbury, Town of Georgina and Township of King.



1.2
MILLION RESIDENTS

The fastest growing region in the Greater Toronto Area and Canada.



48,910
BUSINESSES

The second largest business centre in Ontario with over 500,000 local jobs.



4,400
TECHNOLOGY COMPANIES

Home to 3 of the Greater Toronto Area's top 5 corporate R&D investors.



LOCATION
Could York Region become Canada's next big tech hub? +



The Campaign involves using multiple message delivery channels

Next Steps:

- 1) Develop a detailed campaign schedule and marketing materials in Q3 2016
- 2) Undertake the YORK LINK campaign launch in Q3/Q4 2016
- 3) Focus targeted research, client engagements and marketing efforts on office tenant targets over the next two to three years