



Township of  
**Springwater**

**Welcomes You**



Township of  
**Springwater**

# **Situational Analysis**

for the ***Township of Springwater***

September 2022





Township of  
**Springwater**

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# **Situational Analysis**

**For the Township of Springwater**

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**September 2022**



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## Table of Contents

Executive Summary.....	1
Data Sources.....	5
Community Assets .....	8
<b>1. Demographic Analysis .....</b>	<b>14</b>
1.1. Population Growth .....	15
1.2. Income, Households and Attainability .....	18
1.3. Education, Skills and Training.....	21
<b>2. The People that Live and Work in Springwater.....</b>	<b>25</b>
2.1. Key Indicators .....	25
2.2. Labour Supply in Springwater .....	28
2.3. Labour Market Gaps/Surpluses.....	31
2.4. Workforce Commuting Flow .....	34
2.5. Labour Recruiting Area: Simcoe County - Emerging and in-Demand Occupations .....	37
2.6. Key Occupations for Labour-Based Investment Attraction in Simcoe County.....	43
<b>3. Deep Dive Into Springwater’s Economy .....</b>	<b>46</b>
3.1. Employment Profile.....	47
3.2. Economic Output .....	50
3.3. Export Sales .....	51
3.4. Industry Supply Chain Analysis.....	52
<b>4. Location Quotient Analysis.....</b>	<b>53</b>
4.1. Location Quotient Analysis by Sector .....	53
4.2. Location Quotient Analysis by Industry .....	54
4.3. Shift-Share Analysis .....	56
4.4. Employer Structure.....	58
<b>Appendix A.....</b>	<b>61</b>

## List of Tables & Figures

---

Table 1: Population Change, Springwater and Ontario, 2011-2032 .....	15
Table 2: Households and Dwelling Attainability, 2022 .....	19
Table 3: Post-Secondary Major Field of Study, Springwater, 2022 .....	23
Table 4: Key Labour Force Statistics by Gender, Springwater, 2022 .....	25
Table 5: Labour Force Characteristics by Age and Sex, 2022.....	27
Table 6: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2022.....	29
Table 7: Labour Market Gaps/Surpluses by Occupation, 1-digit NOCs, 2022 .....	32
Table 8: Labour Market Surplus by Sector, 2022.....	33
Table 9: Top Places to Work for Springwater Residents, 2016 .....	35
Table 10: Top Labour Recruitment Areas for Springwater, 2016 .....	36
Table 11: Labour Recruitment Areas by Percent of Labour Force Supplied, Springwater, 2016.....	37
Table 12: Occupations with Highest Level of Employment in the Labour Recruitment Area (Simcoe County).....	38
Table 13: Concentrated Occupations in Simcoe County, 2021 .....	41
Table 14: Key Staffing Patterns, 2021-2026, Ontario.....	44
Table 15: Employment Growth by Sector, Springwater vs Ontario, 2011-2021 .....	47
Table 16: Economic Output by Industry, 2019 .....	50
Table 17: Top Export Dollars Flowing into Springwater by Industry, 2019 .....	51
Table 18: Top Industries by Purchasing Power, Springwater, 2019.....	52
Table 19: Location Quotient Analysis by Sector .....	53
Table 20: Concentrated Industries, Relative to the Rest of Canada, 2021.....	54
Table 21: Concentrated Industries, Relative to the Rest of Ontario, 2021 .....	55
Table 22: Shift-Share Analysis: Competitive Industries, Springwater, 2011-2021 .....	57
Table 23: Shift-Share Analysis: Declining Industries, Springwater, 2011-2021 .....	57
Table 24: Business counts by size, Springwater, 2022 .....	58
Table 25: Top 5 sub-sectors by business counts, Springwater, 2022 .....	59
Table 26: Top 5 sub-sectors by businesses with employees, Springwater, 2022.....	59
Table 27: Top 5 sub-sectors by businesses with over 100 employees, Springwater, 2022.....	60

Figure 1: Percent Population by Age, Springwater vs. Ontario, 2022 ..... 16

Figure 2: Household Income Levels by Percentage of the Population, 2021 ..... 18

Figure 3: Occupied Dwellings by Structure Type, 2022 ..... 20

Figure 4: Educational Attainment Breakdown, Residents Ages 25 to 64, 2022..... 21

Figure 5: Percentage of Residents aged 25-64 with Post-Secondary Attainment,  
2022..... 22

Figure 6: Labour Force Statistics by Gender, Population 15 to 24, 2022 ..... 26

Figure 7: Resident Labour Force by Occupation, 1-digit NOCs, 2022 ..... 28

Figure 8: Labour Force by Industry, 2022..... 30

Figure 9: Largest Absolute Job Growth in Simcoe County, 2016-2021..... 39

Figure 10: Largest (%) Growth Occupations in Simcoe County, 2016-2021 ..... 40

Figure 11: Large Projected Job Growth in Simcoe County, 2021-2028 ..... 42

Figure 12: Largest Industries by Number of Jobs, 2021 ..... 48

Figure 13: Growth Sectors and Industries by Employment Level, 2011 -2021 ..... 49

## EXECUTIVE SUMMARY

Springwater's Situational Analysis is being completed as part of a broader Community Based Strategic Plan. When it comes to the data presented within this Situational Analysis, it should be emphasized that this is an informational piece. Meaning, that the information presented within the following pages is a static representation of the current situation within Springwater. This information does not prescribe a certain solution; instead, it presents a reality or statistical perspective within the local context. This information sets the stage for further development of the Community Based Strategic Plan's end goals and is a valuable piece of information to present to potential investors and local stakeholders regarding Springwater's current community status.

This Situational Analysis begins with an assessment of the people (socio-demographics) that make up Springwater. By profiling population growth and age cohorts, it provides a snapshot of the current makeup of Springwater's population, as well as potential future opportunities. This data can be used to inform decision-making; for example, Springwater has a sizable youth (0-19 population) and would be well-served identifying strategies to retaining those individuals as they age into adulthood and the broader workforce.

Next, by profiling housing and income levels, a snapshot is created of Springwater's current "livability" status. Notably, housing costs are quite high, and while incomes typically match those costs, this presents a challenge for lower-earning workers trying to live in Springwater. Moreover, there is a considerable lack of housing supply outside of "single detached" homes, suggesting there may be room for growth in non-traditional housing units. Education data is then presented, allowing potential investors to view a brief synopsis of the various skills and levels of (academic) expertise available in the community.

Section 2 pivots to an assessment of the local labour force, presenting key performance indicators related to participation, unemployment, and employment rates of various local population cohorts. This again provides an opportunity for strategic initiatives by highlighting disparities within the local labour market. As an example, younger females in Springwater are significantly less likely to find employment compared to their male counterparts (a 21.7% unemployment rate, compared to 12.8% for males). Though this data is not prescriptive (i.e., suggesting solutions), only descriptive (i.e., reflective of the current situation), further introspection may identify ways to close that gap.

With an eye once again toward local skills identification, we then present information related to the number of residents employed by occupation and industry classification. This once again allows potential residents and investors to quickly identify where skills and employment exist within the local labour force.

Next, understanding that labour is fluid in today's economy, it is important to not just survey the resident labour force within Springwater, but also identify geographic areas that currently, or could possibly, supply labour to businesses in Springwater, and what skills and job figures look like within those areas. Doing so allows for an understanding of which occupations are concentrated, growing, and emerging, and could possibly be leveraged to drive community growth in the Township.

Section 3 of the Situational Analysis reviews the local economy using the reverse lens; rather than assessing data based on local residents (regardless of where they work), this section reviews data based on local industry and employment, regardless of where their employees live. Once more, an assessment by industry is done to identify key industries and jobs that can be leveraged to support future community goals and aspirations, and match them up with the current, and emerging, community and economic drivers.

Using two analytical tools, location quotient and shift-share analysis, we are able to identify industries that are significantly more concentrated within the local economy when compared to provincial and national figures and identify which sectors are more or less likely to grow locally when compared to growth rates of their national or international counterparts. Finally, the report concludes with an assessment of current businesses by size and leading industries. This is done to present a broad picture of the makeup of local industry and business.

Later reports, crafted as part of the broader Community Based Strategic Plan, will highlight opportunities based on this quantitative information alongside qualitative assessments derived from consultations with local stakeholders. Once those reports and actions are presented to staff and Council, it will then be up to local stakeholders, staff, and elected officials to undertake those key directions to be taken based on this information.



# Township of Springwater Community **SNAPSHOT**



## Population Profile



## Highest Education

Population ages 15+



## Household & Earnings



of Springwater's population spend 30% or more of household total income on shelter costs.



Average Dwelling Value **\$1,242,014**  
Median Dwelling Value **\$1,163,065**



Total number of households  
**7,926**

All data sourced from Manifold SuperDemographics 2022, unless otherwise specified.

# Township of Springwater Community **SNAPSHOT**



## Labour Force & Local Economy

Median Employment Income | Average Employment Income

**\$49,084** | **\$71,151**

ONTARIO MEDIAN **\$37,844** | ONTARIO AVERAGE **\$54,047**

### PARTICIPATION RATE

ONTARIO  
65.2%

**72.4%**

### EMPLOYMENT RATE

ONTARIO  
59.2%

**66.3%**

### UNEMPLOYMENT RATE

ONTARIO  
9.1%

**8.5%**

## Top 5 Sectors by Business Count\*



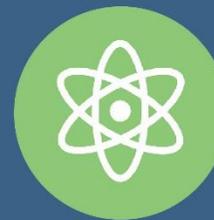
Construction



Real Estate and  
Rental & Leasing



Health Care &  
Social Assistance



Professional,  
Scientific &  
Technical Services



Agriculture,  
Forestry, Fishing  
& Hunting

## Top 5 Sectors by Occupation\*



Sales & Service



Management



Business, Finance  
& Administration



Education,  
Law & Social,  
Community &  
Government Services



Trades, Transport  
& Equipment  
Operators

\*Labour force data is derived from 2021 figures and are therefore influenced significantly by the impacts of COVID-19.

## DATA SOURCES

Please note that every effort has been made to use the most current data available. There are four major sources of information for the remainder of this document:

- The 2001 to 2021 Census from Statistics Canada.
- Canadian Business Registry (CBR) - December 2021
- SuperDemographics 2022 from Manifold Data Mining Inc.
- EMSI Analyst 2022.Q1



### A note on the North American Industry Classification System and National Occupation Classification

#### North American Industry Classification System (NAICS)

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The system is the standard used by national statistical agencies in classifying business establishments for the purpose of collecting, analyzing, and publishing statistical data related to the Canadian economy. It was developed to allow for a level of comparability for businesses across various jurisdictions.

The largest groupings or aggregations of industries categories are called sectors, represented by the first two NAICS digits (i.e., if the first two digits are 41 the business is within the wholesale trade sector), which are broken down into sub-sectors using a third digit (i.e., 413 represents food, beverage and tobacco merchant wholesalers), which are then further broken down into industries using a fourth digit (i.e., 4131 are solely food merchant wholesalers).

#### National Occupation Classification (NOC)

The National Occupational Classification is Canada’s national system for describing occupations. The first digit of the NOC code identifies the broad occupational category of an occupation. This corresponds to the type of work performed, or the educational area of study required. For example, the NOC code of occupations associated with the health sector begins with a three (3). The following digits relate to unit groups within an occupation.

A unit group can represent a given occupation, such as dentist (NOC 3113), wherein dentist is an occupation which encompasses different job titles which carry out very similar tasks such as a dental surgeon, dentist, general practice dentist, and orthodontist. The unit group can also note a set of different occupations falling in the same broad occupational category and skill level and with very similar duties and

employment requirements. For instance, unit group 2143 – mining engineers, regroups several occupations such as mine design engineer, mine safety engineer, and mineral engineer under the same unit group.

### Canadian Business Registry (CBR)

The major sources of information for the business registry are updated from the Statistics Canada survey program and Canada Revenue Agency’s (CRA) Business Number account files. This CRA administrative data source allows for the creation of a complete set of all business entities.

### Manifold Projection Method

Production of 2022 Demographic data estimates is partially based on population statistics collected by the Statistics Canada Census Program. Manifold estimates demographic data annually, including population projections for 5 and 10 years in the future. Manifold has been providing current year population estimates since 2001. Manifold’s data is timely and accurate. It is modelled to the current year and accounts for issues with the Census (e.g., undercount, data suppression for privacy reasons, etc.).

For the purposes of this project, we rely on Manifold data as it is more reliable and timelier than Statistics Canada data. By building on Statistics Canada estimates with additional datasets, Manifold data presents more Manifold methodologies based on the following techniques:

- Enhanced cohort survival methods;
- Nearest neighbourhood and regression techniques; and
- Structural coherence techniques.

### Manifold Data Sources include:

Statistics Canada	Real Estate Boards/Companies
Health Canada	Canadian Bankers Association
Regional Health Ministries	Bank of Canada
Citizenship and Immigration Canada	Canada Post Corporation
Regional School Boards	Consumer and business directories books
Flyer Distribution Association	Proprietary survey and research
Publication of hospitals, CMHC, BBM and partners	

## EMSI Analyst

EMSI data brings the various snapshots of the Canadian economy together in a single picture. First, it aligns the geographies of the data from 2001 to the present, which means the Township of Springwater of 2001 is the same as the Township of Springwater (Hereafter referred to as Springwater) of 2022. This results in geographically detailed data (down to the Census Subdivision level) that apply to today's economy.

The data is remarkably detailed, providing information on 305 industry classifications using the NAICS system and 522 occupations from Statistics Canada's NOC system in over 4,300 integrated geographical areas. The data is updated twice a year, so users have the most current information possible. And to top it all off, it adds 10-year projections based on the CBR data so that it provides an idea of the future alongside the past and present.

### EMSI Data Sources include:

Canadian Business Registry (CBR)

2001, 2006, and 2011, 2016 Census data

Survey of Employment, Payroll and Hours (SEPH)

Labour Force Surveys (LFS)

Canadian Occupational Projection System (COPS)

CANSIM Demographics

Post-secondary Student Information System (PSIS) Education Data



## COMMUNITY ASSETS

Springwater is home to a wealth of community services, halls, centres, libraries, trails, and sports facilities. This section presents information on key services and assets across the municipality; for further information on all that Springwater has to offer, visit the Township's [Recreation and Culture](#) website.

### PROTECTIVE SERVICES\*



#### Midhurst Fire Station 2

- 1453 Snow Valley Rd, Midhurst, Ontario, L0L 1X1



#### Elmvale Fire Station 5

- 7 Patterson St, Elmvale, Ontario, L0L 1P0



#### Minesing Fire Station 3

- 2303 Ronald Rd, Minesing, Ontario, L0L 1Y0



#### OPP - Huronia West Detachment

- 911
- Non-emergency contact: 705-429-3575



#### Hillsdale Fire Station 4

- 1 Albert St E, Hillsdale, Ontario, L0L 1V0



#### Elmvale Paramedic Station

- 17 Allenwood Rd, Elmvale ON, L0L 1P0

\* Fire Station 1 is located at 1254 Sunnidale Road. This station does not respond to emergencies but is active through a partnership with Georgian College.

## COMMUNITY RESOURCE CENTRES/HEALTH CARE SERVICES



### Family Service Centre

#### Springwater Health Services Centre

- 35 Queen St W, Elmvale, Ontario, L0L 1P0



### Elmvale LifeLabs

- 35 Queen St W, Elmvale, Ontario, L0L 1P0



### Housing Support

#### County of Simcoe

- 211
- <https://www.simcoe.ca/dpt/sh>



### Simcoe Muskoka District Health Unit

- 15 Sperling Dr, Barrie, Ontario, L4M 6K9



### Elmvale & District Food Bank

- 62 Yonge St N, Elmvale, Ontario, L0L 1P0

## SCHOOLS

Springwater is also home to six elementary schools and four secondary schools across three distinct school districts. Springwater residents have access to French immersion schools as well as English speaking schools in both the Catholic and English Public systems.

### ELEMENTARY



#### Minesing Central Public School

- 7 Huron St, Minesing, Ontario, L9X 1J2



#### Forest Hill Public School

- 16 Doran Rd, Midhurst, Ontario, L0L 1X0



#### Hillsdale Elementary School

- 16 Albert St E, Hillsdale, Ontario, L0L 1V0



#### Huronian Centennial Elementary School

- 28 Simcoe St, Elmvale, Ontario, L0L 1P0



#### École élémentaire catholique Frère-André

- 273 Cundles Rd E, Barrie, Ontario, L4M 6L1



#### Our Lady of Lourdes Catholic School

- 34 Kerr St, Elmvale, Ontario, L0L 1P0T

### SECONDARY



#### École secondaire catholique Nouvelle-Alliance

- 249 Anne St N, Barrie, Ontario, L4N 0B5



#### Elmvale District High School

- 25 Lawson Ave, Elmvale, Ontario, L0L 1P0



#### St. Theresa's Catholic High School

- 347 Galloway Blvd, Midland, Ontario, L4R 5B2



#### St. Joseph's Catholic High School

- 243 Cundles Rd E, Barrie, Ontario, L4M 6L1

## LIBRARIES AND MUSEUMS

Springwater's public library system has three separate physical locations (Elmvale, Midhurst, and Minesing) and the Township is also home to Historic Fort Willow, a traditional link allowing for continuous trade and transport for Aboriginal peoples as well as the military during the war of 1812. The Site allows for visitors to travel back in time and experience life as it was centuries ago.

### LIBRARIES



#### Springwater Public Library (Elmvale)

- 50 Queen St W, Elmvale, Ontario, L0L 1P0



#### Springwater Public Library (Midhurst)

- 12 Finlay Mill Rd, Midhurst, Ontario, L0L 1X0



#### Springwater Public Library (Minesing)

- 2347 Ronald Rd, Minesing, Ontario, L0L 1Y0

### MUSEUMS



#### Simcoe County Museum

- 1151 Hwy 26, Minesing, Ontario, L9X 0Z7



## RECREATION FACILITIES

Springwater's natural beauty allows residents and visitors to choose from a wide variety of trails, parks, and wildlife areas. Further, the Township is home to many community centres, arenas, sports complexes, and baseball hubs.

### COMMUNITY CENTRES



#### Anten Mills Community Centre

- 3985 Horseshoe Valley Rd W, Anten Mills, Ontario, L0L 1Y2



#### Hillsdale Community Centre

- 4517 Penetanguishene Rd, Hillsdale, Ontario, L0L 1V0



#### Midhurst Community Centre

- 74 Doran Rd, Barrie, Ontario, L0L 1X0



#### Minesing Community Centre

- 2347 Ronald Rd, Minesing, Ontario, L0L 1Y0



#### Elmvale Community Hall

- 33 Queen St W, Elmvale, Ontario, L0L 1P0



#### Knox Building

- 35 Queen Street West, Elmvale, Ontario, L0L 1P0



#### Grenfel Community Centre

- 1989 Sunnidale Rd Centre, Vespra, Ontario, L0M 1T2



#### Phelpston Community Centre

- 1533 Flos 4 Rd W, Phelpston, Ontario, L0L 2K0

**SPORTS FACILITIES**



**Tree Nursery Sports Park**

- 2231 Nursery Rd, Midhurst Ontario, L0L 1X0



**Minesing Station Park**

- 2053 ON-26, Minesing, Ontario, L0L 1Y2



**Doran Park**

- 45 Spence Ave, Springwater, Ontario, L0L1X0



**O'Neil Park**

- 1472 Flos Rd 4 W, Phelpston, Ontario, L0L 2K0



**Hillsdale Community Park**

- 4517 Penetanguishene Rd, Hillsdale, Ontario, L0L 1V0



**Flos Elmvale Community Arena**

- 14 George St, Elmvale, Ontario, L0L 1P0



**Anten Mills Community Park**

- 3985 Horseshoe Valley Rd W, Minesing, Ontario, L0L 1Y0



**Flos Agricultural Society Ball Diamond**

- 14 George Street, Elmvale, Ontario, L0L 1P0



**Grenfel Community Park**

- 1989 Sunnidale Rd Centre, Vespra, Ontario, L0M 1T2



**Elmvale District High School (Shared use Recreational Facility)**

- 25 Lawson Ave, Elmvale, Ontario, L0L 1P0



**Midhurst Lions Park**

- 59 Doran Rd, Midhurst, Ontario, L0L 1X0



\* In addition to these sports facilities, the Township is also responsible for 51 parks throughout the Township of Springwater.

## PARKS AND TRAILS

The main trail in the Township is the North Simcoe Rail Trail which runs the entire length of the Township (north to south). Provided below is just a small number of the many beautiful outdoor recreational parks and trails available to residents. For further information on all the parks and trails in the Township, please visit <https://www.springwater.ca/en/recreation-and-culture/trails.aspx>.



Springwater Provincial Park



Hunter Russell Nature Trail



Tiny Marsh Provincial  
Wildlife Area



Nine Mile Portage  
Recreational Trail



Minesing Wetlands  
Conservation Area



Simcoe County Forest  
Trails



Edenvale Conservation  
Area



Hickling Recreational Trail



North Simcoe Rail Trail



Historic Fort Willow

- 2714 Grenfel Rd, Utopia, Ontario, L0M 1T2

## 1. DEMOGRAPHIC ANALYSIS

Please note that all data presented within this section is reflective of those living within Springwater, regardless of where they work. For example, total income data denotes income for those living in Springwater, even if their job takes place outside the Township. Similarly, someone living outside Springwater but working within the Township would not be included in this section's data.

### 1.1. Population Growth

This subsection illustrates population characteristics for the Township of Springwater. The wider economic landscape relevant to the region is explored by using **Ontario as a benchmark**.

Table 1 illustrates population changes in Springwater from 2011 to 2032 compared to Ontario. The census population in Springwater grew at similar rates as the province between 2006 and 2016. However, from 2016 to 2021, and through projections over the next decade, Springwater is projected to grow at approximately twice the speed of the rest of the province.

Table 1: Population Change, Springwater and Ontario, 2011-2032<sup>1</sup>

	2011	2016	2021	2022	2027	2032
<b>Springwater</b>						
Population Count	18,223	19,059	21,701	23,200	26,054	29,013
% Change	4.39%	4.59%	13.86%	/	12.30%	11.36%
<b>Ontario</b>						
Population Count	12,851,821	13,448,494	14,223,942	15,000,360	15,859,881	16,716,314
% Change	5.70%	4.60%	5.77%	/	5.73%	5.40%

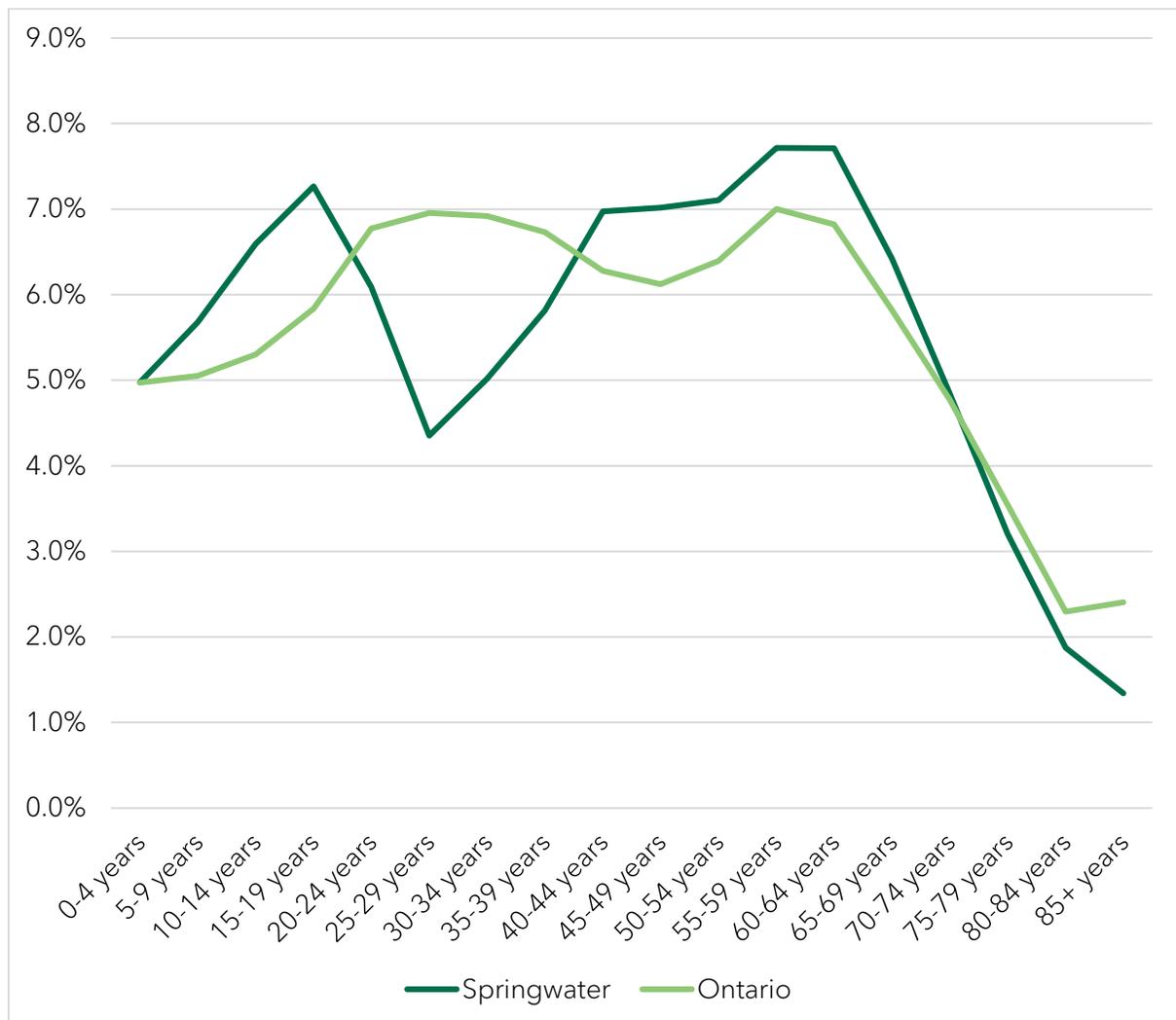
Source: Statistics Canada Census Profiles 2006-2021. Manifold SuperDemographics 2022-2032. Note that the two sources use different methods and thus, are not directly comparable.

<sup>1</sup> We are aware that these figures differ from other Township documents, including the Growth Management Strategy. Manifold data bases their estimates on the current and historical Census, plus a number of additional sources, like Canada Revenue Agency tax filers data, and Canada Post data, housing starts statistics from the Canada Mortgage and Housing Corporation, immigration statistics, movers data, birth rates, and mortality rates. Though these differ from other Township reports, we rely on Manifold population projections here to maintain consistency throughout the report.

## Springwater grew by 13.9% from 2016 to 2021, compared to 5.8% across Ontario.

Figure 1 contrasts the age profile of residents in Springwater and Ontario, in 2022. Springwater has a larger percentage of youth (0-19) and older working-age adults (40-65), compared to Ontario. Ontario, meanwhile, has a significantly larger percentage of young adults (20-39).

Figure 1: Percent Population by Age, Springwater vs. Ontario, 2022



Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022

Overall, Springwater’s working-age population (ages 15-64, 65.1%) is similar to Ontario’s (65.8%). Springwater’s median age (43, compared to 41 for Ontario) is slightly higher than Ontario’s, though its average (41, compared to 42 for Ontario) age is slightly lower.

2022 Age Profile Snapshot		
Age Group	Springwater	Ontario
0-14	17.25%	15.33%
15-64	65.06%	65.83%
65+	17.68%	18.84%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022

The median age of Springwater’s male population is slightly lower than the female population, 42.6 compared to 43.4.

2022 Springwater Age Profile Snapshot		
Age Group	Male	Female
0-14	17.2%	17.3%
15-64	65.6%	64.5%
65+	17.2%	18.2%

Source: McSweeney & Associates and Manifold Data Mining Inc. SuperDemographics 2022



## 1.2. Income, Households and Attainability

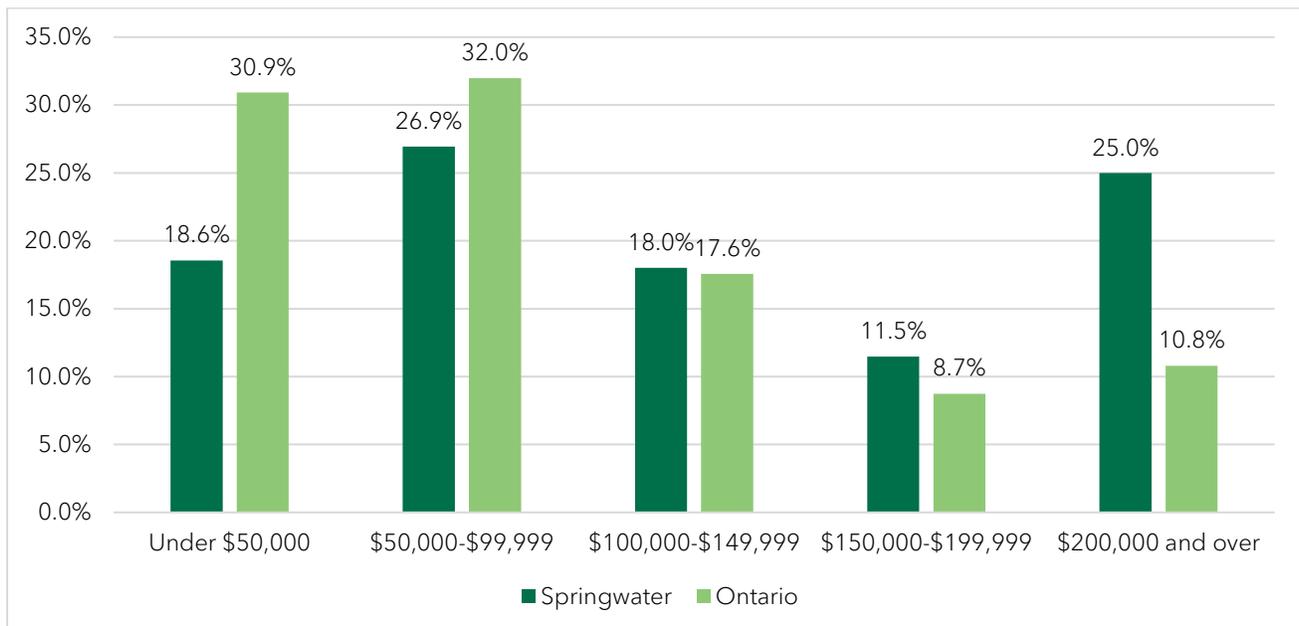
This subsection describes income, households and housing costs of the population. This information is relevant within the context of economic development planning because it provides an understanding of whether a region has attainable housing for resident labour – a key factor in residential and labour force attraction and retention. With regards to employment income, the following observations can be made<sup>2</sup>:

- In 2021, **Springwater’s median employment income was \$49,084**, 30% higher than in Ontario (\$37,844).
- In 2021, the **average employment income for Springwater residents was \$71,151**, 32% higher than in Ontario (\$54,047).

Figure 2 illustrates the distribution of household incomes. Approximately 45.5% of households in Springwater earn less than \$100,000, compared to 62.9% in Ontario.

- Median household total income in Springwater: \$121,315 vs. \$84,052 in Ontario.
- Average household total income in Springwater: \$162,099 vs. \$109,992 in Ontario.

**Figure 2: Household Income Levels by Percentage of the Population, 2021**



Source: Manifold Data Mining Inc. 2022 (2021 incomes).

<sup>2</sup> As noted previously, all income data uses the year previous; therefore 2022 data uses 2021 incomes.

On average, the residents in Springwater have significantly higher levels of employment and household income compared to Ontario. Springwater's dwellings similarly see higher values than the rest of the province. Table 2 and Figure 3 highlight key housing characteristics. Compared to Ontario, Springwater has a higher cost of housing, however, the higher earnings lead to fewer residents spending over 30% of their total income on shelter costs. At the same time, Springwater sees less variety in housing stock, including significantly fewer apartment units (see Figure 3).

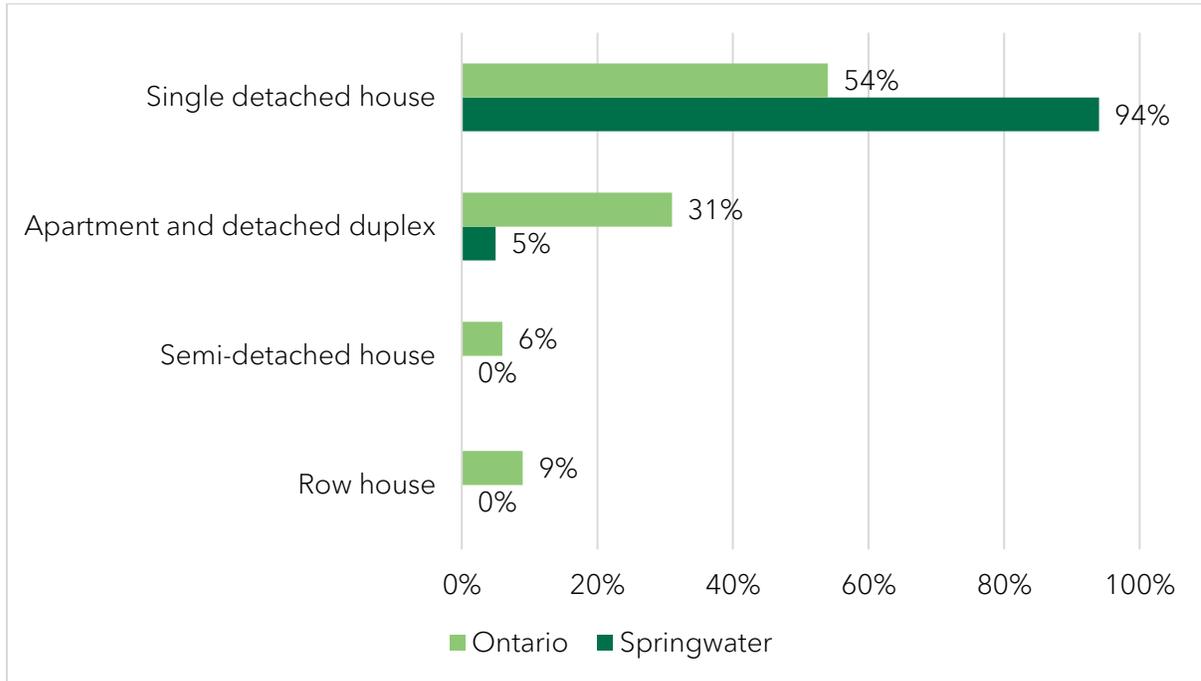
**Table 2: Households and Dwelling Attainability, 2022**

Housing Characteristics	Springwater	Ontario
Total Number of Households	7,926	5,745,955
Average value of dwelling (\$)	\$1,242,014	\$1,021,430
Median value of dwellings (\$)	\$1,163,065	\$860,457
Median monthly shelter costs for rented dwellings (\$)	\$1,095	\$1,108
Average monthly shelter costs for rented dwellings (\$)	\$1,287	\$1,220
% of households owned	90%	70%
% of households rented	10%	30%
Average number of persons in private households	2.9	2.57
Population spending 30% or more of household total income on shelter costs	18%	28%

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022



Figure 3: Occupied Dwellings by Structure Type, 2022



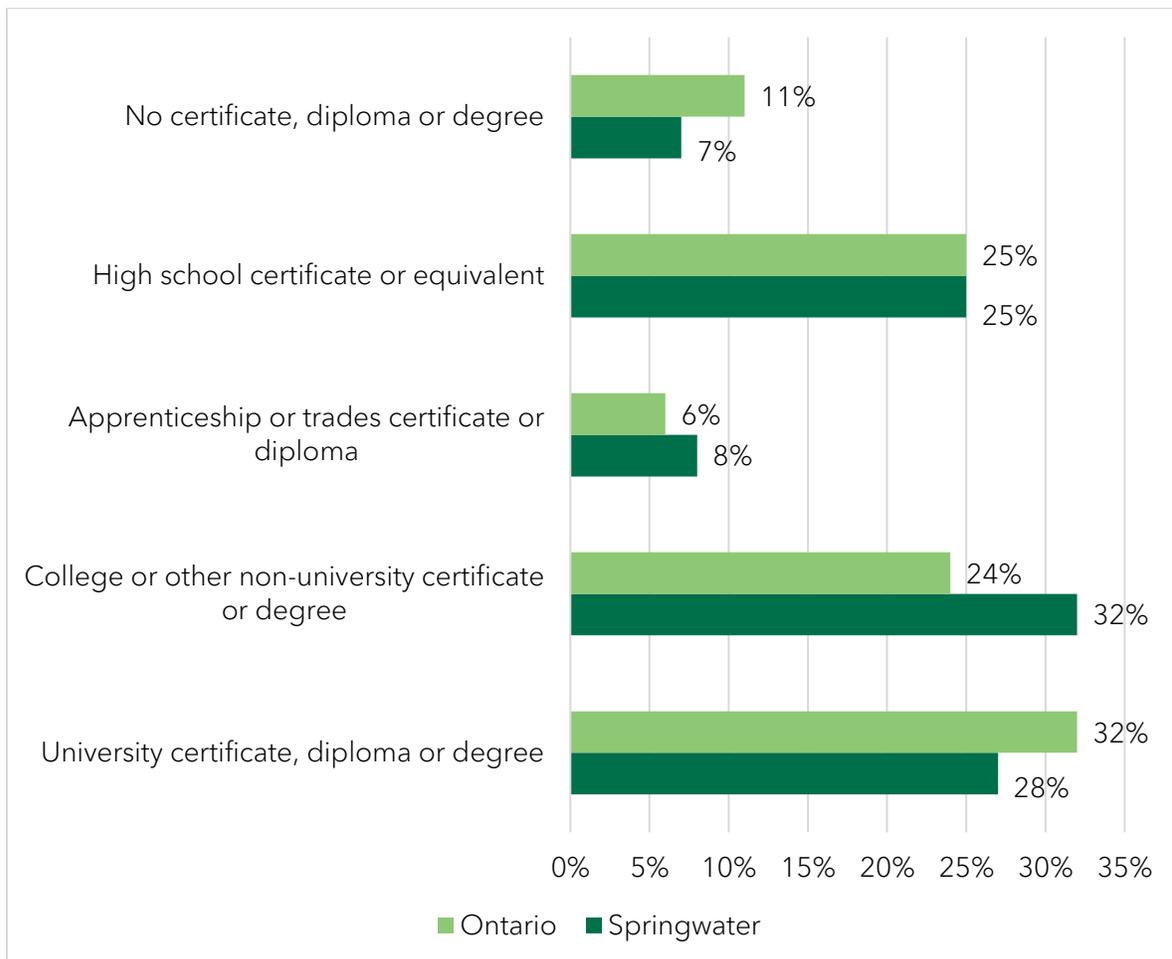
Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics. 2022



### 1.3. Education, Skills and Training

This subsection reviews the level of education and major fields of study for residents of Springwater and Ontario. Figures 4 and 5 outline the education levels obtained by Springwater residents ages 25-64, as compared to Ontario. Definitions may be found in the footnote.

**Figure 4: Educational Attainment Breakdown, Residents Ages 25 to 64, 2022<sup>34</sup>**



Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022

<sup>3</sup> 'High school diploma or equivalent' includes persons who have graduated from a secondary school or equivalent. It excludes persons with a post-secondary certificate diploma or degree.

'Post-secondary certificate diploma or degree' includes 'apprenticeship or trades certificates or diplomas' 'college CEGEP or other non-university certificates or diplomas' and university certificates diplomas and degrees.

'Apprenticeship or trades certificate or diploma' includes Registered Apprenticeship certificates

'University certificate diploma or degree includes the categories 'University certificate or diploma above bachelor level'

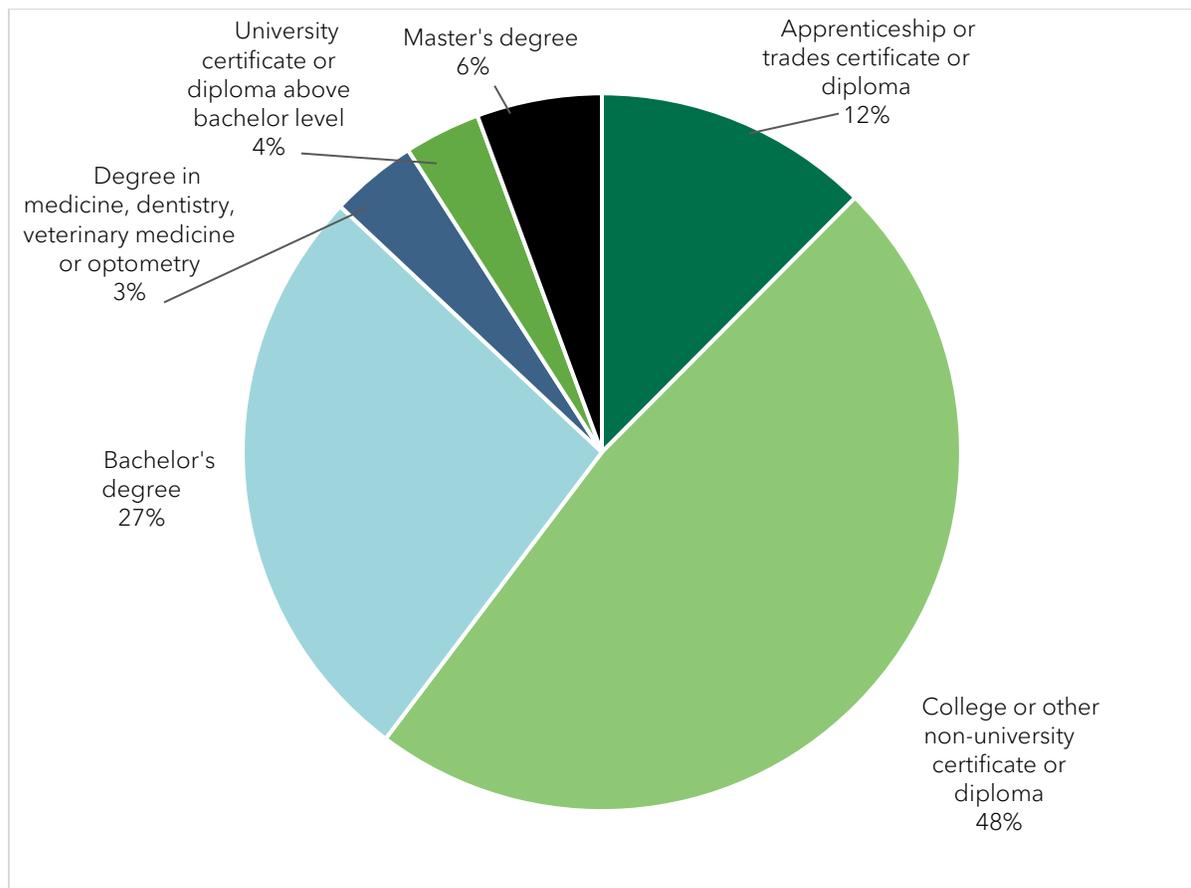
'Degree in medicine dentistry veterinary medicine or optometry' 'Master's degree' and 'Earned doctorate.'

<sup>4</sup> Please note, these data are different than the snapshot data presented in the initial infographic, as these reflect a different age cohort (25-64) compared to the infographic (all residents 15+)

Figure 5 illustrates the post-secondary educational attainment of Springwater residents ages 25 to 64, specifically for those with a post-secondary degree (i.e., these numbers are not comparable to Figure 4). Based on Figure 5, it can be concluded that:

- Of the 8,242 residents aged 25 to 64 with a post-secondary education, a college degree is **the most common type of education**; attained by 48% (3,837 residents) of the cohort.

**Figure 5: Percentage of Residents aged 25-64 with Post-Secondary Attainment, 2022**



Source: McSweeney & Associates from Manifold SuperDemographics 2022

Table 3 illustrates the major fields of study<sup>5</sup> for all residents 15 years and older, from most prominent to least. It is collected for the highest certificate, diploma or degree above the high school or secondary school level. The largest field of study in the

<sup>5</sup> 'Major Field of study' is defined by Classification of Instructional Programs (CIP) 2016 for the population aged 15 years and over in private households. Major field of study is not impacted by an individual's occupation. It is collected for the highest certificate, diploma or degree above the high school or secondary school level: [www.statcan.gc.ca/concepts/classification-eng.htm](http://www.statcan.gc.ca/concepts/classification-eng.htm).

population is 'Health professions and related programs'; and 'Business, management, marketing and related support'.

**Table 3: Post-Secondary Major Field of Study, Springwater, 2022<sup>6</sup>**

Classification of Instructional Programs (CIP)	Total	Female	Male
<b>Total population, 15 years and over</b>	<b>19,199</b>	<b>9,547</b>	<b>9,652</b>
No postsecondary	8,089	3,873	4,217
Health professions and related programs	1,702	1,344	358
Business, management, marketing and related support services	1,699	1,099	600
Education	857	599	258
Construction trades	578	10	568
Mechanic and repair technologies/technicians	578	7	571
Engineering technologies and engineering-related fields	499	32	466
Social sciences	491	280	212
Security and protective services	449	96	353
Visual and performing arts	399	276	123
Parks, recreation, leisure and fitness studies	296	135	161
Precision production	285	5	280
Agriculture, agriculture operations and related sciences	257	93	164
Engineering	256	36	220
Legal professions and studies	256	248	8
Personal and culinary services	242	180	62
Computer and information sciences and support services	211	61	150
Family and consumer sciences/human sciences	203	184	19
Transportation and materials moving	187	21	166

<sup>6</sup> Field of study is collected for an individual's highest education level, regardless of their field of employment.

Psychology	182	162	20
Biological and physical sciences	163	58	105
Natural resources and conservation	161	48	113
Biological and biomedical sciences	156	91	64
History	130	88	42
English language and literature/letters	127	97	30
Public administration and social service professions	124	110	14
Liberal arts and sciences, general studies and humanities	106	70	36
Dental, medical and veterinary residency programs	98	47	51
Architecture and related services	74	21	52
Communication, journalism and related programs	69	25	44
Communications technologies/technicians and support services	63	38	24
Physical sciences	35	10	25
Mathematics and statistics	25	14	11
Science technologies/technicians	24	5	19
Theology and religious vocations	23	12	11
French language and literature/letters	23	21	1
Aboriginal and foreign languages, literatures and linguistics	21	20	1
Philosophy and religious studies	20	4	16
Library science	16	14	2

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022.

## 2. THE PEOPLE THAT LIVE AND WORK IN SPRINGWATER

### 2.1. Key Indicators

Springwater has a labour force of 13,900 individuals. Springwater has a slightly lower unemployment rate alongside stronger employment and participation rates relative to Ontario.



Males in Springwater have higher participation and employment rates than females while seeing substantially lower unemployment rates (7.9% compared to 9.2%). This data may indicate an opportunity to grow the labour force by increasing participation and job search success among females.

Table 4: Key Labour Force Statistics by Gender, Springwater, 2022

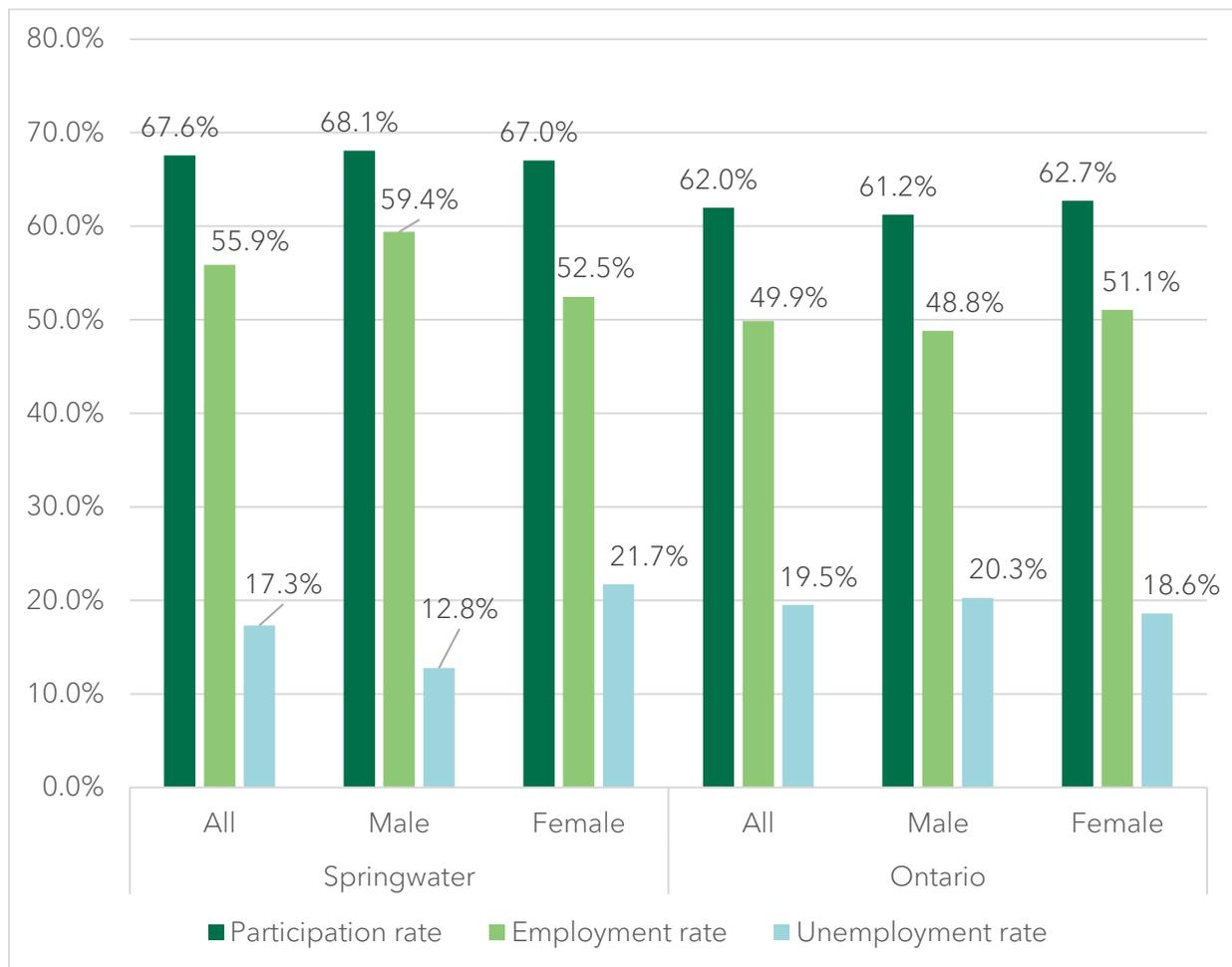
Labour Force Activity	Springwater			Ontario		
	Total	Male	Female	Total	Male	Female
Total population 15 years and over	19,199	9,652	9,547	12,701,375	6,183,030	6,518,345
In the labour force	13,900	7,424	6,476	8,275,729	4,284,717	3,991,011
Employed	12,722	6,841	5,881	7,521,911	3,912,075	3,609,836
Unemployed	1,178	583	595	753,818	372,643	381,175
Not in the labour force	5,298	2,228	3,070	4,425,647	1,898,313	2,527,334
Participation rate %	72.4	76.9	67.8	65.2	69.3	61.2
Employment rate %	66.3	70.9	61.6	59.2	63.3	55.4
Unemployment rate %	8.5	7.9	9.2	9.1	8.7	9.6

Source: McSweeney & Associates from Manifold Data Mining Inc. SuperDemographics 2022

Springwater has higher participation and employment rates compared to Ontario.

Key labour force indicators can be further broken down by age and sex and used to highlight underemployed/underutilized labour groups. Springwater has a slightly lower youth unemployment rate (17.3%) compared to the provincial rate (19.5%). This figure differs significantly between male and female youth, however. Males in Springwater have an unemployment rate 7.5% lower than Ontario (12.8% locally, 20.3% at a provincial level), whereas females have a higher unemployment rate (21.7% compared to 18.6% across Ontario) locally.

**Figure 6: Labour Force Statistics by Gender, Population 15 to 24, 2022**



Source: Manifold SuperDemographics 2022

Table 5 (following page) illustrates that youth (ages 15 to 24) in Springwater are actively engaged in the labour force (more than the same age group in Ontario) but significantly underemployed relative to those 25 and older. Further outreach to youth, represents an opportunity to support economic growth and may enhance youth labour force involvement. Connecting local youth to meaningful work experiences (i.e.,

internships, co-ops, volunteer, etc.), can create opportunities to grow the skills supply of young people in Springwater.

The following table illustrates labour force characteristics for youth and mature adults (25 and older) in Springwater, benchmarked against Ontario data.

**Table 5: Labour Force Characteristics by Age and Sex, 2022**

	Population 15 to 24 years old:					
	Springwater			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	67.6	68.1	67.0	62.0	61.2	62.7
Employment rate (%)	55.9	59.4	52.5	49.9	48.8	51.1
Unemployment rate (%)	17.3	12.8	21.7	19.5	20.3	18.6
	Population 25 years and over:					
	Springwater			Ontario		
	Total	Male	Female	Total	Male	Female
Participation rate (%)	73.3	78.7	68.0	65.7	70.8	61.0
Employment rate (%)	68.3	73.3	63.3	60.9	66.0	56.1
Unemployment rate (%)	6.9	6.9	6.9	7.4	6.8	8.0

Source: Manifold SuperDemographics, 2022



## 2.2. Labour Supply in Springwater

Persons in the labour force can be classified using the National Occupational Classification (NOCs) codes; a four-tiered hierarchical arrangement of occupational groups with successive levels of disaggregation. It contains broad occupational categories (1-digit), major (2-digit code), minor (3-digit code) and unit groups (4-digit code).

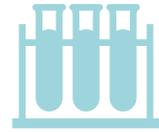
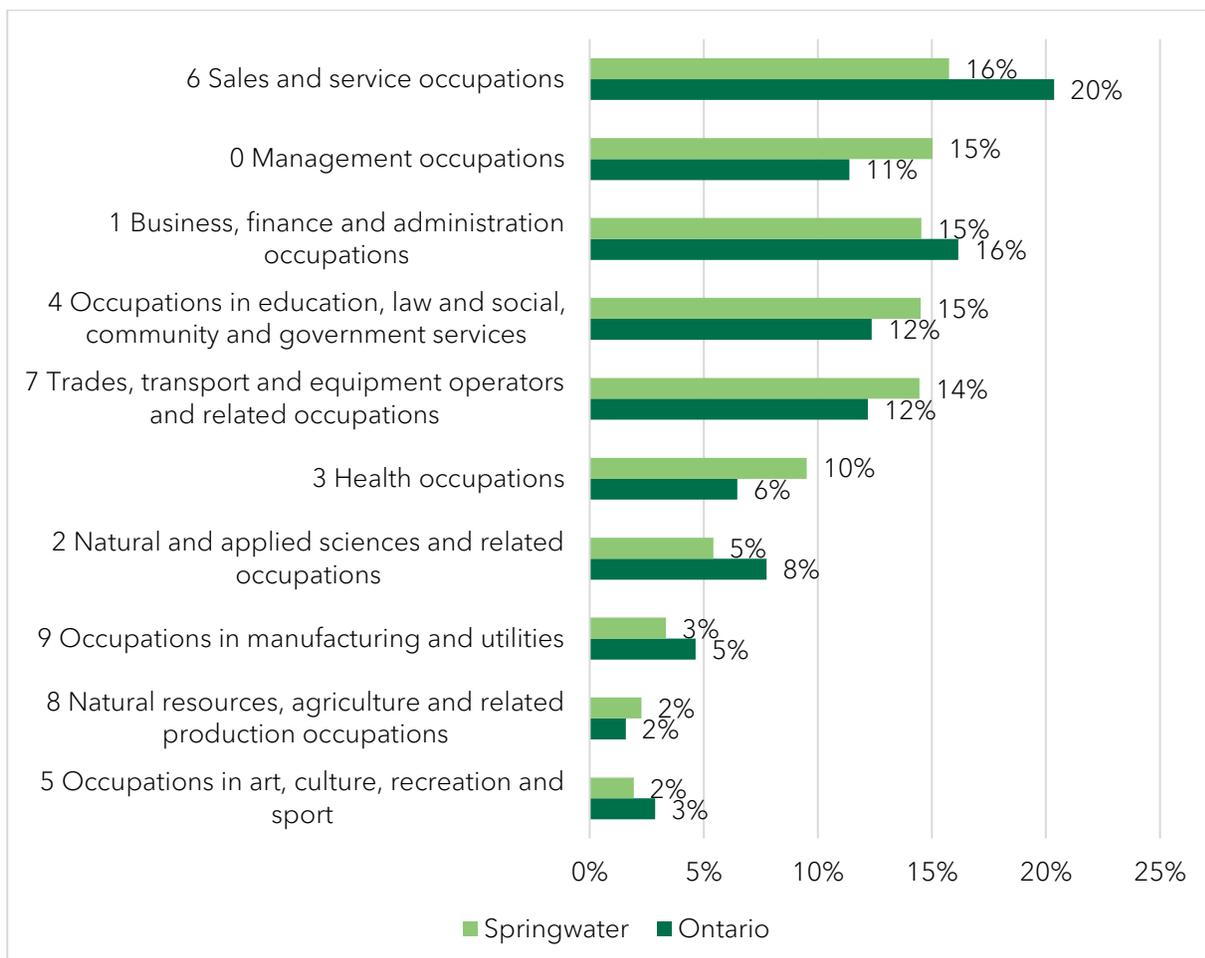


Figure 7 shows that Springwater residents most commonly work in:

- Sales and service occupations
- Management occupations
- Business, finance and administration occupations
- Occupations in education, law and social, community and government services

**Figure 7: Resident Labour Force by Occupation, 1-digit NOCs, 2022**



Source: Manifold SuperDemographics 2022

The number of part-time and full-time workers also helps identify potential labour force engagement and supply. In Springwater, 54.2% of employed individuals typically worked full-time while 45.8% worked part-time. This is higher than the rest of Ontario where 52.5% of individuals typically worked full-time and 47.5% worked part-time.

**Table 6: Percentage of Employed Individuals by Full-Time or Part-Time Status, 2022**

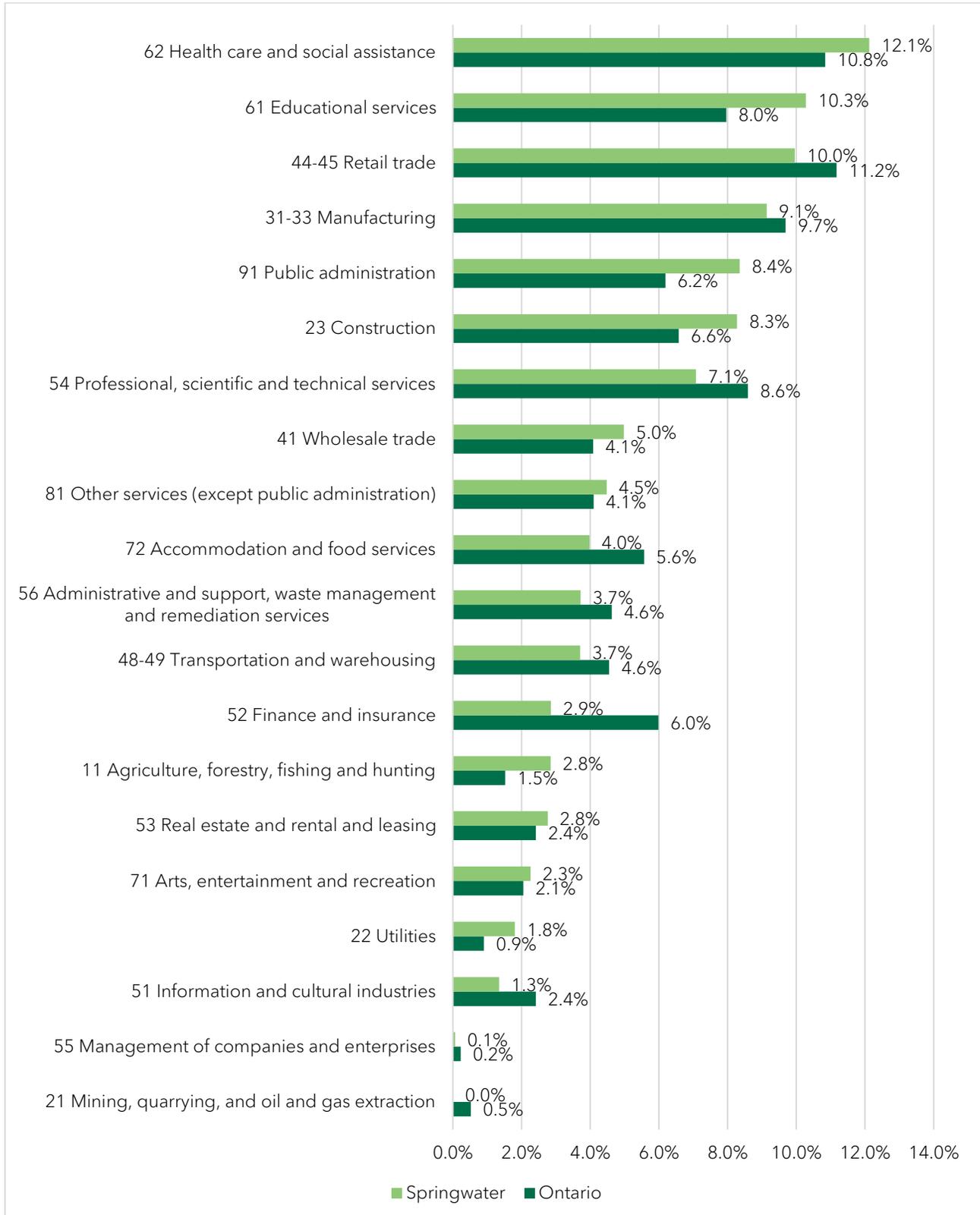
Status	Springwater	Springwater %	Ontario %
Full-Time	7,672	54.2%	52.5%
Part-Time	6,473	45.8%	47.5%

Source: Manifold SuperDemographics 2022

The following figure illustrates the supply of labour that Springwater residents provide for specific sectors. Springwater has larger labour concentrations relative to Ontario most notably in *health care and social assistance, educational services, public administration, and construction*. Concentrations are explored in-depth in Section 3.4.



Figure 8: Labour Force by Industry, 2022



Source: Manifold SuperDemographics 2022

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### 2.3. Labour Market Gaps/Surpluses

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Please note, EMSI Analyst data is reflective of those who work in Springwater, regardless of where they live. Any remaining Manifold or Statistics Canada data is still reflective of only those living in Springwater.

Labour market gaps/surpluses are a measure of how well local labour supply meets local demand. Total occupational demand is difficult to map, as businesses change and alter demand based on a variety of factors (i.e., season, economic/financial outlook, technology, etc.). Total number of jobs is used as a proxy for occupational demand. Similarly, labour supply for an occupation can be difficult to calculate since skills are adaptable and could supply several occupations. Here, the resident labour force that has worked in an occupation (it is their current position or the position of the longest duration in the past year), is used as a proxy for local occupational supply.

The labour market gap/surplus is defined as the difference between the number of jobs (i.e., demand by occupation) in Springwater and the number of workers living in Springwater that worked/work in that occupation (i.e., local supply). There are more workers than jobs in Springwater, making the area a net exporter of labour. **In Springwater, there are 13,898 residents working and 6,815 available jobs; as such, there is a net deficit of approximately 7,083 jobs.**

An occupation where the number of jobs in the local economy is less than the number of workers is considered to have a labour surplus. In Springwater, two sectors have labour surpluses of over 1,700 individuals (see Table 7 on the following page):

- Occupations in education, law and social, community and government services (1,793 more residents working in the sector, compared to the number of jobs)
- Trades, transport and equipment operators and related occupations (1,749)

In Springwater, **the following occupations have labour market gaps** - where there are more jobs than workers available in the local economy:

- Occupations in art, culture, recreation and sport (1,201 fewer workers compared to jobs in the sector)
- Unclassified occupations (536)<sup>7</sup>

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<sup>7</sup> Unclassified occupations capture any positions within businesses that did not report a specific NAICS code. Often this can reflect newer businesses (i.e., they do not have an established NAICS code yet) or a newer industry (i.e., there is no established NAICS code for the sector yet)

These are an approximation since local demand could be higher than total jobs (i.e., positions may be unfilled), and supply may be higher if we account for transferable skills and persons who could potentially fill other occupations. Nevertheless, the results in the table below indicate the direction and magnitude of local labour imbalances.

**Table 7: Labour Market Gaps/Surpluses by Occupation, 1-digit NOCs, 2022**

Occupation Group (1-digit NOCs code)	Springwater Residents Working in Occupation	Jobs in Springwater	Gap (-)/ Surplus (+)
0 Management occupations	2,088	862	1,226
1 Business, finance and administration occupations	2,020	389	1,631
2 Natural and applied sciences and related occupations	753	263	490
3 Health occupations	1,323	1,100	223
4 Occupations in education, law and social, community and government services	2,016	223	1,793
5 Occupations in art, culture, recreation and sport	268	1,469	-1,201
6 Sales and service occupations	2,189	991	1,198
7 Trades, transport and equipment operators and related occupations	2,009	260	1,749
8 Natural resources, agriculture and related production occupations	316	179	137
9 Occupations in manufacturing and utilities	465	92	373
N/A or Unclassified	451	987	-536
<b>Total Labour Force 15 years and older</b>	<b>13,898</b>	<b>6,815</b>	<b>7,083</b>

Source: EMSI Analyst 2022.1. and Manifold SuperDemographics 2022

The same type of analysis can be done for labour supply and demand for local industries. The industries with the largest labour surpluses (Table 8) are:

- Health care and social assistance (1,184 additional workers than positions)
- Manufacturing (1,018)
- Retail trade (649)

These are industries that could be further attracted into the local economy, as they can be well supported by the local workforce. Conversely, where the Township has the

largest labour gaps/shortages (i.e., health care and social assistance) it could present a challenge in terms of developing these industries further, as Springwater will be competing with surrounding economic areas to attract this labour.

The below table presents job data by broad sector for readability's sake. For a presentation of job count by more refined, specific industries, see Appendix A.

**Table 8: Labour Market Surplus by Sector, 2022**

Sectors	Springwater Residents Working in industry	Jobs in Springwater	Gaps (-)/ Surpluses (+)
11 Agriculture, forestry, fishing and hunting	383	356	27
21 Mining, quarrying, and oil and gas extraction** <sup>8</sup>	0	0	0
22 Utilities	243	51	192
23 Construction	1,113	767	346
31-33 Manufacturing	1,229	211	1,018
41 Wholesale trade	670	553	117
44-45 Retail trade	1,339	690	649
48-49 Transportation and warehousing	498	135	363
51 Information and cultural industries	181	103	78
52 Finance and insurance	384	191	193
53 Real estate and rental and leasing	371	138	233
54 Professional, scientific and technical services	952	408	544
55 Management of companies and enterprises	9	5	4

<sup>8</sup> Though this data suggests the mining sector does not play a role in Springwater's economy, through discussions with local officials it became clear that there are approximately 24 active gravel pits within the Township. It is possible that the lack of employees and jobs denoted in the table above is a symptom of those pits being classified as other industries (i.e., manufacturing or farming), that those jobs are, due to a peculiarity with the data, assigned to "unclassified", or that there is an unknown issue. To avoid confusion throughout the rest of the document we have refrained from manually adjusting the data in this table but are aware that positions exist within the mining and quarrying sector that are unfortunately not reflected here.

56 Administrative and support, waste management and remediation services	500	309	191
61 Educational services	1,382	764	618
62 Health care and social assistance	1,630	446	1,184
71 Arts, entertainment and recreation	304	183	121
72 Accommodation and food services	535	388	147
81 Other services (except public administration)	602	269	333
91 Public administration	1,123	754	369
N/A or unclassified	451	92	359
<b>Total Labour Force 15 years and older</b>	<b>13,899</b>	<b>6,815</b>	<b>7,084</b>

Source: EMSI Analyst 2022.1. and Manifold SuperDemographics 2022

## 2.4. Workforce Commuting Flow

This subsection aims to identify the most probable labour force recruitment area for Springwater using commuting patterns for persons that work in the two communities. Please note that this data uses 2016 Census data (as that is the most recent data available). As the data is from a different source and uses information from 2016, the figures below are not directly comparable to those elsewhere in the document. Tables 9 and 10 show commuting flows for persons reporting a “usual place of work” in the Springwater area, and reveal the following trends regarding labour force commuting:

- The top three areas that Springwater supplies labour to are: Barrie, Toronto, and New Tecumseth.
- Springwater exports approximately 85% of its resident labour force (see Table 9 on the following page).
- Top recruitment areas for Springwater are Barrie and Oro-Medonte.
- Springwater imports 71% of its total workforce with a usual place of work (see Table 10 on page 36).

Table 9: Top Places to Work for Springwater Residents, 2016<sup>9</sup>

Place of Work	Total	Male	Female
Barrie, CY	3,775	1,590	2,190
Springwater, TP	1,200	595	610
Toronto, C	385	275	110
New Tecumseth, T	265	215	50
Oro-Medonte, TP	260	155	105
Midland, T	225	50	175
Innisfil, T	215	140	75
Orillia, CY	215	115	100
Essa, TP	180	115	60
Wasaga Beach, T	140	35	100
Newmarket, T	125	65	55
Mississauga, CY	125	90	40
Vaughan, CY	110	100	10
Penetanguishene, T	95	60	45
Severn, TP	70	35	35
Collingwood, T	65	25	40
Clearview, TP	45	25	20
Aurora, T	45	15	25
Bradford West Gwillimbury, T	40	25	15
Richmond Hill, T	40	20	15
Tiny, TP	35	30	10
Mnjikaning First Nation 32, IRI	30	15	15
Tay, TP	25	10	20
Brampton, CY	25	25	0
Hamilton, C	25	20	0
Adjala-Tosorontio, TP	20	10	0
<b>Total residents with a usual place of work</b>	<b>7,780</b>	<b>3,855</b>	<b>3,920</b>
<b># of residents working outside of Springwater</b>	<b>6,580</b>	<b>3,260</b>	<b>3,310</b>
<b>% of residents working outside of Springwater</b>	<b>85%</b>	<b>85%</b>	<b>84%</b>

Source: Statistics Canada, Commuting Flows Tables 2016.

<sup>9</sup> For an explanation of the acronyms used after the municipality, see <https://www150.statcan.gc.ca/n1/pub/92-151-g/2011001/tech-eng.htm>

Table 10: Top Labour Recruitment Areas for Springwater, 2016

Place of Residence	Total	Male	Female
Barrie, CY	1,490	595	905
Springwater, TP	1,200	595	610
Oro-Medonte, TP	235	110	130
Tiny, TP	170	95	75
Wasaga Beach, T	150	65	85
Innisfil, T	145	45	100
Essa, TP	140	55	85
Tay, TP	100	70	30
Severn, TP	90	60	30
Midland, T	80	40	40
Clearview, TP	75	25	45
New Tecumseth, T	60	25	40
Orillia, CY	55	35	25
Collingwood, T	50	15	30
Penetanguishene, T	40	30	10
Newmarket, T	30	10	25
Bradford West Gwillimbury, T	25	15	10
Ramara, TP	25	15	15
Toronto, C	20	10	15
<b>Individuals With a Place of Work in Springwater</b>	<b>4,180</b>	<b>1,910</b>	<b>2,305</b>
# of people working inside Springwater who live outside of Springwater	2,980	1,315	1,695
% of people working inside Springwater who live outside of Springwater	71%	69%	74%

Source: Statistics Canada, Commuting Flows Tables 2016

### The Labour Recruiting Area

A distinct area has been identified as the most likely labour recruitment area for the Springwater economy. The labour recruitment area encompasses those municipalities **which supply more than 3% of their total labour supply for Springwater businesses.** Thus, the following municipalities - including Springwater - are considered to house the most probable workforce available to support businesses and investment attraction:

Table 11: Labour Recruitment Areas by Percent of Labour Force Supplied, Springwater, 2016

Most probable recruitment area:	Total Labour Supplied to Springwater	% of Labour Supplied
Springwater, TP	1,200	28.71%
Tiny, TP	170	23.45%
Tay, TP	100	13.42%
Oro-Medonte, TP	235	6.94%
Wasaga Beach, T	150	5.66%
Severn, TP	90	3.56%

Source: Statistics Canada, Commuting Flows Tables 2016, calculations done by McSweeney and Associates

## 2.5. Labour Recruiting Area: Simcoe County - Emerging and in-Demand Occupations

This subsection outlines trends about the occupations employed within Springwater's labour recruiting area, regardless of where workers live. The objective is to understand which occupations are concentrated, growing, and emerging, and could possibly be leveraged to drive economic growth in the Township. **For the purposes of this report, the entirety of Simcoe County will be used as a labour recruiting area.**

Examining occupation by location will help discern whether there is a concentration of talent/skills and that, in turn, will help identify the industries that are potentially likely to flourish as a result of those skills being available. The occupations are analyzed at the four-digit National Occupation Classification<sup>10</sup>; the most disaggregated level. The following tables and charts illustrate the following:

- Occupations with a large number of jobs in 2021
- Occupations with a large percentage of job growth between 2016-2021
- Occupations with a large projected job growth between 2021-2028

<sup>10</sup> National Occupation Classification: <https://www.canada.ca/en/immigration-refugees-citizenship/services/immigrate-canada/express-entry/eligibility/find-national-occupation-code.html>

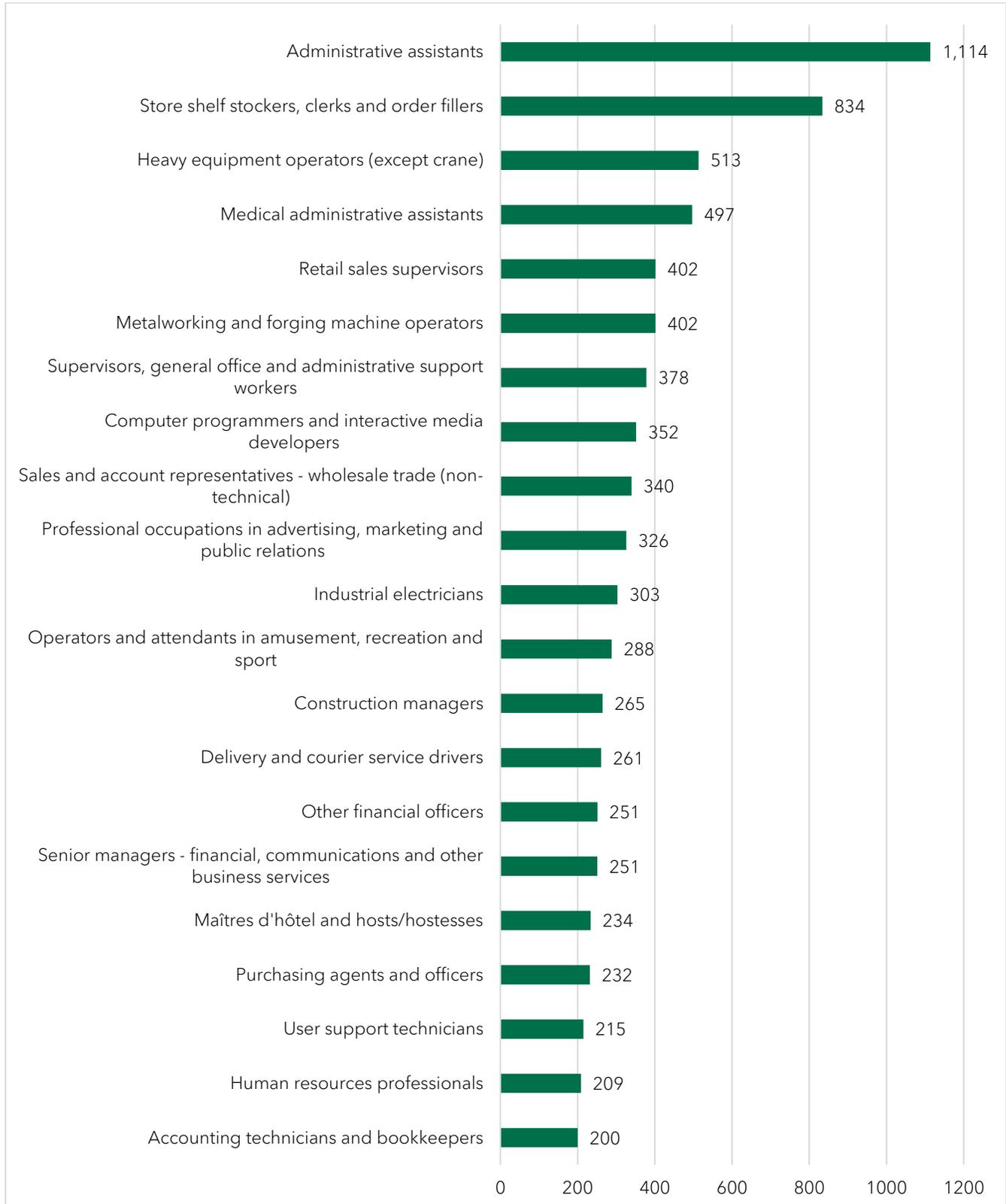
Table 12: Occupations with Highest Level of Employment in the Labour Recruitment Area (Simcoe County)

Description	2016 Jobs	2021 Jobs	2016-2021 Change	2016-2021 % Change	2021 Median Wages
Retail salespersons	6,975	7,023	49	1%	\$31,913
Food counter attendants, kitchen helpers and related support occupations	6,079	5,436	-644	-11%	\$29,471
Cashiers	4,387	3,677	-709	-16%	\$29,284
Registered nurses and registered psychiatric nurses	3,611	3,562	-49	-1%	\$82,975
Elementary school and kindergarten teachers	2,883	3,014	132	5%	\$89,722
Store shelf stockers, clerks and order fillers	2,146	2,980	834	39%	\$29,632
Retail sales supervisors	2,571	2,973	402	16%	\$43,293
Nurse aides, orderlies and patient service associates	3,135	2,876	-259	-8%	\$44,722
Sales and account representatives - wholesale trade (non-technical)	2,399	2,739	340	14%	\$58,671
Secondary and elementary school teachers and educational counsellors	2,388	2,231	-157	-7%	\$92,693
Transport truck drivers	2,325	2,157	-168	-7%	\$50,721
Administrative officers	2,395	2,035	-360	-15%	\$49,840
Cooks	2,183	1,991	-192	-9%	\$30,349
Janitors, caretakers and building superintendents	2,102	1,882	-220	-10%	\$42,606
General office support workers	2,846	1,862	-984	-35%	\$45,859
Material handlers	1,788	1,852	64	4%	\$40,867
Light duty cleaners	1,952	1,833	-119	-6%	\$35,926
Retail and wholesale trade managers	2,299	1,820	-479	-21%	\$79,818
Other customer and information services representatives	2,590	1,797	-793	-31%	\$36,831
Receptionists	1,902	1,795	-107	-6%	\$37,180

Source: EMSI Analyst 2022.1. Note that negative numbers are in red text.

Figure 9 illustrates occupations that added the largest total number of jobs to the economy of the labour recruitment area between 2016 and 2021.

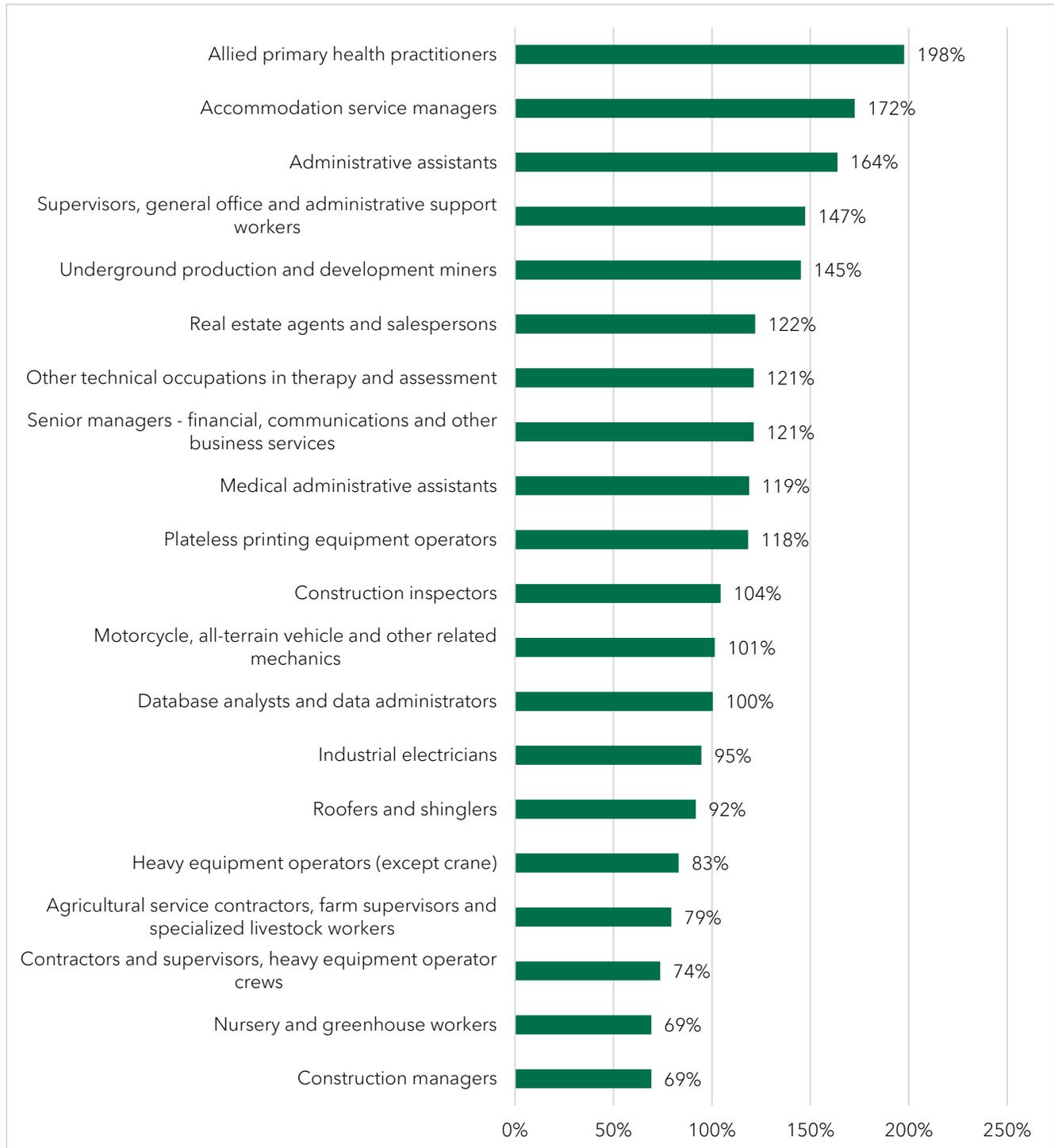
Figure 9: Largest Absolute Job Growth in Simcoe County, 2016-2021



Source: EMSI Analyst 2022.1

Figure 10 illustrates occupations that had the most intense growth in jobs, and also had a relevant impact on the economy as they added a minimum of 60 jobs to the labour recruitment area.

**Figure 10: Largest (%) Growth Occupations in Simcoe County, 2016-2021**



Source: EMSI Analyst 2022.1

Location Quotient is used to measure the relative concentration of an occupation; that is, it compares the percentage of jobs per occupation in the labour shed, relative to the total percentage of jobs in the same occupation in Ontario and Canada. A location quotient above 2 means the labour recruiting area employs twice as many jobs in that occupation than is typical in the province or nation. Such a high concentration shows that there is some momentum in growing or attracting these jobs unique to the region.

Table 13 illustrates occupations that are most heavily concentrated in the labour recruitment area, relative to Ontario and the rest of Canada—using location quotient. Occupations are considered concentrated if they have a location quotient above 1.25.

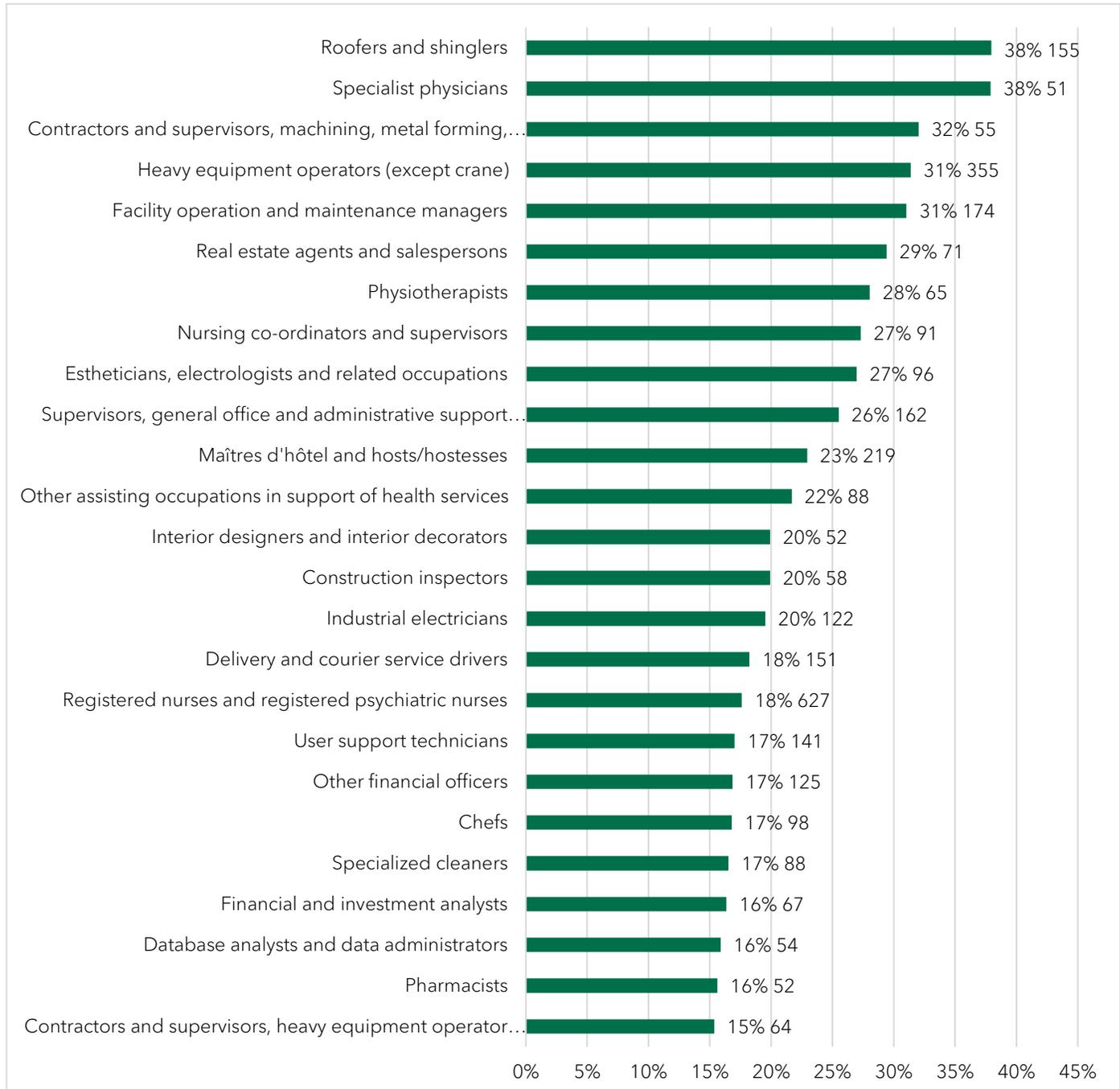
**Table 13: Concentrated Occupations in Simcoe County, 2021**

Occupation	2021 Jobs in the local labour recruiting area	Location Quotient
<b>Relative to Ontario</b>		
Supervisors, motor vehicle assembling	1,042	5.15
Casino occupations	273	3.87
Glaziers	123	3.08
Accommodation, travel, tourism and related services supervisors	329	3.01
Probation and parole officers and related occupations	137	2.96
Motor vehicle assemblers, inspectors and testers	1,593	2.85
Aircraft mechanics and aircraft inspectors	269	2.63
Motorcycle, all-terrain vehicle and other related mechanics	142	2.60
Court officers and justices of the peace	131	2.56
Hotel front desk clerks	394	2.54
<b>Relative to Canada</b>		
Supervisors, motor vehicle assembling	1,042	9.16
Motor vehicle assemblers, inspectors and testers	1,593	5.51
Metalworking and forging machine operators	1,387	3.78
Commissioned officers of the Canadian Armed Forces	19	3.13
Other metal products machine operators	970	3.06
Pest controllers and fumigators	151	3.01
Allied primary health practitioners	288	2.83
Casino occupations	273	2.75
Glass forming and finishing machine operators and glass cutters	95	2.65
Roofers and shinglers	534	2.24

Source: EMSI Analyst 2022.1

Lastly, we investigate emerging occupations by looking at which occupations have strong projected percentage growth over the next five years in the defined labour recruitment area. Figure 11 presents the occupations projected to add at least 5 jobs to the local labour recruitment area and have the highest projected percentage growth from 2021 to 2028.

**Figure 11: Large Projected Job Growth in Simcoe County, 2021-2028**



Source: EMSI Analyst 2022.1

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## 2.6. Key Occupations for Labour-Based Investment Attraction in Simcoe County

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Some key occupations stand out in the labour recruitment area, as they are growing, projected to grow and/or are concentrated. The following list represents occupations that have performed well in the labour recruitment area analysis and represent a strong possibility for labour-based investment attraction. Occupations related to publicly funded industries and retail-related occupations are not considered here.

The following are **key existing occupations**: they are large (300+ jobs), growing (by at least 30% of total jobs), concentrated (with a provincial LQ greater than 1.5), and pay well (2021 median wage of \$50,000 or higher):

- Heavy equipment operators (except crane)
- Purchasing agents and officers
- Supervisors, general office and administrative support workers
- Industrial electricians
- Facility operation and maintenance managers
- Electrical and electronics engineering technologists and technicians
- Roofers and shinglers

The following are **key emerging occupations**; those that are not yet concentrated (LQ less than 1.25) and had the largest percentage growth over the past 5 years (over 50% of total jobs), while at the same time being well-paying occupations wages (2021 median wage of \$50,000 or higher):

- Underground production and development miners
- Other financial officers
- Database analysts and data administrators
- Senior managers - financial, communications and other business services
- Heating, refrigeration and air conditioning mechanics
- Software engineers and designers
- Construction managers
- Administrative assistants

The above occupations form a group of what will be referred to as “key occupations”, which are widely employed and/or increasingly in demand within the County. They represent the best opportunity in terms of attracting industry to Springwater based on labour market patterns. In what follows, the industries that most commonly hire these key occupations are revealed using inverse staffing patterns.

From the list of industries identified to most commonly hire the “key occupations” in the region, the following are poised to have the fastest growth (10% or above) in Ontario over the next 5 years:

- Software engineers and designers
- Database analysts and data administrators
- Supervisors, general office and administrative support workers
- Heating, refrigeration and air conditioning mechanics
- Heavy equipment operators (except crane)
- Other financial officers
- Roofers and shinglers

Table 14 shows which industries in Ontario most commonly employ (by largest number of jobs) all of the identified “fastest growth” occupations.

**Table 14: Key Staffing Patterns, 2021-2026, Ontario**

Industry	Key Occupations Group Jobs in Industry (2021)	Key Occupations Group Jobs in Industry (2026)	% Change (2021-2026)	% of Total Jobs in Industry (2021)
Computer systems design and related services	22,826	25,758	13%	11.84%
Other financial investment activities	22,828	23,333	2%	38.20%
Depository credit intermediation	20,469	22,685	11%	13.47%
Building equipment contractors	14,651	15,895	8%	10.29%
Securities and commodity contracts intermediation and brokerage	7,158	7,977	11%	26.91%
Activities related to credit intermediation	6,789	7,414	9%	32.03%
Other specialty trade contractors	6,697	6,864	3%	16.71%
Other federal services (9112-9119)	5,566	6,038	8%	3.48%

Software publishers	4,446	5,499	24%	14.73%
Local, municipal and regional public administration	5,092	5,044	-1%	2.84%
Agencies, brokerages and other insurance related activities	4,093	4,609	13%	7.93%
Computer and communications equipment and supplies merchant wholesalers	3,885	4,292	10%	10.55%
Data processing, hosting, and related services	3,108	3,736	20%	18.95%
Management, scientific and technical consulting services	2,900	3,033	5%	3.70%
Highway, street and bridge construction	2,800	2,940	5%	16.69%
Scientific research and development services	2,538	2,748	8%	9.70%
Provincial and territorial public administration	2,645	2,715	3%	3.26%
Non-depository credit intermediation	2,239	2,464	10%	11.72%
Foundation, structure, and building exterior contractors	2,381	2,463	3%	3.79%
Architectural, engineering and related services	2,111	2,438	16%	2.31%
Employment services	2,175	2,307	6%	2.03%
Universities	2,010	2,282	14%	1.59%
Management of companies and enterprises	1,813	2,218	22%	3.97%

Source: EMSI Analyst 2022.1

### 3. DEEP DIVE INTO SPRINGWATER'S ECONOMY

The list of industries in Table 14 (previous page) is an indication of industries that could be successful to Springwater given the labour force supply or could be further developed alongside supporting industries.



This section investigates the local economy pertinent for Springwater; that is, the jobs and businesses that drive the local economy. As such, **the central focus of this section will be Springwater, benchmarked by Ontario.**

This section reports industry statistics related to exports, employment, and business growth for the local economy with the aim of uncovering key industries that either exist or are emerging in the region today.

The “North American Industry Classification System” (NAICS) of classifying industries is used for this report. The largest groupings or aggregations of industries categories are called sectors, which are broken down into sub-sectors, which are then further broken down into Industries. An example of this breakdown follows:



### 3.1. Employment Profile

The primary employment sectors in Springwater are construction, educational services, and public administration. Between 2011 and 2021, the local economy grew by **662 jobs (11%) to a total of 6,815 jobs (see Table 15 below)**. Percentage job growth in Springwater was higher than in the province, where job totals increased by only 3% between 2011-2021. Table 15 indicates the percentage of job growth, by sector, for each of these economies. Note that negative numbers are indicated by red text.

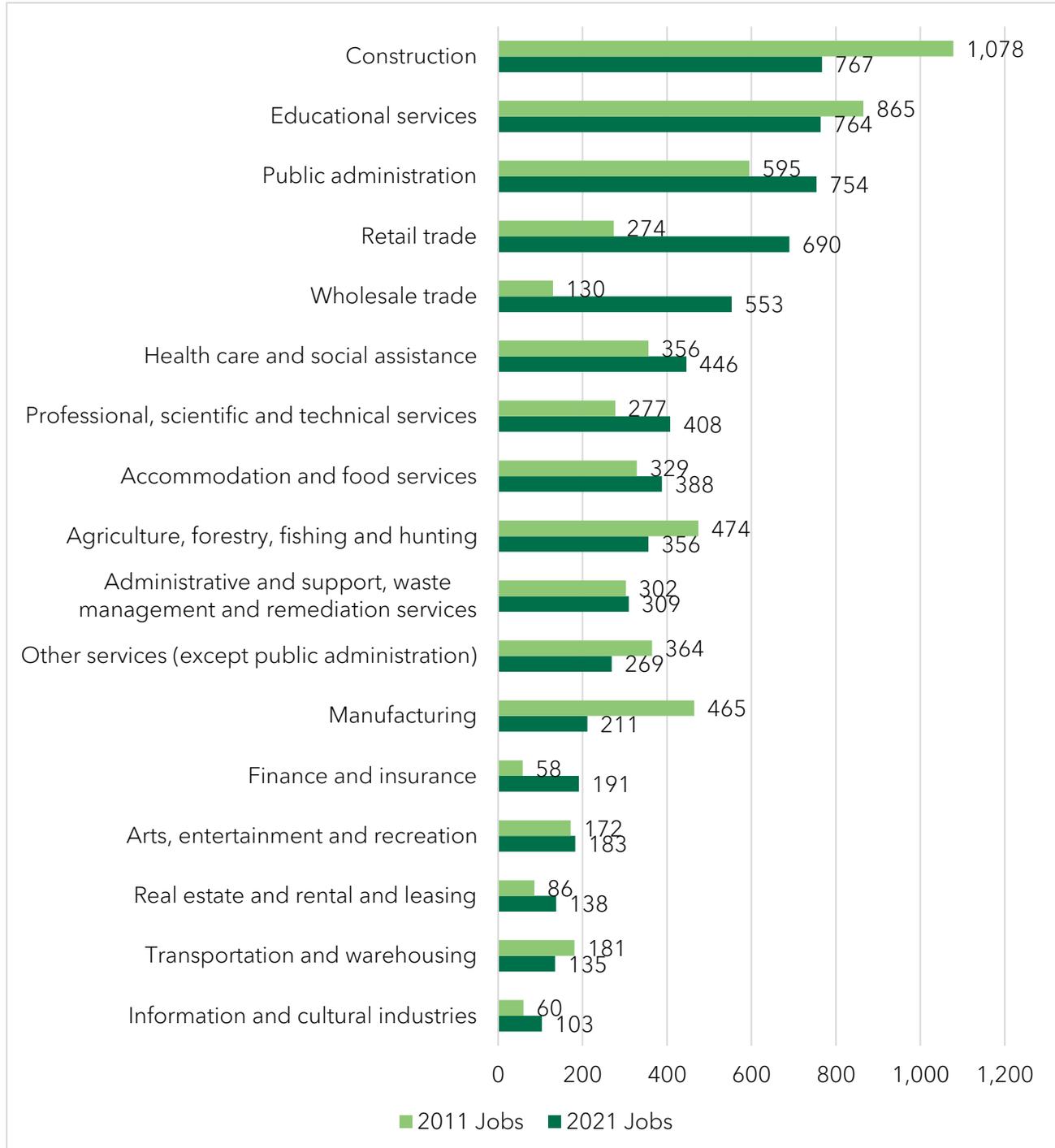
**Table 15: Employment Growth by Sector, Springwater vs Ontario, 2011-2021**

NAICS	Description	Change in Jobs	Springwater % Change	Ontario % Change
11	Agriculture, forestry, fishing and hunting	-118	-25%	-10%
21	Mining, quarrying, and oil and gas extraction	N/A	N/A	7%
22	Utilities	51	N/A	6%
23	Construction	-311	-29%	8%
31-33	Manufacturing	-253	-55%	0%
41	Wholesale trade	423	325%	-1%
44-45	Retail trade	416	152%	-1%
48-49	Transportation and warehousing	-46	-26%	14%
51	Information and cultural industries	43	72%	-2%
52	Finance and insurance	133	228%	8%
53	Real estate and rental and leasing	52	60%	-4%
54	Professional, scientific and technical services	130	47%	15%
55	Management of companies and enterprises	N/A	N/A	27%
56	Administrative and support, waste management and remediation services	7	2%	3%
61	Educational services	-101	-12%	6%
62	Health care and social assistance	90	25%	10%
71	Arts, entertainment and recreation	11	6%	-22%
72	Accommodation and food services	59	18%	-20%
81	Other services (except public administration)	-95	-26%	-5%
91	Public administration	160	27%	8%
X0	Unclassified	11	13%	-1%
<b>All</b>	<b>Total</b>	<b>662</b>	<b>11%</b>	<b>3%</b>

Source: EMSI Analyst 2022.1

To better understand how each sector supports jobs, Figure 12 shows the largest industries in Springwater by number of jobs in 2021. Jobs in 2011 are also shown to illustrate employment change.

Figure 12: Largest Industries by Number of Jobs, 2021



Source: EMSI Analyst 2022.1

Figure 13 illustrates potential areas for investment attraction as they are having a significant economic impact in terms of job creation—publicly funded industries (i.e., education and healthcare), retail and wholesale trade, as well as those related to residential construction are excluded as they are not pertinent to investment attraction. These are not necessarily industries with significant current levels of employment, but they have seen significant levels of relative (i.e., percentage) growth over the past decade.

Figure 13: Growth Sectors and Industries by Employment Level, 2011 -2021

Information and Cultural industries	Professional Services	Transportation and Warehousing
<ul style="list-style-type: none"> <li>• Software publishing</li> <li>• Wired and wireless telecommunications carriers (except satellite)</li> <li>• Other information services</li> <li>• Animal food manufacturing</li> </ul>	<ul style="list-style-type: none"> <li>• Depository credit intermediation</li> <li>• Activities related to credit intermediation</li> <li>• Management, scientific and technical consulting services</li> <li>• Office administrative services</li> <li>• Business support services</li> </ul>	<ul style="list-style-type: none"> <li>• Rail transportation</li> <li>• General freight trucking</li> </ul>

Source: EMSI Analyst 2022.1



### 3.2. Economic Output

This subsection highlights industries with the largest economic impact. The following table illustrates industries with the highest level of economic output as measured by total sales. Average wages by industry are also illustrated. Three industries each account for over \$100 million in total sales within Springwater; *public administration, construction, and agriculture, forestry, fishing and hunting.*

**Table 16: Economic Output by Industry, 2019**

Industry	Sales	Average Wages
Agriculture, forestry, fishing and hunting	\$114,619,741	\$31,093
Mining, quarrying, and oil and gas extraction	N/A	N/A
Utilities	\$22,168,916	\$87,026
Construction	\$136,936,660	\$56,091
Manufacturing	\$67,342,279	\$52,208
Wholesale trade	\$68,219,083	\$55,407
Retail trade	\$43,138,696	\$26,276
Transportation and warehousing	\$26,179,660	\$58,852
Information and cultural industries	\$24,248,650	\$56,115
Finance and insurance	\$19,711,636	\$49,535
Real estate and rental and leasing	\$16,971,643	\$46,405
Professional, scientific and technical services	\$34,264,974	\$52,935
Management of companies and enterprises	\$361,400	\$46,601
Administrative and support, waste management and remediation services	\$37,948,216	\$38,959
Educational services	\$87,194,596	\$65,407
Health care and social assistance	\$28,003,764	\$42,786
Arts, entertainment and recreation	\$14,250,505	\$25,802
Accommodation and food services	\$24,652,257	\$17,803
Other services (except public administration)	\$25,232,111	\$37,089
Public administration	\$168,453,385	\$60,490
<b>All industries</b>	<b>\$959,898,173</b>	<b>\$47,383</b>

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

### 3.3. Export Sales

This subsection investigates export sales by industry. Exports show the amount of money that is spent by industries located outside the region (domestically and internationally) in exchange for goods or services produced by an industry located in Springwater. **In 2019, the most recent data available, total export sales amounted to \$673,071,863.** Below are the largest drivers (over \$5 million) of external revenues into Springwater.

**Table 17: Top Export Dollars Flowing into Springwater by Industry, 2019**

Industry	Total
Local, municipal and regional public administration	\$108,868,612
Farms	\$85,738,287
Elementary and secondary schools	\$78,932,386
Provincial and territorial public administration	\$45,650,573
Motor vehicle merchant wholesalers	\$40,851,657
Residential building construction	\$23,012,401
Clay product and refractory manufacturing	\$20,240,488
Electric power generation, transmission and distribution	\$12,408,033
Foundation, structure, and building exterior contractors	\$10,831,752
Services to buildings and dwellings	\$10,796,651
Office administrative services	\$10,155,327
General freight trucking	\$9,333,517
Motor vehicle parts manufacturing	\$9,046,581
Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	\$8,005,671
Full-service restaurants and limited-service eating places	\$7,978,846
Rail transportation	\$7,157,616
Wired and wireless telecommunications carriers (except satellite)	\$6,740,052
Utility system construction	\$6,347,670
Building equipment contractors	\$6,136,257
Other professional, scientific and technical services	\$5,624,466
Other amusement and recreation industries	\$5,618,362
Business support services	\$5,195,880
Highway, street and bridge construction	\$5,006,090

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

### 3.4. Industry Supply Chain Analysis

An economic base analysis analyzes how the local economy functions. It does not provide solutions to economic problems but instead provides useful information required for decision-making about economic strategies.

The economic base analysis helps determine which economic activities “bring money in”, and where money might be “leaking out”. Another way to assess this metric is to assess the in-region and imported purchases made by each subsector within Springwater. Table 18 presents the top 15 industries in terms of total purchases made, as well as the percentage of those purchases that are made in-region and out-of-region.

**Table 18: Top Industries by Purchasing Power, Springwater, 2019**

Industry	Total Purchases from Sector	Percentage Purchased in Region	Percentage Purchased Out of Region
Farms	\$17,809,111	99.88%	0.12%
Petroleum and coal product manufacturing	\$12,322,444	0.00%	100.00%
Lessors of real estate	\$11,112,082	17.76%	82.24%
Architectural, engineering and related services	\$9,946,995	13.57%	86.43%
Electric power generation, transmission and distribution	\$8,474,630	35.70%	64.30%
Depository credit intermediation	\$8,129,330	20.51%	79.49%
Pesticide, fertilizer and other agricultural chemical manufacturing	\$7,585,029	11.59%	88.41%
General medical and surgical hospitals	\$6,589,458	4.90%	95.10%
Computer systems design and related services	\$6,302,505	8.31%	91.69%
Animal food manufacturing	\$5,806,990	0.00%	100.00%
Plastic product manufacturing	\$5,797,418	0.00%	100.00%
Architectural and structural metals manufacturing	\$5,789,494	30.09%	69.91%
Insurance carriers	\$5,618,469	7.43%	92.57%
General freight trucking	\$5,009,237	59.61%	40.39%
Services to buildings and dwellings	\$4,906,935	70.37%	29.63%

Source: 2022.1 EMSI Analyst, based on 2019 National Input-Output Tables by StatsCan

## 4. LOCATION QUOTIENT ANALYSIS

Location quotient (LQ) analysis compares the level of employment concentration (or specialization) in a local economy to the level of employment concentration in one or more benchmark areas. In other words, does the local economy have proportionately more or fewer employees in specific industries than the benchmark area?

### 4.1. Location Quotient Analysis by Sector

LQ helps to identify the strengths of the community. The location quotient at the broadest industry classification level indicates that Springwater has the strongest specializations relative to the rest of the province in the following sectors:

- Agriculture, forestry, fishing and hunting
- Public administration

Similarly, Springwater has the strongest specializations relative to the rest of the country in the following sectors:

- Transportation and warehousing
- Educational

**Table 19: Location Quotient Analysis by Sector**

Description	2021 Provincial Location Quotient	2021 National Location Quotient
Agriculture, forestry, fishing and hunting	4.73	0.16
Public administration	1.79	0.94
Arts, entertainment and recreation	1.70	0.40
Wholesale trade	1.65	1.63
Construction	1.63	0.91
Educational services	1.59	1.71
Utilities	1.13	1.17
Accommodation and food services	1.06	0.91
Other services (except public administration)	1.00	0.99
Retail trade	0.99	0.99
Real estate and rental and leasing	0.88	0.94

Administrative and support, waste management and remediation services	0.78	0.78
Professional, scientific and technical services	0.70	1.55
Information and cultural industries	0.69	0.38
Health care and social assistance	0.57	0.52
Finance and insurance	0.54	0.77
Transportation and warehousing	0.40	1.84
Manufacturing	0.34	0.65

Source: 2022.1 EMSI Analyst

## 4.2. Location Quotient Analysis by Industry

The following tables list the **industries** that are concentrated in Springwater's local economy (LQ over 1.25), and that account for a minimum of 1% of jobs (at least 68 positions) in the local economy:

**Table 20: Concentrated Industries, Relative to the Rest of Canada, 2021**

Description	2021 Jobs	2021 National Location Quotient
Farm, lawn and garden machinery and equipment merchant wholesalers	176	21.45
Motor vehicle merchant wholesalers	162	19.33
Local, municipal and regional public administration	632	4.14
Farms	343	3.42
Residential building construction	324	3.23
Elementary and secondary schools	726	2.63
Foundation, structure, and building exterior contractors	141	2.43
Other amusement and recreation industries	117	2.26
Other financial investment activities	93	2.15
Other professional, scientific and technical services	82	2.09
Automotive repair and maintenance	92	1.76
Offices of real estate agents and brokers	78	1.75
Services to buildings and dwellings	184	1.56

Source: EMSI Analyst 2022.1

Table 21: Concentrated Industries, Relative to the Rest of Ontario, 2021

Description	2021 Jobs	2021 Provincial Location Quotient
Farm, lawn and garden machinery and equipment merchant wholesalers	176	26.61
Motor vehicle merchant wholesalers	162	17.56
Farms	343	5.09
Local, municipal and regional public administration	632	3.91
Residential building construction	324	3.02
Elementary and secondary schools	726	2.82
Foundation, structure, and building exterior contractors	141	2.50
Other amusement and recreation industries	117	2.18
Automotive repair and maintenance	92	1.95
Other professional, scientific and technical services	82	1.83
Other financial investment activities	93	1.74
Services to buildings and dwellings	184	1.52

Source: EMSI Analyst 2022.1



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### 4.3. Shift-Share Analysis

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Shift-share analysis compares the local employment growth/decline of regional jobs by industry to the employment growth/decline of that industry, as well as the job growth overall for Canada. More specifically, this analytical tool examines job growth/decline by attributing growth, stability, or decline in industries over time to three forces:

- National economic growth: regional job growth/decline that is attributable to the growth, stability, or decline of the entire Canadian economy. Industries will be impacted positively or negatively by the state of the Canadian economy and consumer spending at a national level, external to any local factors.
- Industry growth: regional job growth/decline that is attributable to the growth, stability, or decline of that particular economic activity in the Canadian economy (with the economic growth component removed). General industry trends are outside the influence of local actors and are therefore removed from the local impact.
- Local economic growth: local job growth/decline that is attributable to the local economy because it is growing/declining more or less quickly than jobs in the larger economy (with the Canadian economic and industry growth components removed).

This tool, when correctly interpreted, provides greater descriptive power than the location quotient method as it allows the examination of changes through time.

#### 4.3.1. Shift-Share Analysis within Springwater

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This subsection looks to the past (2011) and current totals (2021) to assess which sectors are most positively impacted by local factors. The example below applies the model to the *local, municipal and regional public administration* sector:

From 2011 to 2021 the *local, municipal and regional public administration* sector saw an increase of 162 jobs in Springwater.

- It would have been expected that the sector decreased by 36 positions based on large-scale industry factors that are relevant to the sector regardless of geographic location.
- National economic growth factors and their impact on the national sector were expected to lead to a net increase of 45 jobs over the same time period.
- As such, before accounting for local factors, the sector would be expected to gain 9 jobs between 2011 and 2021
- Instead, the local sector grew by 162 jobs, suggesting that 153 new jobs can be applied to factors specific to Springwater.

Table 22 allocates employment changes for the ten industries most positively impacted by local effects to national, industry and regional/local effects. Please note not all figures add up entirely due to rounding.

**Table 22: Shift-Share Analysis: Competitive Industries, Springwater, 2011-2021**

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Local, municipal and regional public administration	162	-36	45	153
Motor vehicle merchant wholesalers	136	0	0	136
Services to buildings and dwellings	137	4	4	129
Residential building construction	87	2	1	84
Building equipment contractors	84	3	2	79
Foundation, structure, and building exterior contractors	85	6	5	73
Department stores	62	0	0	62
Business support services	62	0	0	62
Individual and family services	57	0	0	57
Grocery stores	58	-3	5	56

Source: EMSI Analyst 2022.1

Conversely, Table 23 presents the five industries most negatively impacted by regional/local effects from 2011-2021.

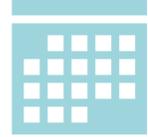
**Table 23: Shift-Share Analysis: Declining Industries, Springwater, 2011-2021**

Industry (NAICS classification)	Growth/ Decline	Industry Growth Effect	National Economic Effect	Regional / Local Effect
Other specialty trade contractors	-66	21	10	-97
Waste collection	-49	-43	6	-97
Other fabricated metal product manufacturing	-79	12	8	-99
Cement and concrete product manufacturing	-108	-11	10	-107
Elementary and secondary schools	-134	32	83	-248

Source: EMSI Analyst 2022.1

#### 4.4. Employer Structure

This subsection illustrates the number and size of employers by industry in the Township. The data in this section comes from Statistics Canada’s Canadian Business Patterns dataset. Employers in this dataset include businesses in the Business Register, which are all Canadian businesses that meet at least one of the three following criteria:



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

Statistics Canada divides businesses into two major groupings:

1. Businesses with a determinate number of employees; and
2. Businesses with an indeterminate number of employees.

Businesses without employees correspond to the “indeterminate” employment category from the previous reference periods. For economic development purposes, businesses with a determinate number of employees (one or more) are of greater interest than indeterminate businesses (which frequently are not active or have very low levels of economic activity). An increase in the number of indeterminate businesses can, however, signal potential new business start-ups.

According to the Canadian Business Registry, Springwater had 2,504 businesses as of December 2021, of which 800 (31.9%) had employees. Of these 800 businesses, the majority had between one and nine employees (676 or 84.5%). Comparatively, 10 businesses (1.3%) had over 100 employers.

**Table 24: Business counts by size, Springwater, 2022<sup>11</sup>**

	1 to 9 Employees	10 to 99 Employees	100+ Employees	Indeterminate	Total
Number of Businesses	676	114	10	1,704	2,504

Source: Canadian Business Patterns December 2021 from EMSI Analyst

<sup>11</sup> Indeterminate businesses are typically self-employed single-individual businesses

The largest sectors by total number of businesses with employees in Springwater are:

- Construction
- Health care and social assistance
- Professional, scientific and technical services

Table 25 presents the five largest sub-sectors by business counts and includes businesses both with and without employees.

**Table 25: Top 5 sub-sectors by business counts, Springwater, 2022**

Sector	Businesses
Lessors of real estate	225
Farms	188
Offices of physicians	112
Offices of real estate agents and brokers	95
Residential building construction	85
Other financial investment activities	85

Source: Canadian Business Counts December 2021 from EMSI Analyst

Many of these businesses, however, are self-employed individuals with no employees. Table 26 notes the subsectors in Springwater by businesses only with employees, excluding self-employed individuals.

**Table 26: Top 5 sub-sectors by businesses with employees, Springwater, 2022**

Sector	Businesses with employees
Offices of physicians	73
Building equipment contractors	55
Residential building construction	45
Foundation, structure, and building exterior contractors	38
Services to buildings and dwellings	26

Source: Canadian Business Counts December 2021 from EMSI Analyst

Finally, the sectors with the greatest number of businesses employing over 100 people are listed in Table 27.

Table 27: Top 5 sub-sectors by businesses with over 100 employees, Springwater, 2022

Sector	Businesses with over 100 employees
Local, municipal and regional public administration	2
Services to buildings and dwellings	1
Farms	1
Other amusement and recreation industries	1
Utility system construction	1
Nursing care facilities	1
Motor vehicle merchant wholesalers	1
Elementary and secondary schools	1
Other residential care facilities	1

Source: Canadian Business Counts December 2021 from EMSI Analyst



## APPENDIX A

The below table represents all industries with job count data in Springwater, by 4-digit NAICS. For a breakdown of the classification system, please see <https://www23.statcan.gc.ca/imdb/p3VD.pl?Function=getVD&TVD=1181553>.

As in the original table, though this data suggests the mining sector does not play a role in Springwater's economy, through discussions with local officials it became clear that there are approximately 24 active gravel pits within the Township. It is possible that the lack of employees and jobs denoted in the table above is a symptom of those pits being classified as other industries, that those jobs are, due to a peculiarity with the data, assigned to "unclassified", or that there is an unknown issue.

We have refrained from manually adjusting the data in this table but are aware that positions exist within the mining and quarrying sector that are unfortunately not reflected here.

Finally, due to data privacy rules, any industries with fewer than 10 positions are noted as "<10".

NAICS	Description	2021 Jobs
6111	Elementary and secondary schools	726
9130	Local, municipal and regional public administration	632
1110	Farms	343
7225	Full-service restaurants and limited-service eating places	335
2361	Residential building construction	324
5617	Services to buildings and dwellings	184
4171	Farm, lawn and garden machinery and equipment merchant wholesalers	176
4151	Motor vehicle merchant wholesalers	162
2381	Foundation, structure, and building exterior contractors	141
4451	Grocery stores	124
7139	Other amusement and recreation industries	117
2382	Building equipment contractors	104
9120	Provincial and territorial public administration	98
5239	Other financial investment activities	93
8111	Automotive repair and maintenance	92

X000	Unclassified	92
5419	Other professional, scientific and technical services	82
4461	Health and personal care stores	78
5312	Offices of real estate agents and brokers	78
6211	Offices of physicians	67
4131	Food merchant wholesalers	66
5416	Management, scientific and technical consulting services	66
4521	Department stores	62
5614	Business support services	62
5413	Architectural, engineering and related services	62
6244	Child day-care services	60
6241	Individual and family services	57
2373	Highway, street and bridge construction	56
4172	Construction, forestry, mining, and industrial machinery, equipment and supplies merchant wholesalers	56
2371	Utility system construction	55
6239	Other residential care facilities	54
6219	Other ambulatory health care services	53
4441	Building material and supplies dealers	52
4481	Clothing stores	52
5412	Accounting, tax preparation, bookkeeping and payroll services	51
4841	General freight trucking	51
4539	Other miscellaneous store retailers	51
8131	Religious organizations	50
6231	Nursing care facilities	43
6212	Offices of dentists	43
5414	Specialized design services	42
2211	Electric power generation, transmission and distribution	41
5611	Office administrative services	40
6213	Offices of other health practitioners	40
5221	Depository credit intermediation	40

5418	Advertising, public relations, and related services	39
5415	Computer systems design and related services	38
6116	Other schools and instruction	38
3271	Clay product and refractory manufacturing	37
2389	Other specialty trade contractors	36
5173	Wired and wireless telecommunications carriers (except satellite)	34
7212	Recreational vehicle (RV) parks and recreational camps	34
5311	Lessors of real estate	33
8132	Grant-making and giving services	33
5223	Activities related to credit intermediation	32
4529	Other general merchandise stores	32
2362	Non-residential building construction	31
7115	Independent artists, writers and performers	31
4511	Sporting goods, hobby and musical instrument stores	31
4442	Lawn and garden equipment and supplies stores	31
7121	Heritage institutions	29
4821	Rail transportation	28
4884	Support activities for road transportation	27
4183	Agricultural supplies merchant wholesalers	27
4471	Gasoline stations	27
3327	Machine shops, turned product, and screw, nut and bolt manufacturing	27
3219	Other wood product manufacturing	26
4179	Other machinery, equipment and supplies merchant wholesalers	25
8121	Personal care services	25
8141	Private households	24
9112	Other federal services (9112-9119)	24
5191	Other information services	24
5112	Software publishers	24
4161	Electrical, plumbing, heating and air-conditioning equipment and supplies merchant wholesalers	24
5313	Activities related to real estate	22

5151	Radio and television broadcasting	22
4411	Automobile dealers	22
3363	Motor vehicle parts manufacturing	21
4413	Automotive parts, accessories and tire stores	20
3334	Ventilation, heating, air-conditioning and commercial refrigeration equipment manufacturing	20
4482	Shoe stores	19
5242	Agencies, brokerages and other insurance related activities	19
4412	Other motor vehicle dealers	18
6221	General medical and surgical hospitals	17
4173	Computer and communications equipment and supplies merchant wholesalers	17
3119	Other food manufacturing	16
3323	Architectural and structural metals manufacturing	16
2379	Other heavy and civil engineering construction	16
3399	Other miscellaneous manufacturing	16
7223	Special food services	16
4911	Postal service	15
5417	Scientific research and development services	14
4452	Specialty food stores	14
4881	Support activities for air transportation	14
8113	Commercial and industrial machinery and equipment (except automotive and electronic) repair and maintenance	14
5621	Waste collection	13
5411	Legal services	13
1153	Support activities for forestry	13
4483	Jewellery, luggage and leather goods stores	13
8123	Dry cleaning and laundry services	11
8112	Electronic and precision equipment repair and maintenance	11
3324	Boiler, tank and shipping container manufacturing	11
2213	Water, sewage and other systems	10

2372	Land subdivision	<10
3115	Dairy product manufacturing	<10
3212	Veneer, plywood and engineered wood product manufacturing	<10
3253	Pesticide, fertilizer and other agricultural chemical manufacturing	<10
3256	Soap, cleaning compound and toilet preparation manufacturing	<10
3329	Other fabricated metal product manufacturing	<10
3371	Household and institutional furniture and kitchen cabinet manufacturing	<10
4421	Furniture stores	<10
4422	Home furnishings stores	<10
4431	Electronics and appliance stores	<10
4453	Beer, wine and liquor stores	<10
4531	Florists	<10
4532	Office supplies, stationery and gift stores	<10
4541	Electronic shopping and mail-order houses	<10
4543	Direct selling establishments	<10
5241	Insurance carriers	<10
5324	Commercial and industrial machinery and equipment rental and leasing	<10
5511	Management of companies and enterprises	<10
5616	Investigation and security services	<10
5622	Waste treatment and disposal	<10
6214	Out-patient care centres	<10
6222	Psychiatric and substance abuse hospitals	<10
6232	Residential developmental handicap, mental health and substance abuse facilities	<10
7111	Performing arts companies	<10
7112	Spectator sports	<10
7113	Promoters (presenters) of performing arts, sports and similar events	<10
7211	Traveller accommodation	<10
8122	Funeral services	<10

8134	Civic and social organizations	<10
8139	Business, professional, labour and other membership organizations	<10
<b>Total</b>	<b>All Industries</b>	<b>6,815</b>

Source: EMSI Analyst 2022.1

