

# Final Report

## Township of Springwater Economic Development Strategy

June 2010



## EXECUTIVE SUMMARY

Strategic planning is one of the most important tools that a community or economic development organization can use for effective development. It is a means for establishing strategic initiatives and maintaining effective programming based on economic opportunities, constraints and the needs of a community.

In the case of the Township of Springwater, its advantageous location within the County of Simcoe, one of the fastest growing regions in the Province, and puts Springwater on the doorstep of one of the busiest four season recreation areas with access to Highways 400, 26 and 93, providing a strong competitive advantage for business and investment attraction to the community.

In light of these considerations, the Mayor and Council recognized the need for the community's first Economic Development Strategy that is premised on building on the Township's existing strengths and translating this into new opportunities for economic growth.

An integral aspect in developing an economic development strategy for the Township of Springwater is to understand its current competitive advantages and disadvantages, its business base, its investment readiness, and the quality of place and experience that it offers both residents and visitors. These factors coupled with the Township's potential to attract new investment, the presence of entrepreneurs and the capacity for growth in its existing business and industries will help to ensure the Township's future economic success.

### Key Objectives

Millier Dickinson Blais was contracted by the Township of Springwater to prepare a strategy that will assist and inform the economic development programming efforts of the Township. The approach to the development of the strategy has included several key components:

- A Background and Literature Review;
- An Economic Base Analysis of the Township of Springwater and surrounding area;
- Community Consultation in the form of focus groups, one on one stakeholder interviews as well as a community survey;
- A SWOT Assessment (Strengths, Weaknesses, Opportunities and Threats) to determine the key issues impacting the Township's ability to attract and retain business investment;
- A Competitive Analysis that positions Springwater relative to a select number of other Simcoe County communities;
- The Identification of Key Sectors and Opportunities for economic growth; and
- A set of implementable recommendations and steps to promote the future growth and marketability of the Township.

The result is an Economic Development Strategy that is both practical and forward thinking and effectively positions the Township of Springwater to best respond to potential economic opportunities that will ensure investment and growth in the future.

### Summary of Findings – Economic Base Analysis

The major findings of our review regarding the analysis of Springwater’s economic base are as follows:

- **The Township’s historical and current population growth scenario is positive and steady.** In 2006, Springwater had a population of 17,456, an increase of 8.4% from 2001 levels. Between 1996 and 2006 the Township experienced a growth rate of 18.0% or a gain of 2,663 residents. Future growth rates have been identified by the Province at a population of 24,000 as a Provincial allocation under the “Simcoe Area: A Strategic Vision of Growth” report, while a population of 26,500 has been marked as a projection in the County of Simcoe’s Official Plan. However, the Provincial allocation has not been adopted in the County’s Official Plan. As a result, the Township’s future population allocation is subject to the Province and has resulted in Springwater to take a wait and see approach until further direction is provided.
- **Springwater’s population is concentrated in the working age group of between 20 and 44 years.** The Township’s proportion of residents under the age of 44 sits at more than half of the population (58.3%), this number has actually declined slightly from 2001 levels, which comprised 63.7% of the resident population. Historically speaking, the age cohort of 65+ has been growing slightly in the Township over the past 5 years from 2001 levels of 10.8% to 11.9% in 2006, which is consistent with historical national trends that demonstrate the growth of this cohort over the past 40 years. Increasing proportions of an aging population, puts pressure on a community to provide for services, amenities and programming that will appeal to this aspect of its population.
- **Half of Springwater’s resident population had attained some level of post-secondary education.** The largest proportion of the population holds a high school certificate or equivalent (26.1%), closely followed by a college, CEGEP or other non-university diploma (26.0%) and university certificate, diploma or degree (24.8%) as of 2006. Slightly different results exist for the County as a whole, which is far more blue-collar than the provincial average. The most recent TOPS report distributed by the Simcoe County Training Board (January 2009), suggests that Simcoe County should build upon existing strengths such as attracting even more youth to trade and college programs.
- **Average household incomes in the Township exceed the County and the Province’s average.** The 2005 average household income for Springwater was \$100,184, which was actually significantly higher than both the County and Provincial average of \$73,624 and \$77,967.
- **Springwater’s labour force grew more quickly than its population between 2001 and 2006.** The Township’s labour force in 2006 was comprised of 10,050 people, an increase of 18.9% over 2001 levels. Based on the 2006 census, the local economy was concentrated in the following sectors: Retail Trade (13.0%), Manufacturing (11.0%), Health Care & Social Assistance (9.5%), Educational Services (9.0%), and Professional, Scientific and Technical Services (5.8%).
- **Despite the strong growth, the Township has a high percentage of workers that commute to employment in Barrie other parts of the County.** The greatest proportion of residents (56.3%) commute to the City on a daily basis for employment, with an additional 19.0% that commute within

the County of Simcoe, while a further 8.9% of the workforce commutes to either the City of Toronto, Region of Peel or York.

- **Service industry jobs provided the majority of employment opportunities for the Township's local labour force.** A high share of the Township's labour force is employed in the areas of retail trade; Springwater's occupations are also closely linked to the field of retail with 25.9% of all occupations in sales and service. The largest share of all sub-occupations within the field of sales and service was in sales, retail salespersons and clerks accounting for 715 of all local labour force occupations.
- **Nearly 33.9% of the Township's labour force is employed in creative class occupations.** The greatest concentration of workers is employed in professional occupations such as teachers and professors (15.1%), followed by other managers (13.4%) and senior management occupations (7.0%).
- **A labour flow analysis reveals the Township is a net exporter of labour.** The greatest amount of labour exported on a daily basis to other communities is in the Retail Trade sector (-925), followed by Manufacturing (-805) and Health Care and Social Assistance (-725) and Construction (-550). Commuting patterns along with industry trends infer that many Springwater residents travel to Barrie on a daily basis for employment within each of these sectors.
- **The greatest share of Springwater's agricultural businesses is in beef cattle ranching and farming.** The Township has a total of 286 farms, and an additional 32 farms dedicated solely to dairy cattle and milk production. The promotion of value-added products has received considerable attention by previous studies completed for the region, suggesting a need to further support the local agricultural industry through value-added production such as abattoirs, which enables community members to purchase and consume locally raised meat, or ethanol products for corn, biodegradable, food processing plants, biotechnology, 100 mile diet, farm tour opportunities and agro-tourism.
- **Springwater ranks eleventh out of the eighteen Simcoe communities reviewed based on select business costs.** The Township of Springwater ranked eleven out of the eighteen communities reviewed under a series of business case comparators. The Township's housing market demands a relatively high average housing price over many other communities across the County, in particular popular communities such as Barrie, Collingwood and Wasaga Beach which all exhibit lower average housing costs than the Township. The Township's municipal tax rates are moderately priced against the comparative communities and rank seventh lowest out of the eighteen communities under review. The Township's development charges also ranked in the middle range, at \$ 5.75 a sq.ft. for both commercial and industrial properties, but did not prove to be as competitive as surrounding communities such as Innisfil and Collingwood.

### Summary of Findings – SWOT Assessment

An effective economic development or marketing strategy must also include a thorough consideration of the opinions and perspectives of the area's current business leaders and community representatives. Consultations with these groups can provide a more relevant and meaningful assessment of the Township of Springwater's strengths and weaknesses, as well as perceptions regarding potential opportunities and threats facing the Township, whether they are of an economic or social nature.

In this context a SWOT (strengths, weaknesses, opportunities, threats) assessment was conducted through a consultation process with members of the Township of Springwater business community, as well as local residents and community leaders. More than 70 individuals participated in the strategy's consultation process that included telephone and face to face interviews, and focus group discussions. Stakeholders included representatives from government, business, tourism operations, community leaders and the development community. A further 54 individuals provided their input to the strategy through an online business survey.

The findings associated with this include:

### Strengths

- **Access to Regional Highway**
- **Presence of Elmvale District High School**
- **Easy Access to Recreational/Outdoor Activities**
- **Small Town Charm**
- **Proximity to Barrie**
- **Pride in Agricultural Community**
- **Elmvale Maple Syrup Festival**
- **Implementation of Telecommunications Infrastructure**

### Weaknesses

- **High Levels of Commuting by Labour Force**
- **Inadequate Support for Business**
- **Lack of Centralized Community Hub**
- **Seen as a Bedroom Community to Barrie**
- **Lacks a Distinctive Identity**
- **Difficulty Accessing Local Physicians and Health Care Services**
- **Lack of Readily Available Serviced Vacant Land**

### Opportunities

- **Agri-business/Agri-tourism Industries**
- **Promotion as a Tourism Destination**
- **Continue Improvements to 'Downtown' Elmvale**
- **Support Local Community Groups**
- **Stay Connected to the Township's Local Businesses**
- **Active Participation with North Simcoe Community Futures Development Corporation**
- **Focus on Needs of Local Small Businesses and Entrepreneurs**

### Threats

- **Shopping/Services Leakage**
- **Servicing to Large Parcels of Employment Land**
- **Lack of Regional Collaboration**
- **County Growth Plans May Hinder Township's Growth**

## Springwater's Competitive Advantages + Disadvantages

Taken together, the results of the background review, economic base analysis and community consultation has provided considerable insight into the Township's competitive advantages and disadvantages with respect to the continued attraction and retention of business and investment in the community.

### Competitive Advantages

- On the doorstep of busiest 4 season recreation area in the province
- Access to major highway network including Hwy 400, 26 and 93
- Rural lifestyle and range of housing options has attracted a skilled, high income workforce
- Good percentage of creative economy workers
- Proximity to 2 post secondary educational institutions
- Availability of high speed internet access
- Access to regional, metropolitan markets and international markets
- Motivated economic development partner in County of Simcoe

### Competitive Disadvantages

- Limited availability of shovel ready, serviced industrial land
- Population growth will slow due to servicing constraints
- Loss of young workers may challenge growth of local economy
- Lack of diversity of employment
- 'Mainstreets' perceived as in decline
- No market profile

## Vision and Action Plan

In the face of growing regional competition and economic uncertainty, Springwater must pursue economic development that is both targeted and focused. In being proactive and progressive in these pursuits, the Township can better realize its vision of becoming a prosperous community that enables the growth of prosperity and business investment while maintaining the quality of life that is valued by its citizens.

**Vision** – “The Township of Springwater will be known as a prosperous community with market opportunities that enable new business investment and economic growth across a broad range of industry.”

---

## Five Goals for the Economic Development Strategy

| GOALS  | PRIMARY OBJECTIVES  |
|--|---|
| 1. Investment Readiness                            | <ul style="list-style-type: none"> <li>• Enhance opportunities for the retention and expansion of local businesses</li> <li>• Support the attraction of new business investment and entrepreneurs to the community</li> </ul>   |
| 2. Pursue Partnerships + Outreach in the Community | <ul style="list-style-type: none"> <li>• Have the Township take more of a leadership role in advocating and supporting strategic and collaborative economic development within the County</li> </ul>  |
| 3. Effective Marketing + Promotion of Springwater  | <ul style="list-style-type: none"> <li>• Ensure the effective promotion of local assets, workforce skills and opportunities for business expansion and entrepreneurial investment in the community</li> <li>• Provide a consistent and focused marketing message</li> </ul> |
| 4. Growth in Key Industries                        | <ul style="list-style-type: none"> <li>• Ensure continued business development and local employment growth based on competitive advantages</li> </ul>   |
| 5. Enhance Capacity of Community Infrastructure    | <ul style="list-style-type: none"> <li>• Ensure the preservation and enhancement of Springwater’s physical, social and service infrastructure</li> </ul>  |

While these **GOALS** and **OBJECTIVES** represent a long term vision for the community, the associated actions detailed in the strategy provide a solid framework for economic development programming and activities in the Township of Springwater in short, medium and longer term.

The implementation of the strategy however, does not happen in isolation of other activities and initiatives being undertaken by the Township of Springwater its community stakeholders. In fact it assumes continued engagement with the local business community, other levels of government and economic development partners in order to achieve the vision of the community in the future.

A more detailed discussion of the recommended actions is outlined in Section 5 of this report.

## Contents

### Executive Summary

|   |    |
|---|----|
| Contents .....  | 1  |
| 1 Introduction.....                                       | 3  |
| 1.1 Purpose of the Report.....                            | 3  |
| 1.2 Approach .....  | 4  |
| 2 Base Analysis.....                                      | 5  |
| 2.1 Demographic Characteristics .....                     | 6  |
| 2.1.1 Population Change .....                             | 6  |
| 2.1.2 Population by Age .....                             | 8  |
| 2.1.3 Educational Attainment and Field of Study .....     | 9  |
| 2.1.4 Household Income .....                              | 11 |
| 2.2 Labour Force Characteristics .....                    | 12 |
| 2.2.1 Labour Force by Industry .....                      | 13 |
| 2.2.2 Local Employment Patterns & Labour Force Flow ..... | 15 |
| 2.2.3 Labour Force by Place of Work.....                  | 16 |
| 2.2.4 Labour Force by Occupation .....                    | 17 |
| 2.2.5 Growth in the Creative Class.....                   | 18 |
| 2.3 Industry Sector Analysis Review .....                 | 21 |
| 2.3.1 Location Quotients Analysis .....                   | 21 |
| 2.3.2 Business Pattern Assessment.....                    | 23 |
| 2.4 Agriculture in Springwater .....                      | 32 |
| 2.4.1 Farm Land Characteristics .....                     | 32 |
| 2.4.2 Farm Capital .....                                  | 36 |
| 2.5 Business Case Comparators.....                        | 37 |
| 2.5.1 Average Housing Prices .....                        | 37 |
| 2.5.2 Municipal Tax Rates .....                           | 38 |
| 2.5.3 Development Charges.....                            | 39 |
| 2.5.4 Electricity Rates.....                              | 40 |
| 2.5.5 Price per Acre of Serviced Employment Land .....    | 41 |
| 2.5.6 Summary of Cost Comparators.....                    | 42 |
| 2.6 Industrial Land Availability .....                    | 44 |
| 2.7 Summary of Findings.....                              | 46 |
| 3 Target Sector Assessment.....                           | 49 |

|       |   |    |
|-------|---|----|
| 3.1   | Immediate Priorities .....                              | 49 |
| 3.1.1 | Professional, Scientific & Technical Services .....     | 49 |
| 3.1.2 | Agriculture/Agribusiness.....                           | 50 |
| 3.1.3 | Tourism.....  | 51 |
| 3.2   | Long Term Priorities .....                              | 53 |
| 3.2.1 | Construction .....                                      | 53 |
| 3.2.2 | Manufacturing.....                                      | 55 |
| 3.2.3 | Wholesale Trade .....                                   | 56 |
| 4     | SWOT Analysis .....                                     | 58 |
| 4.1   | Strengths .....   | 58 |
| 4.2   | Weaknesses .....  | 60 |
| 4.3   | Opportunities .....                                     | 61 |
| 4.4   | Threats.....  | 63 |
| 5     | Township of Springwater Economic Development Plan ..... | 64 |
| 5.1   | Guiding Principles.....                                 | 64 |
| 5.2   | Five Key Goals for the Township of Springwater .....    | 65 |

# 1 Introduction

Strategic planning is one of the most important tools that a community or economic development organization can use for effective development. It is a means for establishing strategic initiatives and maintaining effective programming based on economic opportunities, constraints and the needs of a community. It also:

- helps to shapes a community's future;
- provides structure for mutually accepted goals and a common agenda;
- defines the purpose of the community at large and its role in achieving stated goals; and
- it balances community goals with realistic local resources.

A cornerstone to developing a strategic plan is an understanding of a community or region in terms of its assets as well as its potential. To achieve this, a comprehensive understanding of a community's economy is required.

## 1.1 Purpose of the Report

An integral aspect in developing an economic development strategy for the Township of Springwater is to understand its current competitive advantages and disadvantages, its business base, its investment readiness, and the quality of place and experience that it offers its residents and visitors. These factors coupled with the Township's potential to attract new investment, the presence of entrepreneurs and the capacity for growth in its existing business and industries will help to ensure the Township's future economic success.

The Township of Springwater has retained Millier Dickinson Blais to develop an economic development strategy based on incorporating the Township's existing strengths and translating them into new opportunities for economic growth.

The overall objectives for the Township include:

- a. Supporting the current economic base, while expanding the local economy through innovative economic development initiatives and opportunities;
- b. Developing a set of recommendations to further develop and attract business development while being aware of the Township's current strengths, weaknesses, opportunities and threats;
- c. Sustaining retention efforts and further development of a skilled workforce through a comprehensive strategy that addresses training needs, retention of companies and attraction of new employers;
- d. Establishing a strategic action plan, this expands on the Township's economic goals relating to the growth of business sectors and the development of the local labour force that meet the future needs of the community and benefits the County as well.

## 1.2 Approach

The approach to the creation of this economic development strategy has included several key components:

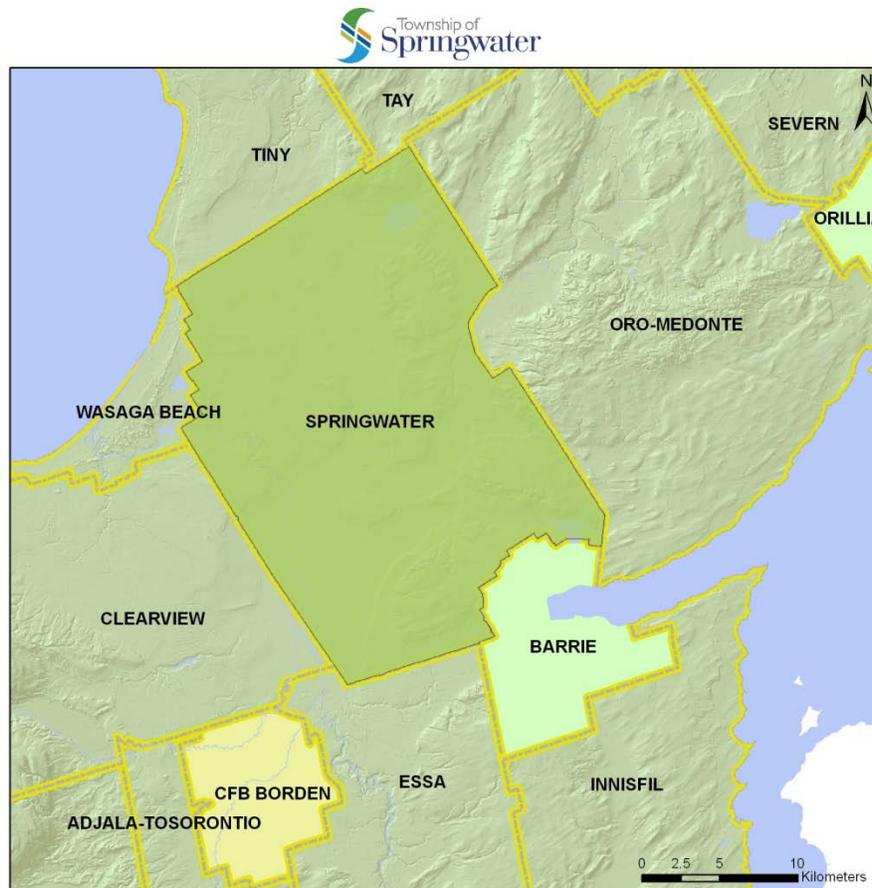
1. A Background and Literature Review;
2. An Economic Base Analysis of the Township of Springwater and surrounding area;
3. Community Consultation in the form of focus groups and stakeholder interviews and community survey;
4. A SWOT Assessment (Strengths, Weaknesses, Opportunities and Threats) to determine the key issues impacting the Township's ability to attract and retain business investment;
5. A Competitive Analysis that positions Springwater relative to a select number of other Simcoe County communities;
6. The Identification of Key Sectors and Opportunities for economic growth; and
7. A set of implementable recommendations and steps to promote the future growth and marketability of the Township.

The result is an economic development strategy that is both practical and forward thinking and effectively positions the Township of Springwater to best respond to the economic opportunities that will ensure investment and growth in the future.

## 2 Base Analysis

The Township of Springwater's advantageous location between the City of Barrie and the Town of Wasaga Beach puts it on the doorstep of one of the Province's busiest four season recreation areas while its access to Highways 400, 26 and 93, provides a strong competitive advantage for business and investment attraction to the community. To fully realize the potential for economic growth however, requires a strong understanding of the strengths that distinguish the community over others and its recent economic and demographic performance.

Figure 1 – Township of Springwater, Location Map



Source: Township of Springwater, 2010

The economic base analysis that follows is divided into three primary parts: firstly, consideration is given to the demographic characteristics of the Township including population trends, educational attainment levels and household income values as compared to the County and as appropriate, the Province of Ontario. The second portion of the discussion provides a current labour force profile while the final element is comprised of detailed industry sector analysis and target sector identification. This final element also reviews the strength and diversity of the local agricultural market as a factor for economic growth.

In completing this report, Millier Dickinson Blais has made use of available 2001 and 2006 population Census information for the Township of Springwater, County of Simcoe and the Province of Ontario, as well as 2005 and 2009 business pattern data obtained from Statistics Canada. As appropriate, the

information has been supplemented with 2009 data purchased from Manifold Data Mining. This predictive data allows for more current understanding of how employment and industry data may have changed since 2006.

## 2.1 Demographic Characteristics

### 2.1.1 Population Change

A sound indicator of a community's long term sustainability and viability is the review of the community's demographic composition. The review of the Township of Springwater's historical and projected population growth scenario suggests a steady pattern of growth. Figure 2 demonstrates the extent of this growth in both absolute numbers and percentage change. In 2006, Springwater had a population of 17,456, an increase of 8.4% from 2001 levels. Between 1996 and 2006 the Township experienced a growth rate of 18.0% or a gain of 2,663 residents. When compared to the growth rates of the County of Simcoe and the Province as a whole from 1996 to 2006, the Township's growth rate exceeded that of the Province but demonstrated a slower rate of growth than the County (10.0% slower). This may be attributed in part to the limited availability of serviced land for either employment or residential development and the continuing constraints on development as a result of the ongoing Simcoe Growth Plan exercise, servicing constraints in Elmvalle and the lack of a secondary plan in place for Midhurst.

Figure 2 – Population Growth Township of Springwater, County of Simcoe: 1996 - 2006

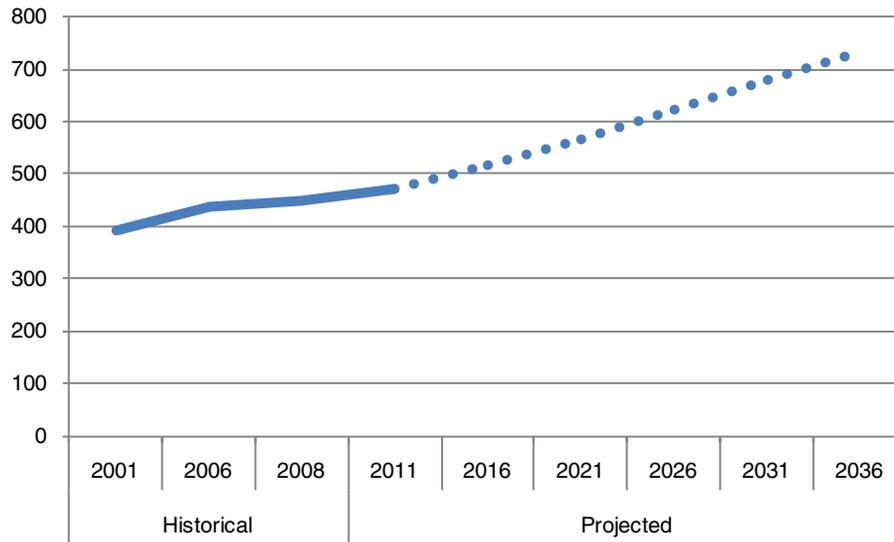
| Population              | 1996       |            | 2001       |       | 2006      |          | (5 Years)    |          | (10 Years)   |  |
|-------------------------|------------|------------|------------|-------|-----------|----------|--------------|----------|--------------|--|
|                         | 1996       | 2001       | 2001-2006  | 2006  | 2001-2006 | % change | Net Increase | % change | Net Increase |  |
| Township of Springwater | 14,793     | 16,104     | 17,456     | 8.4%  | 1,352     | 18.0%    | 2,663        |          |              |  |
| County of Simcoe        | 329,865    | 377,050    | 422,204    | 12.0% | 45,154    | 28.0%    | 92,339       |          |              |  |
| Ontario                 | 10,753,573 | 11,410,046 | 12,160,282 | 6.6%  | 750,236   | 13.1%    | 1,406,709    |          |              |  |

Source: Statistics Canada, Census of Population: 1996, 2001, 2006

The Province's Places to Grow Act (2006), currently projects that the population for Simcoe County will reach 661,000 by the year 2031. This represents an increase of 56.6% over current levels, as compared to a 29% increase for the province as a whole over the same time horizon. This compares to population projection rates prepared by the Ministry of Finance (Fall 2009), which predict population growth for Simcoe County will reach 678,300 by 2031<sup>1</sup>. While the Township of Springwater is expected to absorb some of this growth, much of the increase in population is being directed to the County's urban areas, specifically the Cities of Barrie and Orillia. Future population growth for the Township will be slower due to the predominantly rural nature of the Municipality and servicing capacity.

<sup>1</sup> Growth projected under the reference scenario

**Figure 3 - Population Projections, County of Simcoe, 2006 - 2031**



Source: Statistics Canada, Census of Population, 2006 & Ministry of Finance, Fall 2009

The Township of Springwater, along with its nine distinctive settlement areas, undertook a Growth Management Study (GMS) in 2004, which preceded the Growth Plan and was created to determine how best to accommodate major growth over the next 20 – 25 years.

The consulting firm Hemson Consulting Ltd. was retained to develop population forecasts for both the County of Simcoe and the Township of Springwater. The report makes the assumption that the City of Barrie will attract the greatest share of the County’s projected population. However, the report does not take into consideration the different housing product and markets that exist in Barrie vs. Springwater. The projected growth in Barrie may have little impact on the demand for residential housing in the Township.

The population forecast presented below for Springwater is considered conservative in nature and does not take into account growth of the five planned areas, but does provide for a consistent level of growth across the Township. Hemson forecasts also indicate that there is an obligation for the Township to plan for its projected increase in population. The Township continues to make provisions for the projected growth through the creation and adoption of secondary plans for Midhurst, Snow Valley and Hillsdale areas, as well as through the development of the Centre Vespra Community Plan.

**Figure 4 – Springwater Population Forecast, 2001 (Historical) – 2026 (Forecast)**

| Census | Forecast |             |             |             |             | Total |
|--------|----------|-------------|-------------|-------------|-------------|-------|
|        | 2001     | 2001 - 2006 | 2006 - 2011 | 2011 - 2016 | 2016 - 2021 |       |
| 16,104 | 17,400   | 18,700      | 20,000      | 21,300      | 22,600      |       |
| Growth | 1,296    | 1,300       | 1,300       | 1,300       | 1,300       | 6,496 |

Source: Hemson, 2004

The GMS also reviewed the results of the Ministry of Finance forecasts from August 2002. Based on Springwater’s historical share of the Province and the County’s population, the Ministry of Finance results suggest Springwater’s forecasted population will be between 21,570 and 27,146 by 2026. A steady share approach was used to produce these forecasts, resulting in a population increase that ranges from

between 4,882 and 10,769 persons, a similar estimate to that of Hemson's forecasted population increase of 6,500 by 2026.

The most recent proposed provincial allocations prepared by the Province for the Township were completed in June 2009, and are contained in the Simcoe Area: A Strategic Vision for Growth, which was developed to help manage the growth of the County. The growth plan includes a 2031 population allocation for Springwater of 24,000 persons. Based on discussions with staff from the Township of Springwater, if the allocation from the Province is not increased from the currently proposed 24,000 to recognize potential growth specifically in the settlement area of Midhurst to 2031, it will have a significant impact on the Township's ability to grow and or maintain certain sectors of the local economy.

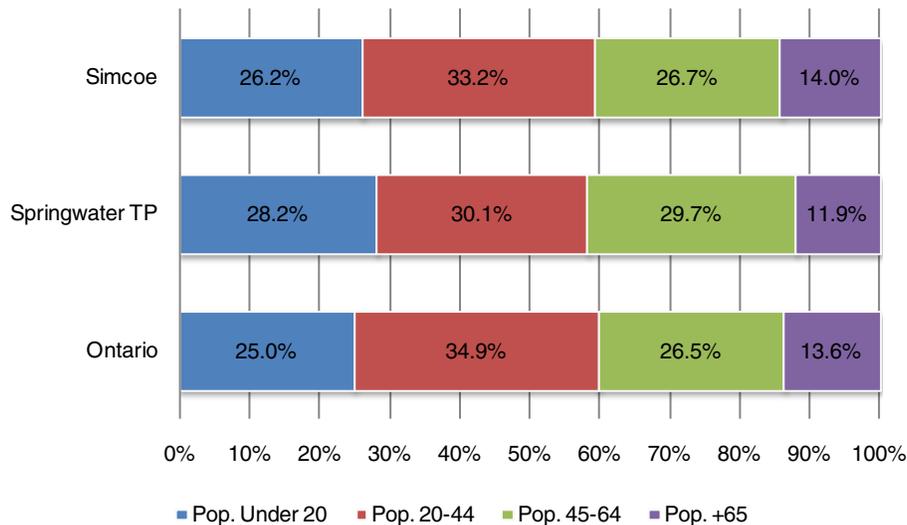
The projected growth figures for the Township raise a number of issues for each of the Township's distinctive settlement areas, as each area has varying capacity to accommodate the projected growth.

### 2.1.2 Population by Age

When consideration is given to the age profile of Springwater as compared to the County of Simcoe and that of the Province only minor differences are evident. The Township is a fairly young community and exhibits a slightly higher proportion of individuals under the age of 20 than either the County or the Province (figure 5), and a slightly higher proportion of residents between the ages of 45 and 64. This combination suggests the presence of older families which may have a bearing on the types of amenities and services that will be in demand by residents. While there is a significant population of school-aged residents, the Township appears to lose a portion of its population as it reaches working age. This is not unusual in predominantly rural communities, where people are more likely to leave the area to attain a post secondary education, or to search for perceived better employment opportunities. However, this does suggest that as part of any future investment attraction and retention efforts, the Township needs to emphasize the capacity of a regional labour pool to interested businesses. A further consideration might be enhanced support to young entrepreneurs and potential small business operators as a way to retain these young workers in the community and create local employment opportunities.

While the Township's proportion of residents under the age of 44 sits at more than half of the population (58.3%), this number has actually declined slightly from 2001 levels. Interestingly, while the Township's population of individuals over the age of 65 (11.9%) was lower than the County (14.0%) and the provincial average (13.6%), historically speaking this cohort has been growing. A Statistics Canada report, "2006 Census: Portrait of the Canadian Population in 2006, by Age and Sex: National Portrait" suggests the proportion of Canada's aging population is rising. The best indicator of an aging population is to review the increase share of those aged 65 + over a historical period as a proportion relative to the total population. Figures show this share has been rising steadily since 1966 when it was 7.7% to 13.7% in 2006.

Figure 5 – Population by Age, 2006



Source: Statistics Canada, Census of Population, 2006

### 2.1.3 Educational Attainment and Field of Study

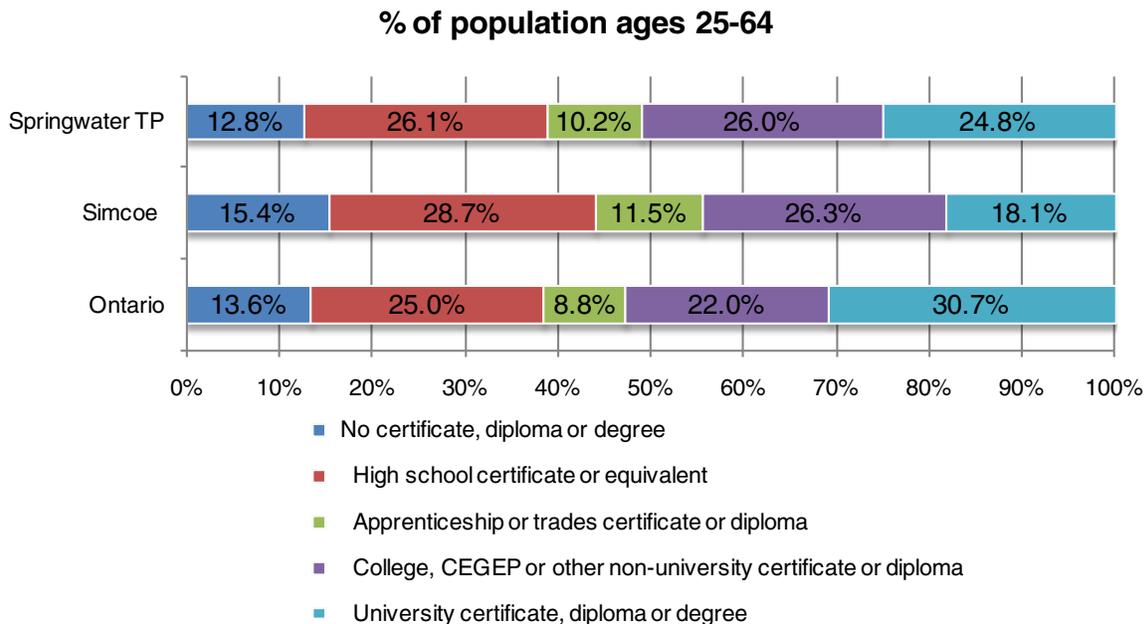
The educational levels attained by a resident population also have implications on growth of that local economy and whether or not its labour force will be seen as attractive to business and industry. Figure 6 provides an educational attainment profile of the working age population of Springwater and Simcoe County as compared to Ontario. In 2006, 50.9% of the resident population in Springwater had attained some level of post-secondary education as compared to the provincial average of 52.7%. The largest proportion of the population holds a high school certificate or equivalent (26.1%), closely followed by a college, CEGEP or other non-university diploma (26.0%) and university certificate, diploma or degree (24.8%) as of 2006. While the percentage of the working age population that have attained a university certificate, diploma or degree is 5.9% lower than the provincial average, it is in fact 6.7% higher than the County average. This may suggest that the Township provides the lifestyle that appeals to a significant number of professionals and offers the proximity of the larger urban centres such as Barrie and the GTA where they are likely to be employed.

In comparison, the County of Simcoe's share of population who have attained some level of post-secondary education stood at 44.4% as of 2006, 6.5% lower than the Township's average. The most recent TOPS report distributed by the Simcoe County Training Board (January 2009), suggests the County is far more 'blue-collar' when compared to the province as a whole and while well-paying jobs linked to skilled trades, technical and manufacturing occupations do exist, the lack of residents attaining post-secondary education raises concerns for future job seekers as more and more employers require employees with post secondary qualifications. The report suggests that Simcoe County needs to do more to attract youth to trade and college programs and improve its support for a stronger rate of high school education completion.

This reaffirms the importance of a post secondary presence in the County, such as Lakehead University in Orillia and the University Partnership Centre at Georgian College in Barrie, which offers undergraduate and graduate studies through partnerships with universities/institutions such as, University of Ontario Institute of Technology (UOIT), Embry-Riddle Aeronautical University, Laurentian@Georgian and York

University. Marketing efforts at the County and in Springwater should promote the current labour force skills as well as the programming available through the County’s post secondary educational facilities. This will help drive demand for graduates and perhaps increase the rate of enrolment of young people in post secondary programming available in the County of Simcoe.

Figure 6 – Educational Attainment, Springwater, County of Simcoe and Ontario: 2006

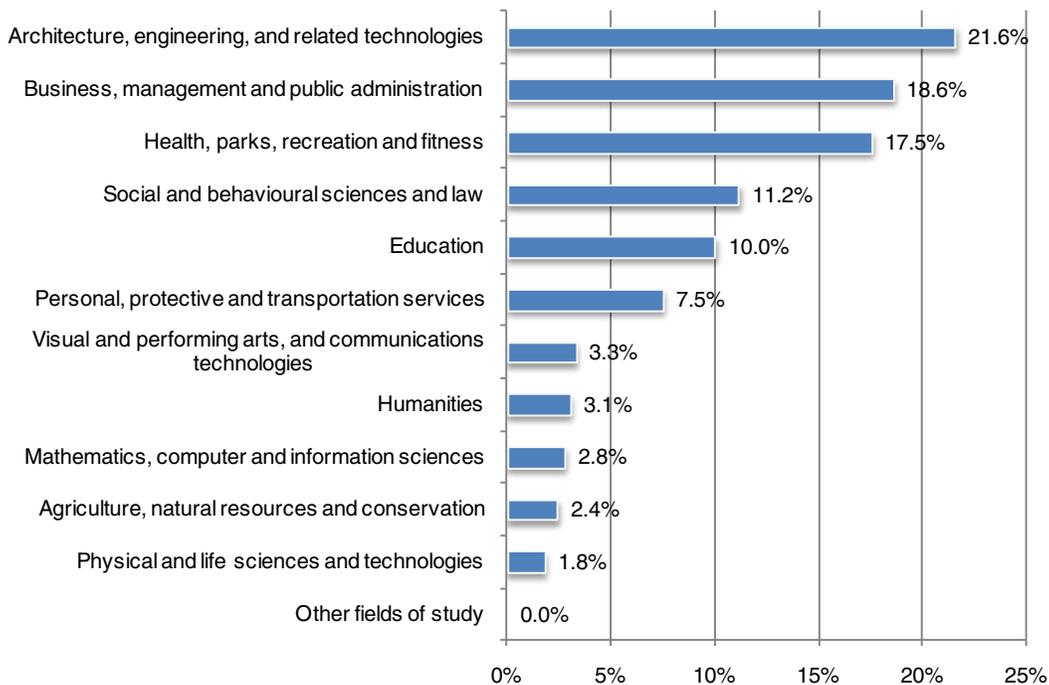


Source: Statistics Canada, Census of Population, 2006

Figure 7 illustrates the most common field of study for those residents age 25-64 with a post-secondary education. The areas of study that are most common among Springwater residents include: architecture, engineering and related technologies (21.6%), business, management and public administration (18.6%) health, parks, recreation and fitness (17.5%), and social and behavioural sciences and law (9.6%). The range of interests and areas of study again speaks to the range of employment opportunities that are available in proximity to the Township as opposed to the availability of local employment located within the Township.

The concentration of individuals educated in the fields of architecture, engineering and related technologies is further supported by the presence and collaborative efforts of the Industrial Research and Development Institute (IRDI) at Georgian College that has recently relocated in the City of Barrie. The IRDI, which was once located in Midland had established an international reputation as a centre for metal forming research in North America. It is now located in Barrie and provides the opportunity for Springwater residents to study in the fields of engineering and related technology, while remaining in the region. The program’s speciality in metal forming research, engineering and related technology continues to flourish at the Barrie campus, while the Precision Skills Centre is located in Midland, which provides product development assistance to local SMEs. In addition, articulation agreements are in place which allows students of Georgian College to pursue an additional one and half years of study and to acquire a university degree through the institution’s partnership with the Laurentian University.

Figure 7 – Major Field of Study, Springwater: 2006



Source: Statistics Canada, Census of Population, 2006

#### 2.1.4 Household Income

Figure 8 demonstrates the distribution of private household income levels in Springwater in 2005. The 2005 average household income for Springwater was \$100,184, which was actually significantly higher than both the County and provincial average of \$73,624 and \$77,967 respectively. Springwater's median household income in 2005 was \$77,835 and by 2008 this figure had increased to \$95,468 according to the Ministry of Economic Development and Trade's Invest in Ontario website<sup>2</sup>.

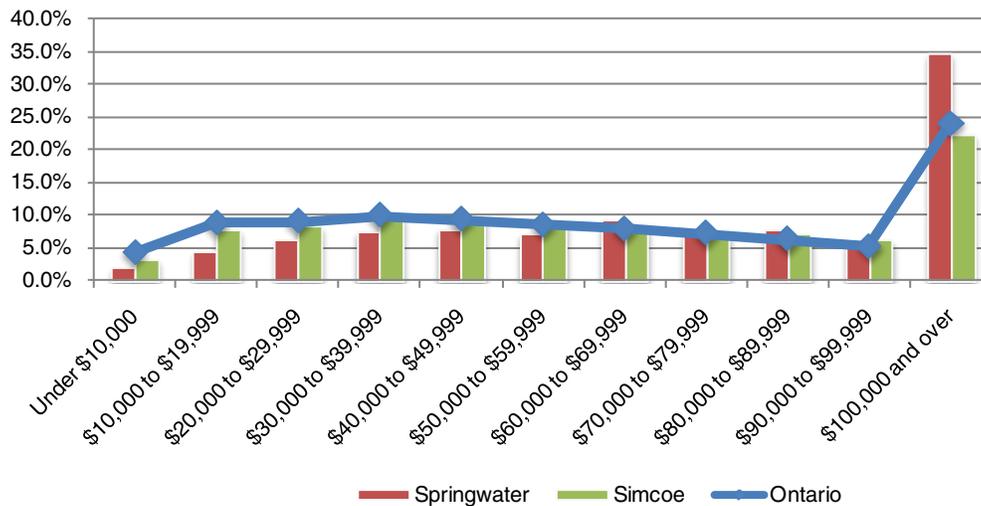
The following figure illustrates that household incomes in Springwater are slightly higher than in the County and the province as a whole. On average, 48.3% of Springwater's private households earn \$80,000 or more as compared to the average of the County (35.7%) and the Province (35.5%).

Springwater's ability to attract and retain residents with high incomes is evident through the comparison of 2000 and 2005 household income levels. The Township has seen a decrease in both the households that earn less than \$50,000 and in the number earning less than \$10,000. In contrast, the Township has seen a significant increase in the number of high income households in the community which is likely due to the quality of life attributes of the community and the ease with which residents can access employment and amenities in the City of Barrie. In particular, the number of households earning in excess of \$100,000 increased by 53.6%, to 2,055 households. While the increase in household incomes has a positive effect on the spending power of this segment of the population, the results of the consultation process suggest that many of these high incomers work and shop outside of the community. The popularity of rural living and estate style development among some ex-urbanites and early retirees is increasing however this

<sup>2</sup> Manifold Data Mining, "SuperDemographics", 2009

portion of the population appears to be spending its income outside of the Township, which results in a leakage of retail spending which may be difficult to overcome in the short to medium term.

**Figure 8 - Household income in 2005 of private households: Springwater, County of Springwater, Ontario**



Source: Statistics Canada, Census of Population, 2006

It is important to understand that the marketability of the Township to current and potential residents relies on its appeal to have a more rural or village lifestyle while still having the employment opportunities afforded by proximity to a major urban centre. This suggests however, that the Township needs to focus more attention on the type of public and private sector investments that will make their community more sustainable and complete in terms of a live/work environment over the longer term. This may mean improvements to its main streets, the quality of its retail shopping environment, the availability of high speed internet, the availability of community services, etc.

It is also important to understand that the availability of affordable housing has implications on the Township’s ability to retain a young workforce, as well as older segments of the population. The growth of the service sector, which generally pays lower wages, may also result in a higher proportion of workers commuting from outside the Township for local employment opportunities.

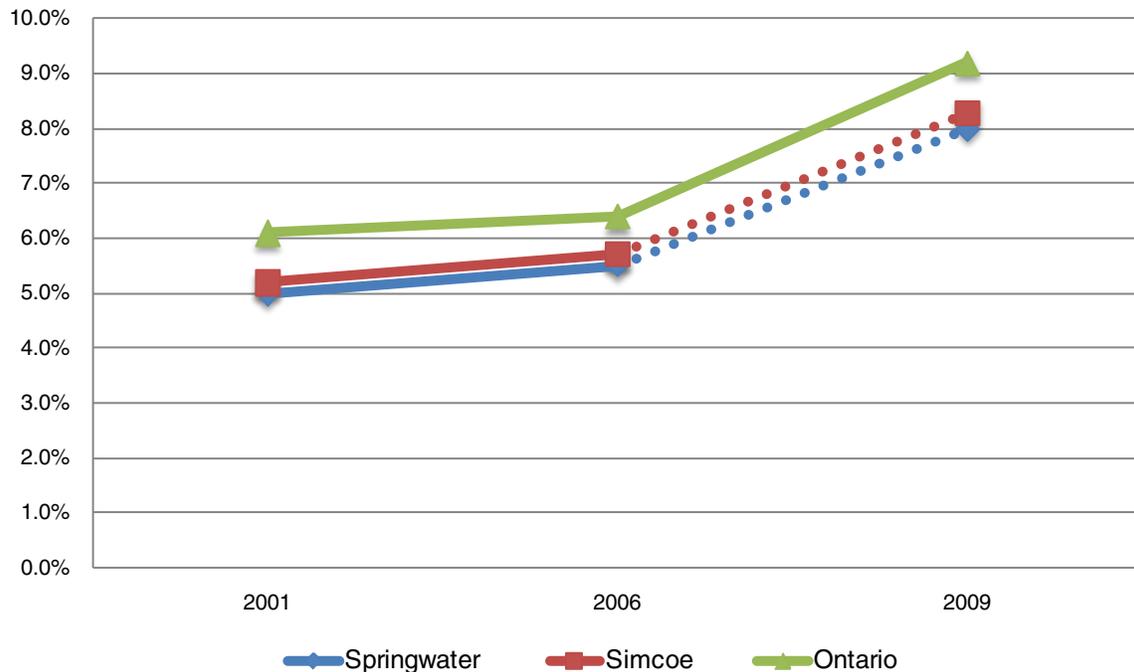
## 2.2 Labour Force Characteristics

Another indicator of a community’s economic health is its labour force performance. This may include labour force growth and industry concentration as well as unemployment levels and occupational characteristics.

From 2001 to 2006 the size of the resident total labour force in Springwater increased by 18.9% to 10,050 persons which would suggest a strong local economy. However, this figure was captured prior to the economic downturn that occurred over the last 18 to 24 months and doesn’t reflect the availability of local vs. regional employment. Springwater’s and the County’s average unemployment rates in 2006 were recorded at 5.5% and 5.7% respectively, which compares to the provincial average of 6.4% for the same time period.

Unemployment figures obtained from Manifold Data Mining however, suggest that as of December 2009, the Township's unemployment rate had risen to 8.0 percent. Increases in the unemployment rate were also experienced across the County and the Province with rates recorded at 8.3% and 9.2% at the end of 2009. The surge in the unemployment rates across all three geographies can be attributed in part to the downturn in the global economy and the related impact it has had on businesses in the manufacturing sectors.

**Figure 9 – Labour Force 15 years and over, Unemployment Rates, Springwater, County of Simcoe, Ontario: 2001 - 2009**



Source: Statistics Canada, Census of Population: 2006

Note: Predicted Figures for Springwater and the County of Simcoe were obtained for, 2009 from Manifold Data Mining

Note: Provincial Unemployment Rates were obtained from Statistics Canada Labour Force Survey, December 2009

### 2.2.1 Labour Force by Industry

As noted earlier, the Township's resident labour force in 2006 was comprised of 10,050 people, an increase of 18.9% over 2001 levels. More recently, the Township has experienced a further increase of 9.2% between 2006 and 2009, bringing its total labour force to 10,972. It is important to point out however, that not all of these individuals will work in the Township of Springwater. Given that many businesses will draw from a regional labour pool, the make-up of a resident workforce can speak to the capacity of a community to attract and retain business investment.

Based on the results of the 2006 census, the resident workforce was concentrated in the following sectors:

- Retail Trade (13.0%),
- Manufacturing (11.0%),
- Health Care & Social Assistance (9.5%),

- Educational Services (9.0%), and
- Professional, Scientific and Technical Services (5.8%).

The high concentration of workers in retail and manufacturing could represent a challenge for the Township, as both of these sectors are subject to the downturns in the provincial economy. Available data for 2009 suggests that there has been a reduction in the number of workers in the retail trade, which now stands at 11.9%, while manufacturing dropped to 10.3% of the total workforce. The Simcoe County Training Board 2009 Trends, Opportunities and Priorities report also confirms that there were numerous business closures across the County in 2008, with high job losses and lay-offs, particularly in manufacturing.

The concentration of labour in educational services (9.0%) has remained consistent from 2006 to 2009, which can be linked to the presence of the County of Simcoe Education Centre located in Midhurst, as well as the opening of Lakehead University in Orillia and the continued expansion of Georgian College and university programming in Barrie and Orillia. The resident labour force employed in Health Care and Social Assistance and Professional, Scientific and Technical services grew at a rate of 15.5% and 10.5% respectively. Both of these sectors may represent opportunities for the Township in terms of business attraction efforts.

While goods producing industries such as manufacturing and agriculture are still present in the Township's economy, the general shift towards service sector employment is a common theme emerging in municipalities across the Province. While the Township experienced some growth in its workforce that are employed in goods producing industries (a growth rate of 3.3% or 80 workers), Springwater experienced a much higher rate of growth in its service industries which increased by 1,510 workers (a growth rate of 25.1%).

As noted the labour force by industry data is intended to convey the capacity and diversity of a local workforce. In this context, consideration is given to the total workforce by sector, regardless of whether or not the individual is employed or working within the Township of Springwater. The impact of jobs in Springwater (place of work) and labour flows – the in and out migration of workers to and from other jurisdictions is discussed in detail in sections 2.2.2 and 2.2.3 of the report.

Figure 10 - Labour Force by Industry, Springwater, County of Simcoe, Ontario: 2006

|  | Springwater |        | County of Simcoe |        | Ontario   |  |
|--|-------------|--------|------------------|--------|-----------|--|
|  | 2009        | 2006   | 2006             |        | 2006      |  |
| All industries   | 10,972      | 10,050 | 227,850          |        | 6,473,735 |  |
| 11 Agriculture, forestry, fishing and hunting                              | 304         | 385    | 3,850            | 1,715  | 114,345   |  |
| 21 Mining and oil and gas extraction                                       | 26          | 15     | 455              | 1,715  | 25,445    |  |
| 22 Utilities   | 114         | 110    | 1,715            | 1,715  | 50,215    |  |
| 23 Construction  | 1,046       | 885    | 19,490           | 19,490 | 384,780   |  |
| 31-33 Manufacturing  | 1,128       | 1,110  | 34,205           | 34,205 | 899,670   |  |
| 41 Wholesale trade   | 513         | 480    | 10,670           | 10,670 | 307,465   |  |
| 44-45 Retail trade   | 1,303       | 1,310  | 27,985           | 27,985 | 720,230   |  |
| 48-49 Transportation and warehousing                                       | 397         | 370    | 10,835           | 10,835 | 307,480   |  |
| 51 Information and cultural industries                                     | 186         | 210    | 4,055            | 4,055  | 172,795   |  |
| 52 Finance and insurance   | 367         | 295    | 5,670            | 5,670  | 316,170   |  |
| 53 Real estate and rental and leasing                                      | 351         | 250    | 4,435            | 4,435  | 126,440   |  |
| 54 Professional, scientific and technical services                         | 700         | 580    | 10,175           | 10,175 | 471,620   |  |
| 55 Management of companies and enterprises                                 | 25          | 30     | 190              | 190    | 8,440     |  |
| 56 Administrative and support, waste management and remediation activities | 378         | 410    | 10,625           | 10,625 | 314,005   |  |
| 61 Educational services  | 988         | 910    | 14,425           | 14,425 | 433,485   |  |
| 62 Health care and social assistance                                       | 1,198       | 950    | 21,120           | 21,120 | 611,740   |  |
| 71 Arts, entertainment and recreation                                      | 295         | 245    | 7,260            | 7,260  | 140,830   |  |
| 72 Accommodation and food services   | 583         | 570    | 16,460           | 16,460 | 414,970   |  |
| 81 Other services (except public administration)                           | 481         | 405    | 10,375           | 10,375 | 303,515   |  |
| 91 Public administration   | 589         | 515    | 13,860           | 13,860 | 350,075   |  |

Source: Statistics Canada, Census of Population: 2006 and Manifold Data Mining 2009

## 2.2.2 Local Employment Patterns & Labour Force Flow

While the previous discussion has focused on the Township's resident labour force concentration by industry, this section reviews the employment opportunities (jobs) that are present in the local economy.

As of 2006, there were 4,310 jobs in Springwater with the highest concentrations of employment in educational services (16.3%), agriculture, forestry, fishing and hunting (10.7%) and public administration (8.9%).

The greatest daily outflow of labour is in the Retail Trade sector (-925), followed by Manufacturing (-805) Health Care and Social Assistance (-725) and Construction (-550) sectors. In total the Township exports 5,255 workers. This represents a significant portion of the Township's total available labour force of 9,565 as of 2006. The highest proportion of workers commutes to employment in Barrie or Wasaga Beach for employment in the retail trade sector. Skilled workers in the manufacturing sector are attracted outside the Township to other parts of the region.

In the manufacturing sector the highest outflow of labour was in the motor vehicle manufacturing sub-sector, where exported labour accounted for -165 employees. The export of labour within this sector can be largely attributed to the Honda auto manufacturer in Alliston and the number of parts manufacturers that are present within the County of Simcoe. While the economic downturn has affected the auto sector, the considerable number of parts manufacturers located throughout Ontario's auto corridor continues to provide significant employment opportunities for Springwater residents.

The recent purchase of the former Transcontinental Bayweb property by Glueckler Metal of Barrie will provide a further 75 manufacturing jobs in Springwater. However, much of the employment will comprise the re-location of employees from the company's Barrie facility.

**Figure 11 – Labour Flow Analysis, Labour Force 15 Years and Over by Industry, Township of Springwater, 2006**

| Industry (NAICS)   | Jobs         | Labour Force | Net exp(-)/imp(+)<br>of labour |
|--|--------------|--------------|--------------------------------|
| <b>Total</b>   | <b>4,310</b> | <b>9,565</b> | <b>-5255</b>                   |
| 11 Agriculture, forestry, fishing and hunting                            | 460          | 375          | 85                             |
| 21 Mining and oil and gas extraction                                     | 20           | 15           | 5                              |
| 22 Utilities   | 10           | 105          | -95                            |
| 23 Construction  | 250          | 800          | -550                           |
| 31-33 Manufacturing  | 275          | 1080         | -805                           |
| 41 Wholesale trade   | 120          | 465          | -345                           |
| 44-45 Retail trade   | 320          | 1245         | -925                           |
| 48-49 Transportation and warehousing                                     | 115          | 355          | -240                           |
| 51 Information and cultural industries                                   | 65           | 215          | -150                           |
| 52 Finance and insurance   | 70           | 290          | -220                           |
| 53 Real estate and rental and leasing                                    | 120          | 250          | -130                           |
| 54 Professional, scientific and technical services                       | 335          | 550          | -215                           |
| 55 Management of companies and enterprises                               | 0            | 30           | -30                            |
| 56 Administrative and support, waste management and remediation services | 140          | 385          | -245                           |
| 61 Educational services  | 715          | 895          | -180                           |
| 62 Health care and social assistance                                     | 210          | 935          | -725                           |
| 71 Arts, entertainment and recreation                                    | 205          | 225          | -20                            |
| 72 Accommodation and food services                                       | 255          | 460          | -205                           |
| 81 Other services (except public administration)                         | 240          | 385          | -145                           |
| 91 Public administration   | 385          | 505          | -120                           |

**Jobs** - number of people employed by local industries; workers may or may not be residents of the municipality.

**Labour Force** - number of local residents employed in the sector, whether or not they work in the municipality.

**Net Export (-) or Import (+) of Labour** - this is calculated by subtracting the resident employed labour force value from the value for local jobs. If the number of local jobs is fewer than the number of residents employed in a particular sector, then the resulting value would be negative, indicating that local residents are commuting outside the community to work.

Source: Statistics Canada, Census of Population, 2006

### 2.2.3 Labour Force by Place of Work

Figure 12 illustrates the commuting patterns of the employed resident population greater than 15 years of age. In total Springwater experiences a net outflow of 7,040 workers. There are 1,060 residents who live and work in the Township, representing only 10.5% of the Township's workforce.

Not surprisingly, Springwater's proximity to the City of Barrie results in the greatest proportion of residents (56.3%) commuting to the City on a daily basis for employment, with an additional 19.0% of residents commuting to other municipalities within the County of Simcoe. A further 8.9% of the workforce commutes to the City of Toronto, the Region of Peel or Region of York. However, there are also 3,095 workers from outside communities that commute into Springwater to work, with the largest portion of these coming from Barrie (27.9%), Oro-Medonte (9.7%) and Tiny Township (4.4%).

**Figure 12 - Commuting Flows of Employed Labour Force, Township of Springwater, 2006**

| Place of Residence (Outflow from Springwater)    | 7,040 | % of Commuting Workforce | Place of Work (Inflow to Springwater)            | 3,095 | % of Commuting Workforce |
|--|-------|--------------------------|--|-------|--------------------------|
| Springwater (TP) / Barrie (CY)                   | 3,960 | 56.3%                    | Springwater (TP) / Springwater (TP)              | 1,060 | 34.2%                    |
| Springwater (TP) / Springwater (TP)              | 1,060 | 15.1%                    | Barrie (CY) / Springwater (TP)                   | 865   | 27.9%                    |
| Springwater (TP) / Toronto (C)                   | 280   | 4.0%                     | Oro-Medonte (TP) / Springwater (TP)              | 300   | 9.7%                     |
| Springwater (TP) / New Tecumseth (T)             | 255   | 3.6%                     | Tiny (TP) / Springwater (TP)                     | 135   | 4.4%                     |
| Springwater (TP) / Oro-Medonte (TP)              | 245   | 3.5%                     | Innisfil (T) / Springwater (TP)                  | 135   | 4.4%                     |
| Springwater (TP) / Orillia (CY)                  | 195   | 2.8%                     | Wasaga Beach (T) / Springwater (TP)              | 105   | 3.4%                     |
| Springwater (TP) / Midland (T)                   | 155   | 2.2%                     | Midland (T) / Springwater (TP)                   | 85    | 2.7%                     |
| Springwater (TP) / Innisfil (T)                  | 155   | 2.2%                     | Tay (TP) / Springwater (TP)                      | 65    | 2.1%                     |
| Springwater (TP) / Essa (TP)                     | 115   | 1.6%                     | Essa (TP) / Springwater (TP)                     | 65    | 2.1%                     |
| Springwater (TP) / Newmarket (T)                 | 105   | 1.5%                     | Orillia (CY) / Springwater (TP)                  | 60    | 1.9%                     |
| Springwater (TP) / Vaughan (CY)                  | 100   | 1.4%                     | Clearview (TP) / Springwater (TP)                | 60    | 1.9%                     |
| Springwater (TP) / Mississauga (CY)              | 90    | 1.3%                     | Collingwood (T) / Springwater (TP)               | 35    | 1.1%                     |
| Springwater (TP) / Penetanguishene (T)           | 75    | 1.1%                     | Penetanguishene (T) / Springwater (TP)           | 30    | 1.0%                     |
| Springwater (TP) / Collingwood (T)               | 65    | 0.9%                     | Severn (TP) / Springwater (TP)                   | 25    | 0.8%                     |
| Springwater (TP) / Wasaga Beach (T)              | 45    | 0.6%                     | New Tecumseth (T) / Springwater (TP)             | 25    | 0.8%                     |
| Springwater (TP) / Clearview (TP)                | 35    | 0.5%                     | Adjala-Tosorontio (TP) / Springwater (TP)        | 25    | 0.8%                     |
| Springwater (TP) / King (TP)                     | 30    | 0.4%                     | Bradford West Gwillimbury (T) / Springwater (TP) | 20    | 0.6%                     |
| Springwater (TP) / Richmond Hill (T)             | 25    | 0.4%                     |  |       |                          |
| Springwater (TP) / Markham (T)                   | 25    | 0.4%                     |  |       |                          |
| Springwater (TP) / Bradford West Gwillimbury (T) | 25    | 0.4%                     |  |       |                          |

Source: Statistics Canada - 2006 Census. Catalogue Number 97-561-XCB2006011.

Source: Statistics Canada - 2006 Census. Catalogue Number 97-561-XCB2006011.

## 2.2.4 Labour Force by Occupation

Consideration of occupations speaks more particularly to the work people do rather than the industry they work in and thus skills that may reside within a community. Figure 13 provides a profile of the labour force by occupation concentrations in the Township of Springwater, the County and the Province for 2006. The largest concentration of occupations in the Township is in sales and service, which accounts for 25.9% of all occupations. The largest share of all sub-occupations includes sales, retail salespersons and clerks<sup>3</sup>.

The Township also has a high proportion of workers with occupations in the trades, transport and equipment operator's occupations (15.9%), business, finance and administration occupations (14.8%) and management occupations (11.4%). A review of 2009 data suggests that this pattern of employment remains largely unchanged.

The concentration of occupations at the County level reveals a similar pattern, with major concentrations in: sales and service occupations (27.1%), occupations of trades, transport and equipment operators (17.8%), business, finance and administration occupations (15.5%) and management occupations (9.9%).

<sup>3</sup> Retail salespersons and sales clerks sell, rent or lease a range of technical and non-technical goods and services directly to consumers. They are employed by stores and other retail businesses, as well as wholesale businesses that sell on a retail basis to the public.

Figure 13 – Labour Force by Occupation, Springwater, County of Simcoe, Ontario: 2006/2009<sup>Predictive</sup>

|   | Springwater |        | County of Simcoe |       | Ontario   |       |           |       |
|---|-------------|--------|------------------|-------|-----------|-------|-----------|-------|
|   | 2009        | 2006   | 2006             | 2006  | 2006      | 2006  |           |       |
| All occupations   | 10,965      | 10,050 | 227,855          |       | 6,473,735 |       |           |       |
| A Management occupations  | 1,291       | 11.8%  | 1,150            | 11.4% | 22,660    | 9.9%  | 666,485   | 10.3% |
| B Business, finance and administration occupations                          | 1,675       | 15.3%  | 1,485            | 14.8% | 35,290    | 15.5% | 1,204,490 | 18.6% |
| C Natural and applied sciences and related occupations                      | 411         | 3.7%   | 390              | 3.9%  | 9,425     | 4.1%  | 451,930   | 7.0%  |
| D Health occupations  | 698         | 6.4%   | 710              | 7.1%  | 12,055    | 5.3%  | 340,685   | 5.3%  |
| E Occupations in social science, education, government service and religion | 1,057       | 9.6%   | 895              | 8.9%  | 17,165    | 7.5%  | 546,390   | 8.4%  |
| F Occupations in art, culture, recreation and sport                         | 345         | 3.1%   | 255              | 2.5%  | 5,130     | 2.3%  | 200,980   | 3.1%  |
| G Sales and service occupations   | 2,839       | 25.9%  | 2,605            | 25.9% | 61,770    | 27.1% | 1,522,820 | 23.5% |
| H Trades, transport and equipment operators and related occupations         | 1,686       | 15.4%  | 1,595            | 15.9% | 40,635    | 17.8% | 911,250   | 14.1% |
| I Occupations unique to primary industry                                    | 491         | 4.5%   | 535              | 5.3%  | 6,270     | 2.8%  | 165,085   | 2.6%  |
| J Occupations unique to processing, manufacturing and utilities             | 472         | 4.3%   | 420              | 4.2%  | 17,440    | 7.7%  | 463,610   | 7.2%  |

Source: Statistics Canada, Census of Population: 2006

### 2.2.5 Growth in the Creative Class

An essential component to determining a community's level of innovation or creativity is an understanding of the degree to which a workforce is skilled or specialized. These types of occupations are often referred to as the creative occupations or the 'creative class' of workers.

In the book *The Rise of the Creative Class*, Professor Richard Florida details the significant societal and economic impact that the creative class of worker is having on both local and international economies and the shifts being made to attract and retain this type of workforce, as more and more economic developers realize the importance of this aspect of a workforce. He defines the creative class as including people in:

- science and engineering,
- architecture and design,
- education,
- arts, music and entertainment

He also includes the broader group of creative professionals in:

- business and finance,
- law, and
- health care and related fields.

In the 2009 report, *Ontario in the Creative Age*, Florida pushes this concept further by positioning creative occupations in the context of four additional broad kinds of work.

- **Creative occupations** – the growing number of workers who are paid to think. These include scientists and technologists, artists and entertainers, and managers and analysts.
- **Routine-service occupations** - where the work involves little autonomy and is focused on the delivery of services, for example, food-service workers, janitors and clerks;
- **Routine-physical occupations** - consisting of people who use physical skills and carry out repetitive tasks (for example, tradespersons, mechanics, crane operators and assembly line workers);
- **Routine-resource occupations** - including mining and forestry.

What is apparent from the creative occupational categories is their ability to cut across industry sector lines in a way that can impact both traditional and emerging industries and the degree to which these occupations translate to a well paid and highly skilled workforce. This is particularly true if one considers that the skills needed for creative occupations are more heavily weighted towards **analytical<sup>4</sup> and social intelligence<sup>5</sup>** skills, both of which play a significant role in a knowledge driven economy.

Richard Florida famously coined the ‘Three-T’s’ of Technology, Talent and Tolerance to define the conditions for success in the creative economy. Recently he added a fourth T - Territory to reflect the critical role that *quality of place* plays to driving a successful creative economy. His research demonstrates that *where* people choose to live is as important a decision to them as their job, personal finances and choice of spouse or partner. Creative people are highly mobile and able to make these kinds of choices and quality of life questions including cost of living, access to cultural amenities and entertainment options, natural beauty and other factors are magnets that attract creative people to a town, city or region.

While it was previously indicated that a significant share of the Township’s resident labour force is employed in sales and service occupations (25.9%), 33.9% of Springwater’s labour force is in fact employed in creative class occupations. This compares to 30.1% in the City of Barrie, 28.4% at the County level and 34.7% at the provincial level (see figure 14 for further detail).

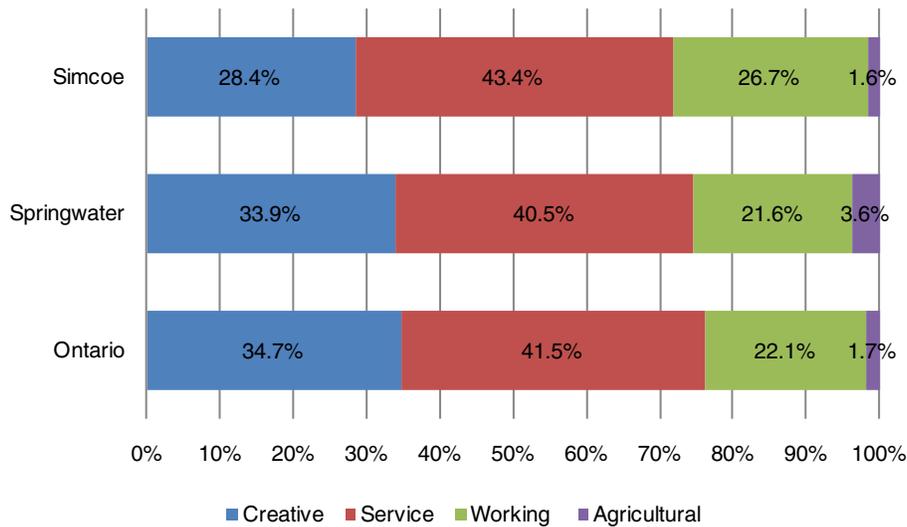
These results support the findings that a higher proportion of individuals with professional occupations reside in Springwater. Given the generally higher wages, specialized skills, and innovative capacities of these individuals, the growth and presence of this class of worker has substantial implications for the Township’s economic development strategy in terms of how the Township can target these individuals to reside in the community. By actively promoting Springwater’s natural beauty, outdoor experiences, and range of housing options, the Township may be able to attract a greater proportion of these workers to the community. Given the tendency towards entrepreneurship exhibited by this class of worker, the Township may also consider how it can better support small business start ups or home based businesses in the community.

---

<sup>4</sup> Examples of occupations that require the highest level of **analytical thinking skills** include surgeons, biomedical engineers, dentists, accountants, plumber, art directors etc.

<sup>5</sup> Examples of occupations that require the highest level of **social intelligence skills** include psychiatrists, chief executives, marketing managers, lawyers, sports coach, film directors etc.

Figure 14 – Labour Force by Occupational Category, 2006



Source: Statistics Canada, Census of Population: 2006

Figure 15 illustrates the breakdown of creative occupations within the Township’s broader creative economy. These results suggest that the greatest concentration of workers are employed in professional occupations as teachers and professors (15.1%), followed by other managers (13.4%) and senior management occupations (7.0%).

Figure 15 – Creative Occupations by Sub-Occupation, Springwater, and Ontario, 2006

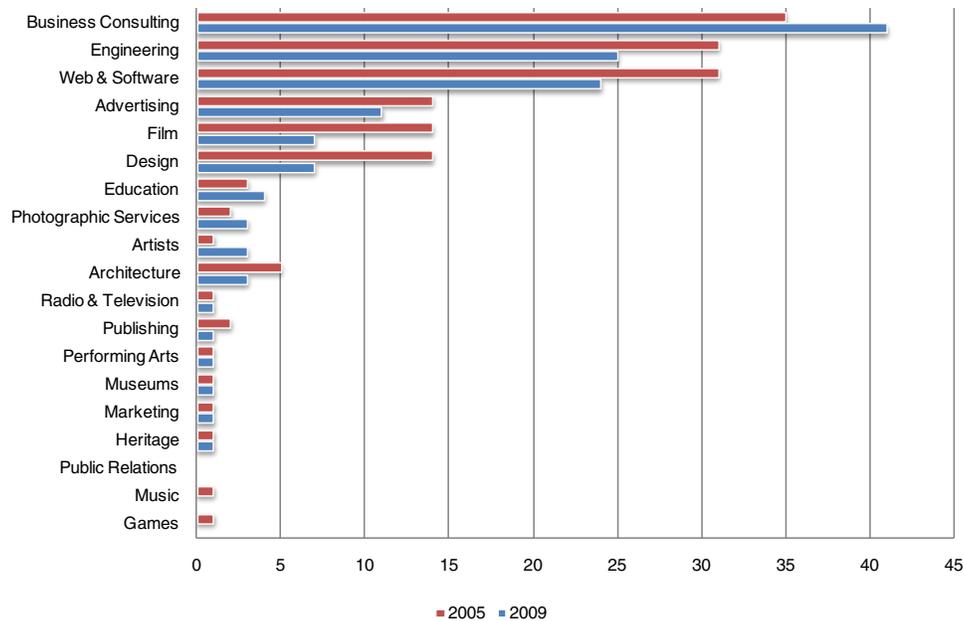
|   | Ontario       |           | Springwater |        |
|---|---------------|-----------|-------------|--------|
|   | 2009          | 2006      | 2009        | 2006   |
| <b>Total</b>  | 2,246,475     | 100.0%    | 3,877       | 100.0% |
| A0 Senior management occupations  | 82,475 3.7%   | 264 6.8%  | 240 7.0%    |        |
| A1 Specialist managers  | 193,350 8.6%  | 290 7.5%  | 225 6.6%    |        |
| A2 Managers in retail trade, food and accommodation services  | 182,695 8.1%  | 261 6.7%  | 230 6.8%    |        |
| A3 Other managers, n.e.c.   | 207,965 9.3%  | 476 12.3% | 455 13.4%   |        |
| B0 Professional occupations in business and finance   | 182,195 8.1%  | 281 7.3%  | 230 6.8%    |        |
| B1 Finance and insurance administration occupations   | 82,185 3.7%   | 117 3.0%  | 115 3.4%    |        |
| C0 Professional occupations in natural and applied sciences   | 266,690 11.9% | 179 4.6%  | 165 4.8%    |        |
| C1 Technical occupations related to natural and applied sciences  | 185,240 8.2%  | 232 6.0%  | 225 6.6%    |        |
| D0 Professional occupations in health   | 71,645 3.2%   | 184 4.8%  | 190 5.6%    |        |
| D1 Nurse supervisors and registered nurses  | 102,330 4.6%  | 235 6.1%  | 195 5.7%    |        |
| D2 Technical and related occupations in health  | 76,580 3.4%   | 148 3.8%  | 165 4.8%    |        |
| E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers | 151,710 6.8%  | 263 6.8%  | 200 5.9%    |        |
| E1 Teachers and professors  | 260,435 11.6% | 603 15.5% | 515 15.1%   |        |
| F0 Professional occupations in art and culture  | 88,355 3.9%   | 109 2.8%  | 100 2.9%    |        |
| F1 Technical occupations in art, culture, recreation and sport  | 112,625 5.0%  | 235 6.1%  | 155 4.6%    |        |

Source: Statistics Canada, Census of Population 2006, Manifold Data Mining 2009

Figure 16 illustrates the pattern of creative industry business growth for Springwater between 2005 and 2009. The greatest gain in the number of creative businesses in Springwater occurred in the business consulting sector, with a net gain of 6 businesses over the five year span. The most significant losses

have been experienced in three sectors: education (-7 businesses), film (-7 businesses) and web & software (-7 businesses).

Figure 16 – Number of Creative Industries, Township of Springwater (2005 & 2009)



Source: Statistics Canada, Canadian Business Patterns Data: 2005 & 2009

## 2.3 Industry Sector Analysis Review

### 2.3.1 Location Quotients Analysis

In order to determine the degree of business and industrial specialization, thus the economic diversity that may be developing in the Township of Springwater, location quotients (“LQ’s”) have been calculated to identify and measure the concentration of industry/business activity by major sector and sub-sector.

Location Quotients are a commonly used tool in local/regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purposes of this study we have calculated location quotients that compare the Township of Springwater industry sector concentration relative to the Province of Ontario. The province is used in this comparison, rather than the region, because the regional economy is relatively similar and may not result in identifiable comparative advantages.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region, the Province of Ontario, which may equate to a competitive advantage. Location Quotients equal to 1.0 for a given sector suggest that the Township of Springwater has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 indicates a concentration of economic activity that is less than the overarching region and may point to a gap or disadvantage in attracting this form of business or industry.

In theory, industrial or business concentration that is greater than the overarching region average may represent the export base of the participating municipalities. Businesses that make up this export base may have likely chosen to locate in the area due to certain regional competitive advantages. These

competitive advantages can be used to attract further investment in the future, in the same or complimentary industries.

Definitions for individual sectors are based on the North American Industrial Classification System (NAICS) and are provided in Appendix I to this report.

Based on the 2006 census data, the industry concentration in Springwater relative to the Province of Ontario reveals the highest concentration of labour in the following sectors:

- Agriculture, forestry, fishing and hunting- **LQ 2.17** (2009 LQ = 1.57)
- Construction - **LQ 1.48** (2009 LQ = 1.60)
- Utilities - **LQ 1.41** (2009 LQ = 1.34)
- Educational services- **LQ 1.35** (2009 LQ = 1.35)
- Real estate and rental and leasing- **LQ 1.27** (2009 LQ = 1.64)

In contrast, the following industries in the Township have underperformed when compared to the Province. Each industry has an LQ value of less than 1.0 and experienced a negative growth rate from 2006 to 2009, these include:

- Manufacturing – LQ 0.79 (-6.9% growth rate from 2006 to 2009)
- Transportation and warehousing – LQ 0.78 (-1.7% growth rate)
- Information and cultural industries - LQ 0.78 (-18.9% growth rate)
- Administrative and support, waste management and remediation services – LQ 0.84 (-15.5% growth rate)
- Accommodation and food services – LQ 0.88 (-6.4% growth rate)

However, it is important to note that while the Township has benefited from competitive advantages within the agriculture, construction, utilities, educational services and real estate and rental and leasing industries, there are in fact opportunities within underperforming industries such as manufacturing, transportation and warehousing, information and cultural industries (as they relate to the professional service industry) as well as industries that are supportive of the tourism sector (i.e. accommodation and food services). Each of the underperforming industries, with the exception of administrative and support, waste management and remediation services have been highlighted as opportunities, and are further elaborated on in the target sector assessment found in section 3.0.

The South Central Community Development Corporation's Economic Competitive Analysis Project (ECAP) (2009) also considered the results of a location quotient analysis for the broader region. The Township of Springwater together with seven Community Future Development Corporations (SCCDC) in the Western Ontario Region<sup>6</sup> have noted specializations in agriculture (3.7), utilities (3.0), construction (1.4), arts, entertainment and recreation (1.3), accommodation and food services (1.2), and manufacturing (1.2). The results of the SCCDC region closely mirror the Township of Springwater performance.

The results of the ECAP labour force concentration analysis suggest a region that is predominantly rural in nature, with capabilities that suggest a strong tourism sector, which can be linked to the presence of entertainment facilities such as Casino Rama on the Rama Reserve in the Orillia area or the recreational

<sup>6</sup> The region includes: Bruce CFDC, Centre of Business and Economic Development (CBED), North Simcoe CFDC, Nottawasaga Futures, Orillia Area Community Development Corporation (CDC), Saugeen Economic Development Corporation (EDC) and Wellington Waterloo CFDC.

activities located throughout the County of Simcoe. The SCCDC region has had some success in drawing business investment in the manufacturing sectors where a low cost business environment has been a deciding factor in selecting a location.

The discussion that follows profiles the Township's business base providing better understanding of the type of business and industry the Township is attracting.

**Figure 17 – Location Quotient Analysis, Springwater: 2001, 2006 & 2009**

| All industries   | 2009 LQ | 2006 LQ | 2001 LQ | Classification based on 2006 LQ |
|--|---------|---------|---------|---------------------------------|
| 11 Agriculture, forestry, fishing and hunting                            | 1.57    | 2.17    | 2.46    | High                            |
| 21 Mining and oil and gas extraction                                     | 0.60    | 0.38    | 0.00    | Low                             |
| 22 Utilities   | 1.34    | 1.41    | 1.46    | High                            |
| 23 Construction  | 1.60    | 1.48    | 1.63    | High                            |
| 31-33 Manufacturing  | 0.74    | 0.79    | 0.82    | Medium                          |
| 41 Wholesale trade   | 0.98    | 1.01    | 1.33    | Medium                          |
| 44-45 Retail trade   | 1.07    | 1.17    | 0.85    | High                            |
| 48-49 Transportation and warehousing                                     | 0.76    | 0.78    | 0.95    | Medium                          |
| 51 Information and cultural industries                                   | 0.63    | 0.78    | 0.93    | Medium                          |
| 52 Finance and insurance   | 0.69    | 0.60    | 0.52    | Low                             |
| 53 Real estate and rental and leasing                                    | 1.64    | 1.27    | 0.85    | High                            |
| 54 Professional, scientific and technical services                       | 0.88    | 0.79    | 0.62    | Medium                          |
| 55 Management of companies and enterprises                               | 1.75    | 2.29    | 0.00    | High                            |
| 56 Administrative and support, waste management and remediation services | 0.71    | 0.84    | 1.08    | Medium                          |
| 61 Educational services  | 1.35    | 1.35    | 1.09    | High                            |
| 62 Health care and social assistance                                     | 1.16    | 1.00    | 1.23    | Medium                          |
| 71 Arts, entertainment and recreation                                    | 1.24    | 1.12    | 1.10    | High                            |
| 72 Accommodation and food services                                       | 0.83    | 0.88    | 0.87    | Medium                          |
| 81 Other services (except public administration)                         | 0.94    | 0.86    | 0.97    | Medium                          |
| 91 Public administration   | 0.99    | 0.95    | 1.06    | Medium                          |

Source: Statistics Canada, Census of Population: 2001 & 2006

Note: 2009 Predictive LQs were obtained through the use of Manifold Data Mining Services

Note: LQs are described as: Very High if over 5.0, High if between 1.25 and 5.0, Medium if 0.75 to 1.25 and Low if less than 0.75

### 2.3.2 Business Pattern Assessment

In contrast to the labour force discussion, business growth in a community is a better measure for determining the capacity of a community to support and sustain a business operation either by the availability of a needed workforce, accessibility to market, or the ability to move goods and people as part of day to day operations.

Statistics Canada's Canadian Business Patterns Data provides a record of business establishments by industry and size. Sources of information are updates from the Statistics Canada survey program and the Business Number registration source collected from the Canada Revenue Agency (CRA). The business

data collected for the Township of Springwater includes all local business which meets at least one of the three following criteria:

- Have an employee workforce for which they submit payroll remittances to CRA; or
- Have a minimum of \$30,000 in annual sales revenue; or
- Are incorporated under a federal or provincial act and have filed a federal corporate income tax form within the past three years.

The Canadian Business Patterns Data records business counts by “**Total**”, “**Indeterminate**” and “**Subtotal**” categories. The establishments in the “Indeterminate” category include the self-employed (i.e. those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners). It should be noted that the Canadian Business Patterns Data uses CRA as a primary resource in establishing counts; therefore, businesses without a Business Number or indicating annual sales less than \$30,000 are not included. The population of these small, unincorporated businesses is thought to be in the range of 600,000 in all of Canada.<sup>7</sup>

A detailed review of the business patterns data for the period between 2005 and 2009 for the Township of Springwater provides an understanding of the growth or decline of businesses in the Township over the last 5 years and the key characteristics that define Springwater’s business community. When combined with the broader industry analysis, the Business Patterns information will assist in refining sector opportunities for the Township of Springwater and provide an indication of where the priorities of the Township exist, especially with regard to program development and delivery, and strategic planning.

Data collected by Statistics Canada, Canadian Business Patterns Data in December 2005 and 2009 suggests that there has been a slight decrease in the number of businesses overall; from 1,774 businesses in 2005 to 1,514 businesses in 2009 (a decrease of -14.7%).<sup>8</sup> There has been a net loss of 260 firms that have either left the area or possibly consolidated. Further investigation into the net loss of business across Springwater reveals much of the diminishing businesses were classified under the self-employed/indeterminate category, which experienced a loss of -193 businesses and comprising 62% of all business as of 2009).

Much of the business composition in Springwater has remained largely unchanged over the one year span, as of 2009:

- 60.5% have less than 4 employees
- 20.7% have between 5 -9 employees
- 15.5% have between 10 -49 employees, and
- 19 businesses (3.3%) have 50 or more employees

Small and medium sized enterprises (SMEs) account for the majority (81.2%) of all business in the Township. This is important from the perspective of the type of economic development support and programming that may be required to ensure that these businesses are sustainable over time.

The County’s Trends Opportunities and Priorities (TOPs) report identified these types of business as having a significant role in economic and employment growth in Simcoe County. The report also suggests that owner operators and self-employed businesses are attractive to both young and older workers, which

---

<sup>7</sup> It should also be noted that expanded abilities to identify ‘inactive’ business units since June 2008 have resulted in a greater number of establishments removed from June to December 2008. This may also affect the establishment counts from 2005 to 2009.

<sup>8</sup> Excludes the “indeterminate” category

in turn drives an entrepreneurial attitude in the County. The TOPs report also made mention of a Canadian Federation of Independent Business report, which suggested that “Experience from previous recessions shows that the micro-business sector generally continues to add jobs, even as large corporations shed employees.” Based on these results SMEs will play an essential role in the continued economic growth in the Township and throughout the County.

**Figure 18 - Business Formation, by size of employment, Springwater & County of Simcoe: 2005 – 2009**

|               | Simcoe County |        |               |                   | Township of Springwater |       |               |                   |
|---------------|---------------|--------|---------------|-------------------|-------------------------|-------|---------------|-------------------|
|               | 2009          | 2005   | Actual Change | Percentage Change | 2009                    | 2005  | Actual Change | Percentage Change |
| Total         | 26,607        | 26,702 | -95           | -0.4%             | 1,514                   | 1,774 | -260          | -14.7%            |
| Indeterminate | 15,065        | 16,029 | -964          | -6.0%             | 939                     | 1,132 | -193          | -17.0%            |
| Subtotal      | 11,542        | 10,673 | 869           | 8.1%              | 575                     | 642   | -67           | -10.4%            |
| 1-4           | 6,354         | 5,979  | 375           | 6.3%              | 348                     | 375   | -27           | -7.2%             |
| 5-9           | 2,456         | 1,925  | 531           | 27.6%             | 119                     | 110   | 9             | 8.2%              |
| 10-19         | 1,428         | 1,350  | 78            | 5.8%              | 62                      | 85    | -23           | -27.1%            |
| 20-49         | 827           | 894    | -67           | -7.5%             | 27                      | 49    | -22           | -44.9%            |
| 50-99         | 251           | 300    | -49           | -16.3%            | 7                       | 10    | -3            | -30.0%            |
| 100-199       | 134           | 133    | 1             | 0.8%              | 6                       | 5     | 1             | 20.0%             |
| 200-499       | 66            | 66     | 0             | 0.0%              | 2                       | 5     | -3            | -60.0%            |
| 500 +         | 26            | 26     | 0             | 0.0%              | 4                       | 3     | 1             | 33.3%             |

Source: Statistics Canada, Canadian Business Patterns Data, 2005 & 2009

On a broad level, Springwater’s businesses by industry type (excluding the self employed) are concentrated in the following industries: Construction (23.5%), Retail Trade (10.1%), Other Services<sup>9</sup> (9.9%), Professional, Scientific and Technical Services (9.4%) and Health care and social assistance (7.3%).

In addition, the following sectors experienced the greatest increase in the number of businesses between 2005 and 2009 in the Township of Springwater:

- Construction (13 additional businesses)
- Health care and social assistance (5 additional businesses)
- Arts, entertainment and recreation (4 additional businesses)
- Wholesale Trade (2 additional businesses)

The high concentration and growth of construction firms in the Township can largely be attributed to the population growth in the Township as a whole and its surrounding areas. The strength of the construction industry is further supported not only by the number of businesses in Springwater and the growth this industry has experienced between 2005 and 2009, but also the high level of labour force concentration as expressed in the industry’s high location quotient value of 1.48.

<sup>9</sup> Other Services: This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services etc...

Figure 19 - Business Formation Summary, Springwater &amp; Simcoe County – 2 Digit NAICs: 2005 - 2009

|  | Simcoe Region |              |               |                   | Springwater |            |               |                   |
|--|---------------|--------------|---------------|-------------------|-------------|------------|---------------|-------------------|
|  | 2009          | 2005         | Actual Change | Percentage Change | 2009        | 2005       | Actual Change | Percentage Change |
| <b>Subtotal</b>  | <b>11542</b>  | <b>10673</b> | <b>869</b>    | <b>8.1%</b>       | <b>575</b>  | <b>642</b> | <b>-67</b>    | <b>-10.4%</b>     |
| 11 Agriculture, forestry, fishing and hunting                            | 314           | 292          | 22            | 7.5%              | 30          | 30         | 0             | 0.0%              |
| 21 Mining and oil and gas extraction                                     | 33            | 28           | 5             | 17.9%             | 3           | 2          | 1             | 50.0%             |
| 22 Utilities   | 24            | 29           | -5            | -17.2%            | 0           | 1          | -1            | -100.0%           |
| 23 Construction  | 1814          | 1658         | 156           | 9.4%              | 135         | 122        | 13            | 10.7%             |
| 31-33 Manufacturing  | 608           | 640          | -32           | -5.0%             | 27          | 32         | -5            | -15.6%            |
| 41 Wholesale trade   | 605           | 543          | 62            | 11.4%             | 31          | 29         | 2             | 6.9%              |
| 44-45 Retail trade   | 1645          | 1645         | 0             | 0.0%              | 58          | 119        | -61           | -51.3%            |
| 48-49 Transportation and warehousing                                     | 405           | 371          | 34            | 9.2%              | 16          | 18         | -2            | -11.1%            |
| 51 Information and cultural industries                                   | 117           | 116          | 1             | 0.9%              | 8           | 16         | -8            | -50.0%            |
| 52 Finance and insurance   | 372           | 368          | 4             | 1.1%              | 10          | 11         | -1            | -9.1%             |
| 53 Real estate and rental and leasing                                    | 407           | 410          | -3            | -0.7%             | 12          | 17         | -5            | -29.4%            |
| 54 Professional, scientific and technical services                       | 1075          | 958          | 117           | 12.2%             | 54          | 53         | 1             | 1.9%              |
| 55 Management of companies and enterprises                               | 103           | 88           | 15            | 17.0%             | 3           | 7          | -4            | -57.1%            |
| 56 Administrative and support, waste management and remediation services | 645           | 555          | 90            | 16.2%             | 41          | 43         | -2            | -4.7%             |
| 61 Educational services  | 130           | 109          | 21            | 19.3%             | 3           | 4          | -1            | -25.0%            |
| 62 Health care and social assistance                                     | 1069          | 917          | 152           | 16.6%             | 42          | 37         | 5             | 13.5%             |
| 71 Arts, entertainment and recreation                                    | 202           | 223          | -21           | -9.4%             | 18          | 14         | 4             | 28.6%             |
| 72 Accommodation and food services                                       | 741           | 743          | -2            | -0.3%             | 25          | 29         | -4            | -13.8%            |
| 81 Other services (except public administration)                         | 1207          | 951          | 256           | 26.9%             | 57          | 56         | 1             | 1.8%              |
| 91 Public administration   | 26            | 29           | -3            | -10.3%            | 2           | 2          | 0             | 0.0%              |

Source: Statistics Canada, Canadian Business Patterns Data, 2005 &amp; 2009

### 2.3.2.1 Detailed Sector Analysis

The following tables detail the range of businesses for six sectors considered to be most relevant to an economic development strategy for the Township of Springwater (excluding the self-employed).

#### Manufacturing

Figure 20 provides a detailed understanding of the concentration of businesses within the subsectors of the Manufacturing industry in Springwater. While the lack of serviced industrial land has limited the attraction of manufacturing operations to the Township, there is a broad range of businesses in the community that includes millwork, machine shops, and medical device manufacturing.

**Figure 20 – Manufacturing Industry, Township of Springwater, Concentration of Business, 2009**

|  | 2009      |               |
|--|-----------|---------------|
| <b>31 - 33 Manufacturing</b>   | <b>27</b> | <b>100.0%</b> |
| 321919 - Other Millwork  | 2         | 7.4%          |
| 323115 - Digital Printing  | 2         | 7.4%          |
| 332710 - Machine Shops   | 2         | 7.4%          |
| 333299 - All Other Industrial Machinery Manufacturing  | 2         | 7.4%          |
| 311330 - Confectionery Manufacturing from Purchased Chocolate                                  | 1         | 3.7%          |
| 311511 - Fluid Milk Manufacturing  | 1         | 3.7%          |
| 314120 - Curtain and Linen Mills   | 1         | 3.7%          |
| 321111 - Sawmills (except Shingle and Shake Mills)   | 1         | 3.7%          |
| 323119 - Other Printing  | 1         | 3.7%          |
| 323120 - Support Activities for Printing   | 1         | 3.7%          |
| 325320 - Pesticide and Other Agricultural Chemical Manufacturing                               | 1         | 3.7%          |
| 332439 - Other Metal Container Manufacturing   | 1         | 3.7%          |
| 332810 - Coating, Engraving, Heat Treating and Allied Activities                               | 1         | 3.7%          |
| 333416 - Heating Equipment and Commercial Refrigeration Equipment                              | 1         | 3.7%          |
| 333519 - Other Metalworking Machinery Manufacturing  | 1         | 3.7%          |
| 333990 - All Other General-Purpose Machinery Manufacturing                                     | 1         | 3.7%          |
| 334220 - Radio and Television Broadcasting and Wireless Communications Equipment Manufacturing | 1         | 3.7%          |
| 334512 - Measuring, Medical and Controlling Devices Manufacturing                              | 1         | 3.7%          |
| 335229 - Other Major Appliance Manufacturing   | 1         | 3.7%          |
| 336612 - Boat Building   | 1         | 3.7%          |
| 337123 - Other Wood Household Furniture Manufacturing  | 1         | 3.7%          |
| 337127 - Institutional Furniture Manufacturing   | 1         | 3.7%          |
| 339990 - All Other Miscellaneous Manufacturing   | 1         | 3.7%          |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

#### Construction

Figure 21 illustrates the range of business establishments associated with the Construction sector that is present in the Township. Residential building construction and plumbing, heating and air-conditioning contractors are the dominant type of businesses in this sector.

Figure 21 – Construction Industry, Township of Springwater, Concentration of Business, 2009

|   | 2009       |               |
|---|------------|---------------|
| <b>23 Construction</b>  | <b>135</b> | <b>100.0%</b> |
| 236110 - Residential Building Construction                                | 22         | 16.3%         |
| 238220 - Plumbing, Heating and Air-Conditioning Contractors               | 17         | 12.6%         |
| 238140 - Masonry Contractors  | 12         | 8.9%          |
| 238210 - Electrical Contractors and Other Wiring Installation Contractors | 11         | 8.1%          |
| 238910 - Site Preparation Contractors                                     | 10         | 7.4%          |
| 238990 - All Other Specialty Trade Contractors                            | 8          | 5.9%          |
| 238310 - Drywall and Insulation Contractors                               | 7          | 5.2%          |
| 238350 - Finish Carpentry Contractors                                     | 6          | 4.4%          |
| 237110 - Water and Sewer Line and Related Structures Construction         | 5          | 3.7%          |
| 238160 - Roofing Contractors  | 5          | 3.7%          |
| 238190 - Other Foundation, Structure and Building Exterior Constructors   | 5          | 3.7%          |
| 238130 - Framing Contractors  | 4          | 3.0%          |
| 238390 - Other Building Finishing Contractors                             | 4          | 3.0%          |
| 236220 - Commercial and Institutional Building Construction               | 3          | 2.2%          |
| 238110 - Poured Concret Foundation and Structure Contractors              | 3          | 2.2%          |
| 238170 - Siding Contractors   | 3          | 2.2%          |
| 238120 - Structural Steel and Precast Concrete Contractors                | 2          | 1.5%          |
| 238320 - Painting and Wall Covering Contractors                           | 2          | 1.5%          |
| 236210 - Industrial Building and Structure Construction                   | 1          | 0.7%          |
| 237130 - Power and Communication Line and Related Structures Construction | 1          | 0.7%          |
| 237310 - Highway, Street and Bridge Construction                          | 1          | 0.7%          |
| 237990 - Other Heavy and Civil Engineering Construction                   | 1          | 0.7%          |
| 238299 - All Other Building Equipment Contractors                         | 1          | 0.7%          |
| 238330 - Flooring Contractors   | 1          | 0.7%          |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

### Wholesale Trade

In 2009, there were 31 wholesale trade establishments in the Township. The greatest number of businesses is concentrated in Other Specialty-Line Building Supplies Wholesaler-Distributors (3 businesses), Farm, Lawn and Garden Machinery and Equipment Wholesaler-Distributors (3 businesses) and Other Specialty-Line Food Wholesaler-Distributors (2 businesses).

Figure 22 – Wholesale Trade Industry, Township of Springwater, Concentration of Business, 2009

|  | 2009      |               |
|--|-----------|---------------|
| <b>41 Wholesale Trade</b>  | <b>31</b> | <b>100.0%</b> |
| 416390 - Other Specialty-Line Building Supplies Wholesaler-Distributors                        | 3         | 9.7%          |
| 417110 - Farm, Lawn and Garden Machinery and Equipment Wholesaler-Distributors                 | 3         | 9.7%          |
| 413190 - Other Specialty-Line Food Wholesaler-Distributors                                     | 2         | 6.5%          |
| 415290 - Other New Motor Vehicle Parts and Accessories Wholesaler-Distributors                 | 2         | 6.5%          |
| 418990 - All Other Wholesaler-Distributors   | 2         | 6.5%          |
| 419120 - Wholesale Trade Agents and Brokers  | 2         | 6.5%          |
| 411120 - Oilseed and Grain Wholesaler-Distributors   | 1         | 3.2%          |
| 412110 - Petroleum Product Wholesaler-Distributors   | 1         | 3.2%          |
| 413120 - Dairy and Milk Products Wholesaler-Distributors                                       | 1         | 3.2%          |
| 414110 - Clothing and Clothing Accessories Wholesaler-Distributors                             | 1         | 3.2%          |
| 414120 - Footwear Wholesaler-Distributors  | 1         | 3.2%          |
| 415120 - Truck, Truck Tractor and Bus Wholesaler-Distributors                                  | 1         | 3.2%          |
| 415210 - Tire Wholesaler-Distributors  | 1         | 3.2%          |
| 416120 - Plumbing, Heating and Air-Conditioning Equipment and Supplies Wholesaler-Distributors | 1         | 3.2%          |
| 416310 - General-Line Building Supplies Wholesaler-Distributors                                | 1         | 3.2%          |
| 417220 - Mining and Oil and Gas Well Machinery, Equipment and Supplies Wholesaler-Distributors | 1         | 3.2%          |
| 417230 - Industrial Machinery, Equipment and Supplies Wholesaler-Distributors                  | 1         | 3.2%          |
| 417910 - Office and Store Machinery and Equipment Wholesaler-Distributors                      | 1         | 3.2%          |
| 417930 - Professional Machinery, Equipment and Supplies Wholesaler-Distributors                | 1         | 3.2%          |
| 417990 - All Other Machinery, Equipment and Supplies Wholesaler-Distributors                   | 1         | 3.2%          |
| 418110 - Recyclable Metal Wholesaler-Distributors  | 1         | 3.2%          |
| 418310 - Agricultural Feed Wholesaler-Distributors   | 1         | 3.2%          |
| 418910 - Log and Wood Chip Wholesaler-Distributors   | 1         | 3.2%          |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

### Retail Trade

There are 58 retail establishments in the Township of Springwater. The greatest concentrations of retail businesses are in the following: Gasoline Stations with Convenience Stores (6), Other Gasoline Stations (5) and All Other Miscellaneous General Merchandise Stores (5). The lack of retail establishments that would cater to a higher earner or visitor looking for a unique retail shopping experience is a concern in terms of the sustainability of the Township's mainstreets.

Figure 23 – Retail Trade Industry, Township of Springwater, Concentration of Business, 2009

|   | 2009 |        |
|---|------|--------|
| 44-45 Retail Trade  | 58   | 100.0% |
| 447110 - Gasoline Stations with Convenience Stores                  | 6    | 10.3%  |
| 447190 - Other Gasoline Stations                                    | 5    | 8.6%   |
| 452999 - All Other Miscellaneous General Merchandise Stores         | 5    | 8.6%   |
| 441120 - Used Car Dealers   | 4    | 6.9%   |
| 444190 - Other Building Material Dealers                            | 4    | 6.9%   |
| 444130 - Hardware Stores  | 3    | 5.2%   |
| 441220 - Motorcycle, Boat and Other Motor Vehicle Dealers           | 2    | 3.4%   |
| 441310 - Automotive Parts and Accessories Stores                    | 2    | 3.4%   |
| 444220 - Nursery Stores and Garden Centres                          | 2    | 3.4%   |
| 445120 - Convenience Stores   | 2    | 3.4%   |
| 445299 - All Other Specialty Food Stores                            | 2    | 3.4%   |
| 445310 - Beer, Wine and Liquor Stores                               | 2    | 3.4%   |
| 451110 - Sporting Goods Stores                                      | 2    | 3.4%   |
| 453110 - Florists   | 2    | 3.4%   |
| 442110 - Furniture Stores   | 1    | 1.7%   |
| 442298 - All Other Home Furnishings Stores                          | 1    | 1.7%   |
| 443110 - Appliance, Television and Other Electronics Stores         | 1    | 1.7%   |
| 443120 - Computer and Software Stores                               | 1    | 1.7%   |
| 444110 - Home Centres   | 1    | 1.7%   |
| 444120 - Paint and Wallpaper Stores                                 | 1    | 1.7%   |
| 444210 - Outdoor Power Equipment Stores                             | 1    | 1.7%   |
| 445110 - Supermarkets and Other Grocery (except Convenience) Stores | 1    | 1.7%   |
| 445210 - Meat Markets   | 1    | 1.7%   |
| 445291 - Baked Goods Stores   | 1    | 1.7%   |
| 446110 - Pharmacies and Drug Stores                                 | 1    | 1.7%   |
| 448120 - Women's Clothing Stores                                    | 1    | 1.7%   |
| 448140 - Family Clothing Stores                                     | 1    | 1.7%   |
| 454113 - Mail-Order Houses  | 1    | 1.7%   |
| 454390 - Other Direct Selling Establishments                        | 1    | 1.7%   |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

### Professional, Scientific + Technical Services

Relating back to the concept of promoting the creative class, the greatest concentration of professional, scientific and technical based businesses is found in the following three categories:

- Offices of Lawyers (7 businesses)
- Computer Systems Design & Related Services (7 businesses)
- Administrative Management and General Management Consulting Services (7)

These types of businesses should factor prominently in any business attraction effort by the Township.

**Figure 24 – Professional, Scientific & Technical Industry, Township of Springwater, Concentration of Business, 2009**

|  | 2009      |               |
|--|-----------|---------------|
| <b>54 Professional, Scientific &amp; Technical</b>                               | <b>54</b> | <b>100.0%</b> |
| 541110 - Offices of Lawyers  | 7         | 13.0%         |
| 541510 - Computer Systems Design and Related Services                            | 7         | 13.0%         |
| 541611 - Administrative Management and General Management Consulting Services    | 7         | 13.0%         |
| 541940 - Veterinary Services   | 6         | 11.1%         |
| 541619 - Other Management Consulting Services                                    | 4         | 7.4%          |
| 541212 - Offices of Accountants  | 2         | 3.7%          |
| 541310 - Architectural Services  | 2         | 3.7%          |
| 541330 - Engineering Services  | 2         | 3.7%          |
| 541410 - Interior Design Services  | 2         | 3.7%          |
| 541620 - Environmental Consulting Services                                       | 2         | 3.7%          |
| 541710 - Research and Development in the Physical, Engineering and Life Sciences | 2         | 3.7%          |
| 541810 - Advertising Agencies  | 2         | 3.7%          |
| 541320 - Landscape Architectural Services  | 1         | 1.9%          |
| 541350 - Building Inspection Services  | 1         | 1.9%          |
| 541370 - Surveying and Mapping (except Geophysical) Services                     | 1         | 1.9%          |
| 541380 - Testing Laboratories  | 1         | 1.9%          |
| 541430 - Graphic Design Services   | 1         | 1.9%          |
| 541490 - Other Specialized Design Services                                       | 1         | 1.9%          |
| 541850 - Display Advertising   | 1         | 1.9%          |
| 541899 - All Other Services Related to Advertising                               | 1         | 1.9%          |
| 541990 - All Other Professional, Scientific and Technical Services               | 1         | 1.9%          |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

### Health care + Social Assistance

Business Patterns data suggest that in 2009 there were 42 health care and social assistance establishments in the Township. These results suggest that there are 22 office of physicians in the Township. According to the Statistics Canada definition, this business category comprises a range of establishments of licensed physicians primarily engaged in the private or group practice of general or specialized medicine or surgery. This category includes: anaesthesiologists, cardiologists' offices, dermatologists, medical pathologists' offices, family physicians, general practice, paediatricians' offices etc.

The strong presence of health care practitioners coupled with Township's success in attracting professional service firms would suggest that the quality of life that is offered by the Township resonates well with professional workers.

**Figure 25 – Health care and social assistance, Township of Springwater, Concentration of Business, 2009**

|  | 2009      |               |
|--|-----------|---------------|
| <b>62 Health Care and Social Assistance</b>  | <b>42</b> | <b>100.0%</b> |
| 621110 - Offices of Physicians   | 22        | 52.4%         |
| 621210 - Offices of Dentists   | 5         | 11.9%         |
| 623210 - Residential Developmental Handicap Facilities                             | 3         | 7.1%          |
| 624410 - Child Day-Care Services   | 3         | 7.1%          |
| 623999 - All Other Residential Care Facilities                                     | 2         | 4.8%          |
| 621340 - Offices of Physical, Occupational, and Speech Therapists and Audiologists | 1         | 2.4%          |
| 621390 - Offices of All Other Health Practitioners                                 | 1         | 2.4%          |
| 621494 - Community Health Centres  | 1         | 2.4%          |
| 621510 - Medical and Diagnostic Laboratories                                       | 1         | 2.4%          |
| 621610 - Home Health Care Services   | 1         | 2.4%          |
| 623110 - Nursing Care Facilities   | 1         | 2.4%          |
| 624310 - Vocational Rehabilitation Services  | 1         | 2.4%          |

Source: Statistics Canada, Canadian Business Patterns Data, 2009

## 2.4 Agriculture in Springwater

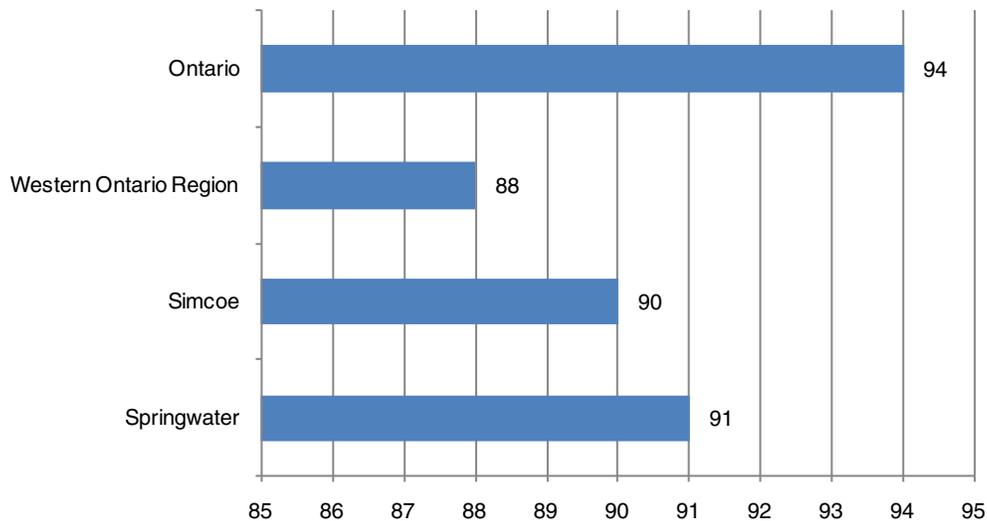
Agriculture in Springwater has been an integral component of the Township’s economy for several decades. The mixture between urban and rural landscapes provides Springwater with the opportunity to produce crops and raise livestock, while providing food to local markets. The agricultural sector’s presence is still widely felt and seen across the Township with a range of local family farms such as Rounds Ranch, Barrie Hill Farms and Nicholyn Farms. The Township’s farm operations continue to adapt to the broad trends in agriculture such as fewer, bigger farms, agri-tourism and buy local campaigns such as the Simcoe County Farm Fresh initiative.

In the section that follows, Springwater’s agricultural economy is reviewed including size and farm type activity. In addition, an analysis of farm operator characteristics and farm operating budgets will also be undertaken. In this section, MDB has made use of 2006 Statistics Canada Agricultural Census data for Springwater, (a census consolidated subdivision). Due to confidentiality constraints, the data for Springwater and Wasaga Beach geographic areas have been combined to form the census consolidated subdivision (CCS). Throughout this section the census consolidated subdivision of Springwater and Wasaga Beach will be referred to as Springwater CCS.

### 2.4.1 Farm Land Characteristics

In 2006 the CCS covered a total farm area of 26,153 hectares or 592 sq. km and over 12% of Simcoe County’s agricultural land base. The average farm size is 91 hectares on par with the average farm size in Simcoe County.

Figure 26 – Average Area of Farms (hectares), 2006



Source: Statistics Canada, Census of Agriculture, 2006

The following figure provides a breakdown of farms in Springwater CCS by NAICs industry codes. In 2006, there were 286 farms in Springwater CCS, with 94 (or 32.9%) of the farms classified as cattle ranching and farming. An additional 20.6% of farms in Springwater CCS are engaged in oilseed and grain

farming, with the third and fourth largest proportion of farms operating other animal production<sup>10</sup> (15.4%), and other crop farming (13.6%)<sup>11</sup>.

**Figure 27 – Farms classified by Industry (North American Industry Classification System), Census of Agriculture: 2006**

|                                      | Springwater |       | Simcoe |       | Western Ontario Region |       | Ontario |       |
|--------------------------------------|-------------|-------|--------|-------|------------------------|-------|---------|-------|
|                                      | #           | %     | #      | %     | #                      | %     | #       | %     |
| <b>Total Farms</b>                   | 286         | 100   | 2,402  | 100   | 18,498                 | 100   | 57,211  | 100   |
| Cattle ranching and farming          | 94          | 32.9% | 663    | 27.6% | 6,384                  | 34.5% | 15,989  | 27.9% |
| Oilseed and grain farming            | 59          | 20.6% | 377    | 15.7% | 3,525                  | 19.1% | 13,056  | 22.8% |
| Other animal production              | 44          | 15.4% | 412    | 17.2% | 2,715                  | 14.7% | 7,573   | 13.2% |
| Other crop farming                   | 39          | 13.6% | 423    | 17.6% | 2,078                  | 11.2% | 8,823   | 15.4% |
| Greenhouse, nursery and floriculture | 15          | 5.2%  | 164    | 6.8%  | 631                    | 3.4%  | 2,822   | 4.9%  |
| Hog and pig farming                  | 12          | 4.2%  | 43     | 1.8%  | 1,274                  | 6.9%  | 2,222   | 3.9%  |
| Vegetable and melon farming          | 8           | 2.8%  | 150    | 6.2%  | 370                    | 2.0%  | 1,769   | 3.1%  |
| Sheep and goat farming               | 7           | 2.4%  | 71     | 3.0%  | 548                    | 3.0%  | 1,365   | 2.4%  |
| Fruit and tree-nut farming           | 4           | 1.4%  | 53     | 2.2%  | 275                    | 1.5%  | 1,892   | 3.3%  |
| Poultry and egg production           | 4           | 1.4%  | 46     | 1.9%  | 698                    | 3.8%  | 1,700   | 3.0%  |

Source: Statistics Canada, Census of Agriculture, 2006

When consideration is given to the concentration of farming activity by major farm type, farming activity is concentrated in Beef cattle Ranching and Farming (21.7%), Dairy Cattle and Milk Production (11.2%) and Other Grain Farming (14.5%).

<sup>10</sup> Other animal production comprises establishments primarily engaged in raising animals such as bees, horses and other equines, rabbits and other fur-bearing animals, llamas, etc.

<sup>11</sup> Other crop farming comprises farms primarily engaged in growing crops, such as tobacco, peanuts, sugarbeets, cotton, sugar-cane, hay, agave, herbs and spices, mint, hops, and hay and grass seeds. Combination crop farming and the gathering of maple sap are included in this industry group.

**Figure 28 – Farms classified by industry (North American Industry Classification System), Census of Agriculture: 2006**

|  | Springwater |        | Simcoe |       | Western Ontario Region |       | Ontario |       |
|--|-------------|--------|--------|-------|------------------------|-------|---------|-------|
|  | #           | %      | #      | %     | #                      | %     | #       | %     |
| <b>Total Farms</b>                                   | 286         | 100.0% | 2,402  | 98.2% | 18,498                 | 96.7% | 57,211  | 95.8% |
| Beef cattle ranching and farming, including feedlots | 62          | 21.7%  | 538    | 22.4% | 4,535                  | 24.5% | 11,052  | 19.3% |
| Dairy cattle and milk production                     | 32          | 11.2%  | 125    | 5.2%  | 1,849                  | 10.0% | 4,937   | 8.6%  |
| Other grain farming                                  | 29          | 10.1%  | 171    | 7.1%  | 1,617                  | 8.7%  | 4,420   | 7.7%  |
| Horse and other equine production                    | 26          | 9.1%   | 249    | 10.4% | 1,455                  | 7.9%  | 4,297   | 7.5%  |
| Hay farming  | 25          | 8.7%   | 305    | 12.7% | 1,447                  | 7.8%  | 5,917   | 10.3% |
| Soybean farming                                      | 21          | 7.3%   | 134    | 5.6%  | 1,135                  | 6.1%  | 5,812   | 10.2% |
| All other miscellaneous crop farming                 | 14          | 4.9%   | 113    | 4.7%  | 600                    | 3.2%  | 2,179   | 3.8%  |
| Hog and pig farming                                  | 12          | 4.2%   | 43     | 1.8%  | 1,274                  | 6.9%  | 2,222   | 3.9%  |
| Nursery and tree production                          | 11          | 3.8%   | 124    | 5.2%  | 411                    | 2.2%  | 1,474   | 2.6%  |
| Livestock combination farming                        | 8           | 2.8%   | 117    | 4.9%  | 1,002                  | 5.4%  | 2,464   | 4.3%  |
| Apiculture   | 7           | 2.4%   | 27     | 1.1%  | 114                    | 0.6%  | 410     | 0.7%  |
| Wheat farming  | 7           | 2.4%   | 35     | 1.5%  | 280                    | 1.5%  | 953     | 1.7%  |
| Sheep farming  | 6           | 2.1%   | 56     | 2.3%  | 417                    | 2.3%  | 1,021   | 1.8%  |
| Other vegetables (except potato) and melon farming   | 5           | 1.7%   | 107    | 4.5%  | 279                    | 1.5%  | 1,526   | 2.7%  |
| Chicken egg production                               | 4           | 1.4%   | 23     | 1.0%  | 227                    | 1.2%  | 599     | 1.0%  |
| Fruit and tree-nut farming                           | 4           | 1.4%   | 53     | 2.2%  | 275                    | 1.5%  | 1,892   | 3.3%  |
| Floriculture farming                                 | 4           | 1.4%   | 30     | 1.2%  | 177                    | 1.0%  | 968     | 1.7%  |
| Potato farming                                       | 3           | 1.0%   | 43     | 1.8%  | 91                     | 0.5%  | 243     | 0.4%  |
| All other miscellaneous animal production            | 2           | 0.7%   | 11     | 0.5%  | 87                     | 0.5%  | 290     | 0.5%  |
| Corn farming   | 2           | 0.7%   | 31     | 1.3%  | 425                    | 2.3%  | 1,694   | 3.0%  |
| Goat farming   | 1           | 0.3%   | 15     | 0.6%  | 131                    | 0.7%  | 344     | 0.6%  |
| Fur-bearing animal and rabbit production             | 1           | 0.3%   | 8      | 0.3%  | 57                     | 0.3%  | 112     | 0.2%  |

Source: Statistics Canada, Census of Agriculture, 2006

More importantly from the perspective of value added agricultural production and agri-tourism is the presence of horse and other equine production, nursery and tree production, vegetable farming, apiculture, and fruit and tree nut farming. Combined with the presence of greenhouse activity suggests that there may be additional opportunities to drive further investment in the region's agriculture sector.

**Figure 29 – Area under Greenhouse, 2006**

|  | Springwater | Simcoe    | Western Ontario Region | Ontario     |
|--|-------------|-----------|------------------------|-------------|
| <b>Total area under glass, plastic or other protection</b> |             |           |                        |             |
| Farms reporting  | 6           | 63        | 383                    | 1,898       |
| Square feet  | 135,773     | 1,553,739 | 9,479,670              | 126,589,790 |
| Square metres  | 12,614      | 144,347   | 880,690                | 11,760,576  |

Source: Statistics Canada, Census of Agriculture, 2006

An alternative technique in understanding the impact of farm operations in the Springwater CCS is through the calculation of location quotients, as performed earlier in section 2.3.1. A location quotient analysis is often used in a more traditional industrial application scenario. However, in the case of identifying farm concentration as compared to both the County of Simcoe and the Province, the tool has also proven to be useful. The results of the location quotient analysis are revealed in figure 30 and suggest that Springwater CCS does in fact have a substantial competitive advantage over other communities in the County as well as in other parts of Ontario. When compared to Simcoe County,

Springwater CCS's edge is illustrated through the high concentration of farms in the following areas of production:

- Hog and Pig Farming (2.34);
- Apiculture<sup>12</sup> (2.18);
- Dairy & Milk Production (2.15); and
- Wheat Farming (1.68)

The results suggest a diverse range of agricultural concentration and the ability to provide not only basic farm products, but also reinforce the idea that there may be additional opportunities to attract value added operations to the Township. For example Nicholyn Farms has tapped into the local food market by providing and selling pork directly to the customer since 1990. These pork products are available at local farm markets as well as at their own on-site retail store. Nicholyn Farms has also tapped into the popularity of eating healthy, natural food, while connecting to the local market. The working family farm has gone a step further to provide a value added experience by engaging interested visitors to the farm with bed & breakfast stays on the farm.

The concept of promoting value-added products is also a part of the South Central Community Development Corporation Economic Competitive Analysis Project (ECAP), which also suggests value-added products, niche markets and education are essential to the transformation and sustainability of agriculture throughout the Region.

It was suggested that in collaboration with stakeholders, an information exchange should occur that presents value-added opportunities such as abattoirs, or ethanol products for corn, biodegradable products, food processing plants, biotechnology, and the impact of the 100 mile diet<sup>13</sup>, farm tour opportunities and agri-tourism. More specifically, the attraction of a facility such as an abattoir will help to promote the idea of purchasing and consuming locally produced meat within one's own community, which in turn would further support campaigns such as the County of Simcoe's Farm Fresh initiative of buying locally.

---

<sup>12</sup> This industry comprises establishments primarily engaged in raising bees, collecting and gathering honey, and performing other apiculture activities.

<sup>13</sup> Is the act of restricting one's diet, to include only foods grown within 100 miles of one's residence

**Figure 30 – Farms classified by Industry (North American Industry Classification System), Census of Agriculture: 2006: Location Quotient Classification**

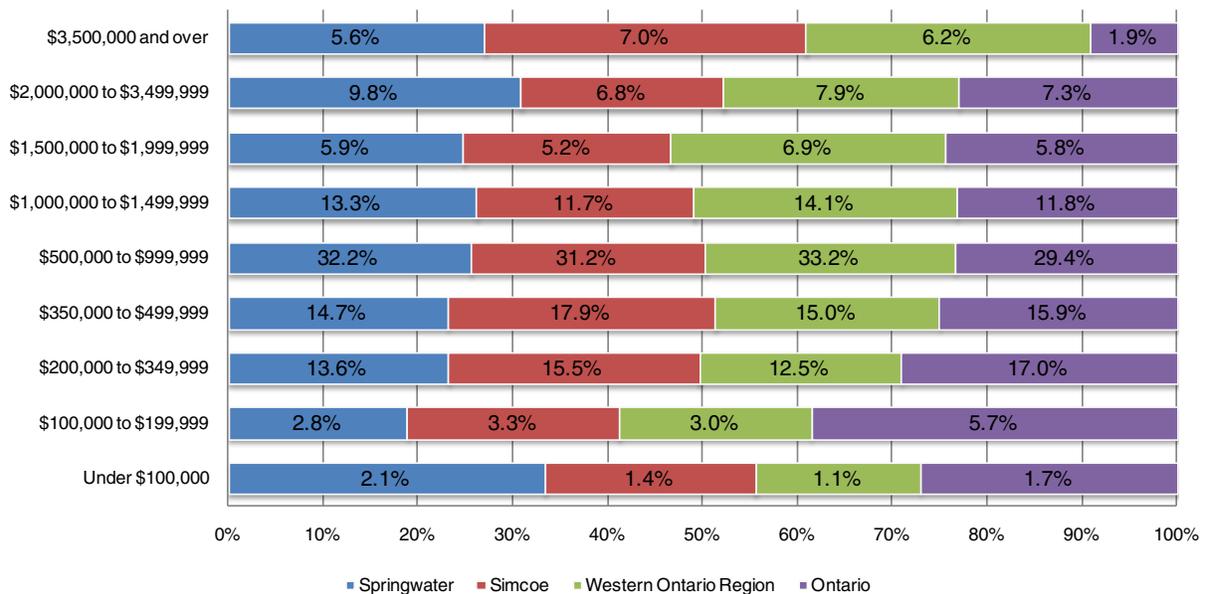
|  | Springwater | Simcoe       | Location Quotient | Classification | Springwater | Ontario       | Location Quotient | Classification |
|--|-------------|--------------|-------------------|----------------|-------------|---------------|-------------------|----------------|
| <b>Total Farms</b>                                   | <b>286</b>  | <b>2,402</b> |                   |                | <b>286</b>  | <b>57,211</b> |                   |                |
| Dairy cattle and milk production                     | 32          | 125          | 2.15              | Very High      | 32          | 4,937         | 1.30              | High           |
| Beef cattle ranching and farming, including feedlots | 62          | 538          | 0.97              | Medium         | 62          | 11,052        | 1.12              | High           |
| Hog and pig farming                                  | 12          | 43           | 2.34              | Very High      | 12          | 2,222         | 1.08              | High           |
| Chicken egg production                               | 4           | 23           | 1.46              | High           | 4           | 599           | 1.34              | High           |
| Sheep farming  | 6           | 56           | 0.90              | Medium         | 6           | 1,021         | 1.18              | High           |
| Goat farming   | 1           | 15           | 0.56              | Low            | 1           | 344           | 0.58              | Low            |
| Apiculture   | 7           | 27           | 2.18              | Very High      | 7           | 410           | 3.42              | Very High      |
| Horse and other equine production                    | 26          | 249          | 0.88              | Medium         | 26          | 4,297         | 1.21              | High           |
| Fur-bearing animal and rabbit production             | 1           | 8            | 1.05              | Medium         | 1           | 112           | 1.79              | Very High      |
| Livestock combination farming                        | 8           | 117          | 0.57              | Low            | 8           | 2,464         | 0.65              | Low            |
| All other miscellaneous animal production            | 2           | 11           | 1.53              | High           | 2           | 290           | 1.38              | High           |
| Soybean farming                                      | 21          | 134          | 1.32              | High           | 21          | 5,812         | 0.72              | Medium         |
| Wheat farming  | 7           | 35           | 1.68              | Very High      | 7           | 953           | 1.47              | High           |
| Corn farming   | 2           | 31           | 0.54              | Low            | 2           | 1,694         | 0.24              | Low            |
| Other grain farming                                  | 29          | 171          | 1.42              | High           | 29          | 4,420         | 1.31              | High           |
| Potato farming                                       | 3           | 43           | 0.59              | Low            | 3           | 243           | 2.47              | Very High      |
| Other vegetables (except potato) and melon farming   | 5           | 107          | 0.39              | Low            | 5           | 1,526         | 0.66              | Low            |
| Fruit and tree-nut farming                           | 4           | 53           | 0.63              | Low            | 4           | 1,892         | 0.42              | Low            |
| Nursery and tree production                          | 11          | 124          | 0.75              | Medium         | 11          | 1,474         | 1.49              | High           |
| Floriculture farming                                 | 4           | 30           | 1.12              | High           | 4           | 968           | 0.83              | Medium         |
| Hay farming  | 25          | 305          | 0.69              | Medium         | 25          | 5,917         | 0.85              | Medium         |
| All other miscellaneous crop farming                 | 14          | 113          | 1.04              | High           | 14          | 2,179         | 1.29              | High           |

Source: Statistics Canada, Census of Agriculture, 2006

## 2.4.2 Farm Capital

The next two figures provide a detailed account of total farm capital by geographic area. As of 2006, 286 farms in Springwater CCS reported a combined total gross farm receipts of \$37,710,955. Sales in forest products were minimal and amounted to only \$189,034 with 10 farms reporting. The majority of farms in Springwater CCS operate with a capital budget of between \$500,000 and \$900,000 (32.2%), which is consistent with farms in the County of Simcoe (31.2%). Interestingly, there are 15.4% of farms reporting total farm capital of over \$2,000,000, compared to the provincial average of 9.2%. The SCCDC ECAP report referred to earlier in this report, suggests that both the Township and the County are highly specialized in the sector of agriculture and while agriculture lost a total of 1,655 jobs in the SCCDC region between 2001 and 2006, it continues to make a significant contribution to the local economy. The decline in the number of farm jobs is consistent with national trends of farm consolidation and farm mechanization. To this end, farm productivity has actually increased. In 2006, the region's local agriculture sector directly employed 16,000 people and generated \$1.9 billion in farm gate receipts compared to \$1.5 billion in 2001.

**Figure 31 – Farms Classified by Total Farm Capital, 2006**



Source: Statistics Canada, Census of Agriculture, 2006

**Figure 32 – Total Gross Farm Receipts (excluding forest products sold)**

|                           | Springwater   | Simcoe        | Western Ontario Region | Ontario           |
|---------------------------|---------------|---------------|------------------------|-------------------|
| <b>Firms reporting</b>    | 286           | 2,402         | 18,498                 | 57,211            |
| Amount in current dollars | \$ 37,710,955 | \$326,632,604 | \$ 3,558,769,546       | \$ 10,342,031,229 |

Source: Statistics Canada, Census of Population, 2006

## 2.5 Business Case Comparators

In order to assess the competitive position of the Township of Springwater to support business growth and investment, data was collected for a range of development and operating cost elements that are typically considered as part of a site selection exercise. In this instance Springwater is compared to the other lower tier communities in the County of Simcoe. For the purposes of this analysis, the following business cost comparators were reviewed:

- Average Housing Prices
- Municipal Tax Rates
- Development Charges
- Electricity Rates
- Price Per an Acre of Serviced Employment Land (where available)

### 2.5.1 Average Housing Prices

A range of both affordable and attractive housing is essential in the attraction of both new residents and business investment, as many business operators not only are interested in reasonably priced housing for its employees, but also a variety of housing options such as executive homes and estates to suit the needs of senior management and the like. One of the most common reasons given for selecting a location for investment is that the owner of the company lives in the community.

The following figure provides average prices for a single family detached home in each of the County of Simcoe's member communities. The Township of Springwater's real estate prices for a single family detached home are at the top end of the average price spectrum, with only Adjala-Tosorontio and Bradford West Gwillimbury demonstrating higher prices. The Township's ability to demand higher prices for a similar home type as compared to neighbouring communities, speaks to the quality of the housing product and the setting for the Township's residential development. Anecdotally, it was suggested that Midhurst offers executive homes and estate lot development that is preferred by executives and professionals living in the region.

**Figure 33 - Average Housing Price. Single Family Detached, Springwater & County of Simcoe Member Communities, 2010**

| Municipality              | Average Price     |
|---------------------------|-------------------|
| <b>Springwater</b>        | <b>\$ 335,041</b> |
| Barrie                    | \$ 272,180        |
| Orillia                   | \$ 219,222        |
| Adjala-Tosorontio         | \$ 365,121        |
| Bradford West Gwillimbury | \$ 350,846        |
| Clearview                 | \$ 251,213        |
| Collingwood               | \$ 261,543        |
| Essa                      | \$ 295,200        |
| Innisfil                  | \$ 282,720        |
| Midland                   | \$ 196,000        |
| New Tecumseth             | \$ 319,084        |
| Oro-Medonte               | \$ 305,455        |
| Penetanguishene           | \$ 210,209        |
| Ramara                    | \$ 219,848        |
| Severn                    | \$ 249,009        |
| Tay                       | \$ 172,669        |
| Tiny                      | \$ 237,977        |
| Wasaga Beach              | \$ 248,434        |

Source: InvestinOntario.com community profiles > Realty Costs, individual municipalities

### 2.5.2 Municipal Tax Rates

Figure 34 demonstrates the 2010 property tax rates for each of Simcoe's communities. Based on these results, the Township of Springwater has the 7<sup>th</sup> lowest commercial and industrial property tax rates, with rates of 2.48% and 3.54%, respectively. Orillia, Midland, Barrie, Penetanguishene and Collingwood have the highest commercial tax rates. When reviewing industrial tax rates across the County, Midland, Penetanguishene, Orillia, Collingwood and Tay have the highest industrial tax rates across Simcoe.

Communities of similar size to Springwater, such as Clearview, Collingwood, Midland, Oro-Medonte and Wasaga Beach were also reviewed against the municipal tax rate results for Springwater. Out of these five communities, the Township had the second lowest commercial and industrial tax rates.

Figure 34 – Total Property Tax Rates, Springwater & County of Simcoe Member Communities, 2010

| Municipality              | Residential   | Multi-Residential | Commercial Residual | Commercial Office Building | Commercial Park/Vac | Commercial Shopping | Industrial Residual | Industrial Large |
|---------------------------|---------------|-------------------|---------------------|----------------------------|---------------------|---------------------|---------------------|------------------|
| <b>Springwater</b>        | <b>0.979%</b> | <b>1.364%</b>     | <b>2.483%</b>       | <b>2.483%</b>              | <b>1.738%</b>       | <b>2.483%</b>       | <b>3.540%</b>       | <b>3.540%</b>    |
| Barrie                    | 1.407%        | 1.497%            | 3.197%              | 3.197%                     | 2.238%              | 3.197%              | 3.368%              | 3.368%           |
| Orillia                   | 1.449%        | 2.100%            | 3.684%              | 3.684%                     | 2.579%              | 3.684%              | 4.091%              | 4.091%           |
| Adjala-Tosorontio         | 0.775%        | 0.775%            | 2.228%              | 2.228%                     | 1.560%              | 2.228%              | 3.227%              | 3.227%           |
| Bradford West Gwillimbury | 1.053%        | 1.478%            | 2.576%              | 2.576%                     | 1.803%              | 2.576%              | 3.654%              | 3.654%           |
| Clearview                 | 1.157%        | 1.638%            | 2.707%              | 2.707%                     | 1.895%              | 2.707%              | 3.814%              | 3.814%           |
| Collingwood               | 1.335%        | 1.912%            | 2.929%              | 2.929%                     | 2.051%              | 2.929%              | 4.088%              | 4.088%           |
| Essa                      | 0.811%        | 1.105%            | 2.273%              | 2.273%                     | 1.591%              | 2.273%              | 3.281%              | 3.281%           |
| Innisfil                  | 1.178%        | 1.724%            | 2.777%              | 2.777%                     | 1.944%              | 2.777%              | 3.901%              | 3.901%           |
| Midland                   | 1.564%        | 2.264%            | 3.216%              | 3.215%                     | 3.216%              | 3.216%              | 4.440%              | 4.440%           |
| New Tecumseth             | 1.079%        | 1.518%            | 2.608%              | 2.608%                     | 1.853%              | 2.608%              | 3.694%              | 3.694%           |
| Oro-Medonte               | 0.908%        | 1.255%            | 2.394%              | 2.394%                     | 1.676%              | 2.394%              | 3.431%              | 3.431%           |
| Penetanguishene           | 1.523%        | 2.200%            | 3.164%              | 3.164%                     | 2.215%              | 3.164%              | 4.377%              | 4.377%           |
| Ramara                    | 0.919%        | 0.919%            | 2.408%              | 2.408%                     | 1.686%              | 2.408%              | 3.449%              | 3.449%           |
| Severn                    | 0.876%        | 1.206%            | 2.355%              | 2.355%                     | 1.648%              | 2.355%              | 3.382%              | 3.382%           |
| Tay                       | 1.281%        | 1.281%            | 2.862%              | 2.862%                     | 2.003%              | 2.862%              | 4.005%              | 4.005%           |
| Tiny                      | 0.837%        | 1.146%            | 2.306%              | 2.306%                     | 1.614%              | 2.306%              | 3.322%              | 3.322%           |
| Wasaga Beach              | 1.051%        | 1.475%            | 2.574%              | 2.574%                     | 1.802%              | 2.574%              | 3.652%              | 3.652%           |

Source: Ministry of Municipal Affairs and Housing, Financial Information Returns

### 2.5.3 Development Charges

As an essential element to any site location considerations, development charges play an important role in the decision-making process of many developers. Since development charges are capable of adding a significant cost to the price of development, it is important that communities maintain a competitive rate in order to attract investment.

While the consultation process revealed a strong public perception that the Township's rates were higher than most of the area's surrounding communities, Springwater is relatively competitive. When compared to each of the communities in the County, Springwater's non-residential commercial and industrial rates per square foot rank tenth out of eighteen communities. With rates of \$5.75 a square foot for non-residential commercial/industrial development charges, these rates are far more cost-effective than the community of Clearview, which is comparable in population size, but charges rates of \$8.36 a square foot higher for both non-residential commercial/industrial. New Tecumseh has the highest non-residential commercial development charges at \$20.30 a square foot, while Tay has the highest non-residential industrial development charges at a rate of \$15.23.

It is important to note that communities such as Innisfil, Collingwood and Oro-Medonte all charge rates of between \$2.00 and \$4.00 less than those set by the Township. Each of these communities has been the focus of significant non-residential development in recent years. In this context, the Township should monitor the competitiveness of its development charges, as a way to make the Township more attractive to investment in the future.

Figure 35 – Development Charge Fees, Springwater &amp; County of Simcoe Member Communities, 2010

| Municipality              | Single Semi-Detached Dwellings per Unit | Multiple Dwellings | Apartment units < 2 per unit | Apartment units > = 2 per unit | Non-Residential Commercial per SF | Non-Residential Industrial per SF |
|---------------------------|---|--------------------|------------------------------|--------------------------------|-----------------------------------|-----------------------------------|
| <b>Springwater</b>        | <b>\$ 12,823</b>                        | <b>\$ 10,750</b>   | <b>\$ 4,991</b>              | <b>\$ 8,062</b>                | <b>\$ 5.75</b>                    | <b>\$ 5.75</b>                    |
| Barrie                    | \$ 26,060                               | \$ 22,614          | \$ 12,831                    | \$ 15,236                      | \$ 18.78                          | \$ 14.19                          |
| Orillia                   | \$ 17,121                               | \$ 14,673          | \$ 9,174                     | \$ 12,229                      | \$ 9.26                           | \$ 9.98                           |
| Adjala-Tosorontio         | \$ 4,383                                | \$ 1,902           | \$ 1,258                     | \$ 1,406                       | \$ 3.37                           | \$ 3.37                           |
| Bradford West Gwillimbury | \$ 27,120                               | \$ 22,839          | \$ 10,898                    | \$ 15,254                      | \$ 9.26                           | \$ 9.26                           |
| Clearview                 | \$ 25,519                               | \$ 21,266          | \$ 11,492                    | \$ 16,113                      | \$ 14.11                          | \$ 14.11                          |
| Collingwood               | \$ 13,059                               | \$ 11,215          | \$ 5,894                     | \$ 9,119                       | \$ 3.40                           | \$ 3.40                           |
| Essa                      | \$ 23,864                               | \$ 21,156          | \$ 10,822                    | \$ 14,644                      | \$ 9.38                           | \$ 9.38                           |
| Innisfil                  | \$ 8,496                                | \$ 7,847           | \$ 3,963                     | \$ 5,230                       | \$ 1.39                           | \$ 1.39                           |
| Midland                   | \$ 15,808                               | \$ 11,700          | \$ 10,750                    | \$ 10,750                      | \$ 3.05                           | \$ 3.05                           |
| New Tecumseth             | \$ 33,487                               | \$ 30,023          | \$ 15,012                    | \$ 23,094                      | \$ 20.30                          | \$ 12.16                          |
| Oro-Medonte               | \$ 5,319                                | \$ 4,449           | \$ 2,401                     | \$ 3,366                       | \$ 3.19                           | \$ 3.19                           |
| Penetanguishene           | \$ 14,098                               | \$ 10,382          | \$ 9,344                     | \$ 9,344                       | \$ 7.06                           | \$ 7.06                           |
| Ramara                    | \$ 15,156                               | \$ 13,065          | \$ 10,452                    | \$ 10,452                      | \$ 5.39                           | \$ 5.39                           |
| Severn                    | \$ 6,601                                | \$ 6,149           | \$ 3,313                     | \$ 4,668                       | \$ 5.58                           | \$ 5.58                           |
| Tay                       | \$ 12,201                               | \$ 11,462          | \$ 6,102                     | \$ 8,597                       | \$ 15.23                          | \$ 15.23                          |
| Tiny                      | \$ 4,172                                | -                  | -                            | -                              | \$ 1.62                           | \$ 1.62                           |
| Wasaga Beach              | \$ 11,721                               | \$ 9,915           | \$ 8,565                     | \$ 8,565                       | \$ 4.74                           | \$ 4.74                           |
| <b>Simcoe County</b>      | <b>\$ 3,861</b>                         | <b>\$ 1,090</b>    | <b>\$ 2,703</b>              | <b>\$ 2,703</b>                | <b>\$ 1.73</b>                    | <b>\$ 0.65</b>                    |

Where applicable, development charges are provided for urban areas.

Source: Municipal Websites, 2010

Charges for Clearview are averaged across 4 service areas.

Charges for Essa are averaged among 2 service areas, Angus and Thornton.

Charges for Midland based on Low, Medium and High Density scenarios.

#### 2.5.4 Electricity Rates

While not a main consideration in the site selection process, electricity does become a factor when looking to eliminate a community from further consideration. For the purposes of this assessment we have focused on electricity service charges. Service charge rates appear to be extremely reasonable in the Township at \$23.98, when compared to the service charge rates in Oro-Medonte, Wasaga Beach Ramara and Severn. Although each of these communities offers the lowest service charge in the County, they have the highest distribution volumetric rate at \$7.008/kW. The lowest distribution volumetric rate can be found in the communities of Adjala-Tosorontio, Barrie, Bradford West Gwillimbury, Essa, New Tecumseth and Penetanguishene, but conversely, have the highest service charge rate of \$391.71.

When compared to communities of similar size, the communities of Clearview, Collingwood and Oro-Medonte each have more competitive distribution volumetric rates of \$2.394/kW, but have a higher service charge rate of \$85.83. Midland also has somewhat competitive rates of \$58.99 service charge and a distribution volumetric rate of \$3.471/kW.

Figure 36 – Electricity Rates, Springwater &amp; County of Simcoe Member Communities, 2010

| Municipality              | Service Charge | Distribution Volumetric Rate \$/kW | Retail Transmission Rate - Network Service Rate \$/kW | Retail Transmission Rate - Line and Transformation Connection Service \$/kW | Wholesale Market Service Rate \$/kW | Rural Rate Protection Charge \$/kW | Debt Retirement Charge \$/kW | Administrative Charge |
|---------------------------|----------------|------------------------------------|---|---|-------------------------------------|------------------------------------|------------------------------|-----------------------|
| <b>Springwater</b>        | <b>23.98</b>   | <b>7.008</b>                       | <b>1.666</b>  | <b>1.422</b>  | <b>0.0052</b>                       | <b>0.0013</b>                      | <b>0.007</b>                 | <b>0.25</b>           |
| Barrie                    | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Orillia                   | 338.04         | 3.5554                             | 1.4236  | 1.2955  | 0.0052                              | 0.0013                             | -                            | 0.25                  |
| Adjala-Tosorontio         | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Bradford West Gwillimbury | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Clearview                 | 85.83          | 2.3935                             | 1.7399  | 1.089   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |
| Collingwood               | 85.83          | 2.3935                             | 1.7399  | 1.089   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |
| Essa                      | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Innisfil                  | 360.8          | 4.1946                             | 1.7653  | 1.6207  | 0.0052                              | 0.0013                             | -                            | 0.25                  |
| Midland                   | 58.99          | 3.4714                             | 1.7676  | 1.5852  | 0.0052                              | 0.0013                             | -                            | 0.25                  |
| New Tecumseth             | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Oro-Medonte               | 23.98          | 7.008                              | 1.666   | 1.422   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |
| Penetanguishene           | 391.71         | 2.1772                             | 1.9136  | 1.7778  | 0.0065                              | n/a                                | 0.007                        | 0.25                  |
| Ramara                    | 23.98          | 7.008                              | 1.666   | 1.422   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |
| Severn                    | 23.98          | 7.008                              | 1.666   | 1.422   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |
| Tay                       | 210.93         | 3.3024                             | 1.9747  | 1.6747  | 0.0052                              | 0.0010                             | 0.007                        | 0.25                  |
| Tiny                      | 210.93         | 3.3024                             | 1.9747  | 1.6747  | 0.0052                              | 0.0010                             | 0.007                        | 0.25                  |
| Wasaga Beach              | 23.98          | 7.008                              | 1.666   | 1.422   | 0.0052                              | 0.0013                             | 0.007                        | 0.25                  |

Sources: Local utility corporations, Hydro One (Springwater, Severn, Ramara, Oro-Medonte), PowerStream (Barrie, Bradford West Gwillimbury, Penetanguishene, New Tecumseth, Adjala-Tosorontio and Essa).  
 Wasaga Distribution is the local provider, but electricity is delivered at Hydro One rates.

### 2.5.5 Price per Acre of Serviced Employment Land

Detailed information was difficult to obtain as the information was either not available or there was no serviced employment/industrial land available. The figure below details available information as of April 2010. Based on these results Bradford West Gwillimbury had the highest average price per an acre, while the lowest cost was attributed to Midland.

Figure 37 – Price per Acre of Serviced Employment Land, Springwater &amp; County of Simcoe Member Communities, 2010

| Municipality              | Average Price   |
|---------------------------|-----------------|
| <b>Springwater</b>        | <b>\$53,659</b> |
| Barrie                    | \$252,500       |
| Orillia                   | \$67,500        |
| Adjala-Tosorontio         | n/a             |
| Bradford West Gwillimbury | \$300,000       |
| Clearview                 | n/a             |
| Collingwood               | \$112,500       |
| Essa                      | n/a             |
| Innisfil                  | n/a             |
| Midland                   | \$32,500        |
| New Tecumseth             | \$80,000        |
| Oro-Medonte               | n/a             |
| Penetanguishene           | n/a             |
| Ramara                    | n/a             |
| Severn                    | n/a             |
| Tay                       | n/a             |
| Tiny                      | n/a             |
| Wasaga Beach              | n/a             |

n/a = no serviced employment/industrial land available

Source: Various Municipal Offices & Real Estate Agents throughout the County

### 2.5.6 Summary of Cost Comparators

The following figure ranks the selected communities based on the previous analysis. Based on the range of selected variables presented in the report, Springwater ranks eleventh overall against the other selected jurisdictions. It should be noted however, that no weight has been given to any of the variables and some of the chosen factors may be more or less important to some companies over others. Other factors may also decide whether a community is considered an appropriate location – proximity to market, access to 400 series highways, transportation infrastructure or quality of a local labour force may also factor in a decision.

Figure 38 – Summary of Cost Comparators, Springwater & County of Simcoe Member Communities, 2010

| Community Ranking                         | Springwater | Adjala-Tosorontio | Barrie | Bradford West<br>Gwillimbury | Clearview | Collingwood | Essa | Innisfil | Midland |
|---|-------------|-------------------|--------|------------------------------|-----------|-------------|------|----------|---------|
| <b>Lowest Average Housing Prices</b> Rank | 16          | 18                | 11     | 17                           | 9         | 10          | 13   | 12       | 2       |
| <b>Lowest Municipal Tax Rate:</b>         |             |                   |        |                              |           |             |      |          |         |
| Industrial Rank                           | 8           | 1                 | 4      | 10                           | 12        | 15          | 2    | 13       | 18      |
| Commercial Rank                           | 7           | 1                 | 16     | 9                            | 11        | 14          | 2    | 12       | 17      |
| <b>Lowest Development Charges:</b>        |             |                   |        |                              |           |             |      |          |         |
| Industrial Charge Rank                    | 10          | 5                 | 17     | 12                           | 16        | 6           | 13   | 1        | 3       |
| Commercial Charge Rank                    | 10          | 5                 | 17     | 12                           | 15        | 6           | 14   | 1        | 3       |
| <b>Lowest Electricity Charges:</b>        |             |                   |        |                              |           |             |      |          |         |
| Distribution Volumetric Rate \$/kW Rank   | 7           | 1                 | 1      | 1                            | 2         | 2           | 1    | 6        | 4       |
| <b>Sum of Scores</b>                      | 58          | 31                | 66     | 61                           | 65        | 53          | 45   | 45       | 47      |
| <b>Overall Ranking</b>                    | 11          | 2                 | 17     | 13                           | 14        | 10          | 6    | 6        | 9       |

Figure 39 – Summary of Cost Comparators, Springwater & County of Simcoe Member Communities, 2010 (Cont'd)

| Community Ranking                    | New Tecumseth | Oro-Medonte | Orillia | Penetanguishene | Ramara | Severn | Tay | Tiny | Wasaga Beach |
|--------------------------------------|---------------|-------------|---------|-----------------|--------|--------|-----|------|--------------|
| <b>Lowest Average Housing Prices</b> | 15            | 14          | 4       | 3               | 5      | 8      | 1   | 6    | 7            |
| <b>Lowest Municipal Tax Rate:</b>    |               |             |         |                 |        |        |     |      |              |
| Industrial                           | 11            | 6           | 16      | 17              | 7      | 5      | 14  | 3    | 9            |
| Commercial                           | 10            | 5           | 18      | 15              | 6      | 4      | 13  | 3    | 8            |
| <b>Lowest Development Charges:</b>   |               |             |         |                 |        |        |     |      |              |
| Industrial Charge                    | 15            | 4           | 14      | 11              | 8      | 9      | 18  | 2    | 7            |
| Commercial Charge                    | 18            | 4           | 12      | 11              | 8      | 9      | 16  | 2    | 7            |
| <b>Lowest Electricity Charges:</b>   |               |             |         |                 |        |        |     |      |              |
| Distribution Volumetric Rate \$/kW   | 1             | 7           | 5       | 1               | 7      | 7      | 3   | 3    | 7            |
| <b>Sum of Scores</b>                 | 70            | 40          | 69      | 58              | 41     | 42     | 65  | 19   | 45           |
| <b>Overall Ranking</b>               | 18            | 3           | 16      | 11              | 4      | 5      | 14  | 1    | 6            |

## 2.6 Industrial Land Availability

An essential consideration in Springwater's ability to attract and retain investment is the availability of serviced industrial lands and/or buildings. Current information on developable land should be maintained and readily available to anyone that would require this information. This should include information such as location including access to major and regional transportation routes, size of parcel, zoning, permitted uses, details of owner and agent contact information, range of services available and its asking price.

At the current time, information provided by the Township's Planning and Development Department, has been consolidated into one spreadsheet. Both public and privately held land characteristics were surveyed in 2008<sup>14</sup>. The results suggested that vacant industrial land in Springwater is mostly privately held, and has limited servicing, mainly private well and septic services. The most recent summary of the Township's employment land inventory suggests there is a total of 175 hectares of designated industrial land with 117 net hectares that are vacant. Currently, there are 18 net vacant hectares of land in Elmvale that are serviced while the remaining 99 hectares of net vacant land are not. Net vacant parcels of land in Hillsdale and Midhurst are not presently serviced but servicing is planned by 2031.

**Figure 40 – Employment Land Supply, Township of Springwater, 2010**

| Industrial Area         | Total Designated Land Area (ha) | Occupied Area (ha) | Gross Vacant Area (ha) | Services Exist | If No, plans to provide services to 2031 (Y/N or na) |
|-------------------------|---------------------------------|--------------------|------------------------|----------------|--|
| Elmvale                 | 24                              | 6                  | 18                     | Y              |  |
| Hillsdale               | 39                              | 7                  | 32                     | N              | Y  |
| Phelpston               | 4                               | 1                  | 3                      | N              | N  |
| Minesing                | 1                               | 1                  | -                      | N              | N  |
| Midhurst                | 58                              | 9                  | 49                     | N              | Y  |
| Bertram Industrial Park | 29                              | 14                 | 15                     | N              | N  |
| Rural South             | 17                              | 1                  | 16                     | N              | N  |
| Rural North             | 4                               | 2                  | 2                      | N              | N  |
| <b>Total</b>            | <b>175</b>                      | <b>41</b>          | <b>135</b>             |                |  |

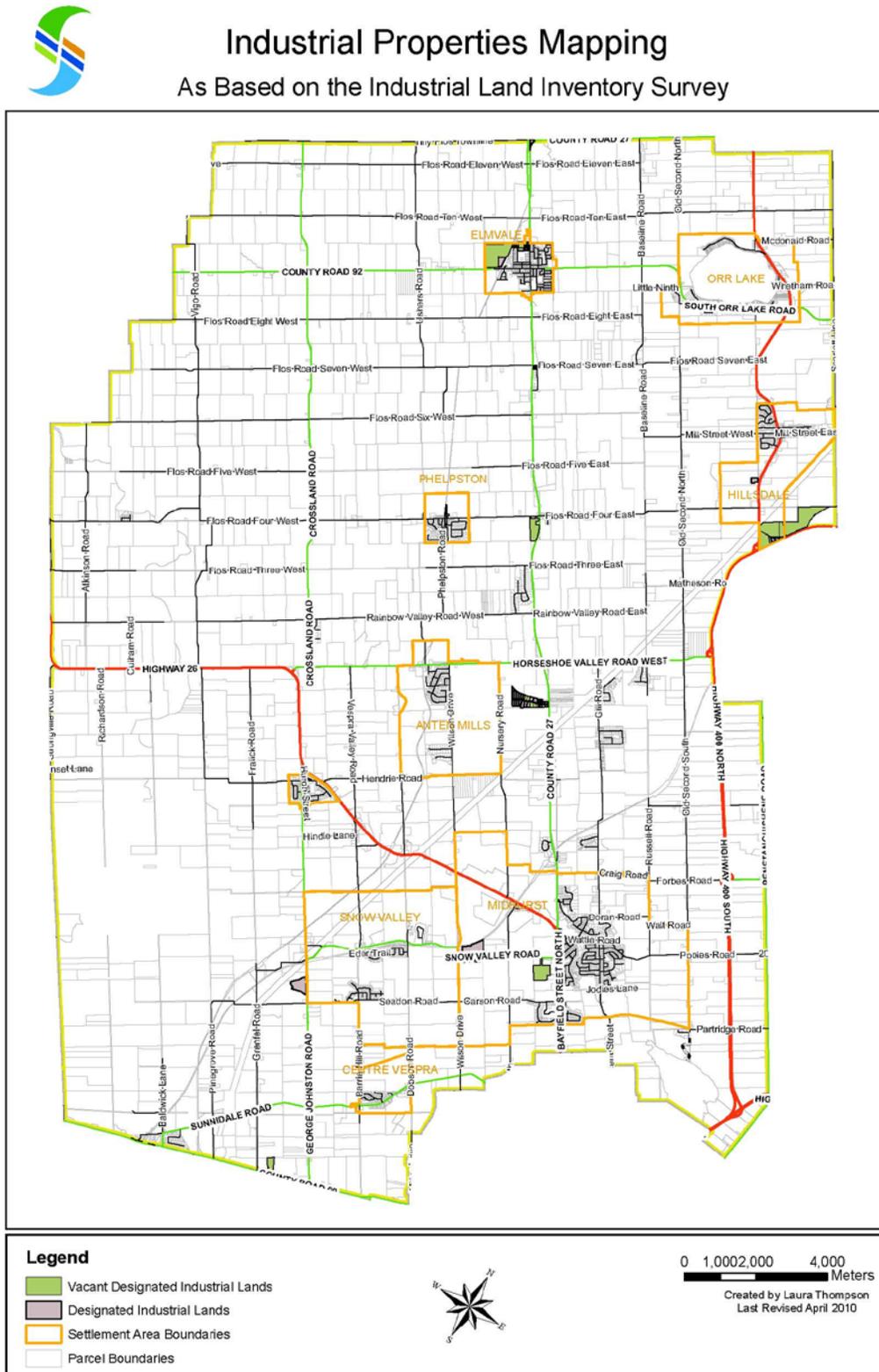
Source: Township of Springwater, Planning & Development Office, 2010

The following map (figure 41) illustrates the availability of industrial lands that are either classified as vacant or partially vacant in the Township of Springwater. Most of the land is in private ownership and scattered throughout Elmvale, Hillsdale, Midhurst and the Rural South. These areas are also in the vicinity of existing and proposed future residential development suggesting the Township may be under pressure to convert these lands to residential development in the future.

Of these areas, the vacant lands in Hillsdale that border the City of Barrie and Highway 400 represent the most significant opportunity to provide marketable, serviced industrial land in the Township. Consideration should be given to the timing and cost of extending servicing to this area of the Township.

<sup>14</sup> The sum of vacant land presented in Appendix VI Figure 42 should not be viewed as exact measurements of industrial land in Springwater, but rather an indication of the location of vacant parcels in the Township.

Figure 41 – Map of Employment Lands Inventory, Township of Springwater, 2010



## 2.7 Summary of Findings

The major findings of our review regarding the analysis of Springwater's economic base are as follows:

- **The Township's historical and current population growth scenario is positive and steady.**

In 2006, Springwater had a population of 17,456, an increase of 8.4% from 2001 levels. Between 1996 and 2006 the Township experienced a growth rate of 18.0% or a gain of 2,663 residents. Future growth rates have been identified by the Province at a population of 24,000 as a Provincial allocation under the "Simcoe Area: A Strategic Vision of Growth" report, while a population of 26,500 has been marked as a projection in the County of Simcoe's Official Plan. However, the Provincial allocation has not been adopted in the County's Official Plan. As a result, the Township's future population allocation is subject to the Province and has resulted in Springwater to take a wait and see approach until further direction is provided.

- **Springwater's population is concentrated in the working age group of between 20 and 44 years.**

The Township's proportion of residents under the age of 44 sits at more than half of the population (58.3%), this number has actually declined slightly from 2001 levels, which comprised 63.7% of the resident population. Historically speaking, the age cohort of 65+ has been growing slightly in the Township over the past 5 years from 2001 levels of 10.8% to 11.9% in 2006, which is consistent with historical national trends that demonstrate the growth of this cohort over the past 40 years. Increasing proportions of an aging population, puts pressure on a community to provide for services, amenities and programming that will appeal to this aspect of its population.

- **Half of Springwater's resident population had attained some level of post-secondary education.**

The largest proportion of the population holds a high school certificate or equivalent (26.1%), closely followed by a college, CEGEP or other non-university diploma (26.0%) and university certificate, diploma or degree (24.8%) as of 2006. Slightly different results exist for the County as a whole, which is far more blue-collar than the provincial average. The most recent TOPS report distributed by the Simcoe County Training Board (January 2009), suggests that Simcoe County should build upon existing strengths such as attracting even more youth to trade and college programs.

- **Average household incomes in the Township exceed the County and the Province's average.**

The 2005 average household income for Springwater was \$100,184, which was actually significantly higher than both the County and Provincial average of \$73,624 and \$77,967.

- **Springwater's labour force grew more quickly than its population between 2001 and 2006.**

The Township's labour force in 2006 was comprised of 10,050 people, an increase of 18.9% over 2001 levels. Based on the 2006 census, the local economy was concentrated in the following sectors:

Retail Trade (13.0%), Manufacturing (11.0%), Health Care & Social Assistance (9.5%), Educational Services (9.0%), and Professional, Scientific and Technical Services (5.8%).

- **Despite the strong growth, the Township has a high percentage of workers that commute to employment in Barrie other parts of the County.**

The greatest proportion of residents (56.3%) commute to the City on a daily basis for employment, with an additional 19.0% that commute within the County of Simcoe, while a further 8.9% of the workforce commutes to either the City of Toronto, Region of Peel or York.

- **Service industry jobs provided the majority of employment opportunities for the Township's local labour force.**

A high share of the Township's labour force is employed in the areas of retail trade; Springwater's occupations are also closely linked to the field of retail with 25.9% of all occupations in sales and service. The largest share of all sub-occupations within the field of sales and service was in sales, retail salespersons and clerks accounting for 715 of all local labour force occupations.

- **Nearly 33.9% of the Township's labour force is employed in creative class occupations.**

The greatest concentration of workers is employed in professional occupations such as teachers and professors (15.1%), followed by other managers (13.4%) and senior management occupations (7.0%).

- **A labour flow analysis reveals the Township is a net exporter of labour.**

The greatest amount of labour exported on a daily basis to other communities is in the Retail Trade sector (-925), followed by Manufacturing (-805) and Health Care and Social Assistance (-725) and Construction (-550). Commuting patterns along with industry trends infer that many Springwater residents travel to Barrie on a daily basis for employment within each of these sectors.

- **The greatest share of Springwater's agricultural businesses is in beef cattle ranching and farming.**

The Township has a total of 62 farms, and an additional 32 farms dedicated solely to dairy cattle and milk production. The promotion of value-added products has received considerable attention by previous studies completed for the region, suggesting a need to further support the local agricultural industry through value-added production such as abattoirs, which enables community members to purchase and consume locally raised meat, or ethanol products for corn, biodegradable, food processing plants, biotechnology, 100 mile diet, farm tour opportunities and agro-tourism.

- **Springwater ranks eleventh out of the eighteen Simcoe communities reviewed based on select business costs.**

The Township of Springwater ranked eleven out of the eighteen communities reviewed under a series of business case comparators. The Township's housing market demands a relatively high average

housing price over many other communities across the County, in particular popular communities such as Barrie, Collingwood and Wasaga Beach which all exhibit lower average housing costs than the Township. The Township's municipal tax rates are moderately priced against the comparative communities and rank seventh lowest out of the eighteen communities under review. The Township's development charges also ranked in the middle range, at \$ 5.75 a sq.ft. for both commercial and industrial properties, but did not prove to be as competitive as surrounding communities such as Innisfil and Collingwood. Information surrounding prices per an acre of serviced land were difficult to obtain, but it was concluded that Bradford West Gwillimbury demanded the highest prices at \$300,000 per an acre due primarily around its advantageous location to a major highway route.

### 3 Target Sector Assessment

The limited supply of serviced industrial lands is a major deterrent to the Township's investment attraction efforts. As noted earlier, if the Township is committed to the attraction of industrial investment, the servicing of marketable lands in proximity to Highway 400, Highway 26 and 93 and the City of Barrie is a prime consideration for the future. In the short term this may include pursuing and marketing opportunities associated with dry industrial operations including limited manufacturing, transportation and warehousing and construction.

Using information provided by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) REDDI database, together with the results of the detailed location quotient analysis, labour flow analysis and business patterns data, the following sectors (and subsectors) have demonstrated that there is potential to drive new investment in the following sectors of the economy:

- Construction
- Manufacturing
- Wholesale Trade
- Professional, Scientific & Technical Services
- Agriculture/Agri-business
- Tourism

An important consideration in determining the opportunities associated with these sectors is the pattern of growth that is expected both provincially and regionally, as well as the emerging trends that will shape these industries in the future. A further consideration is the need to identify where economic development activities should involve investment attraction and marketing, retention and expansion efforts or workforce attraction to ensure their long term sustainability and viability in the community.

The discussion that follows provides a high level understanding of the trends that are impacting the growth of these sectors. Each sector has been sub-divided into two categories: immediate vs, long term priorities determined by a number of factors that are further discussed within each overview.

#### 3.1 Immediate Priorities

##### 3.1.1 Professional, Scientific & Technical Services

Professional, scientific and technical services industries are becoming increasingly important as the Ontario economy continues to shift from an economy based on manufacturing to one that relies more heavily on skilled labour and human capital. Service-producing industries (all industries excluding agriculture/primary, construction, manufacturing and utilities) drive a significant share of growth in GDP and employment in the province; as of March 2010, service industries employed over 79% of Ontario's workers<sup>15</sup>. This sector, together with administrative and services, were responsible for 20.3% of provincial GDP in 2009<sup>16</sup>.

The importance of professional, scientific and technical services to the local economy is indicative of a broader transition towards a knowledge-based paradigm for cities and regions in developed economies. This has important implications for an economic development strategy or investment attraction, as quality of place and lifestyle factors will impact the growth potential of this sector in a community. Perhaps not

---

<sup>15</sup> Statistics Canada, Labour Force Survey, March 2010.

<sup>16</sup> Ontario Ministry of Finance, Ontario Economic Accounts, Fourth Quarter of 2009.

surprisingly, these jobs are also of high value; among 16 industry groups in Ontario, professional scientific and technical services pay the 3<sup>rd</sup> highest wage rate as of 2008 (29.57 \$CDN/hr)<sup>17</sup>.

The main components of this industry include engineering, specialized and computer systems design, and legal and accounting services. The sector's performance generally follows the broader business environment, as it relies on other goods and service producing sectors to drive its output. In spite of this, the sector has also proven quite resilient in spite of the broad-based recession affecting the local, provincial and national economies. Employment in the sector increased 13.8% to 553,000 between March 2009 and March 2010 and is expected to accelerate further as the economic recovery continues<sup>18</sup>.

In 2009, the professional, scientific and technical services workforce in Springwater comprised 700 people, or 6.4% of the local labour force. While this is less than the 8.5% of provincial employment that the sector composes<sup>19</sup>, it has shown significant local growth of 10.5% between 2006 and 2009. The 54 firms in this sector comprise 9.4% of Springwater's businesses in 2009. These are concentrated in:

- accounting,
- tax preparation,
- bookkeeping and payroll services, and
- other professional, scientific and technical services (including marketing, photography, translation and veterinary services).

Overall, Springwater is well positioned to attract a broad range of industries in this sector. It has demonstrated employment growth in both personal and business service industries such as legal and accounting services, and creative and technical industries such as engineering and specialized design. A cultural mapping exercise, undertaken with the County, could better identify the 'creative class' assets and businesses present in the Township.

Immediate focus should be placed on creating opportunities for local employment and business creation in the sector and to better leverage the skilled labour that already exists. This should include a review of Official Plan policies and zoning provisions to ensure that these types of business operations are supported as home based businesses and on the main streets of the Township. In 2006, 215 workers in the sector commuted out of the Township for work, and are likely tied to the Barrie CMA. As capacity in the sector grows, there will be opportunity to create more live-work opportunities within the local economy.

### 3.1.2 Agriculture/Agribusiness

As a primary goods-producing industry, agriculture and agribusiness plays a small but important part in the local and provincial economies. The industry overall was responsible for 1.09% of provincial GDP in 2009, up slightly from 1.07% in 2008. However, the impact of agricultural activity should be more broadly understood to include business activities directly associated with agricultural production. Agri-food, which is more broadly defined to include food, beverage and tobacco manufacturing, agricultural implement and chemical manufacturing, and retailing, wholesaling and food services, was calculated by the Ontario Ministry of Food, Agriculture and Rural Affairs (OMAFRA) to be responsible for 6.3% of provincial GDP in 2008, and 11.3% of all goods-producing industries<sup>20</sup>. The sector has also been largely immune from the downturn in employment experienced by other industries in the recessionary period of 2009. From March 2009 to March 2010, employment in the sector grew 5.1% to 82,000. This is not fully indicative of overall

<sup>17</sup> InvestinOntario.com; Statistics Canada, Labour Force Survey 2008.

<sup>18</sup> TD Economics, Industrial Outlook, January 2010.

<sup>19</sup> Statistics Canada, Labour Force Survey, March 2010.

<sup>20</sup> Ontario Ministry of Agriculture, Food and Rural Affairs. Ontario Gross Domestic Product for Agri-Food Industries, 2008.

employment in the sector, which shows a high degree of seasonality and part-time employment which follows the crop cycle.

Major trends affecting the industry include the consolidation of operations into larger establishments, which decreases overall employment but has shown to increase productivity and output. Data from the South Central Community Development Corporation, which includes the Springwater area, indicates that farm gate receipts increased 26.7% between 2001 and 2006, even as employment in the region lost 1,655 jobs. The Springwater area appears to reflect this trend, with 15.4% of its farms reporting total farm capital over \$2,000,000, as compared to 9.2% for the province overall.

Indeed, although it has a relatively small impact on the provincial economy, agriculture and agribusiness is an important sector in Springwater, and a traditional strength of the Township. It is one of the only major industry groups to import jobs in 2006. In addition to the primary base of farm operations, 2006 data suggests there is strong support for farms as well.

While the majority of farming businesses are in cattle ranching and farming and oilseed and grain farming, other crop farming and green housing account for a significant number of local farming operations. The broad range of farming operations in the Township may signify market opportunities and agri-tourism potential. A 2009 report entitled 'From Kraft to Craft: innovation in Ontario's Food Economy' demonstrates that Ontario's food economy has grown by 2-3% a year over the last decade, with the 'creative' food economy sub-sector growing at anywhere from 5 to 10 times that pace<sup>21</sup>. This sub-sector, which takes advantage of the shift in consumer preferences towards specialty, organic and local foods, could be an opportunity for the Township, given its diverse agricultural base, presence of direct-to-consumer farms, and proximity to large urban markets.

One final consideration that should be given to development in this industry is the increasing importance of science and technology-based research and innovation in agriculture, and diversification of business opportunities that arise from it. Under the umbrella of 'agribusiness', the sector is increasingly understood in terms of its overall supply chain effects – from inputs into chemical manufacturing, to logistics and distribution systems, and expansion of retail markets, the agribusiness sector encompasses a growing and profitable niche in the Ontario economy. For Springwater, this is significant insofar as it can open doors for synergies between the local agricultural base and other regional industrial strengths in transportation and manufacturing, for example. There are a wide range of federal, provincial and institutional organizations providing funding and research assistance to agri-business activities in Ontario.

Given these diverse external opportunities and the local strength in the sector, agriculture and agribusiness represent an investment attraction and retention and expansion target for the Township of Springwater.

### 3.1.3 Tourism

The tourism industry in Ontario is currently undergoing important structural changes. The release of the Ontario Tourism Competitiveness Study in 2009 recommended the formation of 13 new tourism regions in the province. It was announced in the 2009 provincial budget that this readjustment will be accompanied by provincial funding of \$25 million in the next two years, in addition to the \$40 million in annual funding already allocated to tourism<sup>22</sup>. The increase in this funding is reflective of the growing importance that tourism holds in a local economic development framework. In 2007, over 258,000 persons were

---

<sup>21</sup> Donald, B. 'From Kraft to Craft: innovation in Ontario's Food Economy'. February 2009.

<sup>22</sup> Ontario Ministry of Finance. 2010 Ontario Budget: Sector Highlights – Strengthening Key Sectors of Ontario's Economy

employed in jobs directly or indirectly related to the tourism industry in Ontario, and generated over \$22 million in receipts for the province in that year<sup>23</sup>.

The tourism industry in general is continually evolving, and spending and investment is highly susceptible to external trends. The Ontario Tourism Research Study of 2009 pointed to trends that include the growing importance of quality of service and sophistication in tourism offerings, increased competition for tourism investment, and the rise in tourism associated with sustainability and arts/culture, the latter of which now accounts for over 30% of tourism expenditures in the province<sup>24</sup>.

Yet the industry has also faced significant challenges. As consumer spending fell throughout the recession, national tourism GDP declined for the first time since 2003, by 2.3% in 2009. International spending fell to its lowest level in 15 years. When defined to include information, culture and recreation and accommodation and food services industries, employment in tourism industries in Ontario actually increased 1.9% from March 2009 to March 2010, though this has been largely driven by increased employment in low-paying food service jobs<sup>25</sup>. It is further predicted that the tourism and hospitality industry will experience a softer recovery than other industries, as the combination of reduced discretionary spending and the strength of the Canadian dollar are likely to limit tourism expenditures overall<sup>26</sup>.

The Township of Springwater's tourism industry faces similar trends, as well as some opportunities and challenges unique to the region and the Township. In 2001, the South Georgian Bay region (which includes Springwater) was a test region for the Premier Ranked Tourism Destination Framework, which evaluates regional tourism assets. The report demonstrated that the region benefits from various outdoor recreational opportunities, strong cultural heritage resources, and proximity to a large regional population base in South-Central Ontario. Simcoe County in general offers a strong tourism product, driven largely by outdoor recreation. Between 2006 and 2007, the County demonstrated significant growth in tourism employment (4.4%), tourism expenditures (10.2%) and contributions to County GDP (8.5%) in 2007<sup>27</sup>.

However, the region, and the Township more specifically, face a number of challenges with respect to tourism development. The same Premier-Ranked report identified above noted that limited attractions and bed and breakfasts in the region were hindering the attraction of overnight visitors. Springwater has many distinctive tourism assets, including the Snow Valley Ski Resort, Elmvale Zoo, Simcoe County Museum, networks of trails and forests, and 11 designated cultural heritage sites. However, there are a wealth of other 'destination' locations and events in the broader Central Ontario region, which provide high competition for tourism expenditure. Springwater Township is further limited by its lack of frontage on Georgian Bay and Lake Simcoe, and the significant competition for seasonal tourism spending from Collingwood, Wasaga Beach, Barrie and the Muskoka region.

While the Township should begin to explore opportunities to increase local accommodations, its immediate area of focus should be on better identifying, promoting and leveraging its existing and potential tourism assets in an attempt to be more responsive to the emerging wants of domestic tourists. The South Georgian Bay area has been found to generate most of its tourism investment from domestic, provincial visitors; this is promising for Springwater, given that national tourism spending among domestic visitors actually increased in the third and fourth quarters of 2009<sup>28</sup>. There are local employment concentrations to speak of in heritage institutions (1.9 LQ) and other amusement and recreation industries

<sup>23</sup> Statistics Canada. International Travel Survey, 2007. Ontario Ministry of Tourism.

<sup>24</sup> Ontario Ministry of Tourism and Culture, Ontario Tourism Research Study, 2009.

<sup>25</sup> Statistics Canada, Labour Force Survey, March 2010.

<sup>26</sup> Scotiabank Group, Provincial Trends, 2010.

<sup>27</sup> Statistics Canada, Travel Survey Residents of Canada and International Travel Survey, 2007.

<sup>28</sup> Statistics Canada, National Tourism Indicators Highlights, 2009.

(1.81), though Springwater exports 225 jobs in component sectors of the tourism industry, to surrounding areas.

Events and amenities, such as the Elmvale Fall Fair, Springwater Provincial Park, the Minesing Wetlands, and most notably the Elmvale Maple Syrup Festival provide a strong foundation that can be expanded upon to leverage further tourism visitation. Located in the centre of an active tourism region, Springwater could benefit from a stronger unified marketing presence that distinguishes the Township within the broader region; community consultation has been conducted to this end (i.e. the Springwater Visual Identity Survey). An increased online presence, as well as signage on major regional and provincial highways (400, 26, 93) are important means to increase the Township's exposure. Success in these areas can have important spill-over effects for the Township, particularly in the retail trade sector.

Overall, for the reasons presented above, the tourism industry represents a significant opportunity to attract business investment and consumer spending to the Township.

## 3.2 Long Term Priorities

### 3.2.1 Construction

The construction sector in Ontario has shown highly varied performance through the recession and recovery of the last two years, attached as it is to public and private investment and spending. The sector performed poorly as the broader economy was in the depths of the recession; its output in terms of GDP fell 11.4% in 2009, and it experienced seven consecutive quarters of decline beginning in the first quarter of 2008. The sector's share of provincial GDP in 2009 was 4.7%, also down from 2008 levels (5.1%).

However, as public stimulus spending increased and the economy has begun to emerge from the recessionary period, the construction sector has followed suit, experiencing positive growth of 3.1% in the fourth quarter of 2009. Year-over-year employment actually increased modestly, up 0.8% to 391,000 in March 2010. This growth was largely driven by a remarkable rebound in residential building construction. Though there was a 20.7% drop overall in new housing construction in 2009, the sub-sector actually experienced 9.3% growth in Q4 of that year, up markedly from the 0.9% growth it had experienced in Q3. Non-residential building construction stayed mostly stable during the same time period, experiencing modest decline of 0.1% in both Q3 and Q4 of 2009.

Similar trends are expected to continue and re-accelerate into the next year as well, underpinned by a plethora of committed funding to public infrastructure projects<sup>29</sup>. It is forecast that this investment will continue; based upon Statistics Canada's Public and Private investment survey, there is a projected 14.1% increase between 2009 actual and 2010 intended capital investment in the construction industry, driven by expenditures in roads, sewage, transit, public buildings and other infrastructure<sup>30</sup>. This spending will continue to fuel Springwater's non-residential (including utility system, road, bridge etc.) construction sectors.

Further affecting the outlook for the construction industry is the forthcoming implementation of a harmonized sales tax (HST) in Ontario on July 1, 2010. Homebuilders could scale back construction plans as some costs associated with construction will rise, but units priced under \$400,000 are given a 6% rebate (75% of the 8% provincial portion) on the HST at point of sale<sup>31</sup>. Based on the implementation of an HST in other provinces, forecasts indicate that the HST could lower business costs and increase purchasing power for the construction industry. The current PST already applies to building materials in

<sup>29</sup>Scotiabank Group, Provincial Trends, 2010.

<sup>30</sup>Statistics Canada, The Daily, February 26 2010.

<sup>31</sup> BMO Capital Markets Economics. Home Truths: The Heavy Impact of Ontario's HST on Housing. May 5, 2009.

new construction, and the HST would reimburse builders for a portion of taxes paid on supplies<sup>32</sup>. All told, the introduction of the HST on July 1, 2010 could represent a net gain for the construction industry in Springwater.

To that end, Springwater has a strong and diverse construction industry with a local labour force of 1,046 people in 2009, a growth of 18.2% from 2006. Local labour force concentration relative to the province as measured by location quotient also rose over the same time period<sup>33</sup>, from 1.48 to 1.60. High or very high sub-sector concentrations exist in the following areas:

- Land subdivision (5.83)
- Utility system construction (3.3)
- Other specialty trade contractors (2.08)
- Highway, street and bridge construction (1.68)
- Foundation, structure and building exterior contractors (1.52)
- Residential building construction (1.38),
- Non-residential building construction (1.37)
- Building equipment contractors (1.3)

An analysis of business patterns in the Township also reflects the growing and diverse nature of the sector in Springwater, as the number of establishments in the local sector increased by 13 (10.7%) to 135 businesses between 2005 and 2009. These businesses are largely concentrated in residential building construction, building equipment contracting, building finishing contracting, and other specialty trade contracting.

The key factors influencing the future of the construction sector in Springwater are associated with regional competition and future housing demand, driven in large part by local and regional population growth allocations from the Province. Though Springwater's population grew 8.4% between 2001 and 2006, it lags the growth of Simcoe County as a whole (12.0%) and the regional centre of Barrie (23.8%) over the same time period. Housing starts – another strong indicator of construction and trades-related activity – were down 57.3% in Springwater Township between 2008 and 2009, and declined 69.8% in the Barrie Census Metropolitan Area (CMA; Barrie, Springwater and Innisfil). There has been some rebound in the first quarter of 2010, reflecting broader provincial trends in the sector; housing starts are up 89.5% in the CMA, though in Springwater itself, only 8 new single detached houses were started, against 7 in Q1 2009<sup>34</sup>.

The strong concentration of housing construction in Barrie also drains labour out of the Springwater area; 550 workers are exported by the Township, of which 35% are employed in the specialty trades sub-sector. Though population and housing growth is forecast to continue throughout the Barrie CMA, it will remain heavily concentrated in Barrie and South Simcoe County. Though construction may not take place in Springwater to the degree it does in surrounding areas, retaining and growing the employee and small business base, particularly in more specialized and highly-skilled contracting activities, will benefit the Township.

All told, the construction sector represents a continued long-term investment driver for Springwater Township, subject to future regional growth allocation and employment demands.

---

<sup>32</sup> Ibid.

<sup>33</sup> Location quotients are described as 'High' if they are over 1.5, and 'Very High' if they are over 5.

<sup>34</sup> Canada Mortgage and Housing Corporation Release. Barrie New Home Market Continues to Improve. April 12 2010.

### 3.2.2 Manufacturing

The manufacturing sector in Ontario has experienced turbulent economic fortunes in the last number of years. The sector is a traditional strength of the Ontario economy, owing to a globally competitive automotive manufacturing sector that was associated with 400,000 jobs in the province in 2008. However, recent issues with regards to the cost-competitiveness of the Ontario marketplace and the global decline in capital availability have accelerated the slow decline the sector has been experiencing in the last five years. The appreciation of the Canadian dollar, which again reached parity with the American dollar in April 2010 as many analysts predicted, will continue to place additional pressures on the sector in Ontario<sup>35</sup>.

That being said, manufacturing remains an integral component of the Ontario economy, accounting for 15.3% of provincial GDP in 2009. This fact is further reflected by the considerable public investment in the sector throughout the recessionary period of 2008 and 2009. Most notably, the Ontario government provided \$4.8 billion to General Motors and Chrysler, which it estimated saved 85,000 Ontario jobs in the automotive manufacturing supply chain<sup>36</sup>. As a result of this investment, manufacturing appears to be leading recovery in the broader economy; sales increased 10.7% between February of 2009 and 2010<sup>37</sup>, and the sector experienced growth of 2.3% in the fourth quarter of 2009. Seven of eleven manufacturing sub-sectors experienced positive growth in the quarter, including the automotive manufacturing industry (12.2%); analysts expect the sector to grow at twice the rate of the broader economy in 2010-2011<sup>38</sup>.

In the short term, a variety of factors suggest this recovery will continue. The continued effects of stimulus investment will be complimented by the implementation of the harmonized sales tax (HST) on July 1 2010. The HST is estimated to provide \$510 million in sales tax relief annually to manufacturers in the Province; coupled with other corporate tax reductions, the tax rate on new business investment will be cut from 32.8 per cent in 2009 to 16.2 per cent by 2018<sup>39</sup>.

Yet these investments mask the writing on the wall with respect to the long-term fortunes of the sector; the economy is experiencing structural shifts away from manufacturing and goods-producing industries towards service-producing, knowledge intensive industries. Despite more recent growth, the manufacturing sector declined for the fourth straight year, by 12.2% in 2009, and employment fell 1.5% between March of 2009 and March of 2010. However, this growth is not likely to return the sector to its pre-recession levels; it is forecast that, by late 2011, factory production will remain about 8% lower than the levels seen a decade ago<sup>40</sup>.

As such, the manufacturing industry will have to respond to new challenges brought on by these structural shifts. Incorporating re-training and skill enhancement, increased research and development, and increased flexibility will be required to take advantage of new investments in new innovative industries that will produce more high-value products<sup>41</sup>. For example, Ontario's Green Energy Act, and the Open Ontario Plan announced in the 2010 budget, will direct billions of dollars to investment and innovation in green energy manufacturing, installation and retrofit. Springwater is already beginning to capitalize on these opportunities for alternative energy investment, securing funding for two solar projects through the Province of Ontario's Feed-In Tariff program.

---

<sup>35</sup> Scotiabank Group, Provincial Trends, 2010.

<sup>36</sup> Ontario Ministry of Finance. 2010 Ontario Budget: Sector Highlights – Strengthening Key Sectors of Ontario's Economy

<sup>37</sup> Statistics Canada, The Daily, April 16 2010.

<sup>38</sup> TD Economics, Industrial Outlook, January 2010.

<sup>39</sup> Ontario Ministry of Finance. 2010 Ontario Budget: Sector Highlights – Strengthening Key Sectors of Ontario's Economy

<sup>40</sup> TD Economics, Industrial Outlook, January 2010.

<sup>41</sup> Conference Board of Canada. Canada's Manufacturing Sector: There is a Silver Lining. June 23 2008.

Springwater could be well positioned to fill important roles in the manufacturing value chain as the sector continues to evolve. The Springwater manufacturing sector is currently broad-based and diverse albeit small scale, with significant employment concentrations in sub-sectors ranging from textiles, grain milling, industrial machinery and commercial equipment manufacturing, and metal fabrication. Though there is a large employed labour force in Springwater, much of it (805 of the 1,080 workers) work outside the Township, owing to the presence of large employers elsewhere in the region (such as automotive manufacturing in Alliston). The number of manufacturing businesses within the Township has underperformed, losing 5 firms (15.6%) between 2005 and 2009.

The local sector has experienced challenges. To attract future investment, the Township must confront the competitive realities facing the sector in the region, and ensure its readiness for new investment in both the short and long-term. To that end, as a more rural area that borders a growing urban centre, Springwater must be competitive on the basis of accessible, low-cost serviced land in a range of parcel sizes, and an attractive development environment. Industrial property taxes and electricity rates are currently in line with the rest of Simcoe County, but non-residential development charges are currently higher than competing jurisdictions such as Collingwood and Innisfil, and the availability of serviced land is limited overall.

The challenge for Springwater in attracting investment from potential growth subsectors in manufacturing will be ensuring the availability of low-cost development and investment opportunities. In addition to the provision of this physical infrastructure, the Township must also leverage its local labour force, and access to large markets in the broader region. If successful, manufacturing expansion would have important spillovers for the local economy in terms of residential growth, construction and consumption in retail trade. Given the right combination of assets, manufacturing can represent a significant investment attraction and expansion target for Springwater.

### 3.2.3 Wholesale Trade

The wholesale trade sector accounts for the sale and distribution of commodities and manufactured goods within the economy. As such, its performance is largely tied to primary, manufacturing, construction and retail trade sectors, all of which were adversely affected by the economic downturn of 2008 and 2009. The wholesale trade sector suffered associated declines in 2008 and 2009, with total output experiencing a decrease of 6.5% in 2009. Employment also suffered, declining 1.2% between March 2009 and March 2010 to 995,000 workers<sup>42</sup>.

However, given its close ties to these industries, wholesale trade has also seen an associated rebound as activity throughout the economy has begun to stabilize and improve. Wholesale trade output in terms of GDP increased by 4.2% in the fourth quarter of 2009, and it accounted for 6.1% of the province's GDP in 2009, remaining largely stable from 2008 levels (6.3%)<sup>43</sup>. Indications are that, as the recovery continues, the wholesale trade industry shows the potential for growth, again driven by the re-expansion of manufacturing and automotive production and distribution in particular<sup>44</sup>. Sales in Ontario's wholesale trade sector increased 15.6% between January 2009 and 2010, the largest year-over-year growth in the country<sup>45</sup>.

Though manufacturing is experiencing a rebound, indications are that it will not return to its pre-recession levels in terms of employment or overall share of the province's economic output. However, residential construction spending, consumer expenditures and retail trade all showed marked improvement in the

<sup>42</sup> Statistics Canada, Labour Force Survey, March 2010.

<sup>43</sup> Ontario Ministry of Finance, Economic Accounts, Fourth Quarter of 2009.

<sup>44</sup> TD Economics, Industrial Outlook, January 2010.

<sup>45</sup> Statistics Canada, The Daily. March 17, 2010.

fourth quarter of 2009, suggesting a continued base of activity that will support wholesale trade activities. Some caution should be demonstrated, however, as analysts predict that this increase in activity is largely associated with government stimulus and investment in infrastructure; as such, the long-term stability of wholesale trade is not guaranteed.

However, the performance of several wholesale trade subsectors in Springwater demonstrates significant linkages with agriculture, manufacturing and construction – sectors that are of importance to the local economy, and that have shown recent growth throughout the province. Location quotients show sub-sector strength in wholesale-distribution activity related to farm products (1.96 LQ), farm, lawn and garden machinery (5.28 LQ) and agricultural supplies (5.42 LQ); motor vehicles (2.22 LQ) and petroleum products (1.74 LQ); and building material and supplies (1.36 LQ), lumber, millwork and hardware (1.75 LQ), and construction, forestry, mining, and industrial machinery equipment and supplies (1.36 LQ).

The sector employed 513 people in Springwater in 2009; in terms of percentage of the workforce (4.7%) it was on par with both Simcoe County and the province, according to 2006 figures. This represents a modest increase from 2006 levels (6.8%). Business establishment growth was similarly reserved, growing 6.9% between 2005 and 2008 to a total of 31 businesses. Clearly, these businesses in Springwater's wholesale trade industry support a variety of industries in the local economy, and should be considered a strategic advantage to those industries, particularly manufacturing and construction.

It should be noted, however, that Springwater will face competition for wholesale trade investment from Barrie. Though the two municipalities share similar competitive advantages in terms of regional labour pool and access to Central Ontario and major highway routes (26 and 400/69), Barrie has demonstrated continued growth in wholesale trade activities in a variety of sub-sectors. Its ongoing expansion of residential and non-residential construction, coupled with its accelerated growth in retail trade, make it a magnet for wholesaling activities in the region. This is borne out by labour flow data which indicates that Springwater exports 345 people out of the Township who work in the wholesale trade industry.

The long-term success of the wholesale trade sector on Springwater will thus depend on a variety of factors. These include a strong local population base to support retail activities; the availability of serviced parcels of land to house storage and distribution facilities; and the attraction of new investment, and spill-over activity from Barrie, on the basis of cost and proximity to larger markets.

Based on these factors, the wholesale trade sector is a modest business attraction and retention opportunity for the Township.

## 4 SWOT Analysis

An effective economic development or marketing strategy must include a thorough consideration of the opinions and perspectives of the area's current business leaders and community representatives. Consultations with these groups can provide a more relevant and meaningful assessment of the Township of Springwater's strengths and weaknesses, as well as perceptions regarding potential opportunities and threats facing the Township, whether they are of an economic or social nature.

In this context, a SWOT Assessment (Strengths, Weakness, Opportunities and Threats) was conducted to gather a better understanding of Springwater's current market environment, competitive pressures, and potential capacity for future business growth and investment attraction. Furthermore, the SWOT identifies Springwater's current assets and limitations that are necessary to consider in the formation of a successful, sustainable economic development strategy.

This assessment was conducted through a consultation process with members of the Township of Springwater business community, as well as local residents and community leaders. In total, 24 one on one interviews were conducted with selected representatives in March of 2010. In addition to these interviews, 9 face to face interviews were completed with the Township's Mayor, Deputy Mayor, Councillors and staff. Two focus groups were also held on March 4<sup>th</sup>, which were attended by forty business and community members.

The resulting analysis presents the key findings from this consultation along with further insight into the perceived gaps and potential opportunities for the Township. This work will help to inform and position the Township's competitiveness and direction when crafting the strategic phase of the Economic Development Strategy. The key findings of the SWOT Assessment are summarized below.

### 4.1 Strengths

It is essential that an economic development strategy build off and capitalize on the unique elements and strengths of a local community in a way that will lead to growth and critical mass of business and investment activity in the future.

The following discussion highlights some of the key elements on which to build a strong economic future.

**Access to Regional Highway Network** - Springwater's proximity to highway 400 and highways 26, 27 and 93 were identified throughout each of the consultations as a major competitive advantage. The Township's transportation network allows Springwater's residents and business community members to connect with a number of major regional centres, including Barrie, Toronto and communities located in North Simcoe County with ease. This was also identified as being a significant asset in the attraction of business investment to the area.

**Presence of Elmvale District High School** – The high school not only provides spin-off employment opportunities for local business owners serving student needs, it also acts as a community hub connecting Springwater residents together through a common interest. Community members regard Elmvale District High School as a keystone for Springwater's community and would like to see the secondary school continue to thrive. Such continued interest is evidenced by the project, **SERVE**, which has received strong support from the Mayor and is intended to reposition Elmvale District High School as the Elmvale Community Campus.

**Easy Access to Recreational/Outdoor Activities** – Springwater's natural geographic location, which provides access to water, beaches, snowmobile trails and skill hills, provides the Township with the ability

to attract tourists and potential residents to the area seeking an outdoor or recreational based lifestyle. The accessibility to so many different types of recreational activities is seen as a key attribute in attracting families, businesses and workers to the area.

**Small Town Charm** – Participants in the consultation process believe there is a strong sense of community and small town/rural feel that appeals to residents and visitors alike. Enhanced support for the Township’s main streets and the local business base in its settlement areas was seen as a key component to maintaining this charm over the long term.



**Proximity to Barrie** – The Township’s proximity to the City of Barrie affords access to a broad range of services and amenities including retail shopping, dining and personal and health care related services. Springwater’s business owners also benefit from the proximity to a larger consumer and business market for their products and services.



**Pride in Agricultural Sector** – There is high level of support for the continued sustainability of the Township’s agricultural base. While the Township’s agricultural sector is characterized by a growing number of high value farms, there are a number of smaller operations with potential to capitalize on the trend towards high value food products. The continued support for the **Elmvale Maple Syrup Festival**, which attracts more than 30,000 people and is Ontario’s largest one day maple syrup festival is necessary to further promote the community’s involvement in local farming initiatives.

**Implementation of Telecommunications Infrastructure**

– The Simcoe County Broadband Network is currently working in partnership with Bell Communications on the Rural Connections program administered by OMAFRA. The program is intended to deliver broadband services to rural areas across the County, including most of Springwater. Phase 1 has been completed and the final phase, including the erection of all service towers County wide is anticipated to be completed by June 2010. This infrastructure is of critical importance to attracting knowledge or technology based industries and entrepreneurs, as well as servicing many businesses that currently operate out of their homes either through dial-up service or no service at all.

## 4.2 Weaknesses

While the previous discussion outlined the strengths on which to base economic growth, this does not necessarily ensure a community's readiness or ability to capitalize on these growth opportunities.

The following sets out some of the weaknesses or competitive disadvantages facing the Township of Springwater.

**High Levels of Commuting by Labour Force** – While the Township has experienced steady growth over the past ten years in both its general population and labour force levels, there is a significant outflow of labour on a daily basis as workers commute for employment opportunities outside of the community. In 2006, it was suggested Springwater exports 5,255 workers on a daily basis with the greatest proportion of residents (56.3%) commuting to the City of Barrie for employment, with an additional 19.0% that commute within the County of Simcoe, while a further 8.9% of the workforce commutes to either the City of Toronto, Region of Peel or York. While this pattern is not likely to significantly change over the long term, more effort must be afforded the creation and support for employment opportunities in the Township. It is important to note that these commuting patterns have the potential to change significantly over the long term if the employment lands as identified in the Midhurst Secondary Plan are approved by the County.

**Inadequate Support for Business** – Many respondents suggested there is a need to have a key point of contact within the community, such as an economic development officer that can work with business investment and expansion opportunities and take a primary role on driving economic development initiatives. Participants in the consultation process felt the lack of an EDO hampered the Township's ability to partner and collaborate with other economic stakeholders in support of local business interests and may suggest that the Township is not business friendly or investment ready.

**Lack of Centralized Community Hub** – Based on Springwater's historical pattern of growth there are two distinct community hubs within the Township. While the Village of Elmvale has been traditionally regarded as the central hub of the Township, due to the location of the high school, its shopping district along Main Street and the former location of the Town Hall, the Village of Midhurst has also emerged as a hub of Township activity. Midhurst is home to the new Township Administration Building, as well as both County and Provincial administration offices. This has contributed to the perception that the Township is split along geographies and lacks a true 'centre' around which people can rally and support.

**Seen as a Bedroom Community to Barrie** – Being located so close to the City of Barrie has both its advantages and its disadvantages. The lack of serviced industrial land means it is unable to attract significant business investment to the community which results in a significant portion of its labour force commuting outside of the Township for employment. The lack of high speed internet access has also impacted business development historically. Consequently the community is seen as a bedroom community to the City of Barrie.

**Lacks a Distinctive Identity** – Despite having incorporated in 1994 the community continues to struggle with the creation of a distinctive identity around which to rally residents and attract visitors and business to the area. This is due in part to the fact that there are eight distinct communities comprising the Township, all of which see themselves as unique. Many participants attribute this to a historical north/south divide within the Township.

**Difficulty Accessing Local Physicians and Health Care Services** – The lack of local, onsite health care services and family doctors has many residents travelling elsewhere for medical care. In speaking with the Program Manager for the Rural Ontario Medical Program, it has been suggested that based on Springwater's current population there should be eight practicing physicians in the community. Given that

health care services can often be the differentiating factor for deciding to live in a community more effort should be given to understanding the opportunity to provide additional health care services.

**Lack of Readily Available Serviced Vacant Land** – The Township is limited in the availability, quality and location of serviced employment land. While available vacant industrial land currently exists in the Township, the inability to provide beyond the services of well and septic will limit the appeal to investors. At the current time, fully serviced land exists solely within the settlement area of Elmvale. In light of this, these lands may only appeal to dry industrial uses such as light manufacturing, assembling, processing, warehousing, and/or wholesaling.

### 4.3 Opportunities

External factors can also play a significant role in determining the possibilities for an economic development strategy. This can include structural changes in the broader economy, shifts in demographics and technological changes etc.

The following summarizes some of the major factors that are influencing the outcome of the economic development strategy.



#### **Agri-business/Agri-tourism Industries** –

Given Springwater’s strong historical ties to the agricultural industry, there is strong support to promote this industry using new and innovative approaches. These may include encouraging agri-business by increasing farm-gate sales as well as encouraging local farms to open their doors to local tourists interested in farm tours and pick your own fruit/vegetable experiences.

**Promotion as a Tourism Destination** – Combined with regional tourism assets, the Township has a number of local assets with which to draw visitors to the region. Annual events such as the Elmvale Maple Syrup Festival, draw as many as 30,000 visitors for a one day festival and represent a significant



opportunity to promote the other elements of the community that might appeal to visitors. These include: the Minesing Wetland which comprises of 6,000 hectares and includes land holdings of the Nottawasaga Valley Conservation Authority, the Government of Ontario, County of Simcoe as well as several private landowners. The diverse hydrology provides a network of trails across wetlands, fens and marshes. The Township of Springwater along with Friends of the Minesing Wetlands in

partnership with the County of Simcoe, Chippewa Tri Council, Rotary Club of Barrie and the Nottawasaga Valley Conservation Authority have all partnered together to create the Huronia Lookout. The Huronia Lookout will act as a tourism point for visitors, which offers 40 km views expanding over the entire Minesing Wetlands, as well as the Niagara Escarpment, Blue Mountain, Georgian Bay, the Oro Ridge Moraine, the Settlement Area of Minesing and the Ancient Glacial Lake Algonquin Shoreline.

**Continue Improvements to ‘Downtown’ Elmvale** – The historic charm of Elmvale’s downtown is a major asset for the Township and more can be done to improve the area such as support for facade improvements ensuring development that is sympathetic to historical character and making the area more attractive to business and professional services through appropriate zoning. The Settlement Area can also function as a centre for more community events that will draw residents and visitors to the area. A healthy and lively Main Street will not only promote community engagement and pride, but also function as a vibrant tourism destination, stimulate outside investment and contribute to wider-community economic prosperity.

**Support Local Community Groups** – Recently formed groups such as the Springwater Rotary Club and



existing groups such as Focus Elmvale and the Springwater Chamber of Commerce have started to engage local volunteers and business people to represent and market the Township more positively. Each of these groups has worked independently to promote Springwater and an opportunity exists for the Township to actively collaborate in these marketing activities. For instance, the Springwater Chamber of Commerce’s 2008 Vision Exercise Update presented many great ideas on how best to promote special events and “what’s happening here?”.

**Stay Connected to the Township’s**

**Local Businesses** – Local businesses appreciate being given the opportunity to provide their viewpoint and ideas as it relates to the local economy and business environment. As an indicator of the importance of this is the fact that nearly half of all community survey respondents for this report were from the business community. The Township needs to capitalize on this level of involvement and continue to engage this segment of the community through regular opportunities for input and recognition of these efforts.

**Active Participation in North Simcoe Community Futures Development Corporation (NSCFDC)** - North Simcoe Community Futures Development Corporation (NSCFDC) is geared towards supporting small and medium businesses to access the services and capital needed for business start up and development. NSCFDC is also dedicated to promoting community-based planning and economic development initiatives in order to support local economic and employment growth. The Township of Springwater needs to become a more active partner in the program development and delivery of this organization and look for opportunities to collaborate on initiatives that will drive local investment. This is particularly relevant and timely as it relates to the potential to develop the region’s agri-business and agri-tourism economy.

**Focus on Needs of Local Small Business and Entrepreneurs** – Given the significant contribution of SMEs to the economy both locally and on a County-wide level, it is important to focus additional resources and financial support to help continue to see this area of the economy succeed and expand over the long term. This may require collaboration with both the CFDC and the County from a programming perspective, but the Township can look to provide support and information through enhanced use of its website.

#### 4.4 Threats

The obvious measure of success for any economic development strategy will be how well a jurisdiction capitalizes on its opportunities in order to drive economic growth and prosperity. Equally important however, is how those same jurisdictions address or manage the internal and external threats that may impact that vision of a vibrant and healthy community.

The following discussion lays out the key threats facing the Township of Springwater in the implementation of an effective economic development strategy.

**Shopping/Services Leakage** – Stakeholders suggest that there is a strong local desire to support the retailers that locate along Elmvale’s Main Street area but the reality is that the lack of shopping choices requires that they travel to other communities for their purchases. While some suggested that the big box development in Wasaga Beach has contributed to a decline in visitors shopping many more suggest that it’s just as convenient to go to Barrie.

**Servicing to Large Parcels of Employment Land** - As mentioned earlier the lack of full serviced shovel ready industrial land is a significant barrier to business investment in the Township.

**Lack of Regional Collaboration** – Many communities across Canada and the United States have recognized that in order to compete successfully in the global market place collaboration between towns and cities are required. While there have been several attempts to market the region for investment and visitor attraction, most notably the regional tourism marketing plan, regional collaboration efforts have been informal at best and lack the capacity and focus to achieve sustainable long term results. Only the recent creation of an economic development office at the County of Simcoe provides a new opportunity to drive collaborative economic development efforts in the marketing and promotion of the region.



**County Growth Plans May Hinder Township’s Growth** – As of 2006, the Province of Ontario adopted the Growth Plan for the Greater Golden Horseshoe, which set out a vision for growth in the Greater Golden Horseshoe (GGH) to 2031. The Province produced a report centred on the growth plans of the County, entitled “Simcoe Area: A Strategic Vision of Growth.” This document, which will be an amendment to the Growth Plan threatens the growth of the Township due to the insufficient population allocation afforded Springwater. The allocations from the Province do not recognize the growth potential of the Settlement Area of Midhurst, which is a significant settlement area in the Township.

## 5 Township of Springwater Economic Development Plan

Undertaking an economic development strategy is a significant process that requires leadership, resources and forward thinking. In the face of growing regional competition and economic uncertainty, Springwater must pursue economic development that is both targeted and focused. In being proactive and progressive in these pursuits, the Township can better realize its vision of becoming a prosperous community that enables the growth of prosperity and business investment while maintaining the quality of life that is valued by its citizens.

### 5.1 Guiding Principles

#### 1. Outline the steps to follow.

- Economic development does not just happen. It requires the community to identify a number of intermediate steps to reach its final goals.

#### 2. Promote efficient use of scarce resources.

- A significant amount of money, time, and people will be required for economic development efforts and these limited resources must not be wasted. The plan will provide rationale for resource allocation.

#### 3. Improve coordination.

- Many programs, activities, groups, and individuals will be involved in the development effort and it is important that they not overlap or conflict. The plan will serve as a vehicle for communicating development activities.

#### 4. Build consensus.

- The public and the private sector must agree on the major issues involved. This will lead to support in implementing the plan.

#### 5. Increase public awareness.

- Without public support, economic development cannot happen. It is important that the public know how development occurs and how it affects the community.

#### 6. Strengthen the community's competitive position.

- A community with a strategy will not only be inherently more likely to succeed, it will appear more attractive to potential business or industry than a community without a plan.

#### 7. Encourage forward-thinking.

- The strategy will encourage community leaders to think about the future and to not overlook opportunities for development as they arise.

**Vision** — “The Township of Springwater will be known as a prosperous community with market opportunities that enable new business investment and economic growth across a broad range of industry.”

---

## 5.2 Five Key Goals for the Township of Springwater

The Township of Springwater’s Economic Development Strategy is connected through a series of five high level goals, intended as a basis to promote strategic initiatives and ongoing activities on behalf of the Township. These goals are intended to support the continued growth of the Township and encourage a greater level of prosperity for Springwater over the next five years.

### The Five Goals are:

#### 1. Investment Readiness

The primary objective with this goal is to enhance opportunities for the retention and expansion of local businesses, which will be the primary driver of growth in future years. In addition, these actions will help to support the attraction of new business investment and entrepreneurs to the community. This will enable the Township to best capitalize on its community’s resources and communicate existing strengths more effectively.

#### 2. Pursue Partnerships and Outreach in the Community

The primary objective of this goal is to have the Township take more of a leadership role in advocating and supporting strategic and collaborative economic development within the County. This includes efforts to engage with the County, other municipalities, as well as other economic development stakeholders and community groups. Effective partnerships can provide access to greater economic development resources to the Township that may not otherwise be available at a local level.

#### 3. Effective Marketing and Promotion of Springwater

The main objective of this goal is the effective promotion of local assets, workforce skills and opportunities for business expansion and entrepreneurial investment in the community. The audience for this effort includes existing residents and employers as well as external markets. In order to increase the brand recognition for the Township every effort should be made to promote the community under one banner.

#### 4. Growth in Key Industries

The primary objective of this goal is to ensure continued business development and local employment growth, based upon the Township’s competitive advantages and local strengths.

Recognizing that the Township faces significant regional competition for investment, this goal articulates the focused efforts that will be required to ensure growth in key industries, which support Springwater's current economic base and future areas of opportunity.

#### **5. Enhance Capacity of Community Infrastructure**

The primary objective for this goal is to ensure the preservation and enhancement of Springwater's physical, social and service infrastructure. The importance of successful public services and institutions for local economic development cannot be understated. The presence of schools, health care services, and vibrant public spaces generates direct economic growth in terms of employment and local spending. Furthermore, the presence and quality of these services has a foundational effect on the overall level of knowledge, health and attractiveness of the Township, which in turn boosts its competitiveness as a place where people want to live and businesses want to locate.

## Goal 1 - Investment Readiness

---

1. **Action:** Hire a full time economic development officer (EDO) to attract and develop business investment efforts and improve relationships with local businesses. An EDO can assist potential investors to navigate the development approval and assist in navigating the programming offered by either the province or the federal government. The EDO should also contribute to the development of content for the Townships website and ensure that government administered investment attraction websites such as Invest in Ontario (<http://www.investinontario.com/>) are updated with recent community profile data. This can also be completed for tourism promotion on the province's (<http://www.tourism.gov.on.ca/english/research/rtp/>).

Partners: Township of Springwater

Timing: Recruitment 2011 – Job Position Ongoing

2. **Action:** Considering the importance of the Internet in today's business, give consideration to developing website content that more effectively promotes the uniqueness of the community, provides a local business profile, highlights ongoing investment and improvements in the community, local success stories etc. This could be done in partnership with the Chamber of Commerce. In particular the site should include:
  - a. Relevant statistics and resources that could assist an investor or business
  - b. A user-friendly searchable business directory, organized by major sector and/or NAICS code
  - c. A well developed community profile that provides a comprehensive list of statistical information on the community as well historical and cultural information
  - d. Industry profiles highlighting the Township's strength in its target industries – agriculture, construction, manufacturing, wholesale trade, professional/scientific and professional services and the tourism sectors
  - e. Business profiles and local success stories related to the Township's major industries
  - f. News and events
  - g. Maps and directions including general locational maps + directions, distance and travel time for major markets
  - h. Contact information for the municipality and Economic Development Officer

Partners: Township of Springwater, Business Community, Springwater Chamber of Commerce

Timing: 2010

3. **Action:** Support a Township of Springwater Business Retention and Expansion Program in conjunction with the Ministry of Agriculture, Food and Rural Affairs (OMAFRA). This will help to support Springwater in identifying actions for local businesses to keep existing jobs and promote the creation of new ones. A BR + E plan will also encourage dialogue between the following key stakeholders throughout Springwater, these include:
  - a. Businesses
  - b. Local government
  - c. Agencies

- d. Organizations
- e. Community members

Partners: Township of Springwater, OMAFRA, Business Community, Chamber of Commerce

Timing: 2011

4. **Action:** Promote and advertise the *Rural Connections Program*. With the recent implementation of enhanced bandwidth across the entire Township of Springwater this has provided residents, small businesses and home based businesses with access to state of the art, high speed internet services across all areas of the County. Explore the creation of a wireless hotspot in Downtown Elmvale with local service providers.

Partners: Township of Springwater, OMAFRA & private sector (Bell Aliant)

Timing: December 2009 – Ongoing

5. **Action:** Develop an inventory of available serviced and un-serviced commercial and industrial land, as well as commercial and industrial buildings in the Township and make the information available on the Township's website. Provide links to local real estate brokers and landowners as appropriate. The following information should be included:

- a. parcel size,
- b. privately or municipally owned,
- c. contact information
- d. zoning and servicing information

Partners: Township of Springwater & Private Landowners

Timing: 2010/2011

6. **Action:** Review the current inventory of dry industrial land in the Township and assess the opportunity to provide full services to these properties as a way to increase the availability of shovel ready industrial land. Identify the best areas/locations and uses for this type of development and seek the appropriate approvals as required.

Partners: Township of Springwater, Private landowners

Timing: 2010/2011

7. **Action:** Provide a business climate that is understandable, predictable, stable, timely and customer-driven. This should include a review of OP policies and Zoning By-law provisions to ensure that support the attraction of business investment in the Township's target sectors as well as home based businesses.

Lead: Township of Springwater

Partners: Municipal Departments

Timing: 2010-2011

8. **Action:** Undertake a review of the Township's development charges as they apply to non-residential development to ensure that they are in line with surrounding communities and competitive in the attraction of commercial and industrial development

Partners: Township of Springwater

Timing: 2011

## Goal 2 - Pursue Partnerships and Outreach

---

- 1. Action:** Springwater should assemble an inventory of the economic development organizations, business support programs, and external funding resources that can be brought to bear in support of Springwater's economic development programming. The Township should have a thorough understanding of the specific resources available in the region, and the ability to direct local businesses and entrepreneurs to the appropriate sources of information and feedback. Initiating meetings with each of the identified partners will be a critical first step.

Partners: North Simcoe CFDC, County of Simcoe, Greater Barrie Small Business and Enterprise Centre, Springwater Chamber of Commerce, Focus Elmvale, OMAFRA EDCs and BDCs, MEDT

Timeline: 2010-2011

- 2. Action:** In recognition of the fact that the Greater Barrie Small Business and Enterprise Centre is located in Barrie, explore the possibility of creating a satellite business development office that provides a local point of contact for businesses wishing to access information and resources available through these organizations. Give consideration to the use of underutilized municipal buildings in Elmvale, such as the Knox Building, as a permanent location for this resource.

Partners: Greater Barrie Small Business and Enterprise Centre, Simcoe Muskoka Workforce Development Board

Timeline: 2011

- 3. Action:** Strengthen intra-township business partnerships by providing physical and informational resources to the Springwater Chamber of Commerce in their efforts to gather company information, and develop marketing and promotional programming on behalf of local businesses. Specific actions should include:
  - a. Leverage and expand the Chamber's iContact program as a way to electronically share local, regional and provincial economic development news, Chamber programming
  - b. Providing shared space through municipally-owned facilities for Chamber meetings and events
  - c. Encouraging ongoing (quarterly) business/community roundtables to induce greater community participation and ownership over challenges and opportunities facing the township

Partners: Springwater Chamber of Commerce

Timeline: 2010-2011

- 4. Action:** The Township will provide more support to the efforts of voluntary community planning and tourism development initiatives. In particular, the Township will provide administrative and

promotional support to Focus Elmvale in its plans to develop a local business improvement area (BIA), and explore in-kind sponsorship and marketing opportunities with successful local events. The Township can provide free advertising in its local guides and publications in exchange for a sponsorship at the Elmvale Maple Syrup Festival.

Partners: Focus Elmvale, Various Community Groups

Timeline: 2010-2011

- 5. Action:** The Township should identify ways to leverage economic development programming and funding at the senior levels of government. In particular, initiating a review of the program and funding guidelines of the Ontario Ministry of Food and Rural Affairs' Rural Economic Development (RED) program to leverage provincial investment in key areas of mutual concern. Efforts have already been made in this regard, through an application to the Main Street Ontario Initiative. The current priorities of the RED program are associated with developing and supporting the food processing sector, community revitalization, and improving access to skills training and enhancement. Each of these priorities has relevance for the economic development opportunities identified for Springwater.

Partners: OMAFRA, North Simcoe CFDC, County of Simcoe, Simcoe Muskoka Workforce Development Board

Timeline: 2011-2012

## Goal 3 - Effective Marketing and Promotion

---

- 1. Action:** Promote opportunities for regional collaboration on economic development, tourism and marketing initiatives. Springwater must demonstrate its willingness to partner with other jurisdictions and stakeholders across the regional economic development landscape. Collaboration on specific initiatives such as the County's Farm Fresh Association, provides the Township the opportunity for regular discussion and interaction with other members of the County as well as the County as a whole.

Partners: Township of Springwater, community groups and the County of Simcoe

Timing: 2010

- 2. Action:** Consider the importance of improving both local and regional highway signage to attract both tourists and inform visitors and business investors as to their location in the Township. Ensure that both gateway and highway signage is both visible and attractive and includes optimum locations for signage that will attract visitors to the region and identifies events, town centres, local businesses, points of interest, vista points etc.

As cited in the Township's First Impressions Report, some areas of Springwater, Midhurst in particular, was very difficult to navigate. Navigating around rural communities by tourists can be difficult and this problem was noted in the *Discovering Ontario: A report on the future of tourism* is a call for better signage to help make Ontario more welcoming, safe and comfortable for tourists. Encourage local tourism-oriented businesses to apply for the *Tourism – Oriented Directional Signage (TODS) program*, which is intended to direct motorists to their attraction or service with signs along the highway. The province also encourages highway signage through its Logo Signage Program, which places signs on Ontario's 400-series highways to help motorists find essential services like food, fuel and accommodations.

Partners: Township of Springwater, tourism-oriented businesses and the Tourism-Oriented Directional Signage (TODS) & the Logo Signage Program (Ontario Government)

Timing: 2011/2012

- 3. Action:** Continue to support the efforts of the Elmvale Fall Fair, Elmvale Maple Syrup Festival, Elmvale Zoo and Snow Valley Ski Resort by developing an internet strategy that promotes each of these events and festivals using social networking tools (Facebook, MySpace, LinkedIn). Ensure that each of the promotional efforts developed include the Township of Springwater logo to promote brand awareness of both Springwater as a destination as well as the Township's connection to each of these tourism draws. Continue the use of forms of social media such as Facebook, Twitter, LinkedIn and YouTube as examples of low-cost marketing options that have the potential to reach a large demographic. Direct links to the websites and social media pages for these tourism attractions should be made available on the Township's economic and development tourism webpage. This will generate a greater degree of interest and interactivity among potential visitors to Springwater.

Partners: Township of Springwater, local tourism-oriented businesses and events

Timing: 2010

4. **Action:** Explore the opportunity to market the Township and the Region with the Ontario Tourism Marketing Partnership (OTMP). Specific tourism events and festivals will help to increase the awareness of not only the Township, but the region as a whole. OTMP provides awareness of a local tourism product and helps local economies grow through the Tourism Event Marketing Partnership Program (TEMPP), which was created to assist in the marketing of select events and festivals around the province. Review and explore untapped funding opportunities under the TEMPP for major events in the Township such as the Elmvale Maple Syrup Festival.

Partners: Township of Springwater, Elmvale Maple Syrup Festival Association, TEMPP

Timing: Late 2010 (Applications must be received four months prior to the tourism festival/event)

5. **Action:** Develop tourism website content that is dedicated to the tourism and lifestyle experience of Springwater. The tourism website should offer practical trip-planning tools including:
  - a. Searchable directory of attractions, accommodations, activities
  - b. Event calendars
  - c. Fresh content about things to see and do, including testimonials and third party commentary reviews
  - d. Photos and videos
  - e. Ability to view maps and estimate travel times from home to destination

Visitor information needs to be available in multiple, high level traffic locations such as the Springwater's provincial park, retail districts of Elmvale and in the Focus Elmvale owned pamphlet/information kiosk. The all year round information box is ideal for placing snow mobile trail maps and walking/ATV trail maps in the summer.

Partners: Township of Springwater, Focus Elmvale

Timing: 2011

6. **Action:** The Township currently lacks any ongoing tracking mechanisms or updated research to reflect local tourism visitation, expenditures and behaviour. Springwater should strive to collect local data through business and visitor surveys, and use this information to further develop or enhance one or two 'iconic' events that are suited to existing local strengths. Initial impressions based upon community consultations, the South Georgian Bay Premier-Ranked Tourist Destination Framework, and Lake Simcoe Tourism Area Assessment indicate that attention be focused on the following segments:

- a. Promoting year round outdoor recreation and adventure; emphasis on golf, skiing, ATV and snowmobile trails, horseback riding, and cycling. Potential partners include Orr Lake Golf Club, Springwater Golf Club, Rounds Ranch, Springwater Provincial Park, Snow Valley Ski Resort
- b. Expand and enhance signature heritage and event-related programming. Emphasis should be placed on local food and agricultural opportunities associated with County's Farm Fresh Marketing Association, particularly as it relates to the Township's involvement in future marketing/promotion activity (see: Bradford Carrot Fest, Ville-Marie 'Foire Gourmande'). Potential partners include the Elmvale Maple Syrup Festival, Elmvale Fall Fair, local farms and farmer's markets.
- c. In light of significant regional tourism competition, focus on developing specializations in 'vacation gateway' events and services to increase stop-over and pass-through visitation and expenditure (e.g. bed and breakfasts, hotel/motel, outfitting, farm vacation tours and restaurants)

Partners: See above

Timeline: Ongoing

## Goal 4 - Growth in Key Industries

---

- 1. Action:** Initiate a business services resource database geared towards providing mentoring, funding and cost-sharing arrangements for small businesses and entrepreneurs in the Township's target sectors. Over 81% of the township's businesses are small and medium-sized enterprises, which are especially important for rural municipalities and to drive local economic growth and employment. Encourage these local businesses to pursue NSCFDC and GBSBEC small business financing, planning and assistance programs. It should be the responsibility of the Township to survey and follow-up with these businesses, and direct them to the available resources.

Partners: North Simcoe CFDC, Greater Barrie Small Business and Enterprise Centre

Timeline: 2011-2012

- 2. Action:** Explore the potential to provide flexible, low-rent space to develop an incubation/tenancy program for local start-ups, entrepreneurs and growing home-based businesses to the Township's target sectors. This can co-locate with a local business services delivery office, the township administrative offices, and/or downtown Elmvalle to take advantage of existing resources.

Partners: CFDC, OMAFRA

Timeline: 2012-2013

- 3. Action:** Develop a five-year Agriculture and Agribusiness Strategy for the Township, incorporating elements from the South Simcoe Agricultural Action Plan, Food Sector Strategy, Severn Sound Sustainability Plan and the GTA Food Processing Business Survey. Additional input should be gathered from local operators, and provincial and institutional partners. The strategy should be informed by existing initiatives in evidence throughout the province and be two-pronged as follows:

- Pursue ways to further leverage existing local assets (hobby and gate-sales farms, organic and local foods, trading proximity to major Simcoe County and GTA markets) and capitalize on regional trends in agri-tourism and the food economy (local, organic, ethnic foods) by instituting an 'Eat Local' harvest festival to promote local food (e.g. Carrot Festival in Bradford West Gwillimbury)
- Place focused emphasis on adding value to primary products and processes through industrial activities related to bio-products and fuels, chemical manufacturing inputs, production and sale of farming implements and machinery
- Promote the findings of the Severn Sound Sustainability Plan, specifically with regards to the goal entitled "Enhance the Economic Viability of Sustainable Agriculture" into the Agriculture and Agribusiness Action Plan. Strategic direction such as developing and

implementing an action plan to improve the economic viability of agriculture to Springwater and to the Region should be considered. Along with the promotion of local sourced foods to service municipal government, hospitals, educational institutions, grocery stores, restaurants and residents.

Partners: OMAFRA, Simcoe County, Ontario Federation of Agriculture, Agribusiness Association, local business, Severn Sound Environmental Association

Timeline: 2011-2015

4. **Action:** Springwater should actively pursue the development of a local business exchange or buyer network program. A frequently cited concern among local small businesses, retailers and suppliers in Springwater is the greater breadth and lower cost of goods and services in Barrie and Wasaga Beach. The vocal response that the potential closure of EDHS generated among township businesses reflects the value and importance of locally-oriented consumption to the economic health of the township. The Township should be proactive in encouraging a 'local preferred rate' or 'Shop Springwater' discount or membership program, in partnership with the Springwater Chamber of Commerce. (see [www.seacoastlocal.org](http://www.seacoastlocal.org))
  - a. As part of a new online economic development presence, create a local online business directory and 'yellow-pages' service, identifying participants in the buyer network program.
  - b. Create and distribute promotional materials for local businesses to display in support of the new initiative.

Partners: Springwater Chamber of Commerce, Focus Elmvale, local businesses

Timeline: 2010-2012

5. **Action:** Promote the availability of dry industrial lands in the Township that could accommodate construction firms, metal fabrication, limited manufacturing, and warehousing operations. Give consideration to minimum design standards as a means to ensure quality development and heightened levels of interest from potential investors. Additional consideration should be given to the short term deferral of development charges for non-residential development.

Partners: Simcoe County

Timeline: 2011-2012

## Goal 5 – Enhance Capacity of Community Infrastructure

---

1. **Action:** The Township should continue to work with Elmvale District High School, Simcoe County District School Board and the Ontario Ministry of Education to promote a wider range of secondary educational opportunities and pathways in the Township as a foundational element to long-term skill development and economic growth. Special attention should be paid to develop programming that complements local industry strengths, including but not limited to:
  - a. Bringing more Specialist High Skilled Majors and Dual Credit Programs to EDHS – in addition to Outdoor Studies (e.g. Horticulture at Banting)
  - b. Working with Ontario Agri-Food Education Inc. (OAFE) to deliver their agricultural and agro-food education programming modules at EDHS

Partners: SCDSB, EDHS, Ontario Ministry of Education, OAFE, local businesses

Timeline: 2010-2012

2. **Action:** Provide ongoing support for the Mayor promoted SERVE initiative, focused on the development of a “Community Campus” distributive education model centred on Elmvale District High School. The development of this initiative should place special emphasis on career-oriented education. As such, the strategy should ensure the participation of local businesses and regional educational institutions to realize potential synergies between local labour force and business development needs and curriculum/program delivery.
  - i) Invite post-secondary institutions to conduct workshops and information sessions about programs associated with target development sectors (e.g. Georgian College, Hospitality and Tourism, Transportation Studies; Lakehead University – Orillia, Commerce and Administration; University of Guelph, Ontario College of Agriculture)
  - ii) Encourage more effective local school-to-work transitions by involving local businesses and EDHS in Ontario Youth Apprenticeship Programs in sub-sectors appropriate to the local economy (food processing and agriculture, metal fabrication)

Partners: Elmvale District High School, Springwater Chamber of Commerce, Local Businesses, Township of Springwater, Simcoe County District School Board, Regional Post-Secondary Institutions

Timeline: 2010 – 2012

- 3. Action:** In furthering the development of the Community Campus Strategy, explore all opportunities to leverage existing municipal facilities (e.g. Knox Building, Public Library in Elmvale) for the delivery of a range of community services, including:
- i. Educational programming and training facilities in partnership with Georgian College
  - ii. Expanded health care service delivery and physician placement in the Township by partnering with the Rural Ontario Medical Program (ROMP) and Royal Victoria Hospital

This action should be pursued in compliance with the Ministry of Education Facility Partnership Guidelines for use of school board facilities.

Partners: Township of Springwater, Simcoe County District School Board, Ministry of Education, Georgian College and Royal Victoria Hospital

Timeline: 2010 – 2014

- 4. Action:** In consultation with Ontario Ministry of Tourism and Culture, begin studying and planning process for the designation of a Heritage Conservation District (HCD) for the commercial area of Downtown Elmvale to expand tourism attraction and visitation. There are currently 11 properties designated as having cultural heritage value or interest, as designated under Part IV of the Ontario Heritage Act. HCD planning and designation enables funding for conservation and restoration of these and other properties in the district, and allows for greater local legislative control over alterations to property, as put forth in the *Red Brick and Arches: Elmvale's Commercial District Facade Guidelines*. In conjunction with the HCD, explore opportunities to implement Community Improvement Plans to further enhance and develop the Settlement Area of Elmvale.

Partners: Ontario Ministry of Tourism and Culture, Focus Elmvale, local businesses and landowners

Timeline: 2011-2012

# Appendix I

---

## National American Industry Classification System (NAICS) Definitions

## North American Industrial Classification System (NAICS)

### Sector Definitions

#### ***Agriculture, Forestry (NAICS 11)***

This sector comprises establishments primarily engaged in growing crops, raising animals, harvesting timber, harvesting fish and other animals from their natural habitats and providing related support activities.

Establishments primarily engaged in agricultural research or that supply veterinary services are not included in this sector.

#### ***Mining and Oil and Gas Extraction (NAICS 21)***

This sector comprises establishments primarily engaged in extracting naturally occurring minerals. These can be solids, such as coal and ores; liquids, such as crude petroleum; and gases, such as natural gas.

The term *mining* is used in the broad sense to include quarrying, well operations, milling (for example, crushing, screening, washing, or flotation) and other preparation customarily done at the mine site, or as a part of mining activity.

Establishments engaged in exploration for minerals, development of mineral properties and mining operations are included in this sector. Establishments performing similar activities, on a contract or fee basis, are also included.

#### ***Construction (NAICS 23)***

This sector comprises establishments primarily engaged in constructing, repairing and renovating buildings and engineering works, and in subdividing and developing land. These establishments may operate on their own account or under contract to other establishments or property owners.

#### ***Manufacturing (NAICS 31-33)***

This sector comprises establishments primarily engaged in the physical or chemical transformation of materials or substances into new products. These products may be finished, in the sense that they are ready to be used or consumed, or semi-finished, in the sense of becoming a raw material for an establishment to use in further manufacturing.

Related activities, such as the assembly of the component parts of manufactured goods; the blending of materials; and the finishing of manufactured products by dyeing, heat-treating, plating and similar operations are also treated as manufacturing activities.

Manufacturing establishments are known by a variety of trade designations, such as plants, factories or mills. Manufacturing establishments may own the materials which they transform or they may transform materials owned by other establishments. Manufacturing may take place in factories or in workers' homes, using either machinery or hand tools.

### ***Wholesale Trade (NAICS 41)***

This sector comprises establishments primarily engaged in wholesaling merchandise and providing related logistics, marketing and support services. The wholesaling process is generally an intermediate step in the distribution of merchandise; many wholesalers are therefore organized to sell merchandise in large quantities to retailers, and business and institutional clients. However, some wholesalers, in particular those that supply non-consumer capital goods, sell merchandise in single units to final users.

This sector recognizes two main types of wholesalers, that is, wholesale merchants and wholesale agents and brokers.

### ***Retail Trade (NAICS 44-45)***

The retail trade sector comprises establishments primarily engaged in retailing merchandise, generally without transformation, and rendering services incidental to the sale of merchandise.

The retailing process is the final step in the distribution of merchandise; retailers are therefore organized to sell merchandise in small quantities to the general public. This sector comprises two main types of retailers, that is, store and non-store retailers.

### ***Information and Cultural Industries (NAICS 51)***

This sector comprises establishments primarily engaged in creating and disseminating (except by wholesale and retail methods) information and cultural products, such as written works, musical works or recorded performances, recorded dramatic performances, software and information databases, or providing the means to disseminate them. Establishments that provide access to equipment and expertise to process information are also included.

The main components of this sector are the publishing industries (except exclusively on Internet), including software publishing, the motion picture and sound recording industries, the broadcasting industries (except exclusively on Internet), the internet publishing and broadcasting industries, the telecommunications industries, the internet service providers, web search portals, data processing industries, and the other information services industries.

### ***Finance and Insurance (NAICS 52)***

This sector comprises establishments primarily engaged in financial transactions (that is, transactions involving the creation, liquidation, or change in ownership of financial assets) or in facilitating financial transactions. Included are:

- Establishments that are primarily engaged in financial intermediation. They raise funds by taking deposits and/or issuing securities, and, in the process, incur liabilities, which they use to acquire financial assets by making loans and/or purchasing securities. Putting themselves at risk, they channel funds from lenders to borrowers and transform or repackage the funds with respect to maturity, scale and risk.
- Establishments that are primarily engaged in the pooling of risk by underwriting annuities and insurance. They collect fees (insurance premiums or annuity considerations), build up reserves, invest those reserves and make contractual payments. Fees are based on the expected incidence of the insured risk and the expected return on investment.
- Establishments that are primarily engaged in providing specialized services that facilitate or support financial intermediation, insurance and employee benefit programs.

In addition, establishments charged with monetary control - the monetary authorities - are included in this sector.

### ***Real Estate and Rental Leasing (NAICS 53)***

This sector comprises establishments primarily engaged in renting, leasing or otherwise allowing the use of tangible or intangible assets.

Establishments primarily engaged in managing real estate for others; selling, renting and/or buying of real estate for others; and appraising real estate, are also included

### ***Professional, Scientific and Technical Services (NAICS 54)***

This sector comprises establishments primarily engaged in activities in which human capital is the major input. These establishments make available the knowledge and skills of their employees, often on an assignment basis.

The main components of this sector are:

- legal services industries;
- accounting and related services industries;
- architectural, engineering and related services industries;
- surveying and mapping services industries;
- design services industries;
- management, scientific and technical consulting services industries;

- scientific research and development services industries;
- advertising services industries.

The distinguishing feature of this sector is the fact that most of the industries grouped in it have production processes that are almost wholly dependent on worker skills. In most of these industries, equipment and materials are not of major importance. Thus, the establishments classified in this sector sell expertise.

### ***Management of Companies and Enterprises (NAICS 55)***

This sector comprises establishments primarily engaged in managing companies and enterprises and/or holding the securities or financial assets of companies and enterprises, for the purpose of owning a controlling interest in them and/or influencing their management decisions.

They may undertake the function of management, or they may entrust the function of financial management to portfolio managers

### ***Educational Services (NAICS 61)***

This sector comprises establishments primarily engaged in providing instruction and training in a wide variety of subjects. This instruction and training is provided by specialized establishments, such as schools, colleges, universities and training centres.

These establishments may be privately owned and operated, either for profit or not, or they may be publicly owned and operated. They may also offer food and accommodation services to their students.

### ***Health Care and Social Assistance (NAICS 62)***

This sector comprises establishments primarily engaged in providing health care by diagnosis and treatment, providing residential care for medical and social reasons, and providing social assistance, such as counselling, welfare, child protection, community housing and food services, vocational rehabilitation and child care, to those requiring such assistance.

### ***Arts, Entertainment and Recreation (NAICS 71)***

This sector comprises establishments primarily engaged in operating facilities or providing services to meet the cultural, entertainment and recreational interests of their patrons. These establishments produce, promote or participate in live performances, events or exhibits intended for public viewing; provide the artistic, creative and technical skills necessary for the production of artistic products and live performances; preserve and exhibit objects and sites of historical, cultural or educational interest; and

operate facilities or provide services that enable patrons to participate in sports or recreational activities or pursue amusement, hobbies and leisure-time interests.

### ***Accommodation and Food Services (NAICS 72)***

This sector comprises establishments primarily engaged in providing short-term lodging and complementary services to travellers, vacationers and others, in facilities such as hotels, motor hotels, resorts, motels, casino hotels, bed and breakfast accommodation, housekeeping cottages and cabins, recreational vehicle parks and campgrounds, hunting and fishing camps, and various types of recreational and adventure camps.

This sector also comprises establishments primarily engaged in preparing meals, snacks and beverages, to customer order, for immediate consumption on and off the premises

### ***Other Services (NAICS 81)***

This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members. Private households are also included.

### ***Public Administration (NAICS 91)***

This sector comprises establishments primarily engaged in activities of a governmental nature, that is, the enactment and judicial interpretation of laws and their pursuant regulations, and the administration of programs based on them.

Legislative activities, taxation, national defence, public order and safety, immigration services, foreign affairs and international assistance, and the administration of government programs are activities that are purely governmental in nature.

# Appendix II

---

## Current Policies & Initiatives

## Impressions Revisited: A Program for Community Assessment & Improvement

This report was completed in 2006 by the Municipality of West Gray for the Township of Springwater (Springwater, Elmvale, Hillsdale, Midhurst, Orr Lake). It is written from the point of view of six individuals of various business occupations who visited the communities and reported on their observations. The report was broken up into a number of sections including pre/post-visit comments and future suggestions. Prior to the visits most participants had only thought of the community as they were driving through it to get somewhere else. It is widely thought of as a "bedroom community of Barrie". The group then took a five-minute drive through the community without stopping and reported they saw a welcoming community that was well maintained, with great potential but appeared to need some work regarding building appearances. With this positive first impression, the group then assessed several specific aspects of the community.

Community signs can have a major impact on the perception of the visitor. Springwater signs were found to be very attractive and modern. The group found the attractiveness of signs did carry over to the housing/residential areas, and it was noted that there was a good mix of older/newer homes, varying in size. The newer lots seemed small and crowded, while many of the older lots seemed un-kept. Roads, sidewalks, and lighting were good, and the team felt that the area would have the most appeal to the middle income demographic (8.6/10).

When considering becoming a resident, a major concern for newcomers is the quality of Education, Health, Social and Emergency Services. In Springwater Township the pre-school, primary/elementary, high school needs are met with the exception of some controversy regarding Wasaga Beach for a new High School. No college or University was available in the Township. Residents reported that Barrie/Orrillia/Wasaga Beach medical services are used, as Springwater only has one dentist

and no doctors. A long-term care facility was noted, as well as some alternative medical businesses, i.e Physiotherapy, Massage Therapy, Chiropractic. Social services were rated well as daycare, and non-profit organizations were in existence. Emergency services were adequate.

In the local economy it was found that Tourism was perceived as the #1 economy, and the team noted positive initial impressions of the health of the local economy. Many references were made to the 'Maple Sugar Festival' and 'Jungle Zoo'. Underdeveloped attractions were noted, and the team felt that one major drawback was the lack of accommodations (only B&B's) to host potential tourists. No conference facilities are currently available and a lack of 'familiar' chain restaurants exists, offering the tourist several selections of good, local restaurants. Downtown appearances ranked 7/10, Shopping variety 7/10, Customer service 9/10, Signage 7/10, Quality of Merchandise in Downtown 8/10. The Team felt that the area could use more specialty shops, and many needed updating. In keeping with the positive tourism outlook, the team noted that there were many recreational experiences available, most suited to children, families, singles, and young adults. Recreation for Senior Citizens was not visible, and the team felt that the Springwater Township lacking local entertainment.

The team found that public infrastructure and planning was an area that needed improvement. Public transportation was non-existent and sidewalks were good quality but in need of a cleaning. No public restrooms were observed, and the team felt that signage could be improved upon (despite the attractiveness noted above).

All respondents reported they would consider the community to be a suitable location for a young family, but some were hesitant on locating their retail or service business there, as well as their manufacturing business. The community could serve as a suitable location for retired persons however with the absence

doctors/hospitals, feelings were mixed. The group felt that the proximity to other tourism destinations could hinder the tourism development of Springwater, but that spin-off opportunities should be further explored. The residents were very knowledgeable about their community, and were described as being very pleasant.

Some of the responses in listing the top positive qualities observed in the community were: Housing, proximity, openness, potential, roads, friendly, rural and scenic, vibrant retail, lack of crime (safety), variety of activities, and heritage buildings.

### **Red Brick and Arches: Elmvale's Commercial District Facade Guidelines**

This report was written to implement facade guidelines while ensuring retention and conservation of the heritage resources in the Elmvale Commercial District. It is intended to guide change so that the district's architectural and historical character is complimented.

In order to achieve these goals, the Guidelines establish several objectives, such retaining and conserving the heritage buildings in the Commercial District, encouraging the conservation of the distinguishing original qualities or character of heritage buildings and avoiding the removal or alteration of any historic or distinctive architectural feature, encouraging the correction of unsympathetic alterations to heritage buildings, and promoting retention and reuse of heritage buildings while taking measures to prevent their demolition. The guidelines are able to offer assistance to individual heritage property and or business owners to encourage the use of proper conservation approaches when undertaking improvement projects, while fostering community support and pride of the building landscapes.

Some of the architectural elements that distinguish the Elmvale Commercial District Facades include red brick, square fronts, zero clearance setbacks from sidewalks and adjacent

buildings, plasters, upper windows, often with use of arches above or at top of windows, use of recessed or projection brickwork on upper facade, two cornices, signboards above storefront or in some cases multi-paned windows, recessed door-central or at far side, large central upper window. It is important to maintain and conserve original brick and masonry work on the upper facade, and avoid exterior cladding such as vinyl or stucco. Painting is not recommended.

If storeowners are thinking about renovating or reconstructing there are several guidelines that they must follow, such as maintaining the basic height and width of storefronts prevalent in the area, maintaining consistent building heights in cases where such consistency already exists, and maintaining the pattern that is established by repeating building and lot widths prevalent in the area. This ensures that the overall 'theme' of the downtown commercial district is not compromised. Visitors to Springwater will recognize the two most common unique features found along Queen St, which are the arches found above the windows, and the red brick cladding the buildings.

The reading includes a motion to council that the Springwater Heritage committee recommends that the policy to alter the structures in Elmvale Commercial District be adopted. This would mean that when an inquiry is made under the Elmvale Commercial Facade program and/or an application for a building permit is received or requested for a building in the Commercial District, several provisions must be adhered to, such as providing a list of suppliers or contractors for windows, doors, etc able to provide custom work for heritage construction.

Signage is also discussed as it relates to the external view of the building. Externally lit signage is recommended. It is encouraged to be simple, elegant in order to attract potential shoppers. Signs should reflect the style of the buildings (i.e. no neon signs). Three steps are listed to ensure that the facade is attractive and that the job is completed correctly: Evaluation,

Design, and Selecting the Contractor. If a storeowner is considering altering the building's facade several options should be considered such as Redesign, Restoration, and Renovation.

These guidelines will have a strong impact on the community in the way that it is seen by outsiders as well as the pride of local residents. The downtown attractiveness will be something that is keen in the mind of potential tourists, intrigued by the heritage that has been preserved by the Township of Springwater.

### North Simcoe Regional Economic Development Strategy

This report was completed in 2005 by The North Simcoe Community Futures Development Corporation and the Southern Georgian Bay Chamber of Commerce in partnership with the Beausoleil First Nation and Midland, Penetanguishene, Springwater, Tiny and Tay. It was decided in the summer of 2004 that it was time for the communities of North Simcoe to undertake the joint preparation of the first regional economic development strategy that would have a multi-sector focus and would address investment retention as well as investment attraction.

Several objectives for the strategy were cited (but not limited to) including identifying and analysing North Simcoe's main economic development strengths, weaknesses, opportunities and challenges; assisting North Simcoe in its determination of the type of business development it should be pursuing in the future regarding manufacturing, tourism and recreation, retail and seasonal and retirement residential development and health care; gathering a sense of how North Simcoe residents and business, institutional and government leaders wanted their communities to develop in the years ahead; and providing the North Simcoe region with a 'plan of action' to guide economic development planning for the coming decades.

The project included a situation audit (SWOT) for North Simcoe, a 'Game Plan' articulating the

vision of the region for the future and listed economic development goals in the context of a plausible growth scenario, and an 'Action Plan' to strategically enable North Simcoe to achieve the goals and realize the vision. It was noted that Southern Georgian Bay's economy is dominated by Manufacturing (29.7%), Health Care (15.6%), Retail Trade (12.8%), and Tourism (9.0%) which represents about two thirds of all jobs. There were 3715 local jobs in Springwater, which contribute to an excellent Economic Development Intensity (EDI) that exceeds the Provincial Benchmark in three sectors: Agriculture, forestry, fishing and hunting (+164%), Arts, entertainment and recreation (+65%), and Educational services (+14.3%).

The report goes on to discuss the main SWOT findings by industry: Manufacturing, Tourism, Recreation, Residential Development, Retail Malls and Downtown, Institutional Development. Some of the findings are listed below:

#### MANUFACTURING

- **Strengths:** Strong sector with well paid local jobs, productive/reliable workers living in region, entrepreneurs/professional managers living in region, unique quality of life & supportive communities, good support companies (e.g transportation providers), reasonable-to-good proximity to major markets, low cost of living & affordable housing, good family recreation, pristine natural environment, skilled labour pool, great industry support infrastructure, many recent factory expansions.
- **Weaknesses:** Industrial land owned by private sector, high cost of industrial land, meeting JIT delivery needs (distance btw GTA & 401),
- **Opportunities:** Establish municipally-owned industrial parks, market the region, attract new manufacturing investment, retain & support manufacturers, make available services industrial lands for immediate use, attract new industry.

- **Challenges:** Prevent residential encroachment, upgrade HW 12 to four lanes, encourage more young people to get in to trades, address electric power issues at certain locations.

#### TOURISM, RECREATION & RESIDENTIAL DEVELOPMENT

- **Strengths:** "Boating Capital of Ontario", unique attractions, growing as retirement destination, year-round potential.
- **Opportunities:** Visitors see Country and want to move there, raise goals to attract tourists longer, schedule 4 major events per year, refresh existing products/develop new products/strengthen partnerships, lobby for tourism signage on 400 at HW 12.
- **Challenges:** HW 12 needs to be expanded to four lanes, Georgian Bay needs to be more accessible to anglers from boat ramps, draw on successful Ottawa experience, promote public walkways on community waterfronts, make beaches more accessible.

#### RETAIL MALLS & DOWNTOWNS

- **Opportunities:** Survey residents and begin downtown revitalization
- **Challenges:** Maintain healthy malls

#### INSTITUTIONAL DEVELOPMENT

- **Opportunities and Challenges:** Ensure Oak Ridge redevelopment (MHC) occurs at its present location, help Georgian College exploit IRDI's untapped potential,

*GOAL: Create about 190 net new jobs per year over 25 years building strengths (Manufacturing 40%, Tourism 12%, Health care 10%, Retail Trade 9%) Represents a modest but sustained annual job growth of 1.1%*

A number of recommendations were made based on the SWOT findings. These recommendations were listed as either

programs to be initiated within one, two, or three years. Establishing new municipal industrial parks to meet a 25-year regional need, protecting industrial areas from inadvertent residential encroachment, enhancing the existing 3C4U (Community Career Connections for Youth) Program, and making the community waterfronts more accessible to visitors and residents are just a few of the recommendations made to be initiated within one year. Looking further ahead, several recommendations within the two year timeframe were listed, such as the region initiating a second formal employer call program, revitalizing downtowns for residents and visitors, and refreshing/developing summer tourism products and partnerships. Even more forward thinking were the three-year programs to be initiated, such as proactively attracting industrial and other high-tech investment, intensifying summer season tourism marketing, and intensifying winter-shoulder season tourism marketing.

#### Final Land Inventory for the County of Simcoe Growth Management Process

This report was generated in 2010 and presented to the County of Simcoe (COS) because while working through the County of Simcoe's Growth Management exercise, the Townships original land inventory information had been revised.

In 2008, COS was asked to complete a conformity exercise, therefore a 'land inventory' needed to be completed to assess existing available land and potential for development within the County. COS required that the Township staff make significant changes to the 'Greenfield' information. COS asked that the Township further refine these lands to include only those that are currently designated for residential development. This has meant a reduction in the inventory of available greenfield lands and the exclusion of any future development potential for the Midhurst Settlement Area.

It was reported that Springwater had 175 hectares of designated employment land.

Planning staff revised the land budget information and provided Employment Land Information to County staff for the Simcoe County Land Budget.

It is anticipated that this information will be used by the County, along with the Ministry of Municipal Affairs and Housing to determine the total amount of land available for residential and employment land in the County of Simcoe, which will have a direct impact on the population growth allocations for all lower tier municipalities, including the Townships of Springwater. This document will be one that affects business owners, both existing and potential and will be important to consider when developing an overall economic strategy.

Land inventories for each community in COS are attached to the report, outlining the development by unit type, residential unit potential as of March 2009, employment land supply, and urban designated lands with no application.

#### **Premier Ranked Tourist Destinations: An Evaluation Framework and Its Testing in the South Georgian Bay Region**

This framework was developed in 2001 for The Ontario Ministry of Tourism's Tourism Investment and Development Office (TIDO). It was commissioned to develop a framework that captures the attributes/factors/conditions needed in order that a tourist destination be perceived as a "premier-ranked" destination; and to compare the attributes/factors/conditions that exist within the southern shore region of Georgian Bay against this framework and identify what is required, if anything, in order that the Region would be perceived as a premier ranked tourist destination. The study region includes the south shores of Georgian Bay between Owen Sound and Waubashene, and the major expressions of the Niagara Escarpment, including most of Beaver Valley.

This study involved three phases: 1-Requsite Elements Framework, 2-Assessment of tourism resource and infrastructure base, 3-Identification of gaps, barriers, issues, opportunities and

potential partners influencing tourism development. The report discusses the essential dimensions of a tourism product, the performance dimensions, and the futurity dimensions.

The essential dimensions of a tourism product are listed as being A. Distinctive Core Attractions, B. Quality and Critical Mass, C. Satisfaction and Value, D. Accessibility, E. An Accommodation Base. The performance dimensions (The quality of the tourist experience and the destination's success in providing it) is validated by: A. Visitation, B. Occupancy and Yield, C. Critical Acclaim. The Futurity Dimension is sustained by: A. Destination Marketing, B. Product Renewal, C. Managing within Carrying Capacities.

There were several elements cited as making up the current, pending and proposed tourism resource base such as: natural features, parks, preserves and trails; cultural heritage assets; built recreational infrastructure; events and festivals; accommodations' properties; Lifestyle properties; suppliers of sight-seeing, interpretive and adventure products; pending and proposed additions to the facility base; pending and proposed additions to the infrastructure base; and other Identified Site Opportunities.

Some highlights of this inventory included a diverse mix of successful events and festivals comprised of Ontario's best skiing, boating, and golfing. Visitation statistics cite that some 2.86 million travellers, or 3.9 % of domestic visits within and to Ontario in the South Georgian Bay area. South Georgian Bay was reported to have four key strengths that sustain its current attractiveness, and position the whole of the region for substantial growth in visitation. They include the quality of its resource base and the opportunities it provides for outdoor recreational pursuits; the quality of its cultural heritage resource base; the fit between these attributes and the current and emerging wants held by tourists; and, and the region's proximity to the large and growing population base in southern

Ontario and across the borders at Niagara, Windsor and Sarnia.

Several weaknesses of the South Georgian Bay area included a low yield destination, lacking the attractions, beds and quality in the accommodations sector to attract higher spending overnight visitors who are not owners of private cottage, chalet or condo accommodations; lacking in depth and breadth of activities and supporting facilities and services, particularly those of a “weatherproof” nature, when compared to other leading resort destinations; a regional market destination, unable as of yet to significantly penetrate markets from beyond the Provincial borders. The SGB was still largely considered a summer destination, with the shoulder visitation taking place in the central part of the region.

A number of the region's evaluation highlights are listed, such as it being a region with a series of compelling and distinctive core attractions, most of which arise from the quality of the natural resource base or the quality of the facilities informing out interest in the area's role in our history. A need for the region's municipalities, suppliers, and DMO's to invest in tourism development and marketing strategies which reflect evolving organizational structures, and the market shifts coming with new product development is recommended.

Gaps, Barriers, and Issues are listed as they relate to the overall opportunities for the South Georgian Bay region. A series of investment opportunities and recommendations for potential partners are listed, such as improvements to the public open spaces on the waterfronts, development of/improvements to transient dockage for boaters and moorage for cruise ships, and development of hard water, sewage and transportation infrastructure services which will enable further tourism development and improve visitor experience.

The report addresses next steps to be undertaken by the SGB. It was recommended that a broader application and use of the

framework be enabled by integrating the TIMS data base into a standardized GIS database able to generate current maps of the tourism infrastructure in place in destination areas of any scale, and made readily available to stakeholders in tourism development. It is suggested that this framework be packaged as a tool for self assessment by destination areas. A task force was recommended to be struck to examine the development and approval issues/implications to Provincial objectives and the need for and nature of any corrective actions considered appropriate.

The study concluded that validity and importance of the Ministry of Tourism's 'TIMS' database, as a basic tool in comprehending the Province's tourism facility base. It is hoped that this study will contribute to the future development of tourism throughout Ontario and in the south Georgian Bay study region.

#### **Township of Springwater – Main Street Ontario Initiative**

This document is the formal application from the Township of Springwater for the Main Street Ontario Initiative of the Rural Economic Development Program delivered by the Ontario Ministry of Agriculture, Food, and Rural Affairs. The town views the initiative as an opportunity to restore the former vitality of Elmvale. Located within the Township of Springwater, Elmvale has recently seen considerable loss in the economic viability of local businesses, and continues to see barriers to further economic development. Nearby towns contribute to the local economic stress, as they contain big box stores against which Elmvale cannot compete. As well, the local high school is being considered for closing. During a First Impressions Community Exchange, Elmvale was viewed as negative and grim by outsiders.

The application contains 6 Appendices that provide background information for the application

**Appendix 1** – This section contains statistical information regarding local businesses and

highlights that there are issues maintaining business in the area. It also contains correspondence indicating that potential investors are worried about making their investments in Elmvale. Local newspaper articles discussing the need to save the local high school, and the closing of the local Bayweb Plant, which employed around 175 people, are also included.

**Appendix 2** – Includes photographs of downtown areas that need revitalization, as well as photos that show the lack of streetscape design.

**Appendix 3** – Includes photographs depicting “Potential Facade Changes” for main street store fronts. Introduces FOCUS ELMVALE, a local volunteer group that is concerned with the revitalization of the village and that has taken an active role in improving the village of Elmvale.

**Appendix 4** – Includes the document ‘Red Brick and Arches – Elmvale’s Commercial District Facade’. Emphasizes importance of storefronts and contains guidelines for maintenance, shape, setbacks, masonry and colour. The 2006, 2007, and 2008 Springwater Chamber of Commerce Annual Reports are provided. Common elements among the reports include the development of Business after 5 networking events and the First Impressions Community Exchange. The Springwater Chamber of Commerce has identified a need for a 5 year Economic Development Plan.

Also included in Appendix 4 are several brochures outlining tourist attractions and events. FOCUS ELMVALE has included a section of correspondence and letters asking for support of the establishment of a Farmer’s Market. They also advocate for the creation of a Business Improvement Association.

**Appendix 4.2** – Includes letters of support for this application from the local MP, MPP, Mayor of the Township of Springwater, the Chair of the Springwater Heritage Committee, and from several local businesses. All express the need

for assistance in the Town of Elmvale. Several recommendations are given, and common themes included: making Elmvale a place to visit rather than to drive through, signage for Shop Elmvale, better and unique signage throughout town, extending the Maple Syrup Festival, and improvements to the look of the main streets.

**Appendix 5** – Includes a listing of buildings under the Ontario Heritage Act as well as buildings identified as containing significant historic features.

**Appendix 6** – Includes the Elmvale Maple Syrup Festival Brochure, as well as a request for the 2 pamphlets for the Elmvale Fall Fair that are produced every year. A newspaper article about Heritage Park is included, which also indicates a photography competition, concert, and BBQ will be held within the park. A listing of Elmvale & District Horticultural Society Supporters is also provided.

#### Springwater Visual Identity Survey

82.9% of the survey respondents live in Springwater Township. 83.2% have lived in Springwater for more than 5 years.

When asked how they are involved in the Township, 80.3% responded that they live there either full time or on a seasonal basis, 47% work in Springwater Township, 13.7% go to school there, 55.6% are involved in social activities, and 20.5% regularly visit. A total of 2.6% are not involved with Springwater Township. Respondents were asked to choose all applicable responses.

The highest rated attributes in Springwater Township are Parks and Trails, Community Events and Festivals, and Rural Trails at 64.5%, 63.6%, and 60% respectively. These are followed by the Natural Environment (53.6%), Recreation Facilities (53.6%), and Libraries (52.7%). Heritage and Culture (44.5%), and Access to Outdoor Sports (41.8%) are also highly rated. Rated as least important are Tourist Attractions (21.8%) and Unique Retail Opportunities (20%).

The highest rated reasons for living in Springwater Township are quality of life (80.4%), and that it is a good place to raise a family (73.8%). The rural atmosphere (68.2%) and friendly community (61.7%) are also considered important. The lowest rated reasons are tourism and the cost of doing business, both with 8.4%.

When asked about adjectives that best describe Springwater Township, safe (74.5%), family place (73.6%), and rural (71.7%) are the top rated answers. The response rates for welcoming, quiet, friendly, and growing were between 50 and 60% each. Traditional, environmentally friendly, and active each received a response around 40%. Open for business, forward thinking, innovative, bold, and modern each received a response rate of less than 20%.

When asked about adjectives that would best describe the future of Springwater Township, the highest number of responses were for family place (65.7%), growing (63.8%) and safe (61%). Welcoming, rural, quiet, friendly, and environmentally friendly received response rates of approximately 45-55% each. A large range of adjectives, which include active, traditional, open for business, forward thinking, innovative, and dynamic received a response rate between 20 and 40%. Modern and bold both had a response rate of less than 20%.

When asked what makes Springwater unique, a few themes arose from the responses. One of the most common responses was that the Township maintains a small-town, rural feel, but is within close proximity to urban centres such as Barrie and Toronto. The area is safe, welcoming and friendly. It is a tight-knit community with many volunteers, and a lot of community spirit and involvement. There is good cooperation between the Township and its residents, and the local Councillors are friendly and supportive. The Township has several local events and festivals, and maintains a unique history and heritage. The natural surroundings and features, and opportunities for outdoor

activities, are also felt to make Springwater Township unique.

Each respondent was asked the 3 things they would most like people to say about Springwater Township. The most common answers were that it is a friendly, inviting and welcoming community, that it is a great place to live, work, visit or raise a family, and that it is a safe community. The other most common themes included: a close, supportive, small community feel, the community is very active, the area is environmentally rich, opportunity for lots of sports and outdoor recreational activities, that it is clean and well-maintained, and that it is quiet.

The respondents were asked for their input into a new logo and motto for Springwater Township. A number of respondents felt that the current logo was satisfactory, or they felt that creating a new logo was a waste of time and money. Of those who contributed ideas, some common themes emerged. Many people feel that the logo and motto need to represent the mix of agriculture, natural features, and modern residential lifestyles that are all a part of Springwater Township. It should encompass both the beauty of rural areas and of the downtowns. The logo and motto need to reflect both the past and the future, and be respectful of the history of the area. The new design should be simple, easily recognizable, and one person felt it should be easily reproducible by children. Blue and green were mentioned as possible colors, and both trees and water were mentioned several times as things that should be reflected in the new logo. It was also mentioned that a new logo could reflect the current motto, “a refreshing experience”.

**Several mottos were provided and include:**

An unexpected pleasure”

“Springwater Township – where you wish you lived!”

“Growing space for new ideas”

“The place to be!”

- “Come Grow with us”
- “a good place to live”
- “Springwater Township. Be active, be healthy”
- “Springwater – put a spring in your step!”
- “Stay green forever”
- “Rural rest stop”
- “Live, care, contentment”
- “Proud of our past, embracing the future”
- “Old traditions, new opportunities”
  
- “Proud Past, unlimited future”
- “Honour the past, imagine the future”
- “Community pride, community wide”
- “Discover the crossroads”
- “It’s a way of life”
- “Where community meets rural roots”

### Springwater Township – Growth Management Plan Summary

The Township of Springwater is slated for major growth over the next 20 to 25 years, and needs to make some decisions regarding how it wants to see growth and change in the municipality. This report is meant to provide Council, the Planning Committee and community members with recommendations regarding the management of growth and change within the Township, as well as establish a clear and coherent growth and settlement strategy.

The previous Growth Management study was completed in 1996. The current Study was undertaken in preparation for the Official Plan review, which required addressing the requirements of the Provincial Policy Statement, which includes Growth Management Policies.

Provincial and County Policies were examined and 4 documents create the policy context for this Growth Management Plan Summary. These documents are the Planning Act, the Provincial Policy Statement, Ontario Smart Growth and the County of Simcoe Official Plan. In terms of local policy, the Growth Management Strategy prepared by Reinders & Associates Ltd in 1996, and the Township’s Official Plan create the policy context.

The previous Growth Management Study examined the Township’s growth trends, and looked at the nine settlement area structure of the Township. It looked into the potential for growth in the settlement areas, and recommended a strategy based on the nine settlements and a hierarchy of settlement types. They found there was an insufficient amount of land for housing units, and that the Township would need more land for institutional land and open space. The report did not include recommendations for several areas including: no clear priority for secondary plans, and no strategy on how to accommodate the demand for new development that was being forecast. The Township’s Official Plan has clear policy framework regarding economic development, residential growth management, settlement area policies, residential policies, adult lifestyle communities, employment land use plan, and Green Belt Area policy, but it does not provide a settlement strategy that could guide Council in planning decisions regarding where, what type, or under what conditions growth should occur. The Provincial Policy Statement and the County’s Official Plan require a servicing hierarchy, which the Township’s Official Plan does not contain.

The Township has nine distinct settlement areas. The two largest communities, based on settlement area population estimates, are Midhurst and Elmvale. The rural areas of the Township, at 36%, actually support a larger population than any single settlement area. The population in Springwater has grown by 1.77% annually from 1996 to 2001, with a population in 2001 of 16,104. Springwater has a higher

portion of individuals in the 5-14, 45-54, and 55-64 age cohorts than both the County and the Province. They have a smaller portion of post-retirement age groups.

Over the past 10 years, new housing starts have generally been increasing. Since 1994, 82% of the new homes were constructed in defined settlement areas. 42% of the new units were located in the top 3 ranking communities. Non-residential construction has not seen the same high levels as residential, but still tends to occur within the defined settlement areas. 195 consent applications were approved in the past 10 years, and activity tended to be higher in the southern part of the Township. The communities in Springwater are serviced by the full range of sewage and water servicing approaches, with Elmvale being the only community that has a municipal centralized water system and a municipal centralized sewage system.

The Simcoe Area Transportation Network Needs Assessment was a comprehensive study done by the MTO that provided a long-range guide for transportation planning in and around the County. Some recommendations, including the possible 427 extension, could have a significant impact on the Township.

In 2003 a report on growth projections for the County of Simcoe was undertaken by Hemson Consulting, which showed that the County has been growing faster than both the province and the GTA. The County is projected to reach 618,200 between 2021 and 2026. Springwater's population was projected to reach 22,600 between 2021 and 2026. The Ministry of Finance completed Ontario Population Projections to 2028 in July 2000. These are considered the likely results for Springwater Township. They forecast the County will reach a population of 629,834 by 2026 and that Springwater's population will be between 21,570 and 27,146 in 2026. As a result the Township needs to ensure that sufficient lands are retained within the settlement areas.

For residential, a total of 3049 units will be needed with a land area of 189.32 hectares. Currently the supply of land would only support 1695 residential units. Despite the Official Plan's settlement framework, the current supply of land is located outside of Elmvale and Midhurst, the target communities. It is recommended that Springwater designate additional lands for housing or residential use. For employment lands, the demand with range between 27 and 60 hectares, and there are currently 94.09 hectares of employment lands which is sufficient to accommodate its forecasted growth.

The Study then provides elements that should comprise the Township's new settlement strategy. These include:

*-“it is recommended that the Township should continue the Midhurst Secondary Plan Study and the OP review process, and consider other detailed planning studies in order to plan for the forecasted growth of the Township”*

*-“It is recommended that the current settlement hierarchy be revised”*

*-“It is recommended that a servicing hierarchy must be established for the Township to support the settlement strategy”*

*-“It is recommended that the Midhurst Secondary Plan be completed as soon as possible”*

*-“It is recommended that an urban expansion analysis be conducted as the next stage in the Midhurst Secondary Plan”*

*-“It is recommended that the Township establish a program for conducting detailed secondary or community plans for the priority communities”*

*-“It is recommended that the resolution of the servicing constraints in Elmvale be a priority for the Township”*

*-“It is recommended that additional employment lands be designated in the Township”*

*-"It is recommended that new Adult Lifestyle developments should only be permitted in the settlement areas of Elmvale, Hillsdale, and Midhurst"*

*-"It is recommended that no new estate residential developments be permitted in the Township"*

*-"It is recommended that the Township maintain the "Greenbelt Buffer" around the City of Barrie and Town of Wasaga Beach"*

The final section of the Growth Management Study includes a schedule map of each of the 9 settlement areas.

#### **Simcoe Area: A Strategic Vision of Growth**

In 2006, set out a vision and policy document entitled the Growth Plan for the Greater Golden Horseshoe (the Growth Plan) as a planning document intended to better manage growth and protect the natural environment. While many municipalities have incorporated the Growth Plan's objectives and target growth allocations into their official plans, the Simcoe Area – comprised of Simcoe County and the cities of Barrie & Orillia have experienced unprecedented development pressures. The area is also located along sensitive environmental areas. In response to these pressures, the Province has developed a strategic vision for the Simcoe area to provide guidance surrounding the management of growth.

As a strategic vision guide for the Simcoe area to follow, the document stems out of the guidelines of the Growth Plan, while providing direction aimed to promote sustainable growth and increase job creation and quality of life, while protecting the environment and farmland from urban sprawl.

A call to action by the Province was made abundantly clear through the following issues:

- Simcoe County has submitted a new Official Plan for provincial decision. It has been recommended that clearer

growth management direction is needed.

- The City of Barrie and the Town of Innisfil are engaged in a land dispute.
- The Lake Simcoe Protection Plan has been completed, which requires strong growth management.

The Simcoe area has been facing extensive growth pressures. Currently the area has a population of 437,000, the Growth Plan has established a 2031 population forecast of 667,000 and an employment forecast of 254,000 jobs. These forecasts were put into place to promote steady and management growth and further encourage the reuse of existing urban areas and less on greenfield areas.

It is important to note, in December 2008 the County of Simcoe adopted an Official Plan and has been submitted to the Province for a decision. Amendments to Barrie and Orillia's Official Plans are currently underway to implement the Growth Plan.

# Appendix III

---

## Focus Group Results

**TOWNSHIP OF SPRINGWATER**

**ECONOMIC DEVELOPMENT**

**FOCUS GROUP HIGHLIGHTS**

**MARCH 4, 2010**

**REVISION 0**

***Participants:***

*See participant list*

*In Association with:*

***MillierDickinsonBlais***

***Queen's University Executive Decision Centre***

***Facilitators: Lauren Millier, Nicolina Basil, Erik Lockhart***

***Ph#: 613 533-6681***

***E-mail: [elockhart@business.queensu.ca](mailto:elockhart@business.queensu.ca)***

---

## Table of Contents

|  |     |
|--|-----|
| Executive Summary                      | 100 |
| 1.0 – Vision 2020                      | 103 |
| 1.1 – Group 1                          | 103 |
| 1.2 – Group 1 (Refinement of top 10)   | 104 |
| 1.3 – Group 2                          | 106 |
| 1.4 – Group 2 (Refinement of top 10)   | 109 |
| 2.0 – What to keep the same, maintain? | 110 |
| 2.1 - Group 1                          | 110 |
| 2.2 – Group 2                          | 110 |
| 3.0 – What to Change?                  | 111 |
| 3.1 - Group 1                          | 111 |
| 3.2 – Group 2                          | 113 |
| 4.0 – Action plans                     | 114 |
| 4.1 - Group 1                          | 114 |
| 4.2 – Group 2                          | 117 |
| Appendices                             | 119 |
| A - Participants                       | 119 |
| B – Actions brainstormed (Group 1)     | 122 |
| C – Actions brainstormed (Group 2)     | 125 |

## Executive Summary

Attached are meeting proceedings from the Township of Springwater focus groups held on March 4, 2010. The purpose of the sessions was to solicit input and advice from the broader community on economic development. The group explored the following questions:

1. **Vision 2020.** Looking ahead 5 years what would Springwater be like if you had the power to make it any way you wanted? Springwater will have been successful when we have the following in place...
2. **Current state and near term priorities.** What are the major differences between now and your vision for the future? (a) What needs to stay the same? (b) What needs to change?
3. **Implementation:** how do we get from where we are now to where we want to be? What key actions should be included in Springwater's economic development strategy?

|  |
|--|
| <b>Vision for 2020 (the following elements are critical)</b> |
|--|

1. **Live, work & play here:** Springwater is recognized as one of the most desired communities to live in
2. **Healthy education system:** we have a new or revitalized high school
3. **Businesses want to come** here because we have effective business support services. There are local jobs so that 80% of people who live here can work here.
4. **Sustainable growth.** There is a balanced mix of Industrial, Commercial and Residential development in a way that doesn't overwhelm our infrastructure or environment
5. **Health care available locally:** We have sufficient health care professionals and a well staffed medical facility
6. **Recreation opportunities a'plenty:** There are recreation facilities with indoor and outdoor sport activities for families to participate. We are known for our parks, walking, running and biking trails
7. **Gateway to cottage country.** We have additional tourist attractions that blend into the character of the Township. For example, Elmvale looking more like a "turn of the century" rural town dressed up and we are recognized for events and festivals happening year round.
8. **Community cohesion.** Township is unified and citizens feel part of Springwater. Each community has distinct role understanding how it fits into the larger Township.

|   |
|---|
| <b>What to keep, maintain, stay the same</b> <i>(note: these are not prioritized)</i> |
|---|

- Friendly, family-oriented community with quiet, peaceful lifestyle
- Green: No pollution, pure water, trees, Minesing wetlands
- Not congested: feeling of "open space... you can see the stars"... free parking!
- Great outdoor small town: proximity to lots of outdoor amenities, ski hills, beach, Simcoe County forests, Single track cycling / mountain biking etc.
- Well managed growth
- Excellent high & public schools
- Tourism attractions: Museum, Elmvale Jungle Zoo, Fort Willow and 9 mile portage
- Harmony of agriculture / farm land
- Proximity to GTA, Lakes but not in Barrie.. Convenience: close to services, retail
- Safe, crime-free
- Easy commute to GTA, cottage – so close, yet far enough

- Great community festivals and fairs
- Affordability

**Group**

| <b>What to change (major priorities for next 2-3 years)</b>  | <b>1</b> | <b>2</b> | <b>Total</b> |
|--|----------|----------|--------------|
| 1. Business attraction: need better planning, incentives, reasons for SMEs, startups to come here                  | 12       | 17       | <b>29</b>    |
| 2. Onerous planning process: remove red tape, reasonable process around permits, bylaws                            | 8        | 9        | <b>17</b>    |
| 3. Community cohesion and promotion: acknowledge differences and understand that not all communities are identical | 5        | 7        | <b>12</b>    |
| 4. Larger and more modern high school  | 7        | 7        | <b>14</b>    |
| 5. Tourism: better marketing and promotions, more accommodations, signage  | 12       | 5        | <b>17</b>    |
| 6. Health care: Medical centre and more doctors locally  | 6        | 4        |              |
| 7. Municipal planning & infrastructure: sewage, roads, rail, natural gas, high-speed                               | 11       | 2        | <b>13</b>    |
| 8. Transportation infrastructure   | 9        | 2        | <b>11</b>    |

**Ideas for immediate implementation.** Note: These are not ranked but selected ideas within each of the above priority areas. See section 4.1-4.2 for more detail

1. **Make it easier to establish a business:** Lots of barriers, costly studies (traffic impact, wastewater, rezoning, and engineering). Provide tax incentives for business growth: Remove development barriers and lower development charges;
2. **Stream line planning process** so developers or new business owners will understand municipal regulatory processes so they don't need to hire expensive consultants
3. Proactive **marketing to attract new business:** Our greatest assets are recreation / lifestyle, while still being close to Barrie and the GTA for business needs. Find Barrie/GTA business owners that want to make a lifestyle change and sell them on the Township's assets, including lower taxes.
4. **Attract and retain baby boomers.** Create reasons to keep them here and attract more i.e. Retirement home for early retirees with a great recreation program
5. **Transit:** encourage shuttle busses from Elmvale to midland, Barrie & wasaga
6. **Transportation infrastructure:** Need up graded roads - more paved concession roads would be greatly appreciated by the rural residents. Also, wider roads for walkers and riders
7. **Road and location signage overhaul :** pointing out exactly where attractions are ...way finding maps for Elmvale and Springwater township for attractions and events (dates, locations)
8. **Lower commercial taxes:** Stop charging commercial tax payers at twice the rate of residential tax payers ...I couldn't agree more with #6!!!

9. **Expand the serviced area** of Elmvale to the point it can accommodate development
10. **Main Street beautification** program: boulevards, lamps, flowers

Editor's Notes:

- a. The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
- b. The symbol // indicates that two similar ideas have been merged together.
- c. This document contains the meeting proceedings and is not intended as a "Final Report"

## 1.0 – Vision 2020

It is 2020. Springwater has achieved its goals and is recognized widely.

What does it look like? What are some of the defining elements and characteristics?

The Township of Springwater has been successful when we have the following in place?

\* What are the SIX most COMPELLING ideas...?

### 1.1 – Group 1

#### Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 33

Total number of voters (N): 20

#### Total

- 11 1. Maintain school //expand both public and high schools //high school in Elmvale becomes priority for board of education
- 10 2. In 2020 Springwater should have a balanced mix of Industrial, Commercial and Residential opportunities
- 8 3. More businesses, more incentives for business to come here
- 8 4. A strong industrial base. In turn gives birth to residential development, schools, as well as recreational facilities.
- 6 5. Unified township - limited separation between north and south
- 6 6. High speed internet through out
- 5 7. Give Elmvale more emphasis as a complete community
- 5 8. Finish residential developments that are currently approved
- 5 9. Define roles of each community - i.e. Hillsdale, Orr lake, Elmvale, Phelps ton, Midhurst etc
- 5 10. Becomes a destination instead of a pass through
- 4 11. Sustain or improve on the commercial base in the Township.

- 4 12. An easily accessible tourism destination
- 4 13. Agriculture base stabilized
- 4 14. Guidance to local farmers to become profitable and involve young people
- 3 15. Jobs for Springwater
- 3 16. Work / play / home
- 3 17. More diverse stores
- 3 18. More services
- 3 19. Bring Midhurst into Springwater instead of bedroom community to Barrie
- 3 20. Lots of recreational opportunities for all ages
- 3 21. Beautiful spring water
- 2 22. Upscale shopping unique
- 2 23. More health services
- 2 24. Indoor pool rec centre including ice rinks
- 1 25. A healthy natural environment
- 1 26. Better roads leading to Springwater Township //better roads in Springwater Township
- 1 27. Improved public transport
- 1 28. A diverse community connected to the world
- 1 29. Banking competition
- 0 30. We need more transportation, clinics health care
- 0 31. Higher day care resources
- 0 32. Focus on fitness - more opportunities for all ages

**Group 1 (Refinement of top 10)**

Note: the group took the top 21 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items.

1. Maintain school //expand both public and high schools //high school in Elmvale becomes priority for board of education

2. In 2020 Springwater should have a balanced mix of Industrial, Commercial and Residential opportunities

- A strong industrial base. In turn gives birth to residential development, schools, as well as recreational facilities.

- Sustain or improve on the commercial base in the Township.

- More business's, more incentives for business to come here

-> Jobs for Springwater

3. Agriculture base stabilized ...guidance to local farmers to become profitable and involve young people

4. More services ...More diverse stores ...high speed internet through out

5. Community cohesion -> unified township (limited separation between north and south) -- so that people & businesses feel part of Springwater

Define roles of each community - i.e. Hillsdale, Orr lake, Elmvale, Phelps ton, Midhurst etc

- give Elmvale more emphasis as a complete community

- Bring Midhurst into Springwater instead of bedroom community to Barrie

Note: econ dev needs are different in each... what works one area not necessarily the solution elsewhere

6. Finish residential developments that are currently approved

7. An easily accessible tourism destination

- Becomes a destination instead of a pass through

8. Work / play / home -- live here, work here.. Don't have to commute to earn a living

- Lots of recreational opportunities for all ages

## Group 2

### Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 48

Total number of voters (N): 18

### Total

- 10 1. Sufficient doctors ..Medical facilities ...a medical centre with at least 4 doctors along with our present blood lab
- 8 2. Recreation and community centre with a pool, fitness centre, board rooms, etc.
- 6 3. Midhurst, Elmvale and Hillsdale have recognizable industrial and commercial developments with many local residents employed locally
- 5 4. Park with walking/running trails
- 4 5. Less urban sprawl-subdivisions flow together
- 4 6. Springwater is recognized as one of the most desired communities to live in
- 4 7. New or revitalized high school,
- 4 8. Economic development officer on staff that knows the ins and outs and is able to guide any potential business through the growing red tape of the municipality
- 4 9. Enough business to employ people and 85% can live within the tsp,
- 3 10. Additional tourist attractions
- 3 11. We have a council that is open and positive towards commercial development, and not as in the past.
- 3 12. Elmvale looking more like a "turn of the century" rural town dressed up for tourism
- 3 13. Sustainable schools
- 3 14. Many more events happening especially in the winter time
- 3 15. More community centres with pools, indoor and outdoor sport activities for families to participate
- 2 16. We have become the gateway to cottage country and stop the shoppers both ways....job creation
- 2 17. Business support services to attract bus

- 2 18. Growth has occurred in a GREEN fashion
- 2 19. Viable expanded retail base,
- 2 20. Unity of the cities in the township (common village area)
- 2 21. We have hooked up to municipal services e.g., water and sewers
- 2 22. The communities have developed local organizations to represent them and is not obliged to work solely on aq township level.
- 2 23. The community recognized the importance of a cultural heritage policy and the council has a policy of implementing such a policy, and not just pretending to do so.
- 2 24. High school in Midhurst area
- 2 25. Township is viewed as a place to do business not just a residential municipality
- 2 26. We have attracted business and manufacturing
- 2 27. Roads are in ideal condition ...better roads leading to Springwater Township
- 2 28. Able to walk and ride bikes safely on roads
- 2 29. More active strip type malls possibly in the Midhurst area.
- 2 30. Small town feeling
- 1 31. Picnic tables and washrooms for tourists
- 1 32. We should have a shopping centre in the Elmvale whereby you could do a one stop shop for groceries, home building and accessories such as the large super stores.
- 1 33. Vibrant business sector
- 1 34. The township council adopts a policy of allowing local business to bid and tender on township supply and contracts, rather than excluding them
- 1 35. Every one would have a job locally
- 1 36. Able to walk to stores (small grocery stores, cafes, etc.)
- 1 37. Springwater Chamber to grow to 1000 members,
- 1 38. The local municipalities are more than just bedroom communities
- 1 39. A larger, more equipped high school
- 1 40. Farm relates business such as TSC stores and equipment dealers.
- 1 41. Family friendly
- 0 42. Maintain the small school environment for the students.

- 0 43. A larger residential population, perhaps around 35,000
- 0 44. Dog Park
- 0 45. Tree-lined sidewalks in town
- 0 46. Signage to let people know what is available also let them know where they are and what's ahead
- 0 48. Clusters of residential and commercial development

## Group 2 (Refinement of top 10)

Note: the group took the top 15 (>2 votes), merged the similar and then identified the most critical, “make or break to our future” items.

**XXX = make or break critical by 2015**

1. XXX Springwater is recognized as one of the most desired communities to live in
2. XXX sustainable schools ... New or revitalized high school,
3. XXX business support services to attract bus
  - Economic development officer on staff that knows the ins and outs and is able to guide any potential business through the growing red tape of the municipality
  - We have a council that it open and positive towards commercial development, and not as in the past.
4. XXX sufficient doctors ..Medical facilities ...a medical centre with at least 4 doctors along with our present blood lab
5. More community centres with pools, indoor and outdoor sport activities for families to participate
  - Recreation and community centre with a pool, fitness centre, board rooms, etc.
6. Enough business to employ people and 85% can live within the tsp,
  - Midhurst, Elmvale and Hillsdale have recognizable industrial and commercial developments with many local residents employed locally
7. Park with walking/running trails
8. Growth has occurred in a GREEN fashion
  - Less urban sprawl-subdivisions flow together

## 9. Additional tourist attractions

- Elmvale looking more like a "turn of the century" rural town dressed up for tourism
- Many more events happening especially in the winter time
- We have become the gateway to cottage country and stop the shoppers both ways....job creation

### What to keep the same, maintain?

What needs to stay the same? Note: these are not prioritized

#### Group 1

- Friendly community
- No pollution
- Great outdoor small town
- Proximity to lots of outdoor amenities
- Part of a ski community - lots of traffic passing
- Water
- Excellent high & public schools
- Outstanding Museum
- Elmvale Jungle Zoo
- Simcoe County forests
- Single track cycling / mountain biking
- Festivals
- Seniors residence
- Minesing wetlands ..
- Fort Willow and 9 mile portage
- Quiet, peaceful lifestyle ...
- Good planning -> moderate growth
- Community engagement welcomed
- Agriculture / farm land
- Proximity to GTA, Lakes but not in Barrie

#### Group 2

- Trees
- Controlled growth -> attractive places
- Family community
- Pure water
- Open space, not congested – “feeling of space”... see stars... pollution free
- Free parking
- Larger property size
- Harmony of agriculture, communities .. Rural setting
- Convenience: close to services, retail
- Safe, crime-free
- Proximity to recreation, ski hills, beach
- Highway access
- Easy commute to GTA, cottage – so close, yet far enough
- Great community festivals and fairs
- Affordability

### What to Change?

Priorities in next 2-4 years \*\*\*

What does Springwater need to do to achieve our vision?      What needs to change?

\* If we could only focus on FOUR of these...

### Group 1

#### Voting Results

Multiple Selection (maximum choices = 4) (Allow bypass)

Number of ballot items: 12

Total number of voters (N): 19

#### Total

- 17** 1. Business attraction. Development charges too high to attract commercial/industrial businesses
- Tax incentives for business growth -> job creation
- 11** 2. Business retention. Loss of commercial businesses in Elmvale
- We don't promote or support local business as we should
  - More unified business hours in Elmvale -- can't close down on Mondays or early in high season

- 9 3. Improve existing, extremely onerous planning process; dealing with township very slowly (glacial) ...reasonable by-laws (e.g. zoning, development, signs, parking)
- 9 4. We need to understand realistically what our potential development opportunities are and what is limiting the area.
- 7 5. School disorder = fate???
- 7 6. Identity of township versus individual communities -> acknowledge differences and "sense of community"
  - Acceptance of different communities
  - Sense of community needs to be strengthened through better communication
  - moving of municipal services out of Elmvale
- 5 7. Better marketing for tourism and business development
- 4 8. More Doctors
- 2 9. Transportation - moving people around e.g. bus, taxi service
- 2 10. Limited infrastructure e.g. better roads and access, sewage treatment, etc.
- 1 11. Break down barriers within Township - e.g. farms

## Group 2

### Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 18

Total number of voters (N): 19

### Total

- 12 1. Business attraction... Incentive programs for business start-ups or expansion. i.e.: designated area for new business. .. More retail...attracting and keeping retail dollars in communities..lack of local food stores
- 12 2. Getting the trappings of tourism underway e.g. Create more Tourist accommodations ...Rest areas with signs showing activities and map
- 11 3. municipal planning for long term infrastructure growth to facilitate controlled new growth e.g., sewage water and roads ...regional cooperation to facilitate future major infrastructure development e.g., roads and rail
- Infrastructure: Upgrade Natural gas to some communities and High-speed
- 10 4. New improved main street with more retail and less service i.e. liquor/ beer store
- 9 5. Transportation infrastructure.. Improved north south roads complimented by rail line access ...more affordable public transportation between the communities ..wider roads for walkers and riders
- 8 6. Create more jobs
- 8 7. Less red tape for township permits and their supervisors...They are very non helpful ...Less red tape for township permits and their supervisors...
- 7 8. Economic development officer on staff - to facilitate new businesses
- 7 9. larger and more modern high school
- 6 10. lack of small medical centres
- 5 11. Promote the communities rather than the township as a whole as people relate to Elmvale Midhurst and Hillsdale but may not know where Springwater is
- 5 12. identify and protect environmentally sensitive areas for clean water and wildlife travel corridor
- 4 13. Enhanced community/recreation centre (pool/trails/fitness centre/board room to share)
- 4 14. More focused development in Elmvale as it is the only community with full municipal services

- 2 15. Add a Police Station in Elmvale
- 2 16. preparation for multiculturalism e.g. ESL in schools, multiculturalism in public education
- 0 18. No specific promotion of Springwater as a desired community to live (like Collingwood)

### Action plans

What key actions should be included in Springwater's economic development strategy? How do we get from where we are now to where we want to be? What can the City do to help achieve this? (see appendix B for brainstorm)

After brainstorming, individuals were asked to brainstorm (within each area for change), the key actions that the City should take on in the next 2-3 years?

Criteria: High Impact and Realistic

The ideas were not merged before voting, so there are some redundancies.

### Group 1

#### Voting Results

Multiple Selection (maximum choices = 6) (Allow bypass)

Number of ballot items: 36

Total number of voters (N): 18

#### Total

- 10 1. Remove development barriers. Lower DC, streamline planning process

- 8 2. Stream line planning process so developers or new business owners will understand municipal regulatory processes so they don't need to hire expensive consultants
- 7 3. Tax incentives for business growth
- 7 4. Make it easier to establish a business (e.g. rezoning farmland).. lots of barriers, costly studies (traffic impact, wastewater, engineering)
- 6 5. \*\*\* PRIORITY: improve existing, extremely onerous planning process; dealing with township very slow (glacial) ...reasonable by-laws (e.g. zoning, development, signs, parking)
- 5 6. The Township's greatest assets are recreation / lifestyle, while still being close to Barrie and the GTA for business needs. Find Barrie/GTA business owners that want to make a lifestyle change and sell them on the Township's assets, including lower taxes. However, a significant problem is availability of industrial properties. The internet now allows businesses to be located anywhere.
- 5 7. Springwater has a lot of baby boomers. Create reasons to keep them here and attract more i.e. Retirement home for early retirees with a great recreation program
- 5 8. Springwater needs implement development friendly plan for investors and business people.
- 4 9. Knox building - establish health care clinic
- 4 10. Define exactly what types of businesses we need here and in what individual communities
- 3 11. Balance new amenities around the key growth focused communities
- 3 12. promote shopping and business locally
- 3 13. Add recreation opportunities - to draw people to the town
- 3 14. Offer huge incentives for doctors to come to Elmvale
- 3 15. More unified business hours in Elmvale -- cant close down on Mondays or early in high season
- 3 16. \*\*\* PRIORITY: Maintain community amenities espec schools and health care
- 3 17. business retention problems should be addressed before business attraction. why would a business want to move to an area where the businesses are leaving or closing. fix the problem first
- 3 18. When economic development person hired send him out to understand needs of local businesses. Understand what businesses are hiring what types of people
- 3 19. Hire an ED professional to drive these initiatives
- 2 20. Each community within Springwater needs to be assessed for its potential and assets to arrive a and economic plan for that specific community.
- 2 21. Unique profile for local high school - campus community partnership
- 2 22. Ontario's official plan vision document suggest a growth of 600 jobs by 2031. What sector do we want those jobs to be created in?

- 2 23. Spring'WATER' - Develop attraction (e.g. artesian flow at Hwy 27) and public education(&school board) with and for our 'water'
- 2 24. \*\*\* PRIORITY: Business attraction. development charges too high to attract commercial/industrial businesses
- 1 25. planning and development needs to ensure that careful consideration is given to how many of the same services are put in a small community i.e. currently there is 13 restaurants in Elmvale and 1600 population. Competition is good for the consumer but may not be sustainable for the business owner.
- 1 27. Move some of the planned amenities closer to hubs/centres (e.g. soccer fields)
- 1 28. Identify strengths of each town and improve on existing strengths
- 1 29. Separate township into the key areas that local residents relate to i.e. communities around Elmvale. Communities around Midhurst
- 0 31. The township has to be an open book. What do the development fees go to. Where does this money go and how does the township arrive at their figures.

## Group 2

### Voting Results

Multiple Selection (maximum choices = 12) (Allow bypass)

Number of ballot items: 68

Total number of voters (N): 19

### Total

- 9 1. TRANS: encourage shuttle busses from Elmvale to midland, Barrie & wasaga
- 9 2. TOUR: road signage, location signage ... Signage - pointing out exactly where attractions are ...wayfinding maps for Elmvale and Springwater township for attractions and events ..Signage with dates and locations of events and location of tourist attractions, build public washrooms, ...neat and visible signage in and out of Springwater i.e., population and small villages and businesses ...TOUR: Rest areas with signs showing activities and map
- 8 3. RED TAPE: Maintain reasonable fees being charged on applications of which people can afford to pay.
- 6 4. BUS ATTRAC: Incentive programs for business start-ups or expansion. i.e.: designated area for new business. ...property tax holiday for new business
- 6 5. BUS ATTRAC: lower commercial taxes ... stop charging commercial tax payers at twice the rate of residential tax payers ...I couldn't agree more with #6!!!
- 6 6. TRANS: need up graded roads - many are in poor condition - more paved concession roads would be greatly appreciated by the rural residents. ...wider roads for walkers and riders
- 6 7. INFRA: expand the serviced area of Elmvale to the point it can accommodate development
- 6 8. MAIN ST: Beautification program: boulevards, lamps, flowers
- 6 9. RED TAPE: helpful staff to be proactive with applicants, suggestions rather than road blocks ... Township employees more helpful and actually want you to succeed ..cause the staff to take a "why not" approach to development, rather than "why should I" ...rid ourselves of the situation where it is safer and easier for township staff to say no than to say yes
- 5 10. MAIN ST: signage ..Establish a signage standard so signage has consistent a consistent look
- 5 11. MAIN ST: more retail
- 5 12. MAIN ST: Work toward creating a BIA ...Create a BIA to improve main street Elmvale
- 5 13. RED TAPE: revise the fee structure for development services to make it fair; lower the threshold application fee to a fair level

- 5 14. INFRA: work towards having zoned land and serviced land available, rather than requiring everything to be begun from scratch
- 4 15. MAIN ST: Need more retail not just restaurants that will attract younger shoppers to keep business in town rather than heading to Barrie
- 4 16. TRANS: widen road shoulders for bike riding and walking
- 4 17. INFRA: Steering committee monitoring: Have a group of people oversee the progress of initiatives
- 4 18. TRANS: get MTO to confirm plans for 427 expansion
- 4 19. TOUR: new tourist attractions i.e. amphitheatre, theme park, etc
- 4 20. TOUR: Enhance parks - things to do, see, public washrooms
- 4 21. RED TAPE: Train existing staff rather than hiring separate person. Must control costs.
- 4 22. RED TAPE: Provide the ability to fast track your requests
- 4 23. BUS ATTRAC: cut development charges - too high
- 4 24. BUS ATTRAC: advertise in a 100 mile radius to attract business
- 4 25. INFRA: bypass in downtown area with signage directing people to both shopping main throughways
- 4 26. INFRA: revise the development charges for commercial and industrial development, to make them fair
- 4 27. INFRA: Bring someone in from the "real world" to help them understand what it takes to move forward!!
- 3 28. TOUR: central tourist information centre with lots of visibility ...kiosks and brochures, info center
- 3 29. TOUR: more marketing of our area in other areas and at other events
- 3 30. TOUR: promote our local artists & crafts people in local paper, township website ,etc
- 3 31. TRANS: car pooling spots
- 3 32. RED TAPE: rid council of the view that we should be nothing but a bedroom community
- 3 33. BUS ATTRAC: create business clusters to keep business in town
- 3 34. TOUR: Elmvale BIA - for implementation
- 3 35. BUS ATTRAC: set target time limits for procession development applications, stop the lengthening delays
- 3 36. MAIN ST: Events in downtown - improve existing, new ones? ..Length events to more than one day

- 3 37. INFRA: street lights so local businesses are more visible in the evening (esp. winter time)
- 3 38. TRANS: bus transportation to Midhurst
- 2 39. RED TAPE: improving communication at municipal and local level
- 2 40. TOUR: Create more Tourist accommodations
- 2 41. TRANS: Possible commuter train from Barrie to Midland
- 2 42. INFRA: elect people who see the long term goals
- 2 43. INFRA: expand Anne Street north of Carson Road over to Highway 26
- 2 44. BUS ATTRAC: commercial to show Springwater residents to shop locally- what is available (stores, professionals, etc)
- 2 45. BUS ATTRAC: Create realistic municipal fee structure for development services
- 2 46. BUS ATTRAC: rewards program for purchases in township towards taxes or similar
- 2 47. MAIN ST: Facade preservation programme
- 1 48. RED TAPE: keeping small town mentality even though township is growing
- 1 49. TRANS: address the problem of backup caused by insufficient access to Wasaga Beach
- 1 50. RED TAPE: create target time periods to address applications
- 1 51. TOUR: create a data base to communicate with all businesses quickly
- 1 52. TOUR: encourage B&B's etc
- 1 53. TOUR: Heritage preservation strategy
- 1 54. BUS ATTRAC: Sell the ideal lifestyle of the township
- 1 55. BUS ATTRAC: BIA to set standards for business and types of businesses on main streets
- 1 56. BUS ATTRAC: need again for a one stop shop for convenience - people appreciate the time savings of this.
- 1 57. BUS ATTRAC: Use existing leading business people to attract new business
- 0 58. \*\*\* PRIORITY: New improved main street with more retail and less service i.e. liquor/ beer store

## Appendices

## Participants

### Group 1

2. norm summers pat lalonde fencing
3. Dan Mclean
4. Glenn Moreau
5. Tim Lester Tims Diving Supplies
6. murray miller miller lumber
7. Tim Hesch (Superior Cleaning Systems)
8. John Ball - Snow Valley Resort
9. Craig Beacock ( Beacocks Auto)
10. Angela Hummelink, Sutton Group Incentive Realty Inc., Brokerage
11. Edward Hore Elmvale Maple Syrup Fest
12. William Shotyk, Elmvale Foundation
13. Geraldine Rounds
14. Jason Haris, Orr Lake Golf Club
15. Carol Cruden
16. bruce elliot
17. Simon Seif

### Group 2

2. Steve Bertram Jim Bertram & Sons
3. Andrea Rudy, midhurst natural health clinic
4. Gary E. French
5. Joe Marcelli Northland Rental
6. Bill Kindou
7. Tom Cave Elmvale Foodland
8. Bill French - Lordwill Enterprises Inc

9. ross money
10. Heather Sewell Focus Elmvale
11. Bob Simmons Gail Henderson Resident
12. Harold Parker
13. Teresa Woolard, PPL Legal CAre of Canada Corporation
14. Frank Strong
15. Vince & Nancy Hummelink
16. Pat Silver, Springwater Chamber of commerce
17. Adam Martynuik, midhurst natural health clinic

## Actions brainstormed (Group 1)

For each of our top priorities, what exactly should we include in the economic development plan? i.e. what actions, strategies, and initiatives must we pursue?

### **PRIORITY: Business attraction. Development charges too high to attract commercial/industrial businesses**

#### **- Better marketing for tourism and business development**

2. Tax incentives for business growth
3. Remove development barriers. Lower DC, streamline planning process
4. Knox building - establish health care clinic
5. Inventory our current workforce and prove we have the skills in community that are required
6. Define exactly what types of businesses we need here and in what individual communities
7. Move some of the planned amenities closer to hubs/centres (e.g. soccer fields)
8. promote shopping and business locally
9. The township has to be an open book. What do the development fees go to. Where does this money go and how does the township arrive at their figures.
10. Spring'WATER' - Develop attraction (e.g. artesian flow at Hwy 27) and public education(&school board) with and for our 'water'
11. The Township's greatest assets are recreation / lifestyle, while still being close to Barrie and the GTA for business needs. Find Barrie/GTA business owners that want to make a lifestyle change and sell them on the Township's assets, including lower taxes. However, a significant problem is availability of industrial properties. The internet now allows businesses to be located anywhere.

### **PRIORITY: Business retention. Loss of commercial businesses in Elmvale**

#### **- we don't promote or support local business as we should**

2. More unified business hours in Elmvale -- can't close down on Mondays or early in high season
3. Businesses also have to be competitive - why shop local when 10 minutes down the road there are lower prices

4. Business retention problems should be addressed before business attraction. Why would a business want to move to an area where the businesses are leaving or closing? fix the problem first
5. planning and development needs to ensure that careful consideration is given to how many of the same services are put in a small community i.e. currently there is 13 restaurants in Elmvale and 1600 population. Competition is good for the consumer but may not be sustainable for the business owner.
6. When economic redevelopment person hired send him out to understand needs of local businesses. Understand what businesses are hiring what types of people

**PRIORITY: improve existing, extremely onerous planning process; dealing with township very slow (glacial) ...reasonable by-laws (e.g. zoning, development, signs, parking)**

2. Make it easier to establish a business (e.g. rezoning farmland).. lots of barriers, costly studies (traffic impact, wastewater, engineering)
3. Hire an ED professional to drive these initiatives
4. Springwater needs implement development friendly plan for investors and business people.
5. Stream line planning process so developers or new business owners will understand municipal regulatory processes so they don't need to hire expensive consultants
6. Springwater has a lot of baby boomers. Create reasons to keep them here and attract more i.e. Retirement home for early retirees with a great recreation program

**PRIORITY: We need to understand realistically what our potential development opportunities are and what is limiting the area.**

2. Ontario's official plan vision document suggests a growth of 600 jobs by 2031. What sector do we want those jobs to be created in?
3. Host "Springwater Events"

**PRIORITY: Maintain community amenities espec schools and health care**

2. Offer huge incentives for doctors to come to Elmvale
3. Unique profile for local high school - campus community partnership
4. Add recreation opportunities - to draw people to the town
5. Balance new amenities around the key growth focused communities

6. Common roof government facilities for business, organizations and agency partners (one stop shopping)

**PRIORITY: Identity of township versus individual communities -> acknowledge differences and "sense of community"**

- Acceptance of different communities
- Sense of community needs to be strengthened through better communication
- moving of municipal services out of Elmvale

2. Identify strengths of each town and improve on existing strengths

3. Separate township into the key areas that local residents relate to i.e. communities around Elmvale. Communities around Midhurst

4. Each community within Springwater needs to be assessed for its potential and assets to arrive and economic plan for that specific community.

## Actions brainstormed (Group 2)

### **PRIORITY: Business attraction... .. More retail ..attracting and keeping retail dollars in communities ..lack of local food stores**

2. BUS ATTRAC: Incentive programs for business start-ups or expansion. i.e.: designated area for new business. ...property tax holiday for new business
3. BUS ATTRAC: rewards program for purchases in township towards taxes or similar
4. BUS ATTRAC: Create realistic municipal fee structure for development services
5. BUS ATTRAC: set target time limits for procession development applications, stop the lengthening delays
6. BUS ATTRAC: lower commercial taxes ... stop charging commercial tax payers at twice the rate of residential tax payers ...I couldn't agree more with #6!!!
7. BUS ATTRAC: create business clusters to keep business in town
8. BUS ATTRAC: commercial to show Springwater residents to shop locally- what is available (stores, professionals, etc)
9. BUS ATTRAC: Use existing leading business people to attract new business
10. BUS ATTRAC: Develop identifiable business parks
11. BUS ATTRAC: need again for a one stop shop for convenience - people appreciate the time savings of this.
12. BUS ATTRAC: advertise in a 100 mile radius to attract business
13. BUS ATTRAC: cut development charges - too high
14. BUS ATTRAC: BIA to set standards for business and types of businesses on main streets
15. BUS ATTRAC: Sell the ideal lifestyle of the township
16. BUS ATTRAC: Leasing cost comparable to surrounding communities

### **PRIORITY: Getting the trappings of tourism underway**

2. TOUR: Create more Tourist accommodations

3. TOUR: Elmvale BIA - for implementation
4. TOUR: Heritage preservation strategy
5. TOUR: Enhance parks - things to do, see, public washrooms
6. TOUR: road signage, location signage ... Signage - pointing out exactly where attractions are ...wayfinding maps for Elmvale and Springwater township for attractions and events. Signage with dates and locations of events and location of tourist attractions, build public washrooms, ...neat and visible signage in and out of Springwater i.e., population and small villages and businesses ...TOUR: Rest areas with signs showing activities and map
7. TOUR: encourage B&B's etc
8. TOUR: central tourist information centre with lots of visibility ...kiosks and brochures, info center
9. TOUR: more marketing of our area in other areas and at other events
10. TOUR: new tourist attractions i.e. amphitheatre, theme park, etc
11. TOUR: create a data base to communicate with all businesses quickly
12. TOUR: promote our local artists & crafts people in local paper, township website, etc

**PRIORITY: municipal planning for long term infrastructure growth to facilitate controlled new growth eg, sewage water and roads ...regional cooperation to facilitate future major infrastructure development eg, roads and rail**

**- Infrastructure: Upgrade Natural gas to some communities and High-speed**

2. INFRA: elect people who see the long term goals
3. INFRA: Steering committee monitoring: Have a group of people oversee the progress of initiatives
4. INFRA: expand Anne Street north of Carson Road over to Highway 26
5. INFRA: work towards having zoned land and serviced land available, rather than requiring everything to be begun from scratch
6. INFRA: expand the serviced area of Elmvale to the point it can accommodate development
7. INFRA: four way stops as opposed to traffic lights
8. INFRA: Bring someone in from the "real world" to help them understand what it takes to move forward!!
9. INFRA: street lights so local businesses are more visible in the evening (esp. winter time)
10. INFRA: revise the development charges for commercial and industrial development, to make them fair

11. INFRA: bypass in downtown area with signage directing people to both shopping main thoroughways

**PRIORITY: New improved main street with more retail and less service i.e liquor/ beer store**

2. MAIN ST: Beautification program: boulevards, lamps, flowers
3. MAIN ST: Events in downtown - improve existing, new ones? ..Length events to more than one day
4. MAIN ST: Facade preservation programme
5. MAIN ST: signage ..Establish a signage standard so signage has consistent a consistent look
6. MAIN ST: more retail
7. MAIN ST: Work toward creating a BIA ...Create a BIA to improve main street Elmvale
8. MAIN ST: Need more retail not just restaurants that will attract younger shoppers to keep business in town rather than heading to Barrie

**PRIORITY: Transportation infrastructure.. Improved north south roads complimented by rail line access ...more affordable public transportation between the communities ..**

2. TRANS: Possible commuter train from Barrie to Midland
3. TRANS: address the problem of backup caused by insufficient access to Wasaga Beach
4. TRANS: need up graded roads - many are in poor condition - more paved concession roads would be greatly appreciated by the rural residents. ...wider roads for walkers and riders
5. TRANS: bus transportation to Midhurst
6. TRANS: encourage shuttle busses from Elmvale to midland,barrie & wasaga
7. TRANS: widen road shoulders for bike riding and walking
8. TRANS: car pooling spots
9. TRANS: get MTO to confirm plans for 427 expansion

**PRIORITY: Less red tape for township permits and their supervisors...They are very non helpful ...**

2. RED TAPE: guides, policies, procedures
3. RED TAPE: helpful staff to be proactive with applicants, suggestions rather than road blocks ... Township employees more helpful and actually want you to succeed ..cause the staff to take a "why not"

approach to development, rather than "why should I" ...rid ourselves of the situation where it is safer and easier for township staff to say no than to say yes

4. RED TAPE: improving communication at municipal and local level
5. RED TAPE: Train existing staff rather than hiring separate person. Must control costs.
6. RED TAPE: keeping small town mentality even though township is growing
7. RED TAPE: Provide the ability to fast track your requests
8. RED TAPE: we are not city of Toronto
9. RED TAPE: create target time periods to address applications
10. RED TAPE: revise the fee structure for development services to make it fair; lower the threshold application fee to a fair level
11. RED TAPE: Maintain reasonable fees being charged on applications of which people can afford to pay.
12. RED TAPE: rid council of the view that we should be nothing but a bedroom community

# Appendix IV

---

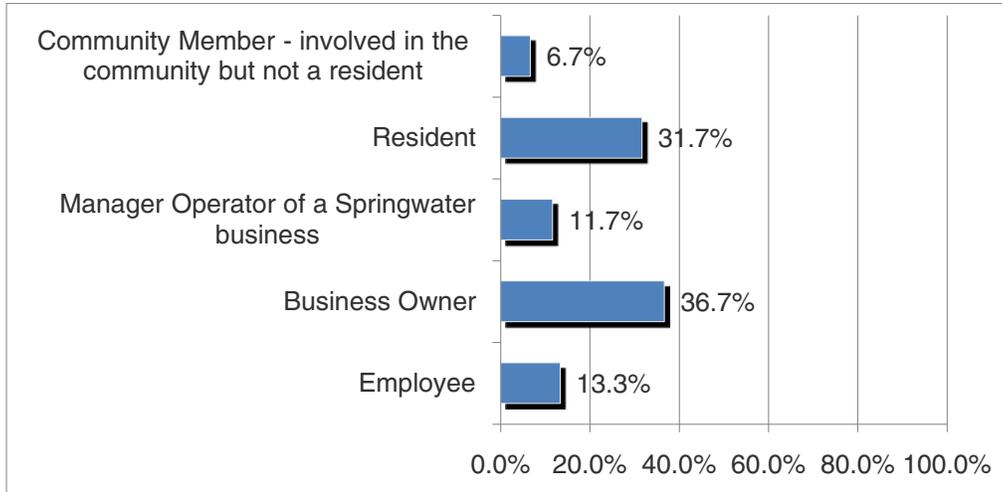
## On-line Survey Results

# Township of Springwater Economic Development Strategy Survey Results

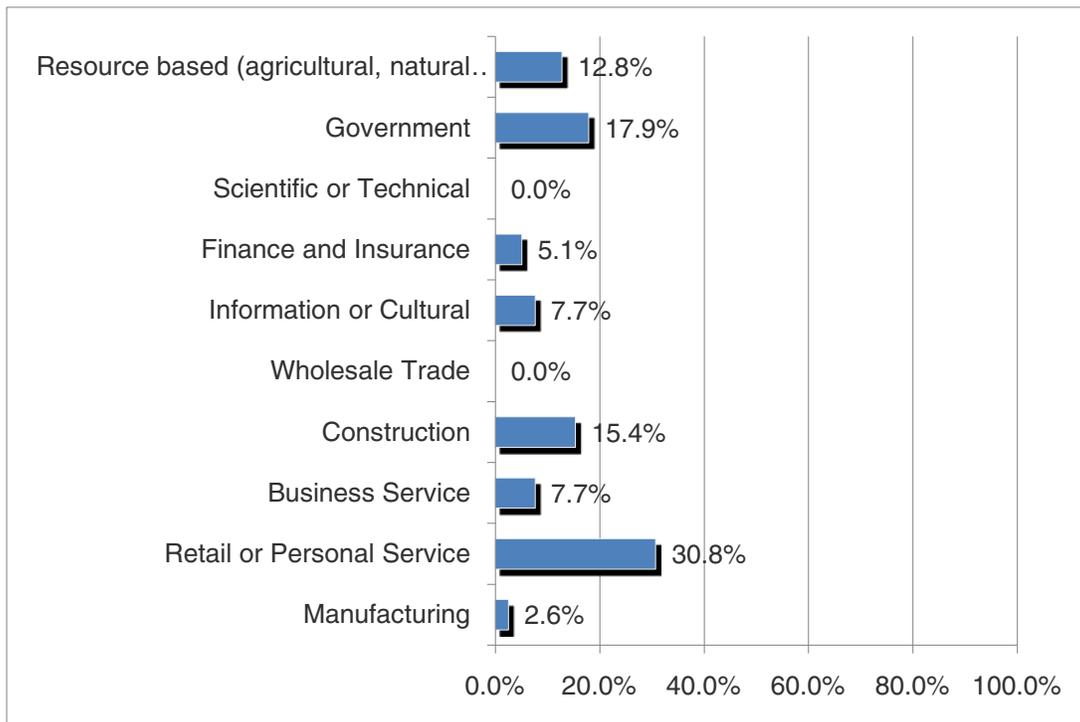
Total number of respondents (03/22/10): 36

## General Questions

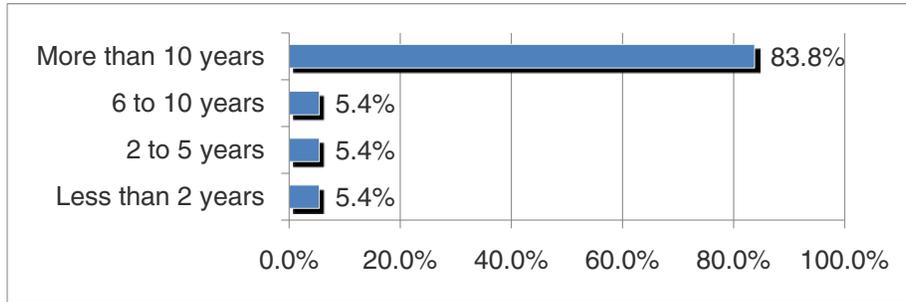
### 1. Are you responding as a(n):



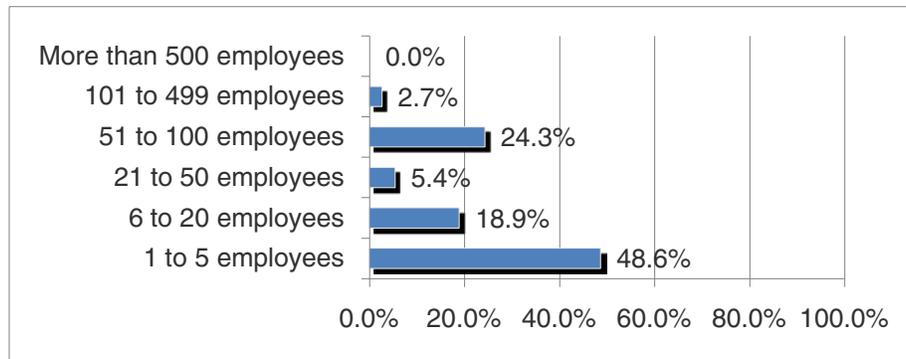
### 2. What is the primary type of your business?



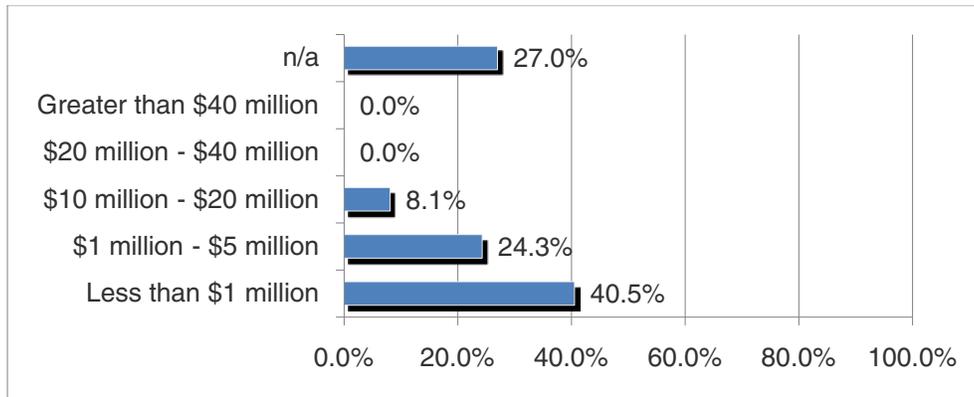
**3. How long has the business been in existence?**



**4. How large is your business?**

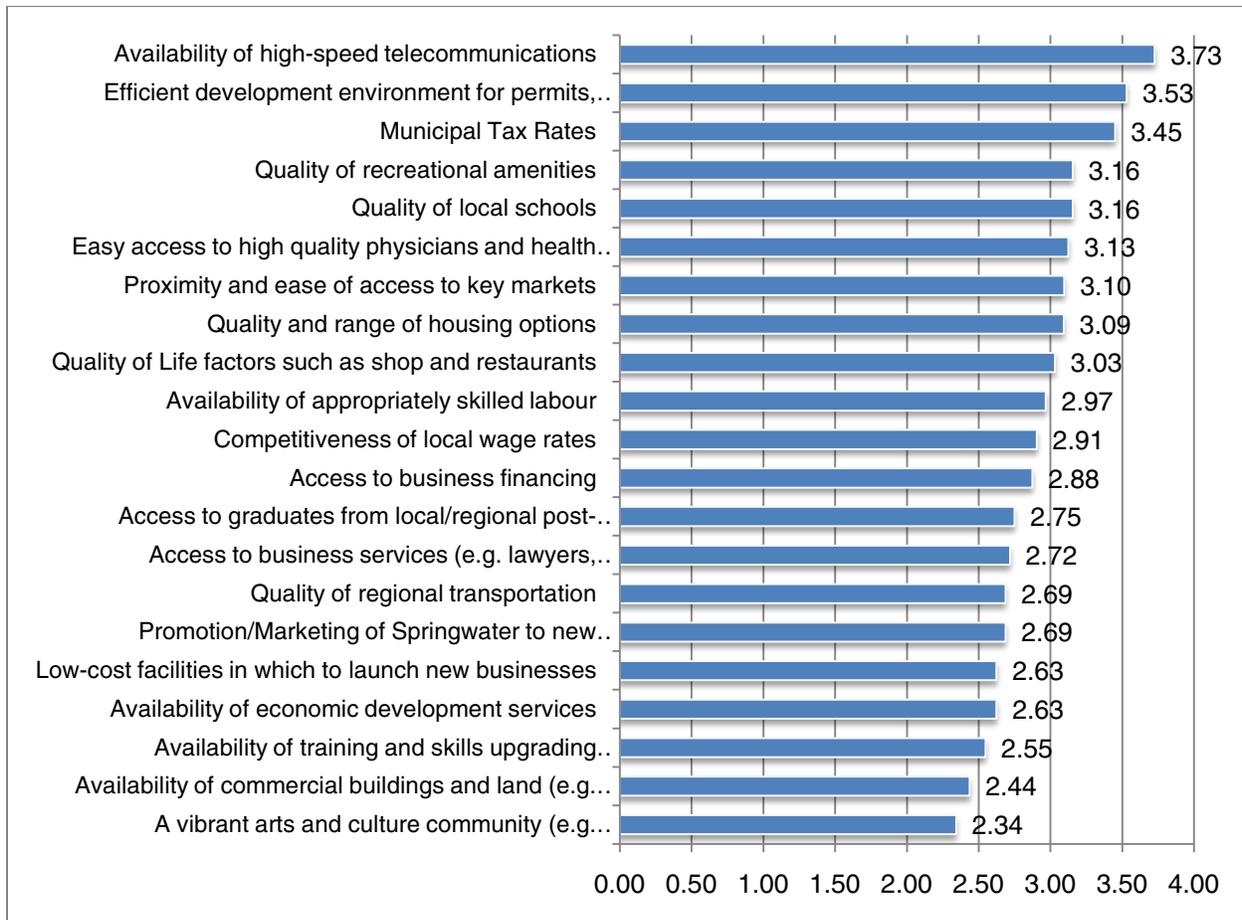


**5. What was the approximate revenue for your company in the previous year?**



- **Business Environment**

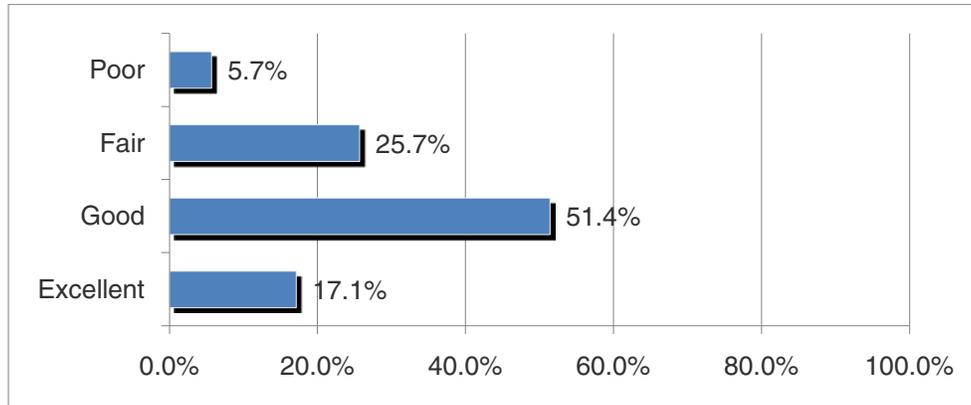
6. Please rate the following criteria to indicate the level of importance each one has in ensuring the growth of your business (1 = Not important, 4 = High importance):



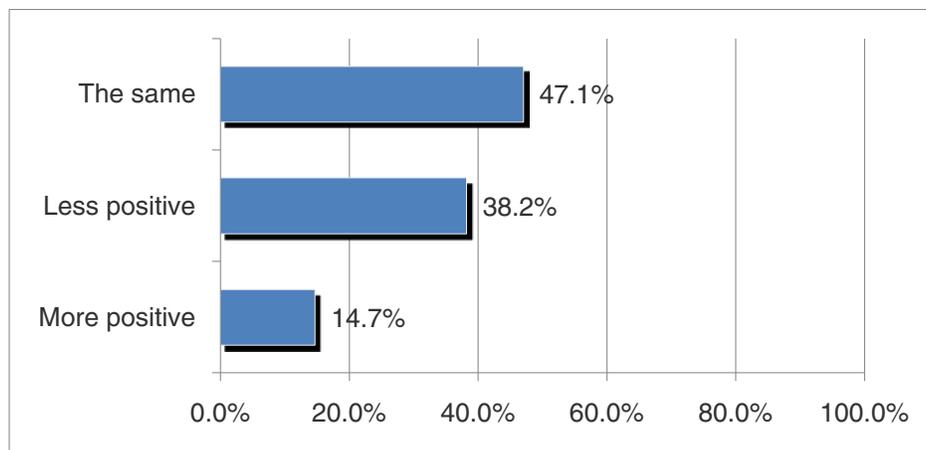
7. What is the primary reason for locating your business in Springwater?

- Available farmland
- Rural setting and values, tourism opportunities
- Proximity to Barrie; Lower taxes than Barrie, and presumably less interference from government and regulators of all types.
- Proximity to manufactured component suppliers in Central and Southern Ontario; shipping costs
- Recreation: excellent off-road cycling (some of the best single-track in the world), downhill skiing including Snow Valley and Blue Mountain
- Low-cost building/property
- Proximity to both Barrie and Northern Toronto markets
- The presence of Township amenities such as the high school, church and at the time doctors
- Purchased an existing business

**8. What is your general impression of Springwater as a place to do business?**



**9. In the past 3 years, has your attitude about doing business in Springwater changed?**



**10. List 3 of the community's advantages as a place to do business.**

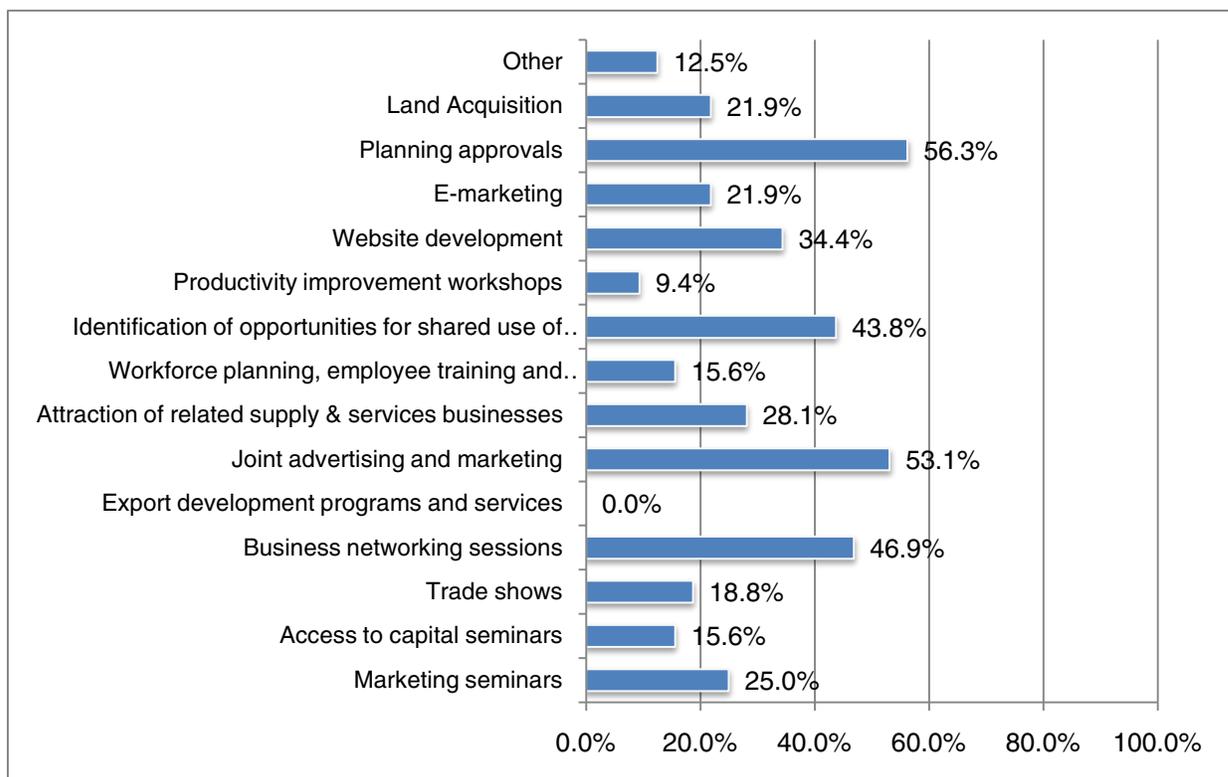
- **Location:** Hub of Barrie, Orillia, Penetang/Midland and Collingwood; entrance to southern Georgian Bay's cottage area and attractions; close proximity to major markets and transportation routes; proximity to Toronto and Barrie, but lower costs
- **Quality of Life:** Small town atmosphere and friendliness; personal acknowledgment; fun place to live and work, makes attracting people easier; good health care and education; benches and lamps along Main Street; diverse opportunities; great sense of togetherness in putting on the Maple Syrup Festival; Township amenities such as school and churches and a more "laid back" environment
- **Business Environment and Local Services:** Good infrastructure; proactive, helpful township employees; good source of qualified workers; one on one service; supporting employees that live

in the community; lower tax rates; positive step from council on economic recovery through tourism, tourism activities

**11. List 3 of the community's disadvantages as a place to do business.**

- Business Costs:** Too many hurdles and expenses for new expansion; development fees very detrimental to expansion; excessive permit fees and development taxes discourage growth; taxes have increased 4x over the last 20 years; difficulty reconciling taxes paid to services provided; onerous process to build or add new industrial space (land use restrictions); planning approvals to difficult and slow
- Local Government and Services:** Slow moving municipal government with poor vision; uncommunicative government; uneducated council, lack of vision to include recreational activities into business plan; no competitive internet access; the decision to relocate the Township's administration building to Midhurst
- Diversity and Strength of Local Business:** More variety of businesses; currently patchwork of business areas; commercial vs. residential growth; not enough tourism-type business and attractions to bring more visitors; poor shopping experiences reported; old fashioned mindset of local retailers

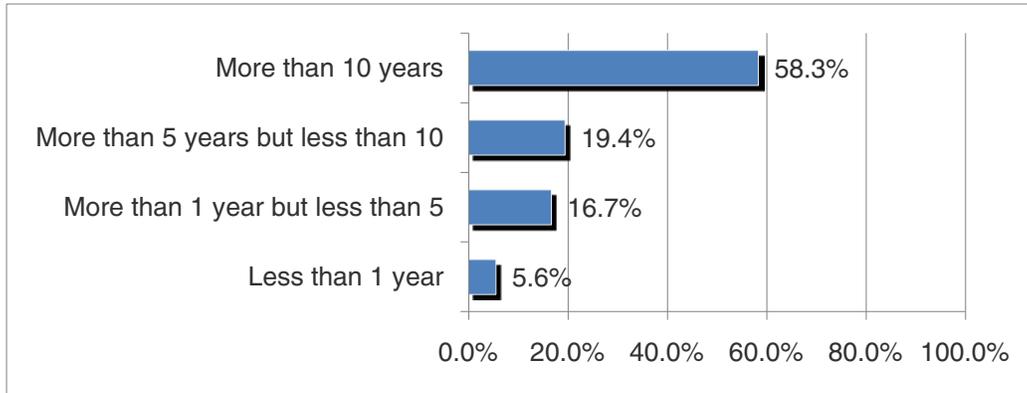
**12. Describe how the planning and development office could assist your business sector (please choose from the following list).**



- **Community Questions**

- 

**13. How long have you lived in Springwater?**

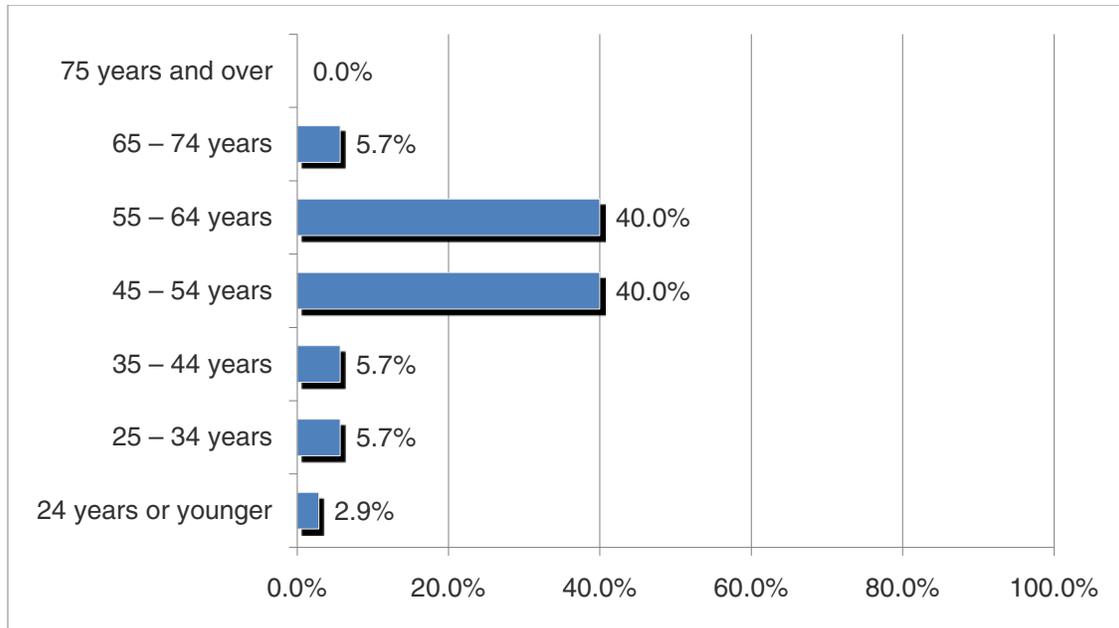


**14. What is the main reason you moved to Springwater?**

**In order of frequency:**

- Born/grew up in Springwater/Elmvale
- Be closer to family/raise children
- Job/family job offer, be closer to work
- Large available properties/homes/estate lots
- Recreation opportunities, schools, safety
- Lower taxes than in Barrie
- There's a potential for advancement, growth and opportunity
- Property sizes and prices

**15. What is your age?**



**16. Use three words to describe Springwater:**

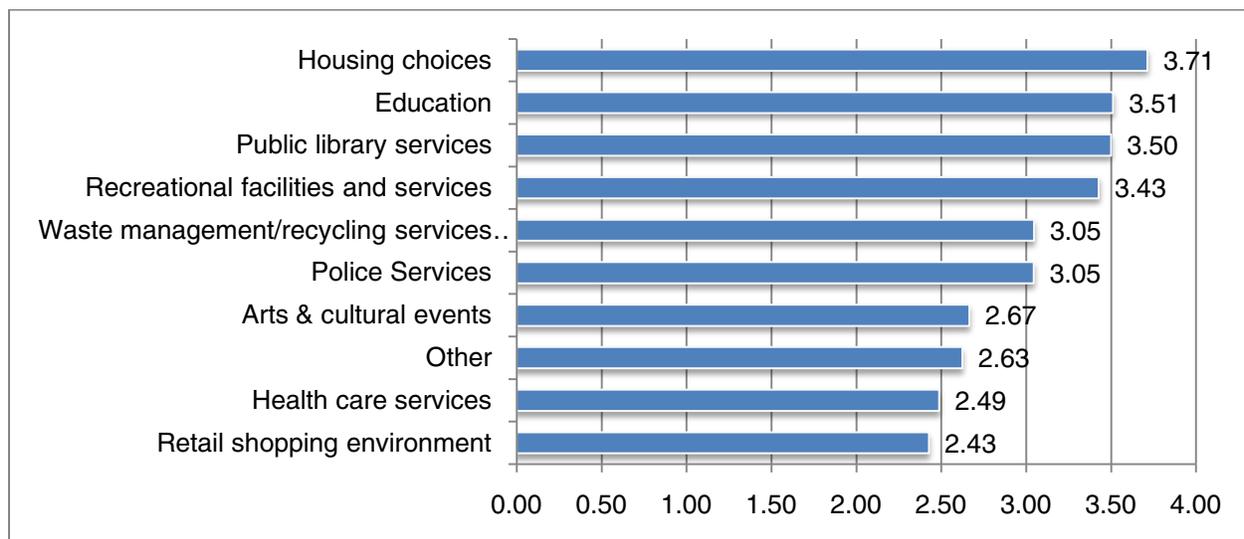
**In order of frequency:**

- Friendly, caring
- Community, small town atmosphere, quaint
- Rural, agricultural
- Scenery, natural, beautiful, pretty
- Green, environment, fresh air, forest
- Accessibility, convenient
- Water, clean water
- Beautiful and clean
- Quiet, serenity
- Backwards, out of touch
- Upscale
- Conservative
- Divided
- Safe
- Familiar
- Soul
- Country

**17. What are the top three best things about being a resident of Springwater?**

- **Quality of Life:** Friendly, country lifestyle, relaxing, support of neighbours and friends, peaceful and friendly neighbourhoods, low taxes, community celebrations and festivals, lots of amenities, safe environment, close to quality healthcare, schools and churches, beautiful place to live, peace and quiet
- **Location and Access:** Close to Barrie, close to highways, convenient shopping and services, rural but close to the city, close to main shopping areas, close to Barrie and Toronto, shops and services in Elmvale, proximity to interests both north and south
- **Recreation and Outdoor Activities:** Proximity to beaches, ski hills, lakes, parks, trails, woodlands etc., recreation – something for everyone, Wasaga Beach recreation; close to biking/country roads, a lot of nature/trails, collective efforts to preserve natural resources; great Farmers Market
- **Cooperation and Development:** People know and like each other and work together well, interest in collaborative efforts in business development, cooperation of the Municipality to keep the area clean and safe, united against poor leadership

**18. Using a scale of 1 to 5 where 1 is 'not at all satisfied' and 5 is 'very satisfied', please rate the quality of the products and services available in Springwater.**



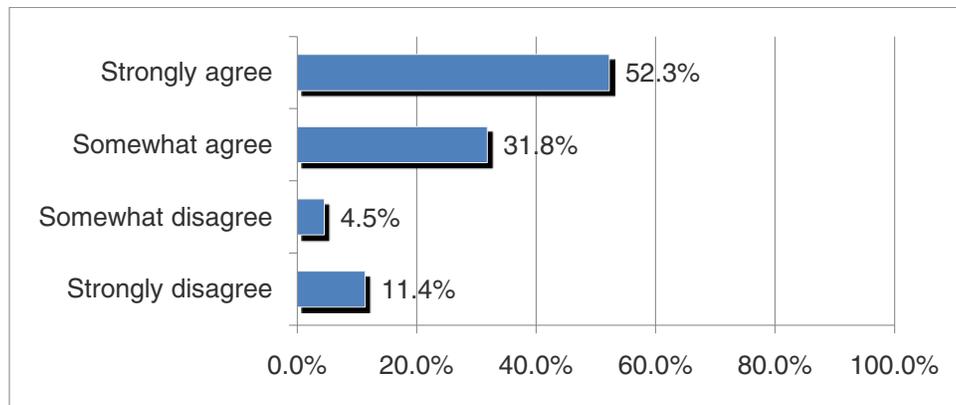
**19. If you are not a resident of Springwater, which services and facilities do you access in Springwater?**

- Bank, some retail shopping, food/Foodland, fuel, soccer fields and walking trails, recreation, arts and culture, Springwater Provincial Park, arena – but few services outside of the south end of the Township, none

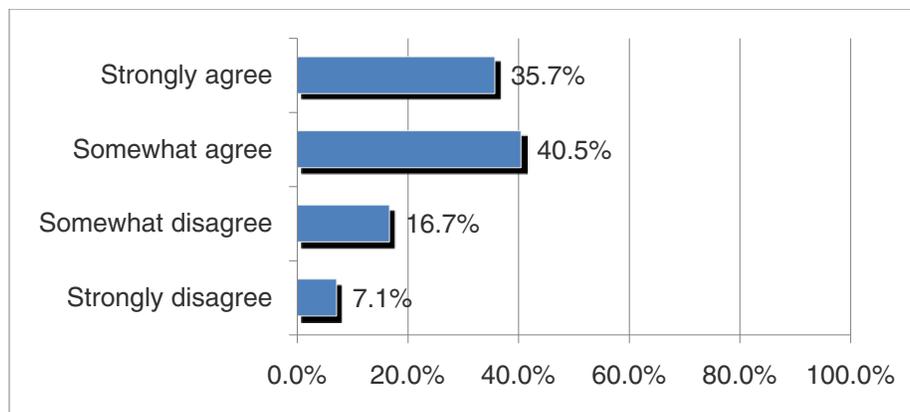
**20. If you are a Community Member (do not live/work in Springwater but are otherwise active in Springwater) how are you involved with the community? What services do you provide?**

- Volunteering – fundraising events, Farmers Market, Chamber of Commerce, special events committee, fire department; business ownership; work in Springwater

**21. Please indicate to what level you agree or disagree with the following statement: Springwater needs to actively pursue industrial/commercial growth.**



**22. Please indicate to what level you agree or disagree with this statement: Springwater is a good location for a business to succeed.**



**23. Use three words or phrases to describe your vision for Springwater 10 years from now.**

- **Growth:** more complete, controlled growth; doubled in size; more progressive; better linkages between communities; higher household incomes
- **Quality of Life:** people friendly; maintain small town atmosphere; beautiful parks, bike paths and walking trails; maintain rural environment; protect communities; improve schools, new Elmvale High School; new recreation centre for Elmvale; more year-round recreation opportunities; more vibrant downtown

- **Business Development:** More appropriate retail (commercial, fine dining); become more of a live/work/play community; better balance of commercial, industrial and residential; stronger commercial centres; affordable business taxes; more job opportunities (manufacturing); vacation destination; lower taxes; better recognition, a 'known' community
- **Services:** self-contained/sufficient community providing all services to residents; solve traffic problems; restructuring in the town/better leadership; more local support; more doctors

#### 24. What are the three best opportunities for growth in the next five years?

- **Commercial Businesses:** more businesses in Main Street Elmvale, but not just 'knick-knack' stores; broader base of retail stores; higher end 'boutique' commercial; better marketing; a Midhurst Commercial District
- **Industrial Development:** Industry; new small manufacturing operations; industrial in Midhurst Industrial Parkway, Hillsdale business park and Snow Valley industrial area; development of employment lands along Highway 400 corridor; small green industries; incentives to new commercial/industrial businesses; farming
- **Tourism and Recreation:** planned tourism; better marketing plan to attract visitors; tourist initiatives and trail development; improved recreation services and sporting facilities; establish Elmvale as a tourist destination; be 'playground' for Barrie and surrounding area
- **Service Provision and Local Community:** keep or rebuild the Elmvale High School; high school and community partnerships; more residential planning and development, not scattered subdivisions; more local artisans; utilizing local farmer goods; beautification of Elmvale; more health care/medical; police station; lower congestion

#### 25. Do you have any additional comments?

- The municipal government needs to be more forthcoming and willing to work with the people.
- Sustainable, environmentally responsible growth is the future for Springwater. Urban sprawl and growth for growth's sake is not the legacy to leave our children.
- Local business is what the Township needs to encourage. Support your local businesses! We're trying hard!
- How do we attract business/commercial/industrial without sacrificing our quality of life?
- Reduce our business costs & approval costs for investing in new facilities & expanding.
- Need high speed internet available in all parts at reasonable costs.
- If more could be done to lure industry to the area, this would give the township a financial boost. Due to lack of accommodation facilities, tourism opportunities may not flourish.
- Industry may pay high taxes but are a detriment to the rural peace of Springwater--.We cherish our rural roots here and the lifestyle that accompanies a rural setting.
- Springwater sends too many highly qualified residents to work else where
- The cost of water is prohibitive.
- Access to suitable industrial property is a big problem. If a business cannot find a suitable location, it cannot locate here. The Bertrand Industrial Park is too far from Barrie and not a nice place.
- Create something unique as an attraction that fits into the atmosphere of Springwater - build on this theme (i.e. St Jacobs) and develop commercial that fits into the theme.

- Springwater suffers from a past total lack of vision. Industrial development has absolutely no benefit for township, given that existing industrial areas in Barrie and in township are half empty. The best course for the township is to concentrate on quality of life within and develop tourist initiatives to include trail and nature areas.
- Empty store fronts should be used to display local art/events or the Township should market for specific desired uses within the windows, for example, "Locate your Restaurant Here"
- Township should communicate directly with local business owners via dedicated website and newsletter/communication
- Better Township signage, should be a large decorative sign especially entering from Wasaga and Barrie to indicate people are entering Springwater (like the Barrie and Bracebridge Entrance Signs)
- I regret that this township has become so expensive to live in. I feel the government could be more helpful with information and costs to developers and business people. Growth is needed and recognition to the convenience of this township to Barrie, Hwy 400, Midland etc.
- It would be appropriate if the Council had a policy to support local business and tax payers.
- Lower development charges and make staff user friendly.

# Appendix V

---

## One on One Stakeholder Interview List

# List of Completed Stakeholder Interviews

---

1. Debra Muenz
2. Jason and Andrea Harris
3. Steve Bertram
4. Len Ferragine
5. Linda Van Casteren
6. Michael Jacobs
7. Morris Gervais
8. Patricia Silver
9. Peter Whitfield
10. Randy Bauer
11. Ron Sheardown
12. Norah Elliott
13. Anthony Glueckler
14. Bill French
15. Brian Smith
16. Don Gordon
17. George Woods
18. Heather Sewell
19. Robert Lamb
20. Heidi McElwain
21. Brenda Stanley
22. Geri Rounds
23. Michelle Hunter
24. John Ball

# List of Staff + Councillors

---

1. Mayor Tony Guergis
2. Deputy Mayor Hope
3. CAO Winanne Grant
4. Councillor Reg Cowan
5. Councillor Mick Caldwell
6. Councillor Dan Clement
7. Councillor Kim Anderson
8. Councillor Linda Collins
9. Nancy Tuckett
10. Laura Thompson

# Appendix VI

---

## Employment Land Inventory

Figure 42 - Vacant Employment Lands Inventory, Township of Springwater, 2010

| INDUSTRIAL       | BUSINESS/ OWNER                | ADDRESS                       | DESIGNATION        | ZONING   | LOCATION        | EXISTING USE | SERVICING                | PROPERTY AREA          |                    |
|------------------|--------------------------------|-------------------------------|--------------------|----------|-----------------|--------------|--------------------------|------------------------|--------------------|
|                  |                                |                               |                    |          |                 |              |                          | (m²)/ PERCENT COVERAGE | PROPERTY Area (ha) |
|                  |                                |                               |                    |          |                 |              |                          | 1,168,171.00           | 116.8              |
| 4341020001023000 | 1246190 ONTARIO INC            | 2334 CASSELL DR               | BUSINESS PARK      | CH       | HILLSDALE       | VACANT       | Private                  | 147,688.00             | 14.77              |
| 4341020001023020 | 1246190 ONTARIO INC            | 2334 CASSELL DR               | BUSINESS PARK      | CH       | HILLSDALE       | VACANT       | Private                  | 51,518.00              | 5.15               |
| 4341020001023050 | 1246190 ONTARIO INC            | 2334 CASSELL DR               | BUSINESS PARK      | CH       | HILLSDALE       | VACANT       | Private                  | 2,848.00               | 0.28               |
| 4341020001022010 | TRIDCA HOLDINGS                | 2305 CASSELL DR               | BUSINESS PARK      | CH       | HILLSDALE       | VACANT       | Private                  | 66,334.00              | 6.63               |
| 4341040001575000 | GRAHAM GREGORY LORNE           | 176 Queen St. W               | INDUSTRIAL         | M(H)     | ELMVALE         | VACANT       | Full Services            | 110,420.00             | 11.04              |
| 434101000213730  | JIM BERTRAM & SONS             | 20 BERTRAM INDUSTRIAL PRKW.   | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | Private                  | 21,159.00              | 2.12               |
| 434101000213728  | JIM BERTRAM & SONS             | 18 BERTRAM INDUSTRIAL PRKW.   | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | Private                  | 5,787.00               | 0.58               |
| 434101000213776  | JIM BERTRAM & SONS             | 17 BERTRAM INDUSTRIAL PRKW.   | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | Private                  | 9,577.00               | 0.96               |
| 434101000213782  | 1124166 ONTARIO INC            | 13 BERTRAM INDUSTRIAL PRKW    | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | Private                  | 4,439.00               | 0.44               |
| 434101000213780  | JIM BERTRAM & SONS             | 15 BERTRAM INDUSTRIAL PRKW    | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | Private                  | 9,125.00               | 0.91               |
| 434103000314602  | JACK JOSEPH SHANAHAN           | 1516 FLOS RD FOUR W           | INDUSTRIAL         | MO       | PHELPSTON       | VACANT       | Private                  | 1,531.00               | 0.15               |
| 434101000620500  | GREGORY PLATEK                 | 4924 COUTY RD 90              | INDUSTRIAL         | MO & EP  | COUTY RD 90     | VACANT       | ----                     | 72,376.00              | 7.24               |
| 434101000331102  | SPRINGWATER TOWNSHIP           | 1435 SNOW VALLEY RD           | INDUSTRIAL         | MI       | MIDHURST        | VACANT       | ----                     | 8,831.00               | 0.88               |
| 434104000153910  | VERLAAN GERARDUS CORNELIUS     | 92 YONGE ST N                 | INDUSTRIAL         | MI       | ELMVALE         | VACANT       | Full Services            | 843.00                 | 0.08               |
| 434104000153920  | VERLAAN GERARDUS CORNELIUS     | 94 YONGE ST N                 | INDUSTRIAL         | MI       | ELMVALE         | VACANT       | Full Services            | 1,230.00               | 0.12               |
| 4341040001537000 | LGM GROUP LTD                  | 18 WILLIAM ST                 | INDUSTRIAL         | MI       | ELMVALE         | VACANT       | Full Services            | 16,809.00              | 1.68               |
| 434101000213788  | JIM BERTRAM & SONS             | 5 BERTRAM INDUSTRIAL PRKW.    | INDUSTRIAL         | MI       | RURAL SOUTH     | VACANT       | Private                  | 5,364.00               | 0.54               |
| 434103000315800  | JOHN JOSEPH SHANAHAN           | 1526 FLOS RD FOUR W           | INDUSTRIAL         | R1-26    | PHELPSTON       | VACANT       | ----                     | 1,695.00               | 0.17               |
| 434103000311501  | J B HOGAN BERNARD              | 1729 PHELPSTON RD             | INDUSTRIAL         | A        | PHELPSTON       | VACANT       | ----                     | 55,285.00              | 5.53               |
| 434101000615901  | SIMCOE COUNTY                  | 2816 GEORGE JOHNSTON RD       | INDUSTRIAL         | WD       | GEORGE JOHNSTON | VACANT       | ----                     | 147,179.00             | 14.72              |
| 434103000307400  | CHRIS KARKANAS                 | 13548 COUNTY RD 27            | INDUSTRIAL         | A & MO-7 | COUNTY RD 27    | VACANT       | ----                     | 126,976.00             | 12.70              |
| 434103000610200  | LGM GROUP LTD                  | 98 YONGE ST N                 | INDUSTRIAL LIGHT   | A & EP   | ELMVALE         | VACANT       | Full Services            | 9,024.00               | 0.90               |
| 434101000327320  | ALEX CURRIE MOTORS TD          | 1093 SNOW VALLEY RD           | INDUSTRIAL/ CO/ MM | A        | MIDHURST        | VACANT       | Partial Services (water) | 181,775.00             | 18.18              |
| 434101000213762  | JIM BERTRAM & SONS             | NO MUNICIPAL ADDRESS          | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 9,065.00               | 0.91               |
| 434101000213738  | JIM BERTRAM & SONS             | 26 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 9,834.00               | 0.98               |
| 434101000213742  | JIM BERTRAM & SONS             | 34 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 12,262.00              | 1.23               |
| 434101000213740  | JIM BERTRAM & SONS             | 30 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 10,400.00              | 1.04               |
| 434101000213746  | JIM BERTRAM & SONS             | 42 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 13,274.00              | 1.33               |
| 434101000213744  | JIM BERTRAM & SONS             | 38 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 12,707.00              | 1.27               |
| 434101000213754  | JOSEPH FURFARI INVESTMENTS LTD | 25 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 8,660.00               | 0.87               |
| 434101000213752  | JOSEPH FURFARI INVESTMENTS LTD | 29 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 11,291.00              | 1.13               |
| 434101000213750  | JOSEPH FURFARI INVESTMENTS LTD | 33 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 11,331.00              | 1.13               |
| 434101000213748  | JOSEPH FURFARI INVESTMENTS LTD | 37 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL         | MO       | RURAL SOUTH     | VACANT       | PRIVATE                  | 11,534.00              | 1.15               |

Figure 43 – Partially Vacant Employment Lands Inventory, Township of Springwater, 2010

| INDUSTRIAL       | BUSINESS/ OWNER                          | ADDRESS                       | DESIGNATION   | ZONING         | LOCATION     | EXISTING USE                                   | SERVICING                | PROPERTY AREA (m²)/<br>PERCENT COVERAGE                           | PROPERTY AREA<br>REMAINING (m²) | TOTAL<br>PROPERTY AREA<br>(ha) | PROPERTY<br>AREA<br>REMAINING (ha) |
|------------------|--|-------------------------------|---------------|----------------|--------------|--|--------------------------|---|---------------------------------|--------------------------------|------------------------------------|
|                  |  |                               |               |                |              |  |                          |   | 281,079                         | 57.3                           | 28.8                               |
| 4341020001021100 | MILLER WASTE SYSTEM                      | 2347 CASSELL DR               | BUSINESS PARK | CH             | HILLSDALE    | WASTE MANAGEMENT AND PICKUP                    | Private                  | 9675 /4%  | 9288                            | 0.97                           | 0.9288                             |
| 4341010000213768 | BFI CANADA/ JOSEPH H. WRIGHT             | 21 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | WASTE MANAGEMENT AND PICKUP                    | Private                  | 13759 /2.2%   | 13456                           | 1.38                           | 1.3456                             |
| 4341010000213732 | GARY PRIEST TRUCKING/ GARY PRIEST        | 22 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | TRUCKING / TRANSPORT SERVICE                   | Private                  | 7931 /7.4%  | 7344                            | 0.79                           | 0.7344                             |
| 4341010000213720 | TST OVERLAND EXPRESS/ ROB O'REILLY       | 16 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | TRANSPORTATION AND DISTRIBUTING                | Private                  | 12747 /5.5%   | 12045                           | 1.27                           | 1.2045                             |
| 4341020001021000 | MOONSTONE INC/ JAMES KNIGHT              | 2365 CASSELL DR               | BUSINESS PARK | CH             | HILLSDALE    | TRANSPORT SERVICE                              | Private                  | 11088 /4.4%   | 10600                           | 1.11                           | 1.06                               |
| 4341010000213786 | WIREFCOMM NORTH INC.                     | 1515 SNOW VALLEY RD           | INDUSTRIAL    | MO             | RURAL SOUTH  | Telecommunications Contractor                  | PRIVATE                  | 4046 /10.9%   | 3604                            | 0.40                           | 0.3604                             |
| 4341010000213706 | JACK AND LISA HEYDEN FARM                | 4 BERTRAM INDUSTRIAL PRKW.    | INDUSTRIAL    | MI             | RURAL SOUTH  | STORAGE BARN FOR HAY                           | Private                  | 4975 /9%  | 4527                            | 0.50                           | 0.4527                             |
| 434104000155301  | SPRINGWATER SELF STORAGE/ ROBERT COE     | 7 WILLIAM ST                  | INDUSTRIAL    | MI             | ELMVALE      | STORAGE  | Full Services            | 4139 /26.9%   | 3025                            | 0.41                           | 0.3025                             |
| 4341010000213714 | ONTARIO SOIL DRILLING / MIKE BISSON      | 12 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | SOILS AND BORING DRILLING                      | Private                  | 14366 /13.9% TOTAL /<br>ONTARIO SOIL<br>DRILLING USE ONLY<br>4.5% | 12369                           | 1.44                           | 1.2369                             |
| 434103000610103  | KELLY TOWN                               | 96 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 2825 /-----   | -----                           | 0.28                           | -----                              |
| 434104000153901  | JAMES JOSEPH SETTLE                      | 88 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 680 /-----  | -----                           | 0.07                           | -----                              |
| 434104000153900  | DIANE CATHERINE RAEDTS                   | 86 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 742 /-----  | -----                           | 0.07                           | -----                              |
| 434104000153800  | JANETT IRENE SAMPSON                     | 82 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 1104 /-----   | -----                           | 0.11                           | -----                              |
| 434104000149710  | OLIVE MILDRED JEAN WILSON                | 80 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 808 /-----  | -----                           | 0.08                           | -----                              |
| 434104000149700  | ROBERT ALLAN CARSON                      | 78 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 932 /-----  | -----                           | 0.09                           | -----                              |
| 434104000153500  | ANDREW VAN GILST                         | 32 WILLIAM ST                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 811 /-----  | -----                           | 0.08                           | -----                              |
| 434104000149600  | DAVID HOWARD SKINNER                     | 74 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 1672 /-----   | -----                           | 0.17                           | -----                              |
| 434104000149500  | STEPHEN GLENN MCGREGOR                   | 72 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 1491 /-----   | -----                           | 0.15                           | -----                              |
| 434104000149400  | JOHN BIRD                                | 70 YONGE ST N                 | INDUSTRIAL    | MI             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 1951 /-----   | -----                           | 0.20                           | -----                              |
| 434104000153400  | AGAR KINNARD                             | 46 WILLIAM ST                 | INDUSTRIAL    | MI (H) & EP-12 | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 5695 /-----   | -----                           | 0.57                           | -----                              |
| 434103000601500  | EUGENE & JOAN MINNINGS                   | 14495 COUNTY RD 27            | INDUSTRIAL    | RR             | COUNTY RD 27 | SINGLE DETACHED DWELLING UNIT                  | Private                  | 3805 /6.6%  | -----                           | 0.38                           | -----                              |
| 434104000153410  | EVELYN GRACE CODLING                     | 42 WILLIAM ST                 | INDUSTRIAL    | R1             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 737 /27%  | -----                           | 0.07                           | -----                              |
| 434104000153420  | WADE BRUCE ADAMS                         | 44 WILLIAM ST                 | INDUSTRIAL    | R1             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 669 /22%  | -----                           | 0.07                           | -----                              |
| 434104000153600  | MARK GERRARD COLUMBUS                    | 40 WILLIAM ST                 | INDUSTRIAL    | R1             | ELMVALE      | SINGLE DETACHED DWELLING UNIT                  | Full Services            | 733 /20.4%  | -----                           | 0.07                           | -----                              |
| 434104000153801  | GVS SHEET METAL/ KEITH ST.AMANTE         | 6 WILLIAM ST                  | INDUSTRIAL    | MI             | ELMVALE      | SHEET METAL CONTRACTING                        | Full Services            | 4137m² /43 %  | 2358                            | 0.41                           | 0.2358                             |
| 434103000104000  | GLEN SHAKEL/ SHAKEL WRECKING             | 4270 PENETANGUISHENE RD       | INDUSTRIAL    | MO             | HILLSDALE    | SCRAP YARD AND WRECKING YARD                   | -----                    | 26262 / 2.6%  | 25579                           | 2.63                           | 2.5579                             |
| 4341010000330700 | MIDHURST SAND AND GRAVEL/ GEORGE ATKINS  | 1432 SNOW VALLEY ROAD         | INDUSTRIAL    | MH             | MIDHURST     | SAND AND GRAVEL DISTRIBUTOR                    | Private                  | 209541 /FULL QUARY  | 0                               | 20.95                          | 0                                  |
| 4341040001575500 | DLG SERVICE INC/ DOUG GRAHAM             | 8 THURLOW ST                  | INDUSTRIAL    | MI             | ELMVALE      | SAND AND GRAVEL DISTRIBUTOR                    | Full Services            | 40180 / 0.5 %   | 39979                           | 4.02                           | 3.9979                             |
| 434103000315600  | SHANAHAN'S/ JACK SHANAHAN                | 1518 FLOS RD FOUR W           | INDUSTRIAL    | MO & EP & A    | PHHELPSTON   | RUBISH REMOVAL AND METAL FABRICATION           | -----                    | 12631 /7.2%   | 11721                           | 1.26                           | 1.1721                             |
| 434104000153300  | SPRINGWATER TOWNSHIP                     | 11 WILLIAM ST                 | INDUSTRIAL    | MI             | ELMVALE      | PUBLIC WORKS YARD 3                            | Full Services            | 2818 /14%   | 2423                            | 0.28                           | 0.2423                             |
| 434101000331101  | SPRINGWATER TOWNSHIP                     | 1453 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | PUBLIC WORKS YARD 1                            | -----                    | 21437 /10.2 %   | 19250                           | 2.14                           | 1.925                              |
| 434101000331118  | MARK ALAN HAYTER                         | 1529 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | NOT VACANT                                     | -----                    | 4266  | -----                           | 0.43                           | -----                              |
| 434101000331116  | KRYSTYNA TABISZ                          | 1515 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | NOT VACANT                                     | -----                    | 6185  | -----                           | 0.62                           | -----                              |
| 434101000331115  | 1257044 ONTARIO LTD                      | 1509 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | NOT VACANT                                     | -----                    | 4069  | -----                           | 0.41                           | -----                              |
| 434101000331110  | 1503464 ONTARIO LTD                      | 1471 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | NOT VACANT                                     | -----                    | 4686  | -----                           | 0.47                           | -----                              |
| 434101000331114  | A-Z STORAGE/ GEORGE BARKS                | 1503 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | MINI STORAGE                                   | -----                    | 4165 /17.8 %  | 3423                            | 0.42                           | 0.3423                             |
| 434101000331112  | SNOW VALLEY MINI STORAGE/ MIKE MORAN     | 1489 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | MINI STORAGE                                   | -----                    | 7118 /18.7%   | 5786                            | 0.71                           | 0.5786                             |
| 4341010000213772 | THE SPACE PLACE/ LEAH JACKSON            | 19 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | MINI STORAGE                                   | Private                  | 13840 /10.3%  | 12414                           | 1.38                           | 1.2414                             |
| 434104000153750  | BARZELL DESIGNS/ DAVID RAPLEY            | 10 WILLIAM ST                 | INDUSTRIAL    | MI             | ELMVALE      | MILLWORK MANUFACTURER                          | Full Services            | 3932 /37%   | 2477                            | 0.39                           | 0.2477                             |
| 434104000153100  | GLUECKLER METAL INC.                     | 13 WILLIAM ST                 | INDUSTRIAL    | MI-7           | ELMVALE      | Metals   | Full Services            | 14792 /32%  | 10058                           | 1.48                           | 1.0058                             |
| 4341020001022010 | CP TOOL AND DIE/ RICHARD CANNON          | 2333 CASSELL DR               | BUSINESS PARK | CH             | HILLSDALE    | MANUFACTURING OF TOOL AND DIE                  | Private                  | 12287 /4%   | 11795                           | 1.23                           | 1.1795                             |
| 434101000331103  | GRANT LLOYDE / SPRINGWATER WOODCRAFT     | 1533 SNOW VALLEY RD           | INDUSTRIAL    | MI & EP        | MIDHURST     | MANUFACTURING AND REFINISHING OF WOOD PRODUCTS | -----                    | 15784 /9%   | 14363                           | 1.58                           | 1.4363                             |
| 434101000331117  | SPAHR MACHINERY                          | 1523 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | MACHINERY MANUFACTURING                        | -----                    | 4193 /17%   | 3480                            | 0.42                           | 0.348                              |
| 434103000601502  | MINNINGS ELECTRICAL SEVICE/ PETER & GARY | 114495 COUNTY RD 27           | INDUSTRIAL    | MI             | COUNTY RD 27 | ELECTRICAL SERVICING SHOP                      | Private                  | 5002 /7%  | 4651                            | 0.50                           | 0.4651                             |
| 4341010000213790 | FURNITURE DESIGNERS AND CUSTOM BUILDER 1 | BERTRAM INDUSTRIAL PARKWAY    | INDUSTRIAL    | MI-4           | RURAL SOUTH  | CUSTOM FURNATURE WAREHOUSE                     | Private                  | 5746 /10%   | 5171                            | 0.57                           | 0.5171                             |
| 434101000213764  | BERTRAM & SONS CONSTRUCTION/ JIM BERTRAM | 23 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | CONSTRUCTION CONTRACTOR                        | Private                  | 15580 /10.3%  | 13975                           | 1.56                           | 1.3975                             |
| 434101000213710  | SIROLA HOLDINGS                          | 8 BERTRAM INDUSTRIAL PARKWAY  | INDUSTRIAL    | MO             | RURAL SOUTH  | Conductive Concrete                            | Private                  | 5179 /24.5%   | 3910                            | 0.52                           | 0.391                              |
| 434101000213784  | EP INDUSTRIES                            | 11 BERTRAM INDUSTRIAL PARKWAY | INDUSTRIAL    | MO             | RURAL SOUTH  | CLOSED   | Private                  | 3844 /17.8%   | 3159                            | 0.38                           | 0.3159                             |
| 434101000620600  | ABRAMS SERVICE CENTRE TOO INC/ PAUL ABRA | 4934 COUNTY RD 90             | INDUSTRIAL    | MO & EP        | COUNTY RD 90 | AUTOMOTIVE SERVICE REPAIR SHOP                 | -----                    | 8057 /4.5%  | 7694                            | 0.81                           | 0.7694                             |
| 434101000506300  | KENNETH MAGUIRE                          | 2358 RONALD RD                | INDUSTRIAL    | R1             | MINESING     | AUTOMOTIVE SERVICE REPAIR SHOP                 | Partial Services (water) | 5386 /8.8%  | 4912                            | 0.54                           | 0.4912                             |
| 434101000331113  | SERVICE MASTER/ KURTIS MANKTELOW         | 1497 SNOW VALLEY RD           | INDUSTRIAL    | MI             | MIDHURST     | BUILDING DAMAGE REPAIR                         | -----                    | 4540 /20%   | 3632                            | 0.45                           | 0.3632                             |