

Staff Report

A23-035



To: Chair and Corporate Services Committee
From: Tracy Roxborough, Communications Officer
Date: 30 Aug 2023
Subject: Economic Development Strategy, Phase 1 Report and Presentation

Report Highlights

- Severn is in the process of developing their first Economic Development Strategy
- Explorer Solutions was awarded the project in May 2023
- The project consists of three phases with Phase 1 now complete
- Explorer Solutions has prepared the Phase 1 Preliminary Report and presentation for submission to the Corporate Services Committee

Recommendation

THAT Administrative Report No. A23-035, dated August 30, 2023 the Economic Development Strategy Phase 1 Report be received;

AND THAT staff proceed with Phase 2 of the Economic Development Strategy, including public consultation, development of the draft Economic Development Strategy, and preparation of the Phase 2 Report.

Background

As part of the Strategic Plan, Council directed staff to develop an Economic Development Strategy. In May, the contract to develop the strategy was awarded to Explorer Solutions in the amount of \$65,670 plus HST. The project launched on May 24, with a project kick-off meeting and driving/familiarization tour with Township staff and Explorer Solutions project lead Jason Kipfer. Phase 1 of the Project has now been completed and the results of that phase have been prepared as the Phase 1 Preliminary Report (Attachment 1), and the Phase 1 PowerPoint presentation (Attachment 2).

Analysis

Staff have participated in bi-weekly project meetings to provide project direction, administrative support, and review of project files and documents. The project remains on schedule.

Phase 1 included:

- Background Research and Documentation Review
- Baseline Economic Analysis
- Full-Spectrum Sector Analysis
- Economic and Market Trends Analysis

A summary of this information will be presented during this meeting.

Phase 2 will involve:

- numerous opportunities for Council and staff input through one-on-one interviews and visioning session
- multiple in-person and virtual public/stakeholder engagement opportunities
- development of the draft Economic Development Strategy
- submission of the Phase 2 Report and presentation to the Township to complete Phase 2 and progress to Phase 3

Phase 2 is projected to be completed in January 2024, with the final Economic Development Strategy to be presented to the Township in March 2024.

Financial Considerations

This project was identified as a priority for Council in their Strategic Plan. Staff submitted a \$25,000 funding request to the Ontario Ministry of Food, Agriculture, and Rural Affairs Rural Economic Development funding program to help fund the initiative. The remaining \$40,670 is to be funded by the Capital Reserve.

Report Supported By

Strategic Plan:

- | | | | |
|-------------------------------------|------------------------|--------------------------|--------------------------------|
| <input checked="" type="checkbox"/> | Economic Development | <input type="checkbox"/> | Infrastructure to Match Growth |
| <input type="checkbox"/> | Customer Service Focus | <input type="checkbox"/> | Does Not Impact Strategic Plan |
| <input type="checkbox"/> | High-speed Internet | | |

Relevant Background Report

[A23-032](#)

[A23-020](#)

Attachments

[Severn Economic Development Strategy - Phase 1 Report](#)

[Severn Economic Development Strategy - Phase 1 Report Presentation](#)

Reviewed By

Andrew Plunkett, Director of
Finance/Treasurer

Laurie Kennard, Chief
Administrative Officer

Status:

Approved - 22 Aug 2023

Approved - 22 Aug 2023



Township of Severn
Economic Development Strategic Plan
Phase I Preliminary Report
August 21, 2023

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1. Executive Summary

To be included in the final report submission.

2. Introduction

To be included in the draft report submission.

3. Summary of Past Projects, Policies, and Plans

The Township of Severn is governed and guided by various levels of policies and plans. In this section, the Project Team conducted a thorough review of past projects, policies, and plans relevant to the preparation of the Township of Severn Economic Development Strategy.

The following sub-sections summarize the key takeaways and highlight the most relevant aspects capable of providing situational context to the Project Team for which to further investigate, challenge and validate in a 2023 context.

3.1 Ontario Lake Country BR+E Project (2016)

The implementation of a regional Business Retention and Expansion (BR+E) study was identified as a key priority following the success of the 2011 Orillia BR+E study and the subsequent success made to enhance the municipalities business environment. The study area included the City of Orillia, the Townships of Oro-Medonte, Ramara, and Severn, and the Chippewas of Rama First Nation. Spearheaded by the Orillia Area Community Development Corporation in collaboration with the other townships, a BR+E program is an internationally recognized process undertaken to enhance the business environment in a municipality or region by eliminating barriers to economic growth.

Goals and priority actions were identified along with other action items such as a series of proposed events and a Strengths, Weaknesses, Opportunities, and Threats analysis.

3.1.1 Economic Development Connection

Business Retention and Expansion (BR+E) is a vital component of municipal economic development and the recommendations coming out of the Phase II consultation process (tied to strengthening BR+E) will be cross referenced for alignment and relevancy with the proposed goals and priorities emanating from the 2016 Ontario Lake Country BR+E Project report, in addition the possibility of amending the 2016 goals (in a post-

pandemic context) with the potential of new identifying new priority areas and more relevant strategies for facilitating BR+E.

3.2 The Couchiching Community Safety and Well-Being Plan (2021-2025)

The Community Safety and Well-Being (CSWB) Plan details the Township's commitment to working together with local municipalities, the County of Simcoe, and community organizations towards improved social outcomes for residents. Community safety and well-being is the ideal state of a sustainable community where everyone is safe, has a sense of belonging and opportunities to participate, and where individuals and families can meet their needs for education, health care, food, housing, income, and social and cultural expression.

Areas of focus and risk were identified within the CSWB, and actions mapped out regarding mental health and addictions, access to services, social connectedness and safety, and employment.

3.2.1 Economic Development Connection

Community safety and well-being plans help to set a strong foundation and framework for transitioning a community to a complete community. They develop strategic, collaborative partnerships, that leverage and enhance community assets, and strengthens local capacity to drive change. There are several aspects within the CSWB Plan that impact community economic development and influence economic development strategic planning, including: areas tied to access to housing, education, and social services; local employment opportunities and job creation, among others.

3.3 Planning Policies and Legislation

On April 6, 2023, the province released for comment the proposed 2023 Provincial Planning Statement. It proposes to repeal A Place to Growth – the Growth Plan for the Greater Golden Horseshoe and the 2020 Provincial Policy Statement, and replace both with this integrated policy statement.

The update will focus on leveraging the housing supportive policies of both documents, removing barriers and continuing to protect the environment through a streamlined province-wide land use planning policy framework.¹

¹ <https://ero.ontario.ca/notice/019-6813>

Currently, for the development of the Township's economic development strategy, the Project Team will consider the policies and legislation of these two documents in the development of strategic priorities as both reports both focus on land use planning matters. Throughout the duration of the project, the Project Team will continue to monitor the direction of the proposed Provincial Planning Statement that would replace the existing Provincial Policy Statement and A Place to Grow: Growth Plan for the Greater Golden Horseshoe for new policy and/or legalisation that could influence the recommendations coming out of the Township's economic development strategy.

3.3.1 Provincial Policy Statement (2020)

The long-term prosperity and social well-being of Ontario depends upon planning for strong, sustainable, and resilient communities for people of all ages, a clean and healthy environment, and a strong and competitive economy.

The Provincial Policy Statement focuses growth and development within urban and rural settlement areas while supporting the viability of rural areas. It recognizes that the wise management of land use change may involve directing, promoting, or sustaining development. Land use must be carefully managed to accommodate appropriate development to meet the full range of current and future needs, while achieving efficient development patterns and avoiding significant or sensitive resources and areas which may pose a risk to public health and safety.

Focus areas identified were building strong healthy communities, wise use and management of resources, and protecting public health and safety.

3.3.1.1 Economic Development Connection

What affects Ontario also affects the Township of Severn, so the Project Team will focus on areas of the Provincial Policy Statement that directly relate to the township's economy and potential for growth for which should be considered and implemented on a local level.

3.3.2 A Place to Grow: Growth Plan for the Greater Golden Horseshoe (2020)

A Place to Grow is the Ontario government's initiative to plan for growth and development in a way that supports economic prosperity, protects the environment, and helps communities achieve a high quality of life. It established the long-term framework for where and how the region will grow, while recognizing the realities facing cities and smaller communities, and acknowledging what governments can and cannot influence.

The policies of this plan outlined how land is developed, resources are managed and protected, how public dollars are invested, and considered where and how to grow, protect what is valuable, how to support the infrastructure for growth, and included a process of implementation and interpretation.

3.3.2.1 Economic Development Connection

An economic development strategy is often viewed as an operational blueprint that helps inform and guide planned growth by incorporating infrastructure planning and investment, considers demographic changes while protecting cultural heritages, economic development opportunities, employment trends, land use planning, and population health. Growth management policies can lead to job creation and investment to help prepare for future economic development needs.

3.4 Township of Severn Official Plan (Draft 2022)

The primary purpose of the Official Plan is to provide the basis for guiding growth and managing change that will support and emphasize the Township's unique character, diversity, civic identity, rural lifestyle, and heritage features and to do so in a way that has the greatest positive impact on the quality of life in Severn to the year 2051. The draft Official Plan has been adopted by Severn Council but is currently pending final approval by County.

Goals identified within the Official Plan include protection of the natural heritage system, develop settlement areas, create complete communities, maintain the character of rural areas, protect agricultural production, ensure an adequate supply of land and housing, support economic development, ensure infrastructure meets the needs of residents, and promote facility improvements and cultural heritage.

3.4.1 Economic Development Connection

An Official Plan for the township helps to ensure that future planning and development will meet the specific needs of the community. It provides the framework and foundation to build an economic development strategic plan as it sets the vision and direction for growth and development within the same community.

3.5 Severn Recreation Master Plan (2022)

The Severn Recreation Master Plan is a high-level document that provides direction on municipal recreation services for the next 15 years. The Plan contains needs, assessments, and recommendations for three distinct service areas: Programs and Events; Facilities; and Parks, Trails, and Boat Launches. It also provides direction on

service delivery and a detailed implementation plan including timing, cost estimates, and related considerations. Trends, programs, and events were identified throughout the plan for direction and focus.

3.5.1 Economic Development Connection

While parks and recreation master planning can foster healthy communities, promote conservation and environmental stewardship, stimulate economic activity, and provide transportation equity, it will allow the Project Team to consider the three distinct service areas for their impact and influence on strategies that support talent and youth attraction and retention and overall lifestyle. It provides a framework to improve recreational services, programming, and infrastructure.

3.6 Transportation Master Plan (Draft 2023)

A Transportation Master Plan (TMP) is a visionary document that includes plans, policies, and strategies for transportation infrastructure and services for walking, cycling, transit and roads. The plan guides staff, stakeholders, and decision-makers on transportation development and is typically updated every five years to address the changes in population, employment, travel trends or policy direction.

The plan reviewed existing conditions, engaged stakeholders, outlined traffic forecasts, identified issues and concerns, and provided alternative solutions in short-term, medium-term, and long-term projects.

3.6.1 Economic Development Connection

To help inform the economic development strategy, the Project Team will consider the four alternative strategies, with emphasis on the preferred road network strategy (subject to council approval) that focuses on localized traffic options and how they may enhance or impact the proposed economic development strategies within the plan as they attempt to respond to the planned growth and future demand of the Township.

3.7 Strategic Plan (2023 to 2026)

Township of Severn's Strategic Plan communicates Council's priorities, goals, and high-level actions for the 2023 to 2026 term. The Township's goal is to build a healthy and connected community where people come first, and everyone has access to the resources they need. Priorities included economic development, a customer service focus, implementing infrastructure to match growth, and improved high-speed internet.

Mission

Township of Severn is a welcoming community-focused municipality that promotes responsible development, encourages all-season tourism, and delivers a high level of service. We celebrate our unique identity, preserve the natural environment, and value our historic small-town charm.

Vision

Through excellence in service and preservation of our historic and natural assets, the Township of Severn enhances the quality of life for residents and creates opportunities for the community. We welcome investments that complement and respect our rural character.

3.7.1 Economic Development Connection

Throughout the development of the Township's economic development strategy, the Project Team will establish a vision, supported by a series of strategic priorities to guide the economic development initiatives forward by the Township over the next five years. The Township's existing mission and vision will be used to challenge the strategic priorities for alignment and relevance.

3.8 Signage Strategy

In 2020, the Township commenced the process of updating its brand and as a key component of the process, the Township undertook the development of a multi-year signage strategy and implementation plan. Stemming from the plan, a key objective was to replace and/or install more than 340 individual signs throughout the Township to ensure they were not only compliant with Township branding, but to highlight the area as a community of communities, spark curiosity in visitors, drive investment to the area, and stimulate community pride. Furthermore, the strategy was designed to enhance local wayfinding and discovery of place, while supporting economic development and capture missed opportunities.

3.8.1 Economic Development Connection

Ensuring adequate, optimal and current wayfinding signage throughout the Township is not only an important step in local economic development but it also supports tourism and local visitors to the community as it encourages and eases the process of travelling to and identifying key points of interest, attractions and landmarks, considering that the Township spreads over a vast area within Simcoe County. The Project Team will consider the Signage Strategy from a lifestyle, tourism and business investment

perspective while they navigate the Township during the planned onsite requirements of the project.

3.9 County of Simcoe Official Plan (2016)

The County's Official Plan is designed to assist in growth management where the County is expected to experience continued strong growth in population and urban development over the next twenty years in accordance with the Growth Plan (2006) as amended. It attempts to achieve a balance between the demands for economic development, community building, and environmental conservation, and provides a framework for coordinated planning with adjacent municipalities, agencies, and other levels of government. Goals and themes were identified.

3.9.1 Economic Development Connection

Having a strong understanding of the County's Official Plan will assist the Project Team in facilitating the provision of adequate and accessible infrastructure that are essential for business operations and growth throughout the Township. The County will potentially be a key partner in moving forward many of the recommendations contained within the economic development strategy, so it is vital understand how the proposed strategies (at the Township level) support, align with, and adhere to the County's Official Plan.

3.10 Development Charges Background Study (2019)

The study provided for cost recovery of growth-related capital expenditures from new development. Types, locations, servicing needs, and capital costs were identified to accommodate growth arising from residential and non-residential needs over a forecasted period. Service needs were identified for each settlement area.

3.10.1 Economic Development Connection

This plan helps identify hurdles of economic growth to improve the township's fiscal, economic, and social situations. The Project Team will consider development charges in the development of proformas necessary to support any proposed economic development projects. From communality competitiveness perspective, the Project Team will also consider the development charges in comparison to other competing jurisdictions.

4. Baseline Economic Analysis

4.1 Regional Socio-Economic and Demographic Profile

The objective of the Regional Socio-Economic and Demographic Profile is to assess the current state of the economic environment in Severn and its surrounding communities. This exercise will allow the Project Team to identify any potential market differences and strength that will aid in the development of strategies and recommendations to help guide the community forward over the next five years and beyond. This section uses data from Statistics Canada 2021 Census of Population² and focuses on four areas with different geographical sizes for comparison that were agreed upon in consultation with the Township. Data was derived for the Township of Severn, the Township of Ramara, the Township of Oro Medonte, the City of Orillia, and the Province of Ontario.

4.1.1 Income – Individual vs. Household

It is important to analyze each region separately to obtain a complete economic profile of the populations in the comparable urban and rural areas. Demographics vary between regions, and it is important to break down the information regionally.

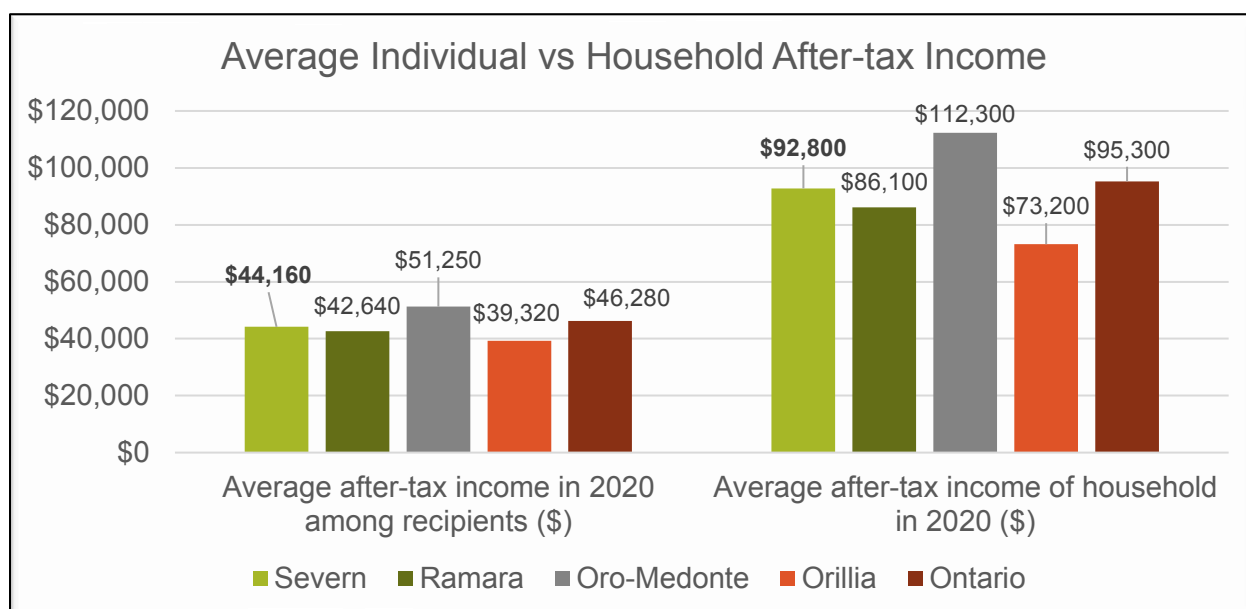
After-tax income was among the key economic indicators analyzed. Individual and household after-tax income is one of the most common metrics used when analyzing the purchasing power of a population.

Chart 1 reveals a spread of \$11,390 in the individual level, average after-tax income between the five jurisdictions. The Township of Oro Medonte reported the highest average after-tax income of \$51,250 and Orillia reported the lowest at \$39,320. The Township of Severn fell slightly below this average at \$44,160 and the provincial average was slightly above this average at \$46,280.

A similar pattern also exists when considering after-tax household income. Chart 1 reveals a spread of \$39,100 in the average after-tax household income between the five jurisdictions. Again, the Township of Oro Medonte reported the highest average after-tax household income of \$112,300 and Orillia reported experienced the lowest at \$73,200. While the provincial average after-tax household income was slightly above this average, the Township of Ramara was slightly below.

² Government of Canada, Statistics Canada, "Census of Population," July 12, 2023, <https://www12.statcan.gc.ca/census-recensement/index-eng.cfm?MM=1>.

Chart 1. Average Individual vs Household After-tax Income (2020)



4.1.2 Private Households

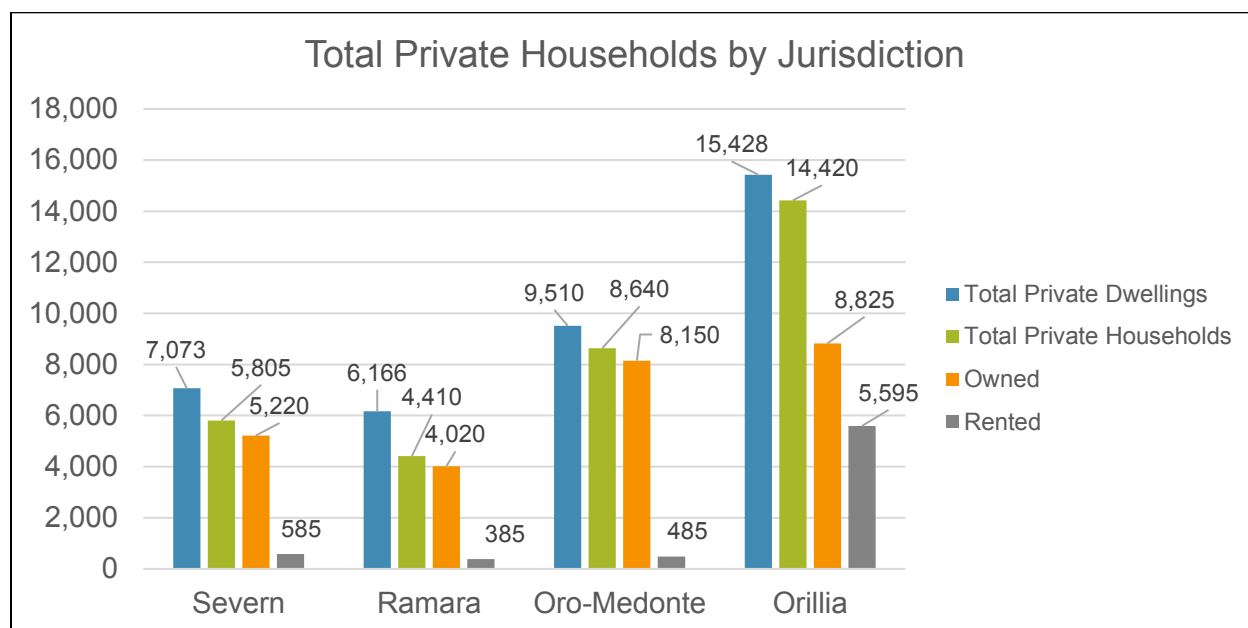
In 2021, the Township of Severn, while slightly above in both categories, was comparable to the Township of Ramara when analyzing the number of private dwellings and private households as seen in Chart 2. The Township of Oro Medonte had 9,510 private dwellings and 8,640 private households. The City of Orillia, the largest of the four local jurisdictions had 15,428 private dwellings and 14,420 private households.

A private dwelling refers to a separate set of living quarters with a private entrance from either the outside of the building or a common hall, lobby, vestibule, or stairway inside the building (it does not pass through the living quarters of another person or group of persons).

A private household refers to a person or groups of persons who occupy the same dwelling and do not have a usual place of residence elsewhere in Canada or abroad.

It was observed that Oro Medonte had the highest percentage of household ownership at 94 percent. This is in comparison to 91 percent in Ramara, 90 percent in Severn; and 61 percent in Orillia. Overall, within the province of Ontario, 68 percent of the 5,491,200 household were owned.

Chart 2. Total Private Households by Jurisdiction (2021)



4.1.3 Population by Jurisdiction

Chart 3 compares the 2016 and 2021 population counts between the four comparable areas³ and

Chart 4 compares the percentage change in population by jurisdiction (between 2016 and 2021) and includes the Province of Ontario.

Key takeaways derived from these two charts stems from the changes in population counts rather than the individual populations themselves. All jurisdictions, including the Province of Ontario, experienced positive increases in population growth between 2016 and 2021.

When comparing the rate of growth over the same duration at the local level, the Townships of Ramara and Oro Medonte, not only grew the most, but also at the same rate of 9.4 percent. The Township of Severn grew at a similar growth rate of 8.3 percent followed by Orillia with a growth rate of 7.2 percent. The province itself experienced the smallest growth rate of the comparable jurisdictions at 5.8 percent, with having grown its population of 13,448,494 in 2016 to 14,223,942 in 2021. Having knowledge of the Township of Severn’s faster than provincial average growth rate can help Township

³ Provincial population figures were not included due to skewing the chart, but Ontario’s population was 13,448,494 in 2016 and 14,223,942 in 2021.

Council in making more informed decisions that touch upon other aspects of municipal planning beyond simply economic development.

Chart 3. Population (2016 – 2021)

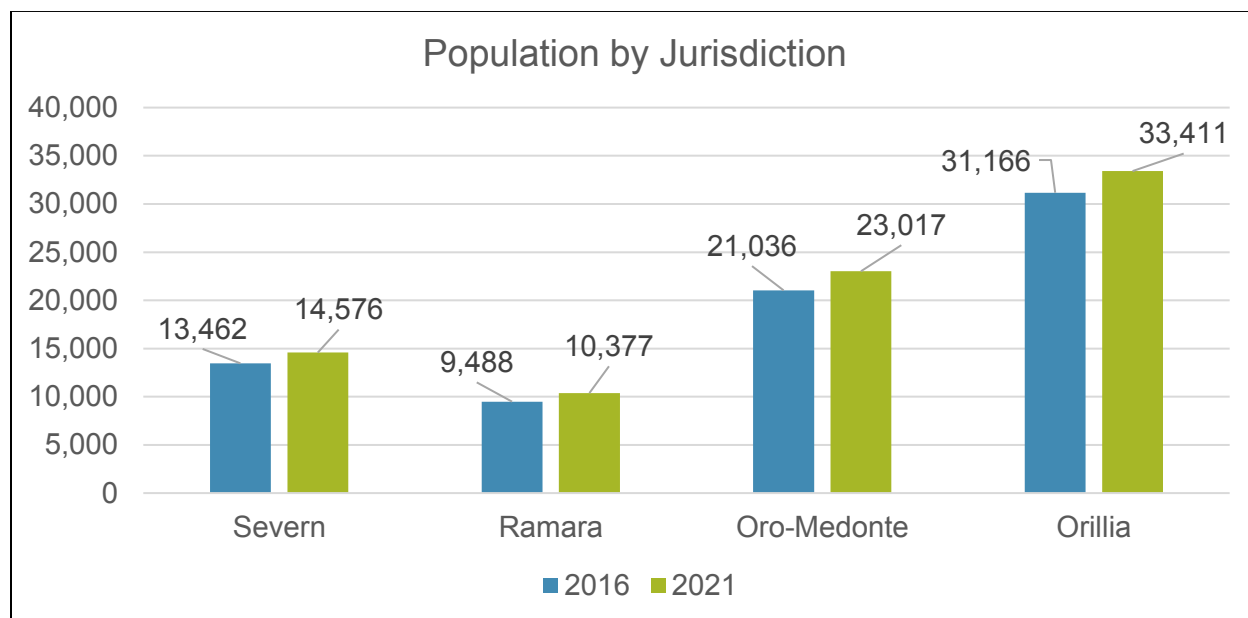
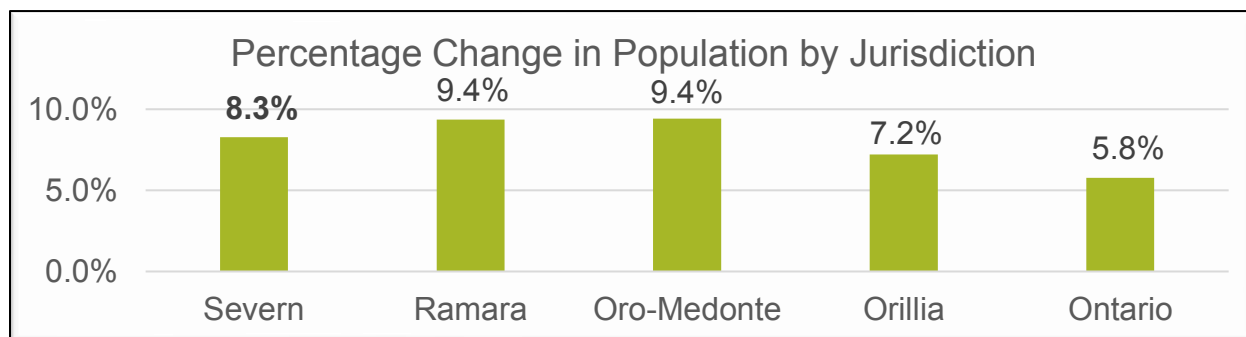


Chart 4. Population Change by Jurisdiction (2016 - 2021)



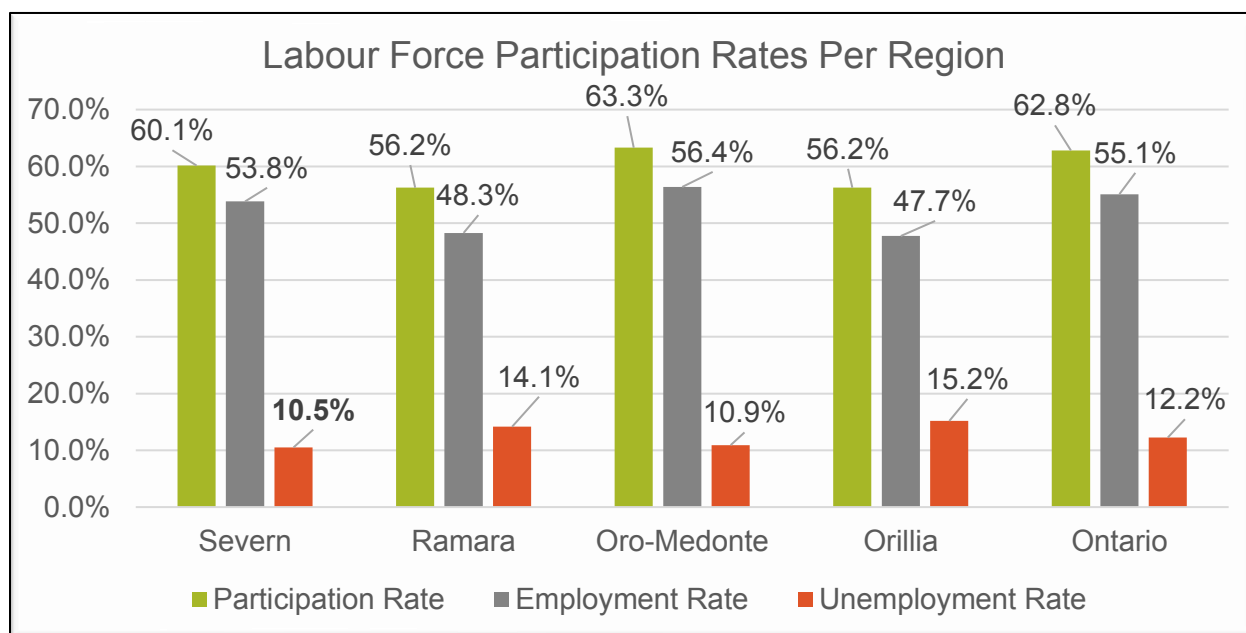
4.1.4 Employment

In 2021, the Township of Oro Medonte experienced the highest employment participation rate of 63.3 percent. This is in comparison to 62.8 percent at the provincial level. Severn’s employment participation rate was slightly below the provincial rate with 60.1 percent and both Ramara and Orillia shared the lowest employment participation rate of 56.2 percent.

The Township of Severn reported the lowest unemployment rate out of the comparable jurisdictions, consisting of 10.5 percent. This was followed by the Township of Oro

Medonte (10.9 percent), the Province of Ontario (12.2 percent), the Township of Ramara (14.1 percent) and the City of Orillia 15.2 percent).

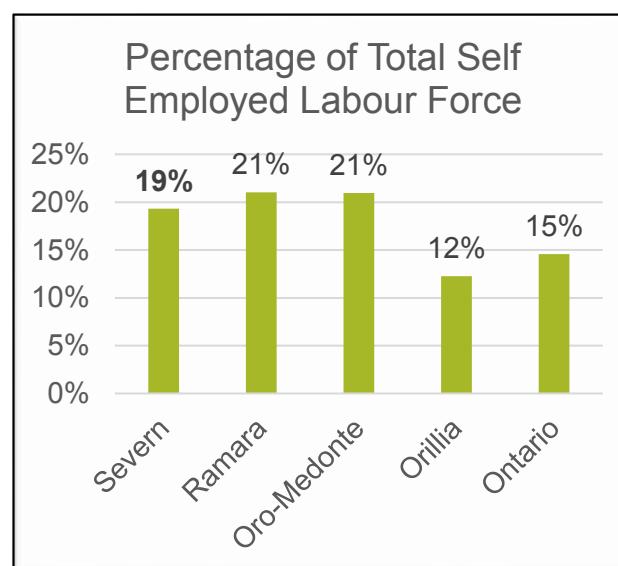
Chart 5. Labour Force Participation Rates by Jurisdiction



4.1.5 Self-Employment

One way for measuring the level of entrepreneurship in a region is to consider its level of self-employment. Chart 6 illustrates the percent of each comparable region that is self-employed and compares those figures to the provincial average. While the Province of Ontario is identified with 15 percent of its labour force as self-employed in 2021, the City of Orillia reported slightly below the provincial average with 12 percent. The Townships of Ramara and Oro Medonte both experienced the highest self-employment rate at 21 percent of the comparable regions. The Township of Severn experienced the

Chart 6. Percentage of Total Self Employed Labour Force



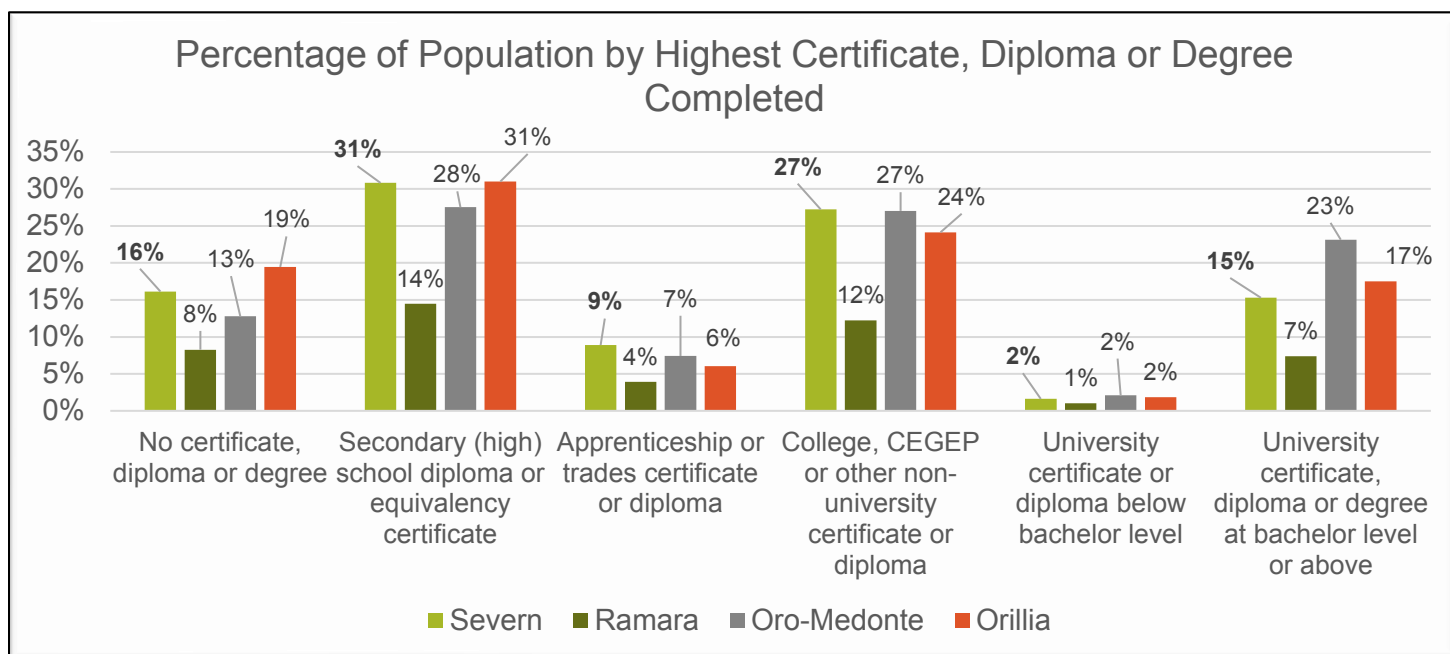
second highest rate of self-employment at 19 percent.

4.1.6 Education Level

Chart 7 identifies the highest level of education achieved for the four comparable local areas in 2021. The majority of residents in the Township of Severn reported having a secondary school diploma or equivalency certificate (31 percent, 3,830 people) or a College, CEGEP or other non-university certificate or diploma (27 percent 3,385 people). Sixteen percent of residents, representing 2,005 individuals within the Township do not hold a high school certificate, diploma, or degree. Fifteen percent representing 1,900 residents have completed a university degree at a bachelor level or higher, 9 percent (representing 105 residents) completed an apprenticeship or trades certificate or diploma, and 2 percent (representing 20 residents) hold a university certificate or degree below the bachelor level.

The City of Orillia has the highest percentage of the comparable municipalities without a high school certificate, compared to Ramara with the lowest percentage. The Township of Severn and the City of Orillia share the highest and the same percentage of its population who have received their secondary high school certificate. This is in comparison to Ramara with the lowest. Of the comparable jurisdictions, the Township of Severn has the largest percentage of its population with an apprenticeship or trades certificate or diploma. The Townships of Severn and Oro Medonte share the highest percentage (27 percent) of its population who have obtained a College, CEGEP or other non-university certificate or diploma. A very small percentage of the population from all comparable locations hold a university certificate or degree below the bachelor level. In the category of having completed a university degree at a bachelor level or higher, this represents 23 percent of Oro Medonte's population, compared to seven percent in Ramara. The Township of Severn is in the middle with 15 percent of its population.

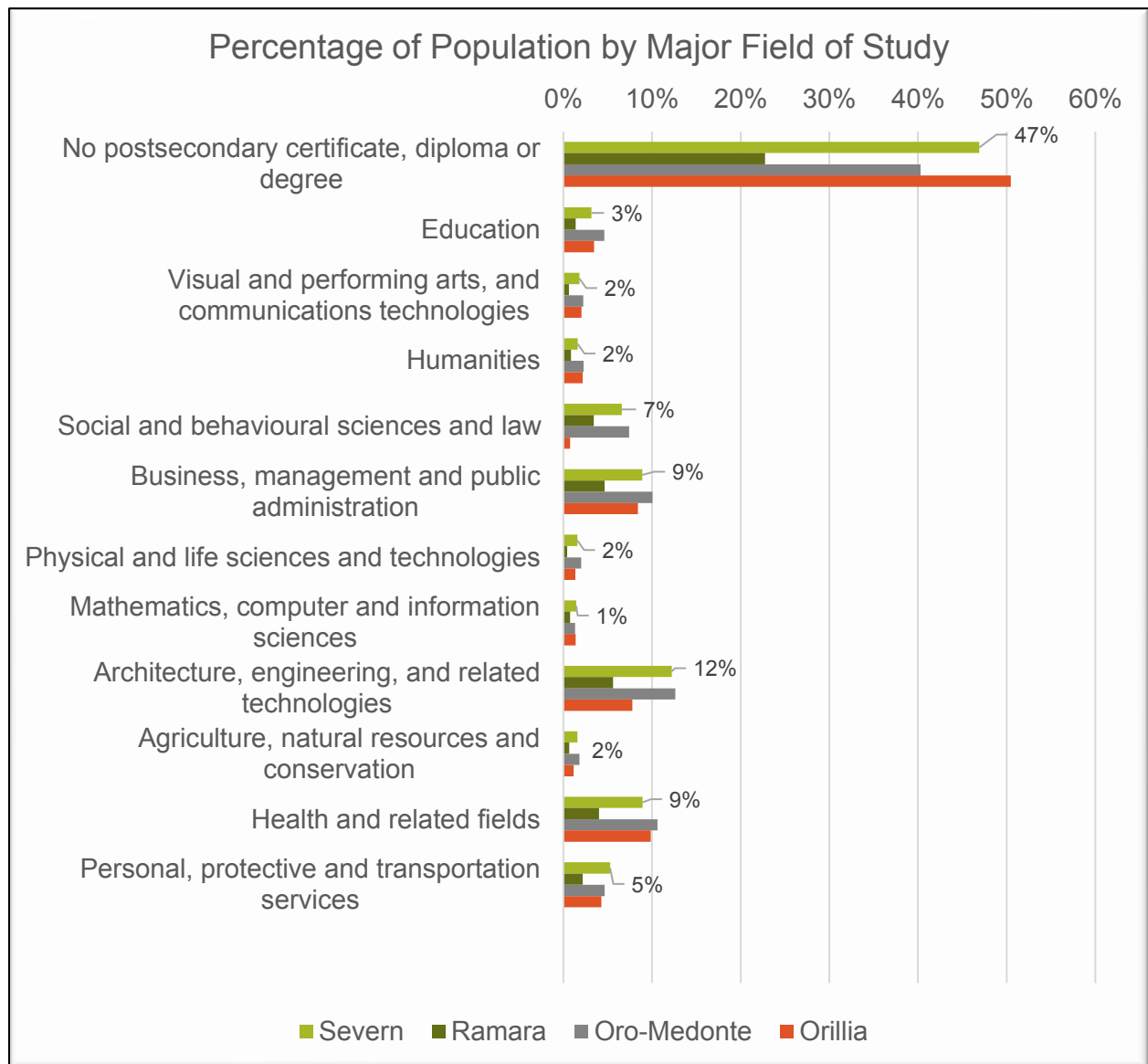
Chart 7. Highest Certificate, Diploma or Degree by Jurisdiction (#)



4.1.7 Labour Force by Field of Study

Chart 8 presents the percentage of population (in 2021) by major field of study between the comparable regions. The key takeaways from this assessment are that all local regions indicate a higher rate of not having pursued post-secondary studies than the provincial average of 42 percent. Other trends observed indicate a noticeably high percentage of the population having completed studies in the field of ‘architecture, engineering, and related technologies’, representative by 12 percent of the Township of Severn’s population; and both 9 percent in ‘business, management, and public administration’ as well as in ‘health and related fields’.

Chart 8. Labour Force by Major Field of Study



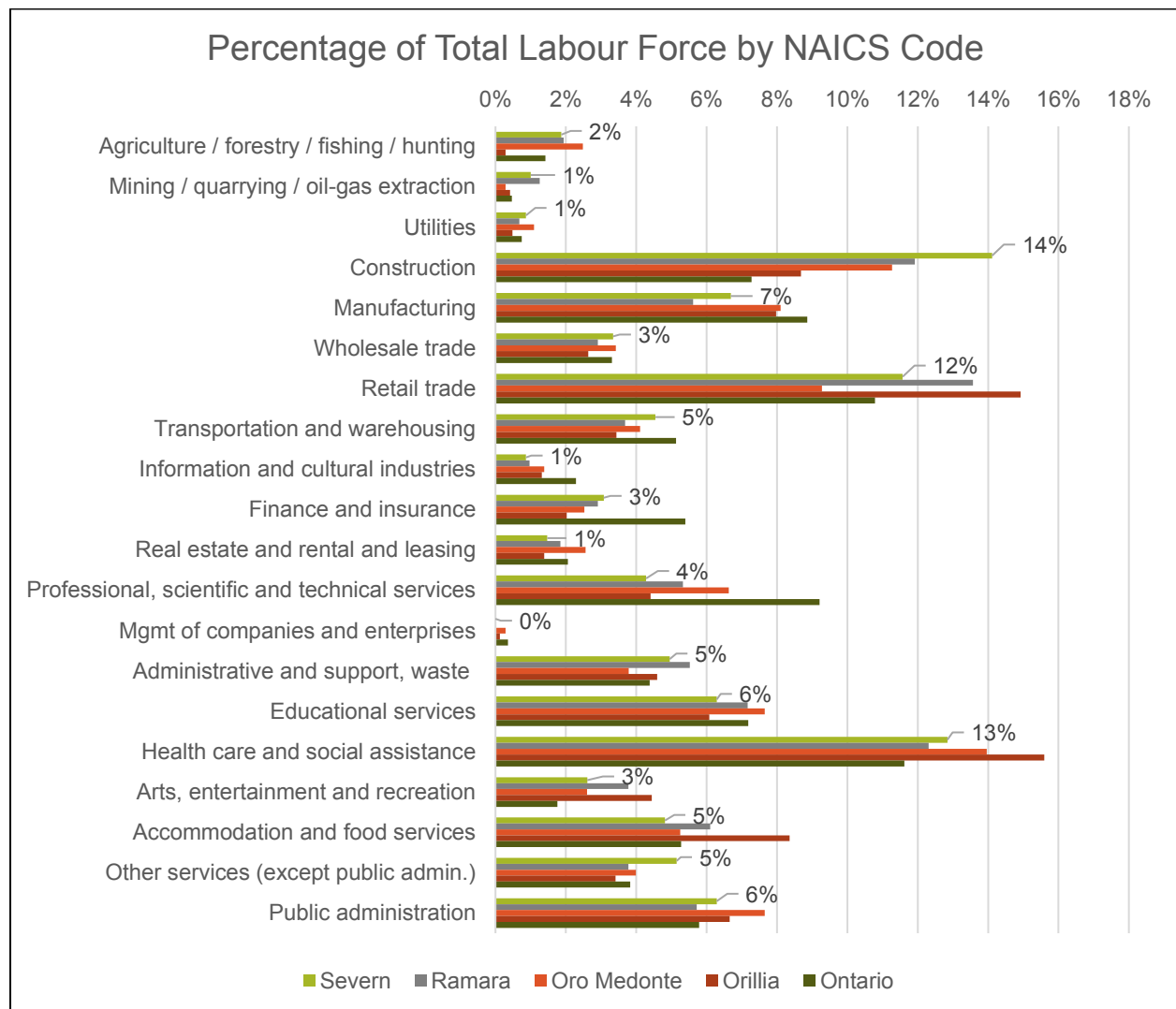
4.1.8 Labour Force by Industry

Chart 9 presents the percentage of the total labour force by industry using the North American Industry Classification System (NAICS). Not only does this provide a glimpse into the prevailing industries with the highest (or lowest) levels of corresponding labour pools, it can also serve to determine if there are any gaps in the local labour force based on the field of study and business activities, notwithstanding the fact that a labour position associated with finance and accounting (for example) is a transferrable skillset which could be employed in one of many industries presented below.

The Project Team noted the top three industries in 2021 based on having the highest average percentage of the workforce by industry activity in the Township of Severn. They include construction (14 percent), health care and social assistance (13 percent) and retail trade (12 percent). The construction employment rate is also higher in the Township of Severn than any other region including the Province of Ontario (7 percent).

Compared to the other jurisdictions, it was observed that the Township of Oro Medonte had seven key industries (based on the size of local labour force) that stood out much greater than the comparable locations. They include health care and social assistance (33 percent), construction (27 percent), retail trade (22 percent), manufacturing (19 percent), education services (18 percent), public administration (18 percent) and professional, scientific and technical services (16 percent).

Chart 9. Percentage of Total Labour Force by NAICS Code (2021)



4.1.9 Place of Work, Work Commute and Mode of Transportation

Today’s workforce continues to adapt to the realities of an ever-changing work environment, due in part to the Covid-19 Pandemic. With work-from-home or hybrid arrangements compressed or alternative work schedules becoming more common, it will become increasingly important to track these changes as new trends have the potential to assist in future municipal planning considerations.

Chart 10 captures the percentage of the population in 2021 from the four comparable local areas plus that of the province to understand people’s primary place of work. When considering “work from home”, 19 percent of the Township of Severn’s population identified with this locale of work. This contrasts with 30 percent of the provincial population, 25 percent in the Township of Oro Medonte, 21 percent in the Township of Ramara and 17 percent in the City of Orillia.

Other noticeable trends identified were that 17 percent of the Township of Severn’s workforce have no fixed workplace address and 63 percent of the local labour force, similar to the comparable regions, worked at their usual place of work.

Chart 10. Percentage of Employed Labour Force by Place of Work

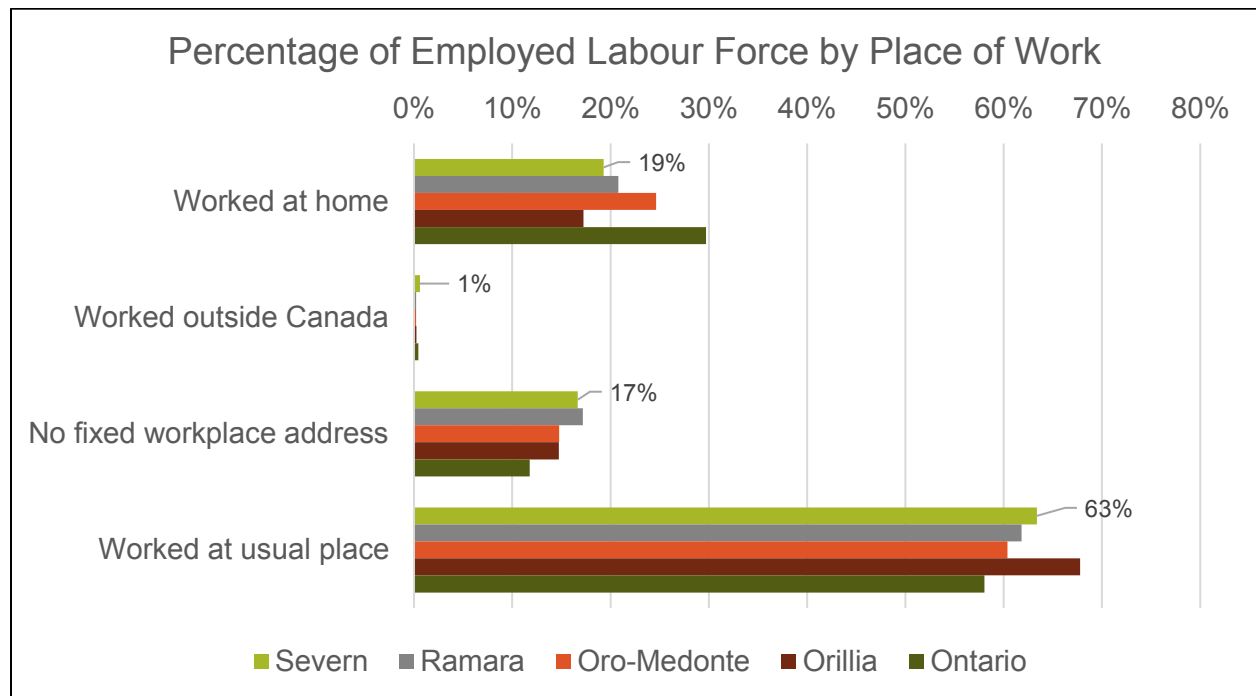
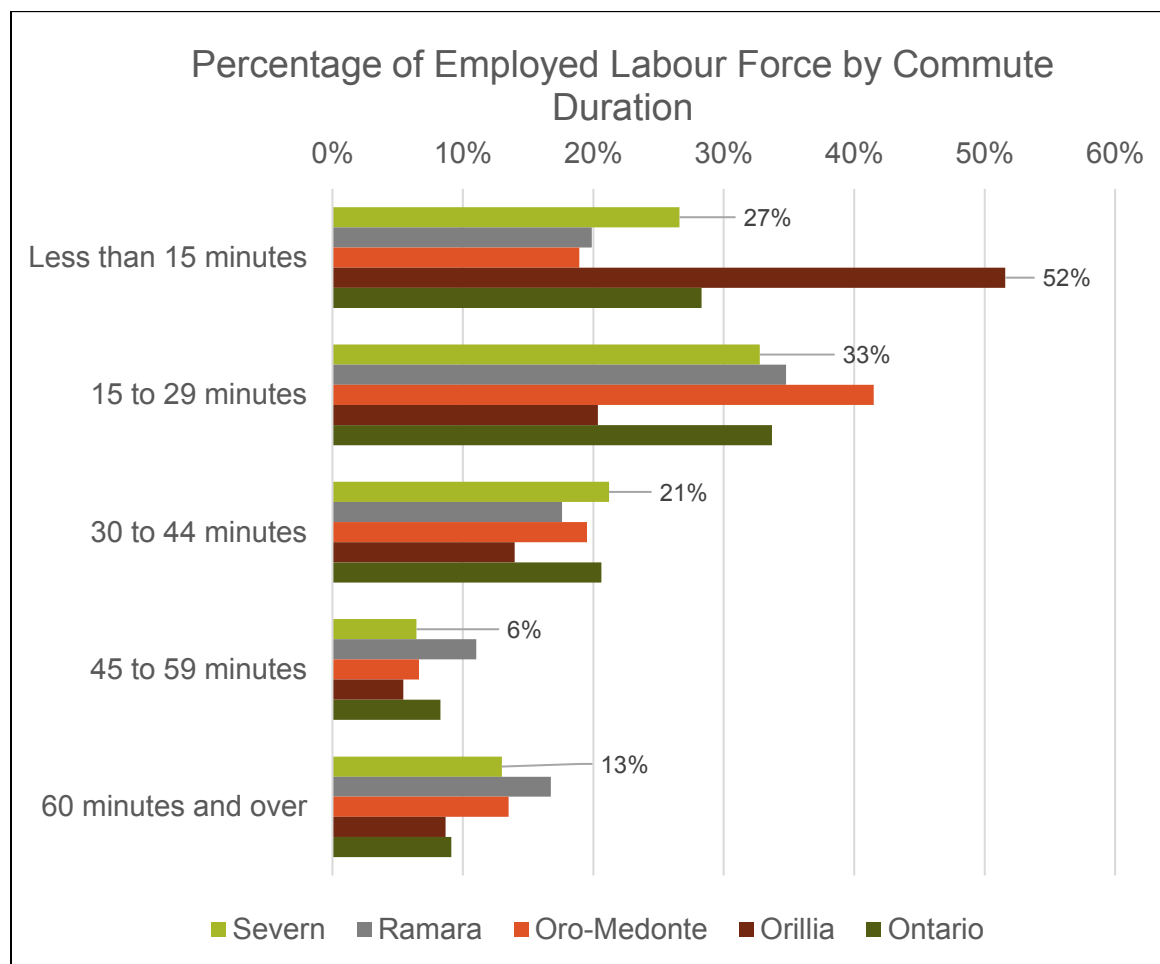


Chart 11 provides insight into the commuting distances (by duration of time) to place of work. In 2021, the Township of Severn saw 27 percent of its labour force commuted less than 15 minutes to work, 33 percent between 15-29 minutes, 21 percent between 30-44 minutes, 6 percent between 45-59 minutes, and 13 percent travelled for one hour or longer to their place of work.

The Project Team also observed that 52 percent of Orillia residents have a less than 15-minute commute to work and overall, 72 percent less than 30 minutes.

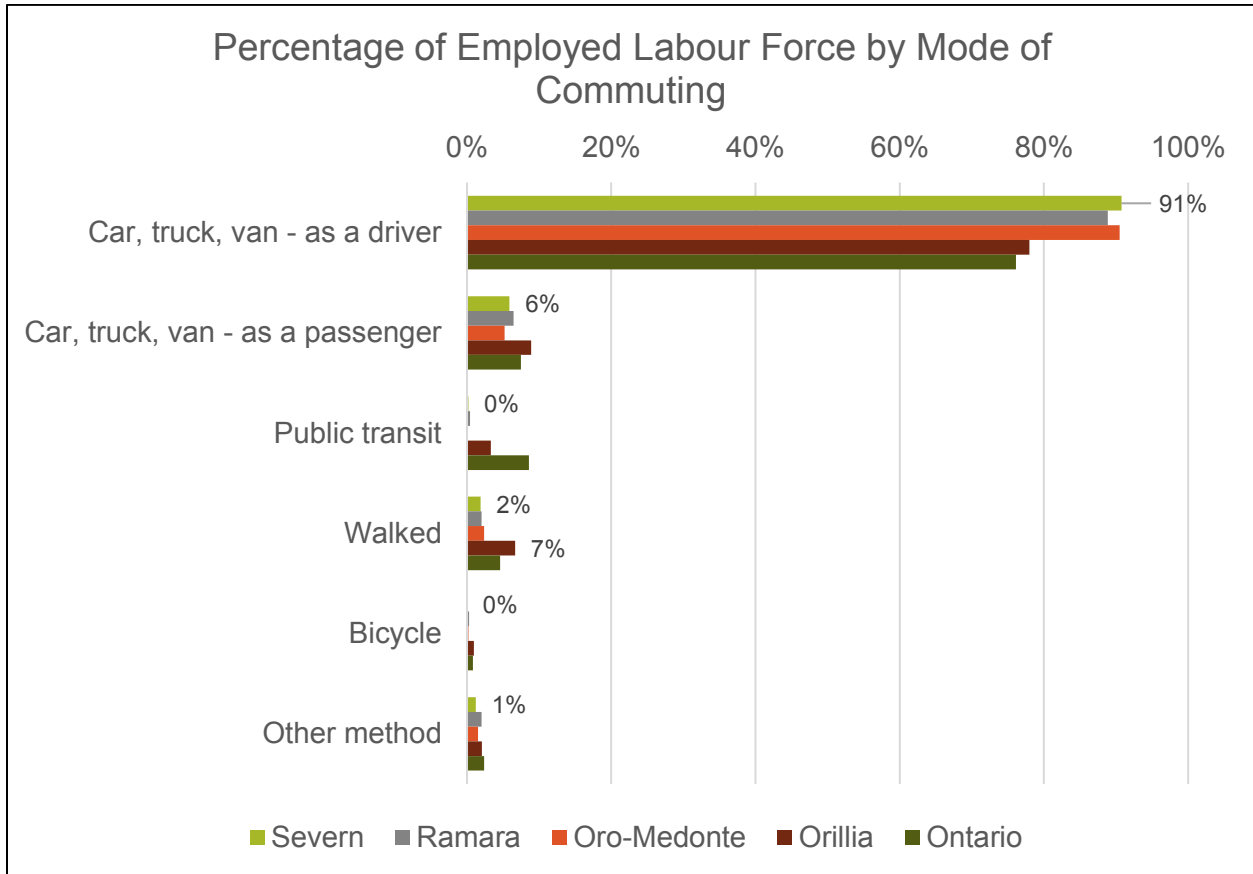
Chart 11. Percentage of Employed Labour Force by Commute Duration



When the percentage of the employed labour force was observed by mode of transportation throughout the comparable regions, Chart 12 reveals that the prevailing share of all modes of transportation to work in 2021 involved transportation by car, truck, van - as a driver. The Township of Severn saw 91 percent of their labour force commute as a driver compared to 6 percent as a passenger.

In the category of public transit as a mode of transportation, it is understandable that the provincial average maintains the highest share at 9 percent and comparatively, no one in the Township of Severn commuted via public transit, given the lack of a public transportation system.

Chart 12 - Percentage of Employed Labour Force by Mode of Commuting



6. Full-Spectrum Sector Analysis

6.1 Business Counts

Business Counts data offers insights into the concentration and size of business establishments by industry sector. In this section, the Project Team utilized data derived from Statistics Canada Canadian Business Counts 2022⁴ to perform various sector analyses. This data was collected from the Canadian Business Register Repository and is presented in two categories – Without Employees⁵ and With Employees.

It should be noted that the Business Register Repository consists of various data sources from Canada Revenue Agency (CRA) files (i.e., T2, T1, GST, PD7, and T4 files), regional profiling (i.e., telephone or on-site interview), survey feedback and other Statistics Canada research. Therefore, businesses without a business registration number, and businesses with local operations but are registered elsewhere, are not captured by this dataset.

6.1.1 Sector Business Count and Location Quotient Analysis

Table 1 presents the number of business establishments (with and without employees) in each 2-digit North American Industry Classification System (NAICS) within the Township of Severn. There were 1,865 classified business establishments in 2020 in the Township. It was observed that 65.5 percent of all classified businesses (1,259 out of 1,865) have no employees and 48.1 percent of businesses with employees employ 1 to 4 workers, representing 21.6 percent of total business establishments.

In 2020, the top three industries that had the most without-employee business establishments in the Township were Construction (NAICS 23) with 241 businesses, Real Estate and Rental and Leasing (NAICS 53) with 238 businesses, and Professional, Scientific, and Technical Services (NAICS 54) with 125 businesses.

⁴ Government of Canada, Statistics Canada. “Add/Remove Data - Canadian Business Counts, with Employees, December 2022,” February 20, 2023.
<https://www150.statcan.gc.ca/t1/tbl1/en/cv.action?pid=3310066101>.

⁵ The “Without Employees” category includes the Self-Employed (i.e., those who do not maintain an employee payroll, but may have a workforce consisting of contracted workers, family members or business owners)

The top three industries that had the most with-employee businesses were Construction (NAICS 23) with 180 businesses, Retail Trade (NAICS 44-45) with 63 businesses, and Other Services (NAICS 81)⁶ with 104 businesses.

Most businesses in 2020 had less than five employees (403 establishments versus 606 total with employees). There was one business that employed more than 200 people (NAICS 71 - Arts, Entertainment and Recreation), two businesses with more than 100 employees (one representing Manufacturing NAICS 31-33; and one representing Accommodation and Food Services NAICS 72), and there were seven businesses that employed more than 50 people.

Table 1. Business Counts in Township of Severn by 2-digit NAICS Industry, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
Total		2,017	1,382	635
Unclassified		152	123	29
Sub-total, classified		1,865	1,259	606
11	Agriculture, forestry, fishing and hunting	104	84	20
21	Mining, quarrying, and oil and gas extraction	7	0	7
22	Utilities	9	8	1
23	Construction	421	241	180
31-33	Manufacturing	64	30	34
41	Wholesale trade	40	22	18
44-45	Retail trade	131	63	68
48-49	Transportation and warehousing	74	56	18
51	Information and cultural industries	11	3	8
52	Finance and insurance	97	81	16
53	Real estate and rental and leasing	261	238	23
54	Professional, scientific and technical services	170	125	45
55	Management of companies and enterprises	7	6	1
56	Administrative and support, waste management and remediation services	122	77	45
61	Educational services	20	16	4

⁶ This sector comprises establishments, not classified to any other sector, primarily engaged in repairing, or performing general or routine maintenance, on motor vehicles, machinery, equipment and other products to ensure that they work efficiently; providing personal care services, funeral services, laundry services and other services to individuals, such as pet care services and photo finishing services; organizing and promoting religious activities; supporting various causes through grant-making, advocating (promoting) various social and political causes, and promoting and defending the interests of their members.

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
62	Health care and social assistance	93	59	34
71	Arts, entertainment and recreation	34	19	15
72	Accommodation and food services	47	27	20
81	Other services (except public administration)	153	104	49
91	Public administration	0	0	0

A location quotient⁷ (LQ) analysis was carried out to further analyze the concentration of businesses in each of the 2-digit NAICS industries within the Township compared to Ontario averages. The location quotient analysis explains which industries have a higher portion of business establishments when compared to the province.

A score of 1 represents perfect parity to the province. To allow a small degree of flexibility, the Project Team classifies a score from 0.75 to 1.25 as Moderate Strength, meaning an on-par result with the province. A score lower than 0.75 represents a lower concentration in business. A score that is greater than 1.25 represents a high concentration or strong presence in the Township.

Table 2 presents a summary of the LQ and their strength between the Township and the Province of the industries noted at their two-digit NAICS level.

⁷ A location quotient is a way of quantifying how concentrated a demographic feature is in a particular region compared to the province.

Table 2. Business Count Location Quotient Analysis, 2020

Business Count Location Quotient (LQ) Analysis					
NAICS 2-digit	Industry	Township of Severn Business Count	Province of Ontario Business Count	Location Quotient	Strength
11	Agriculture, forestry, fishing and hunting	104	47,646	1.69	High
21	Mining (Aggregate) ⁸	7	1,738	3.12	High
22	Utilities	9	2,954	2.36	High
23	Construction	421	141,030	2.31	High
31-33	Manufacturing	64	36,181	1.37	High
42	Wholesale trade	40	39,385	0.79	Moderate
44-45	Retail trade	131	92,622	1.10	Moderate
48-49	Transportation and warehousing	74	105,856	0.54	Low
51	Information	11	22,059	0.39	Low
52	Finance and insurance	97	91,125	0.82	Moderate
53	Real estate and rental and leasing	261	302,650	0.67	Low
54	Professional, scientific, and technical services	170	201,110	0.65	Low
55	Management of companies and enterprises	7	15,173	0.36	Low
56	Administrative and support and waste management and remediation services	122	58,062	1.63	High
61	Educational services	20	17,525	0.88	Moderate
62	Health care and social assistance	93	104,020	0.69	Low
71	Arts, entertainment, and recreation	34	25,037	1.05	Moderate
72	Accommodation and food services	47	44,366	0.82	Moderate
81	Other services (except public administration)	153	94,890	1.25	Moderate
91	Public Administration	0	1,393	N/A	N/A
Total		1,865	1,444,822		

⁸ While Statistics Canada refers to this industry term as “Mining, quarrying, and oil and gas extraction”, it was felt that Township Council would best identify with this term, as Council is most familiar with this industry reference.

The LQ analysis indicates that the Township of Severn has a high concentration or competitive sectors in six industries (Agriculture, Mining (Aggregate), Utilities, Construction, Manufacturing, and Administrative) when compared to the province.

In 2020, there were 727 businesses (with and without employees) within the top six industries (that had a higher concentration than the province). Out of these industries, Construction employed the most (421 employees), followed by Administrative (122 employees), and Agriculture (104 employees).

6.1.2 Economic Driver Business Count

In this section, the Project Team derived business count data at the 4-digit NAICS level for the top six sectors with the greatest number of business establishments in the Township. The 4-digit level data provides a closer look at different business activities in each of these sectors and paints a portrait of the Township’s business inventory.

6.1.2.1 Construction

In 2020, the industry of Construction (NAICS 23) had 421 business establishments in the Township, of which, 57.2 per cent (representing 241) were businesses without employees, and 42.8 per cent (representing 180) were with employees as presented in Table 3 below. There were 127 businesses with 1-4 employees, 35 with 5-9 employees, 16 with 10-19 employees, and 2 businesses with 20-49 employees.

Table 3. Business Count, Construction, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2361	Residential building construction	120	65	55
2362	Non-residential building construction	30	20	10
2371	Utility system construction	6	3	3
2372	Land subdivision	13	12	1
2373	Highway, street and bridge construction	4	2	2
2379	Other heavy and civil engineering construction	5	1	4
2381	Foundation, structure, and building exterior contractors	46	16	30
2382	Building equipment contractors	70	40	30
2383	Building finishing contractors	84	57	27
2389	Other specialty trade contractors	43	25	18

A closer look at the 4-digit level revealed that 28.5 percent of those businesses were classified as 'Residential building construction' (120 establishments) where 65 of those businesses operated without employees compared to 55 with employees. 'Building finishing contractors' comprised 20 percent (or 84 establishments) as the second largest employer, followed by 'Building equipment contractors' represented as 16.7 percent (or 70 establishments).

6.1.2.2 Administrative and Support, Waste Management, and Remediation Services

In 2020, the 'Administrative and Support, Waste Management, and Remediation Services' industry in the Township consisted of 122 businesses. Of them, 77 (representing 63 percent) did not have employees. Among the remaining 45 businesses that had employees, 27 of them (representing 60 percent) had less than five employees.

Table 4. Business Count, Administrative and Support, Waste Management, and Remediation Services, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
5611	Office administrative services	4	4	0
5612	Facilities support services	0	0	0
5613	Employment services	4	3	1
5614	Business support services	14	14	0
5615	Travel arrangement and reservation services	4	4	0
5616	Investigation and security services	3	3	0
5617	Services to buildings and dwellings	83	43	40
5619	Other support services	6	3	3
5621	Waste collection	1	0	1
5622	Waste treatment and disposal	1	1	0
5629	Remediation and other waste management services	2	2	0

Businesses activity in the 'Administrative' industry primarily concentrated on 'Services to buildings and dwellings' (68 percent), 'Business support services' (11.5 percent), and 'Other support services' (4.9 percent).

6.1.2.3 Agriculture, Forestry, Fishing and Hunting

In 2020, there were 104 businesses in the Township that had business activities related to 'Agriculture, forestry, fishing and hunting'. Approximately 84 businesses (representing 80 per cent) were businesses without employees.

Table 5. Business Count, Agriculture, Forestry, Fishing and Hunting, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
1111	Oilseed and grain farming	15	10	5
1112	Vegetable and melon farming	2	1	1
1113	Fruit and tree nut farming	0	0	0
1114	Greenhouse, nursery and floriculture production	3	1	2
1119	Other crop farming	19	16	3
1121	Cattle ranching and farming	26	24	2
1122	Hog and pig farming	0	0	0
1123	Poultry and egg production	2	2	0
1124	Sheep and goat farming	2	2	0
1125	Aquaculture	0	0	0
1129	Other animal production	15	13	2
1131	Timber tract operations	0	0	0
1132	Forest nurseries and gathering of forest products	1	1	0
1133	Logging	6	4	2
1141	Fishing	0	0	0
1142	Hunting and trapping	2	2	0
1151	Support activities for crop production	4	3	1
1152	Support activities for animal production	6	4	2
1153	Support activities for forestry	1	1	0

Within this sector, 25 percent of businesses throughout the Township (representing 26 businesses) were engaged in ‘Cattle ranching and farming’. Of these businesses, 24 did not have any employees, and two had 1-4 employees. ‘Other crop farming’ was the second-largest sub-industry with 16 businesses without employees and three businesses with 1-4 employees. It is important to note that within the agricultural industry, it is common that family members who reside on the farm may participate in the daily farm duties, but not be listed as direct employees of the business. Additionally, a business without any employees could be a holding company which owns the farmland, building and assets and which leases these out to the operating business.

6.1.2.4 Utilities

The Utilities sector within the Township had the fourth-largest business count with eight businesses without employees and one business with employees. The business count at the four-digit level identified all businesses to be in the sub-sector of ‘Electric power generation, transmission and distribution’.

Table 6. Business Count, Utilities, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2211	Electric power generation, transmission and distribution	9	8	1
2212	Natural gas distribution	0	0	0
2213	Water, sewage and other systems	0	0	0

6.1.2.5 Mining, Quarrying, and Oil and Gas Extraction

The business count data identified seven business establishments in the ‘Mining, Quarrying, and Oil and Gas Extraction’ sector in the Township. Each of those businesses employed workers as evident in Table 7. Five businesses fell under the ‘Non-metallic mineral mining and **quarrying**’ sub-sector, and two were associated with ‘Support activities for mining, and oil and gas extraction’.

Table 7. Business Count, Mining, Quarrying, and Oil and Gas Extraction, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2111	Oil and gas extraction	0	0	0
2121	Coal mining	0	0	0
2122	Metal ore mining	0	0	0
2123	Non-metallic mineral mining and quarrying	5	0	5
2131	Support activities for mining, and oil and gas extraction	2	0	2

Within the ‘Non-metallic mining and quarrying’ industry, two of the five businesses employed 50-99 people, one employed 10-19, one employed 5-9, and one employed less than 5 individuals.

Within the ‘Support activities for mining, and oil and gas extraction’ industry, both businesses employed 5-9 people.

6.1.2.6 Manufacturing

In Table 8 below, the business count data identified five business establishments in the ‘Manufacturing’ sector in the Township. Two businesses employed workers and three businesses did not. The two businesses with workers were categorized as ‘Bakeries and tortilla manufacturing’ and ‘Beverage manufacturing’. The three without workers fell under the ‘Dairy product manufacturing’ sector, the ‘Other food manufacturing’ sector, and ‘Cut and sew clothing manufacturing’ sector.

Table 8. Business Count, Manufacturing, 2020

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
3111	Animal food manufacturing	0	0	0
3112	Grain and oilseed milling	0	0	0
3113	Sugar and confectionery product manufacturing	0	0	0
3114	Fruit and vegetable preserving and specialty food manufacturing	0	0	0
3115	Dairy product manufacturing	1	1	0
3116	Meat product manufacturing	0	0	0
3117	Seafood product preparation and packaging	0	0	0
3118	Bakeries and tortilla manufacturing	1	0	1
3119	Other food manufacturing	1	1	0
3121	Beverage manufacturing	1	0	1
3122	Tobacco manufacturing	0	0	0
3123	Cannabis product manufacturing	0	0	0
3131	Fibre, yarn and thread mills	0	0	0
3132	Fabric mills	0	0	0
3133	Textile and fabric finishing and fabric coating	0	0	0
3141	Textile furnishings mills	0	0	0
3149	Other textile product mills	0	0	0
3151	Clothing knitting mills	0	0	0
3152	Cut and sew clothing manufacturing	1	1	0
3159	Clothing accessories and other clothing manufacturing	0	0	0
3161	Leather and hide tanning and finishing	0	0	0
3162	Footwear manufacturing	0	0	0
3169	Other leather and allied product manufacturing	0	0	0

Both the 'Bakeries and tortilla manufacturing' and 'Beverage manufacturing' businesses employed 10-19 people each.

7. Situational Analysis

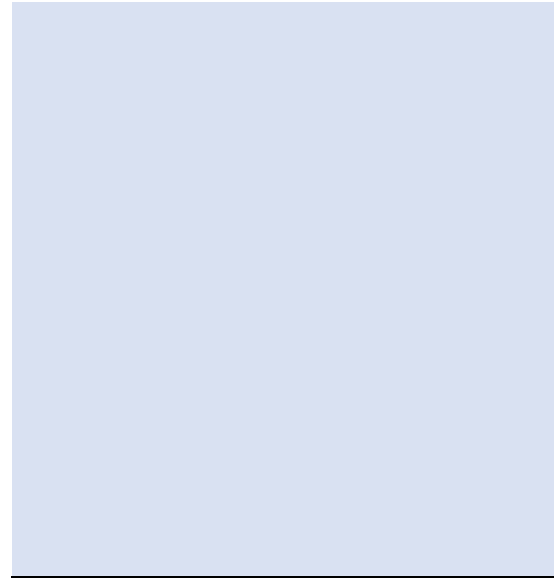
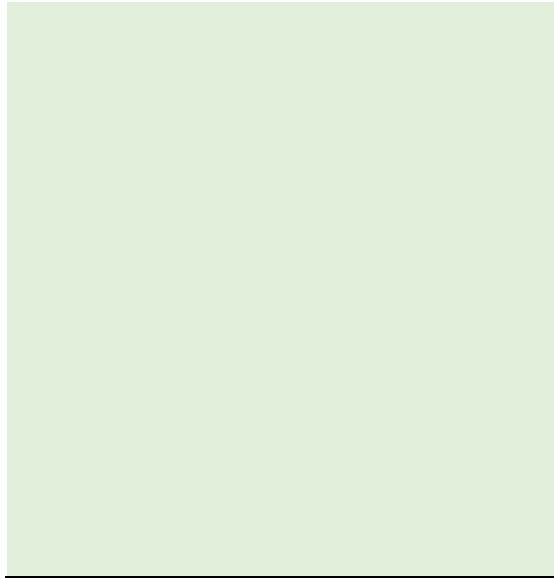
A Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis was undertaken, and which formed the basis of the Situational Analysis. This analysis included an evaluation and assessment in the areas of Business and Industry, Tourism and Recreation, Lifestyle, and Arts, Culture, and the Creative Economy based on the work completed in section 3 (Summary of Past Projects, Policies and Plans) and section 4 (Baseline Economic Analysis). The assessment and analysis will be expanded during the Phase II: Consultation Process, however, the statements listed in each of the four categories below that are flagged with an asterisk (*) were captured directly from the work completed in sections 3 and 4. These statements will be included in many of the planned engagement activities for relevancy in a post-pandemic era context.

7.1 SWOT Analysis

Table 8 summarizes the results of the SWOT analysis associated with the category of ‘Business and Industry’ within the Township.

Table 8. SWOT Analysis: Business and Industry

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> <i>To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> Planning, permitting, and development process * Internet services * Cost of electricity * Public transportation * * <i>To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> Job opportunities * Growth and development * Internet services * Reduce barriers to the planning and developing process * Ensure that aggregate resources are protected for long term use, that extraction occurs in a manner that has minimal impact on the environment, sensitive land uses, and the character of the Township, and adaptive and beneficial rehabilitation occurs on former aggregate operations * Protect areas for agricultural production while supporting on-farm diversification and agri-tourism uses * Support economic development in settlement areas, resort areas, and in employment areas that foster employment growth, competitiveness, and a positive business environment * 	<ul style="list-style-type: none"> Poor internet services * Lack of skilled workforce * Seasonal weather * Electricity costs * * <i>To be expanded upon throughout the duration of the project</i>



- Ensure that all infrastructure (sanitary sewers, water distribution, stormwater management facilities and roads) meet the needs of present and future residents and businesses in an efficient, sustainable, environmentally sensitive, cost effective and timely manner *
- Pandemic recovery *
- Enhance the Township's capacity to attract and retain businesses *
- Township to work with Simcoe County to further community economic development which promotes economic sustainability and employment and business opportunities *
- Work with Simcoe County to enable and manage resource-based development including agriculture, forestry, aggregates, and tourism and recreation *
- ** To be expanded upon throughout the duration of the project*

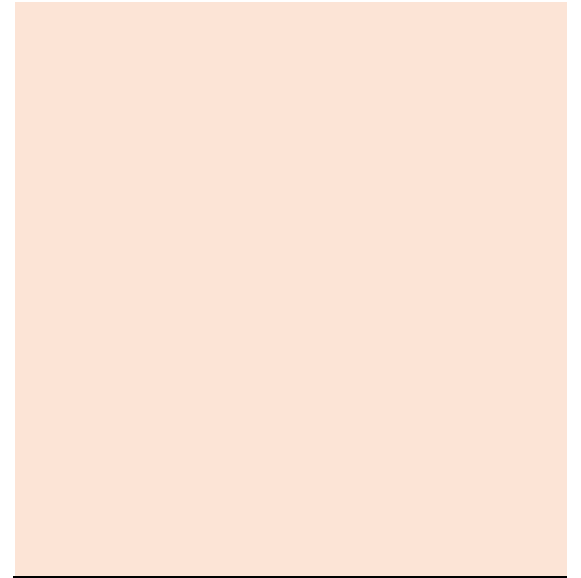


Table 9 summarizes the results of the SWOT analysis associated with the category of ‘Tourism and Recreation’ within the Township.

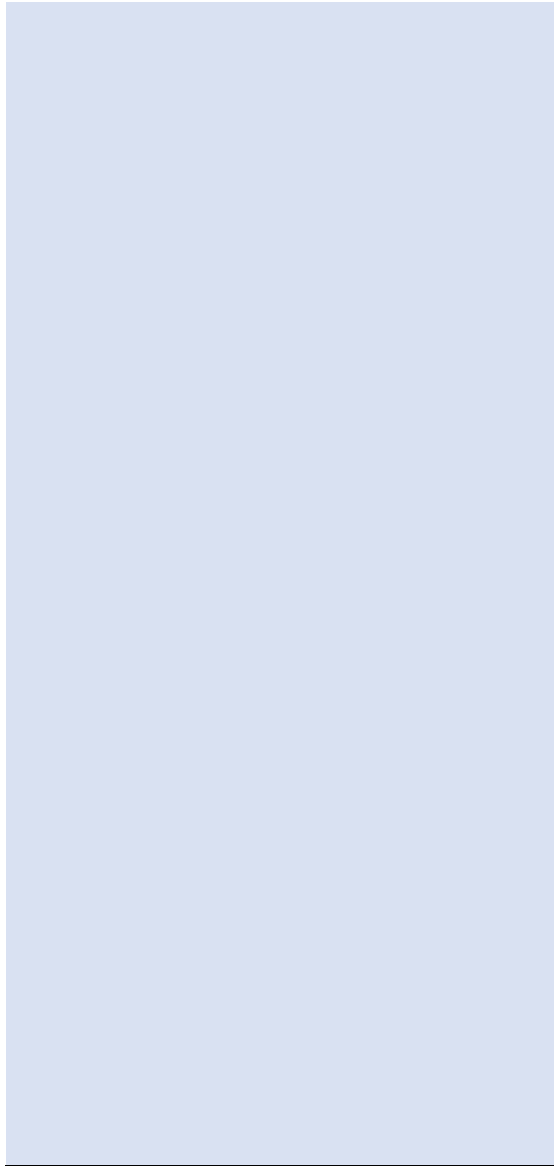
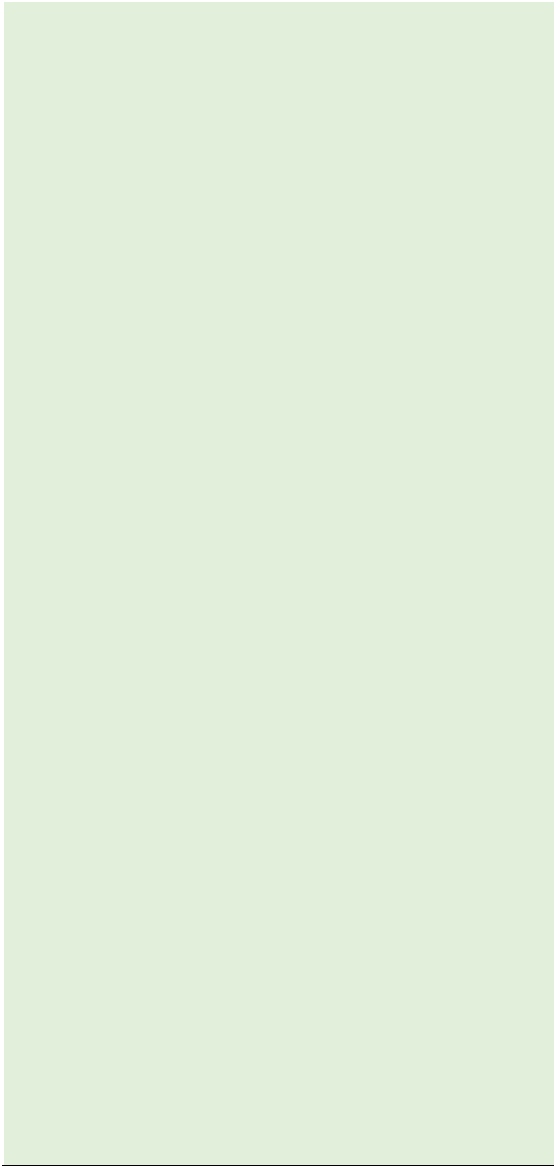
Table 9. SWOT Analysis: Tourism and Recreation

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • Parks (11 municipal, 1 managed by Bayou Park non-profit) * • Trails (7 regional trails) * • Boat Launches (8 launches with docks, 2 water access points, 10 other launches not maintained by the Township) * • * <i>To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Recreation facilities * • * <i>To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Recreation facilities * • Pandemic recovery * • Environmentally focused parks planning and management * • Continued improvements and/or addition of signage and wayfinding * • Development of an interpretive signage strategy * • Developments and parkland dedications * • * <i>To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Seasonal weather * • Electricity costs * • * <i>To be expanded upon throughout the duration of the project</i>

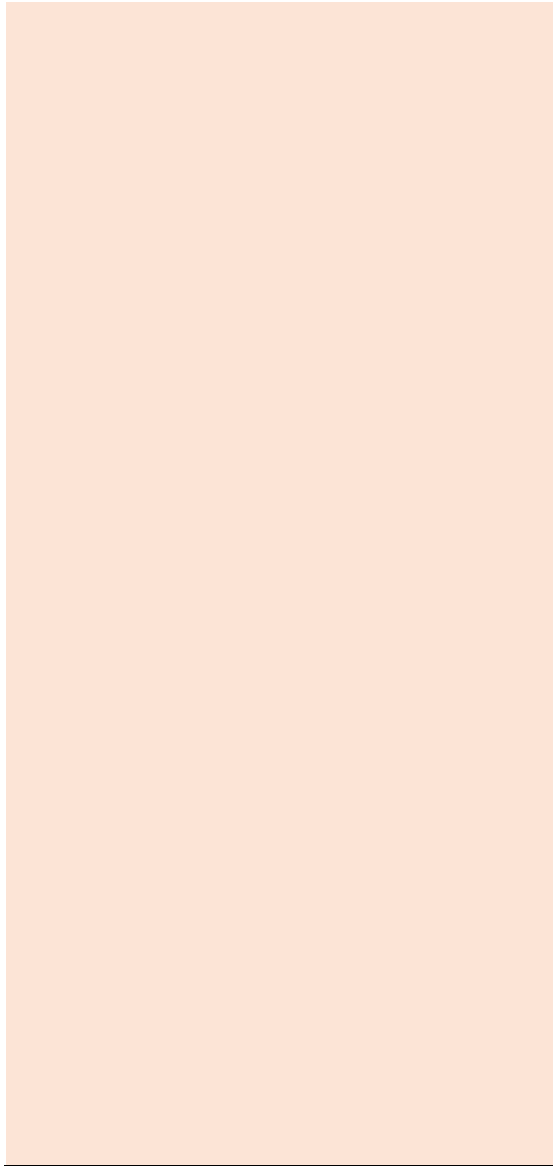
Table 10 summarizes the results of the SWOT analysis associated with the category of ‘Lifestyle’ within the Township.

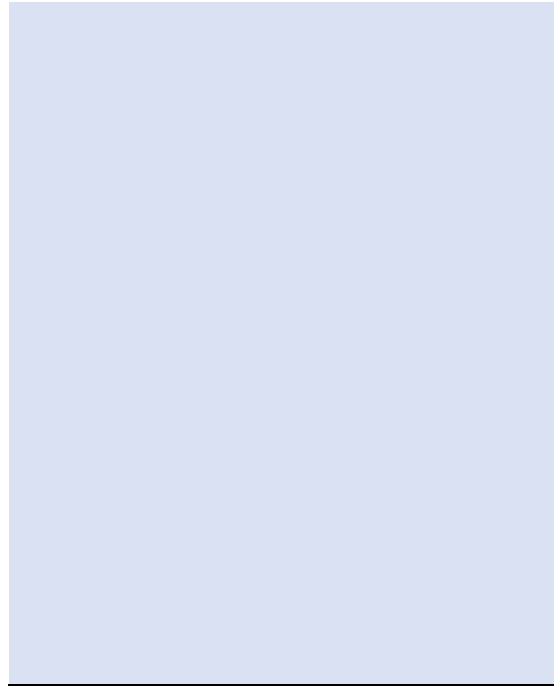
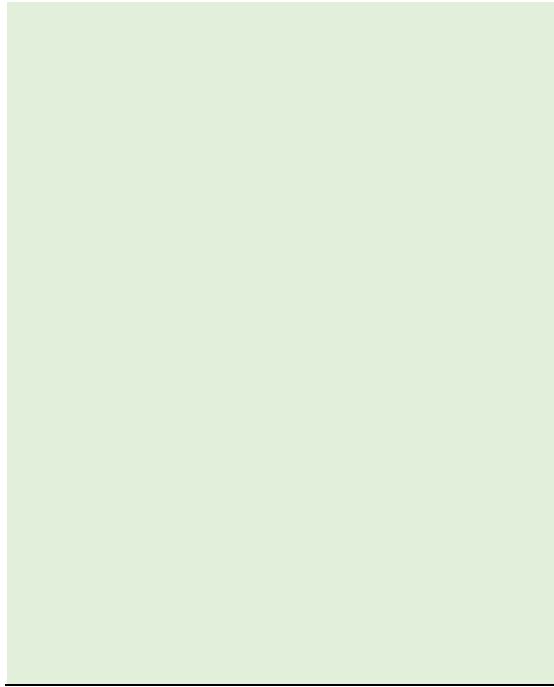
Table 10. SWOT Analysis: Lifestyle

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • Quality of life * • Location * • Severn provides sport, wellness and fitness, learning, and community activities/events throughout the year * • <i>* To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Internet services * • Cost of electricity * • Public transportation * • Recreation facilities * • <i>* To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Direct development to Settlement Areas where full wastewater and water services are planned or available * • Protect and enhance the character of settlement areas, to encourage and support the creation of complete communities, and to enhance the settlement areas as diverse, live able, safe, thriving, and attractive communities * • Protect, maintain, and enhance the open space character of lands in the Rural Areas of the Township * • Ensure an adequate supply of land and housing choices are available for present and future residents * • Pursue and promote facility improvements that will assist with the creation of complete settlement areas and a complete community and support, meeting residents social, cultural, and recreational needs * • Township’s cultural heritage resources be identified, conserved, and enhanced whenever practical and in accordance with Provincial requirements and that all new development occur in a manner which respects the Township’s cultural heritage * • Address the impacts of Climate Change, to achieve the Township’s short and long-term targets for greenhouse gas (GHG) reductions and creating a sustainable and resilient community * • Create an engaged community where all residents feel involved with municipal processes and with the community as a whole * • Accessibility and inclusion * 	<ul style="list-style-type: none"> • Seasonal weather * • Electricity costs * • Limited Mental Health and Addiction support to meet growing demand * • Social Connectedness / Safety * • Infrastructure to meet growing population * • Urban out-migration * • Accessibility and inclusion * • Aggregate haul routes * • <i>* To be expanded upon throughout the duration of the project</i>



- Environmentally focused parks planning and management *
- Develop arts, culture, and heritage *
- Support all season outdoor recreation *
- eSports *
- Infrastructure and equipment *
- Healthy active living *
- Focus on short duration programming tied to sport, wellness and fitness, learning, and community activities/events *
- Improve participation tied to sport, wellness and fitness, learning, and community activities/events *
- The need for indoor and outdoor facilities to meet community activity requirements *
- Focus on upgrades and improvements tied to indoor and outdoor facilities to meet community activity requirements *
- Township to adapt to meet the housing demand and changing demographics with servicing, water, and roads *
- Township to advocate for affordable broadband to our residents and businesses*
- Work with Simcoe County to implement growth management to achieve lifestyle quality and efficient and cost-effective municipal servicing, development, and land use *
- Work with Simcoe County to positively influence the creation of built environments for people of all ages and abilities, which serve to establish complete healthy communities and enhance the quality of life for residents *
- Work with Simcoe County to ensure development of the Township with diversified economic functions and opportunities, and a diverse range of housing options *





- Work with Simcoe County to achieve coordinated land use planning *
 - Work with the Simcoe County to direct a significant portion of growth and development to settlements where it can be effectively serviced, with a particular emphasis on primary settlement areas *
- FOCUS ON TRANSPORTATION**
- Minimize entrance impacts along Hwy 11 *
 - Facilitate pedestrian/cycling traffic *
 - Establish sidewalk system/standards *
 - Improve pedestrian access between No Exit roads *
 - Improve connectivity between bike routes/trails and settlement areas *
 - Improve signage for pedestrians/cyclists *
 - Provide standards for bike lanes *
 - Identify truck routes for carrying aggregate from quarries to marketplace *
 - Minimize impacts of truck traffic in populated areas *
 - ** To be expanded upon throughout the duration of the project*

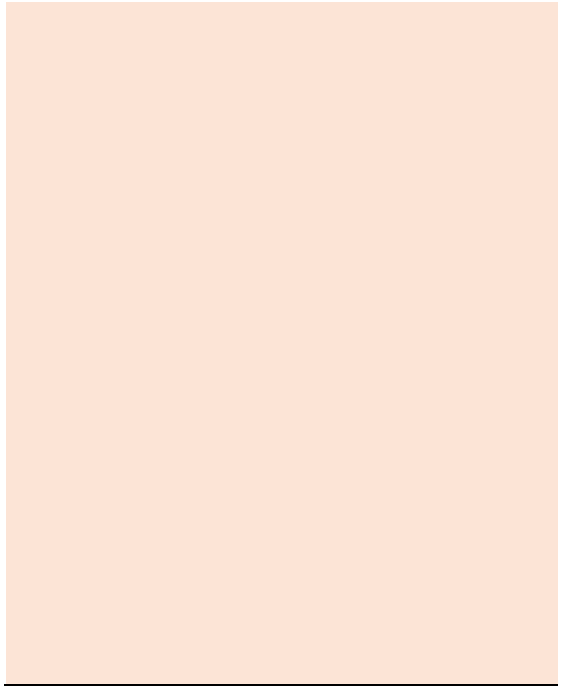


Table 11 summarizes the results of the SWOT analysis associated with the category of ‘Arts, Culture, and the Creative Economy’ within the Township.

Table 11. SWOT Analysis: Arts, Culture, and the Creative Economy

Strengths	Weaknesses	Opportunities	Threats
<ul style="list-style-type: none"> • An online community calendar⁹ that details various community events, festivals, and activities throughout the year. • The Village Players of Coldwater is a local theatre company that puts on a play and musical each year. • Various heritage buildings and museums, including Coldwater Canadiana Heritage Museum, Coldwater Mill, Big Chute Marine Railway Lock 44, and Matchedash Community and Heritage Centre • Various arts and culture community groups to encourage residents to get in touch with their artistic side. • There are various sports programs offered throughout the Township. • The Culture and Recreation Advisory Committee provides recommendations to Council on matters related to culture and recreation. • <i>* To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • <i>* To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • Township to improve its responsiveness, communications, engagement, outreach, and ease of access * • Township to work with Simcoe County to protect and enhance the Township’s natural heritage system and cultural features and heritage resources, including water resources * • <i>* To be expanded upon throughout the duration of the project</i> 	<ul style="list-style-type: none"> • <i>* To be expanded upon throughout the duration of the project</i>

⁹ <https://calendar.severn.ca/>

8. Economic and Market Trends Analysis

Economic Drivers: Tourism; maple syrup; nature-based tourism; natural resources / assets; water activities; vacations; weddings; destinations.

Tourism Assets: Agri-tourism; four-season destination; waterfront properties; waterfront sports.

Strategic directions which the Township is moving towards include: a Rural lifestyle with urban services; a Better broadband network, Infrastructure to match the growth; Westshore opportunities; and support for urban development.

What is the Township doing today that will position it for sustainable economic well-being, growth, and development? Start of the plan, 99 percent residential and not a lot of commercial/businesses, assets needing rehabilitation, Westshore recreation facility new build, some parks, and baseball fields.

Regional Level: Historical trend assessment of approved building permits, transportation options for the elderly and those with mobility constraints, the impact of cottage country floating homes, Lake Simcoe Regional Airport-historical assessment of passenger air service, assessment of the airport as a gateway into Severn Township (focus on tourism).

8.1 Regional Assessment

According to the Ontario Government: A Place to Grow Growth Plan for the Greater Golden Horseshoe (2020), Severn is “one of the most dynamic and fast-growing regions in North America”¹⁰. “The Plan applies to the 16 Towns and Townships, also referred to collectively as local municipalities, which constitute the County of Simcoe”¹¹. “The Plan is a broad policy document, implemented through local municipal official plans and amendments, zoning bylaws, and subdivision approvals, together with long-term transportation, sewer, water, and waste management plans, environmental studies, watershed management plans, financial programs, capital budgets, economic development initiatives, and human services plans”¹². Simcoe County Council watches over plan implementation and adherence to policy¹³.

¹⁰ County of Simcoe Planning Office Consolidation 2023; MHBC Planning Limited, 2022: 14

¹¹ County of Simcoe Planning Office Consolidation 2023: 5

¹² County of Simcoe Planning Office Consolidation 2023: 5

¹³ County of Simcoe Planning Office Consolidation 2023: 6

The goals of the County of Simcoe Official Plan include “protecting, conserving, and enhancing the County's natural and cultural heritage, achieving wise management and use of resources as well as implementing growth management for lifestyle quality and efficient, cost-effective municipal servicing, development and land use”. Additionally, The County works on “achieving coordinated land use planning among local municipalities and with neighbouring counties, districts, regions, and cities, as well as First Nations lands”.

Additionally, the County aims to “further community economic development promoting economic sustainability in Simcoe County, providing employment and business opportunities”. Simcoe County hopes to establish complete healthy communities for people of all ages and abilities. The County of Simcoe also “wishes to promote socially and physically accessible rural and urban communities, while protecting and enhancing public health and safety.

8.1.1 Historical Trend Assessment of Approved Building Permits and Housing Market

This trend assessment indicates growth in terms of building permits and the housing market, despite some outward migration. According to MPAC (Municipal Property Assessment Corporation) (2023), during the pandemic, building and home-improvement permits within the Township and in the country, in general, increased due to more time spent at home. Since then, building permit approval has trended more towards pre-pandemic rates, with people desiring to spend more on travel and leisure. This could be a beneficial trend for Severn which is seen as a desirable location for recreation and tourism. According to Refin (2023)¹⁴ and Evans (2022)¹⁵, there is a growing trend of people moving to Severn to acquire space ‘in paradise’ and as ‘work from home’ has been normalized. This could also be due to the surrounding area’s small-town feeling, appeal for holiday homes, and reputation as an ideal place to move to during retirement. Concerns or threats relate to possibilities of flooding and intense weather events, particularly the impact of storms because of climate change in the area.

The Ainsley Group (2014)¹⁶ predicted that “in the worst-case scenario, an estimated 2,482 residential units will be built in the Township by the end of the next decade, with a combination of 84 percent single-family units, 2 percent apartment units and 14 condominium/townhouse units”. Furthermore, “Severn Township has become among

¹⁴ Redfin, “Severn Housing Market: House Prices and Trends | Redfin,” n.d.

¹⁵ Evans, “Building Boom: Almost 1,000 Homes Will Soon Be Built in Severn,” May 16, 2022.

¹⁶ Ainsley Group (January 2014). Township of Severn Transportation Master Plan Final Draft. PDF.

the leaders in the province when it comes to the percentage increase of building permits year over year”. The Severn housing market is competitive and is mirroring trends across several other places in Ontario (Redfin 2023). In this assessment, the Project Team revisited the demographics of the Township. Age groups listed in the 2023 Severn Community Profile included people aged 0-14 as 14 percent of the population, 15-64 years 62 percent of the population, and 65+ 24 percent of the population, suggesting that many people residing in the area are currently of working or retirement age. If residents are working or retired, they may own or visit a holiday or rental property. It is possible that more families could be attracted to the area if there are better, diversified economic opportunities as well as other desirable improvements, such as improved recreation spaces and programs, transportation and service options, high quality education and health care.

Throughout the first half of 2023, homes in Severn receive on average approximately five offers and sell in around 20 days, compared to eight days in 2022. According to data from Redfin.com “The median sale price of a home in Severn was \$515,000 in December 2022, up 2.5 percent since 2022”. “The median sale price per square foot in Severn is \$227, up 0.7 percent since 2022”. The 2023 Severn Community Profile suggests that job opportunities are rising locally, “up 6 percent from 2021-2022”. The availability of affordable housing and commercial space is an important pull factor that has the potential to drive economic and commercial growth. ¹⁷

While expanding, the Township would like to maintain a rural lifestyle while increasing the number of urban services. Furthermore, the Township would like to develop a better broadband network and infrastructure which could lead to the creation of more Westshore opportunities. Diverse plans for housing affordability and safety within the area are necessary. So are quality community schooling and recreation spaces to meet demand and increase the quality of life.

8.1.2 Transportation, particularly for the elderly and those with mobility constraints

The Ontario Government (2023) supports creating complete communities, prioritizing intensification, and higher densities in strategic growth areas as well as infrastructure to support improved transit systems. The Ontario Government’s (2023) A Place to Grow Growth Plan for the Greater Golden Horseshoe report outlines that “within all major transit station areas, the development will be supported, where appropriate, by a) planning for a diverse mix of uses, including additional residential units and affordable

¹⁷ Redfin, “Severn Housing Market: House Prices and Trends | Redfin,” n.d.

housing, to support existing and planned transit service levels; b) to foster collaboration between public and private sectors, such as joint development projects; c) to provide alternative development standards, such as reduced parking standards; and d) to prohibit land uses and built forms that would adversely affect the achievement of transit-supportive densities.”

The County of Simcoe’s June 22, 2023, Updated Transportation Master Plan (TMP) Draft guides Severn’s long-term strategy for expansion and management of a highly sustainable, multi-modal transportation system. The renewed vision echoes optimism from the Ontario Government’s (2023) A Place to Grow Growth Plan for the Greater Golden Horseshoe document which seeded hopes for multimodal and sustainable transportation systems lessening greenhouse gas emissions, offering a balance of transportation choices that would reduce reliance upon automobiles while enhancing prospects for economic development.

The June 2023 County of Simcoe TMP Update “included a mode-by-mode review of transportation including road recommendations from the 2014 TMP Update as well as identification of new candidate road improvement projects from analysis, new growth assumptions and public/stakeholder input and potential road jurisdiction changes.”¹⁸ For the future, The County has chosen the preferred higher-sustainable alternative which means investing strategically in all modes of travel to meet mobility needs and accommodate growth while supporting a new focus on transit upgrade, active transportation and safety-first infrastructure.¹⁹ “The next phase of the TMP, Phase III will focus on prioritization, timing, phasing and planning-level costing for the draft recommendations provided as well as a suite of supporting strategies to form the overall TMP.”²⁰

Currently, transportation in Severn is car-dependent and somewhat bikeable with minimal transit. This indicates a need to increase walkability, bikeability, and access to transit, particularly for the elderly and those with mobility constraints. To facilitate investment in higher-sustainable options, Severn is advised to follow plans to scale-back road network capacity expansion projects by focusing on growth-related needs identified by the 2014 TMP Update, through public and stakeholder consultation and the

¹⁸ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

¹⁹ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²⁰ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

identification of future congestion points.²¹ They may consider prioritize road-widening based on scores that are higher than a threshold i.e., in Southeast Simcoe where growth is projected to be highest.²² They may also follow the plan to support provincial road projects for better interregional flows.²³

Apart from road maintenance and improvements, transit and active modes of transportation are also under evaluation and consideration. Transit operates as the County of Simcoe LINX, VIA Rail Washago (CNR), and Ontario Northland. Longterm direction is to improve the efficiency and integration of the County's LINX Transit Service and local municipal services towards an integrated County-wide transit system.²⁴ Short-term directions are organized based on enhancing connectivity and coordination, encouraging accessibility, providing fare integration, implementing governance funding and operating models and sustainable infrastructure and vehicles.²⁵ "Active transportation, comprising of walking, cycling and rolling will play a bigger role with planned linkages organized into the network."²⁶ The newest version of the TMP "recommends a new Priority Cycling Network to help see through the goal of the Ultimate Cycling Network in the County"²⁷. It is notable that electric vehicle (EV) technology is seen to be on the rise and therefore will need to be more integrated going forward.

For ageing and elderly populations, The Ontario Government's (2023) online Transportation Guide to Programs and Services for Seniors recommends providing driving courses for mature drivers, increasing awareness of programs like CAA's Toolkit for Seniors, and encouraging adherence to renewal requirements such as via the Ministry of Transportation's Senior Driver Renewal Program. As the number of seniors increases, there also may be a need for increased accessible parking spaces in addition to transit. Quality health care in the area could help people make good decisions about when it is time to stop driving. There is a need for everyone to plan for the time when more people will stop driving altogether. Access to busing, taxis, vans or other public transit, carpools, volunteers, friends or family, or others that drive, and safe walking areas with access to necessities will be more important in the foreseeable future.

²¹ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²² https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²³ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²⁴ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²⁵ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²⁶ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

²⁷ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

8.1.3 Impact of cottage country floating homes

Currently, “Ontario Regulation 161/17 governs structures and things that Canadian Citizens, residents or those with permits may use on public lands, for example (not limited to), a ‘camping unit’, which includes any watercraft equipped for non-commercial camping or overnight accommodation for no more than twenty-one days at one location per year, moving at least 100m from the last location as long as it is not already occupied or prohibited per land use plan or signage”²⁸. This definition explains that while currently “municipalities regulate land use and provide services, the provincial government is responsible for lake beds and Crown land and the federal government regulates the movement of vessels on the surface of the water, as well as some waterways”. On June 23, 2023, the Ministry of Natural Resources and Forestry posted that Ontario Regulation 161/17 was amended, clarifying that “floating accommodations cannot be placed or used for outdoor accommodation or camping purposes on public land covered by water and Ontario Regulation 326/94 clarified the same rule applicable for non-residents”.²⁹ All levels of government will have a role in implementing and policing rules around cottage country floating homes.

The Environmental Registry of Ontario explains that “Ontario is seeing an increase in the number and types of structures and things being used for overnight accommodation on Ontario’s lakes and rivers.”³⁰ “The Ministry of Northern Development, Mines, Natural Resources and Forestry (2023)³¹ is aware of concerns regarding the prolonged and indeterminate occupation of floating accommodations and related potential impacts, such as (but not limited to) impacts on waterways, islands and access, pollution affecting water quality, aquatic plants lake beds, fish/wildlife and habitats, wastewater management, risk of oil and other spills, application of building permits, duration of use and people occupying lands without authorization, noise pollution, aesthetic and privacy impacts on waterfront property owners, public safety concerns (fire response), as well as concern over advertising that suggests a range of options for the use of floating accommodations on the water- including short-term rentals/commercial use, increasing traffic and lack of payment of property taxes.

²⁸ “Proposal to Amend Ontario Regulation 161/17 to the Public Lands Act to Change the Requirements Related to Floating Accommodations | Environmental Registry of Ontario,” June 23, 2023.

²⁹ “Proposal to Amend Ontario Regulation 161/17 to the Public Lands Act to Change the Requirements Related to Floating Accommodations | Environmental Registry of Ontario.”

³⁰ “Proposal to Amend Ontario Regulation 161/17 to the Public Lands Act to Change the Requirements Related to Floating Accommodations | Environmental Registry of Ontario,” June 23, 2023.

³¹ “Proposal to Amend Ontario Regulation 161/17 to the Public Lands Act to Change the Requirements Related to Floating Accommodations | Environmental Registry of Ontario,” June 23, 2023.

Proposed changes to regulations have been made as the “Ontario Government wishes to clarify the structures/things that cannot be placed and used for overnight accommodation on water over public land”, however, it is unclear how it will be regulated and as a result, this poses a significant ongoing and future challenge for Severn.^{32 33 34}

8.1.4 Lake Simcoe Regional Airport

8.1.4.1 Historical assessment of air passenger service

Lake Simcoe Regional Airport (CYLS) Passenger and Aircraft Movement Trends in Chart 13 “displays the annual aircraft movements, by aircraft type, from 2011 to November 2018”³⁵. “Through most of 2018, the total aircraft movements and jet aircraft movements have been on an upward trend, signifying a growing corporate and private jet presence”. “Jet operations at an airport drive economic activity through fuel sales, various airport use fees (parking, landing fees, etc.), and the requirement for stationed aircraft and vehicle mechanics”.

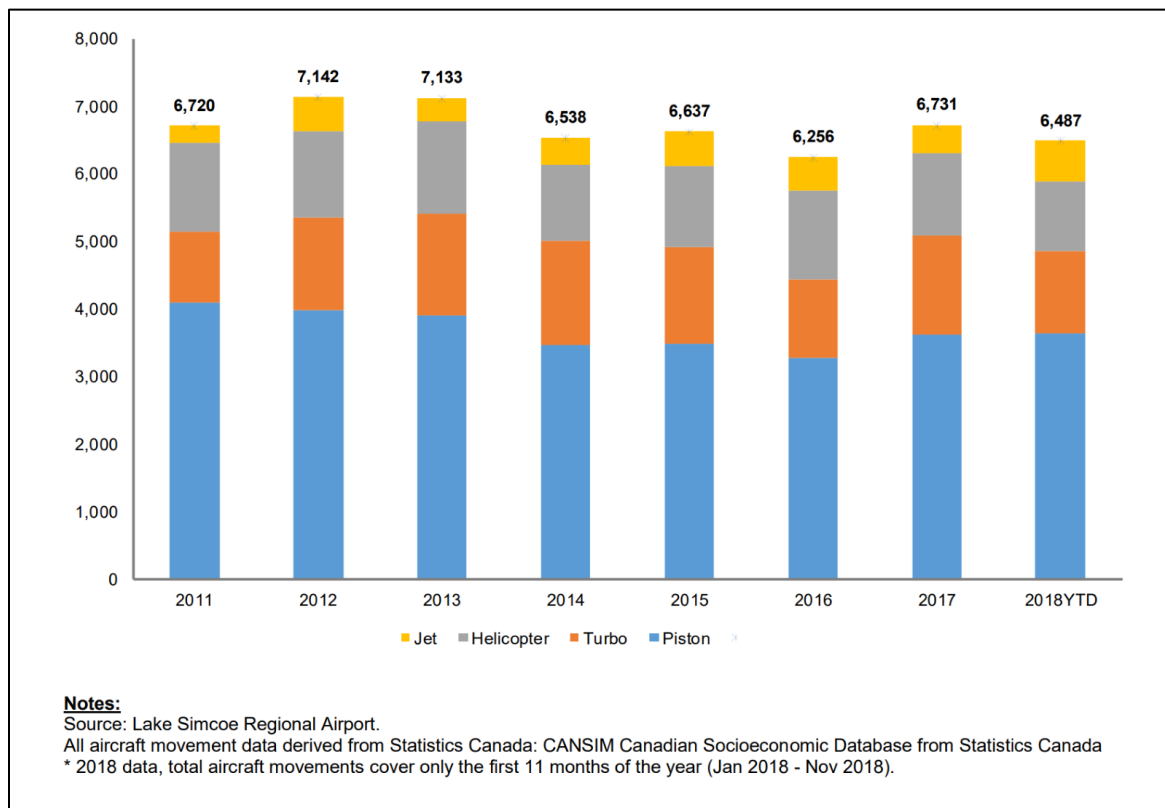
³² Crawley, “Ontario Wants to Ban Cottage Country ‘floating Homes’ Made from Shipping Containers.”

³³ Lorinc, Lorinc, and Lorinc, “This Curious Georgian Bay Structure Is Causing Controversy in Cottage Country,” May 24, 2023.

³⁴ “Proposal to Amend Ontario Regulation 161/17 to the Public Lands Act to Change the Requirements Related to Floating Accommodations | Environmental Registry of Ontario,” June 23, 2023.

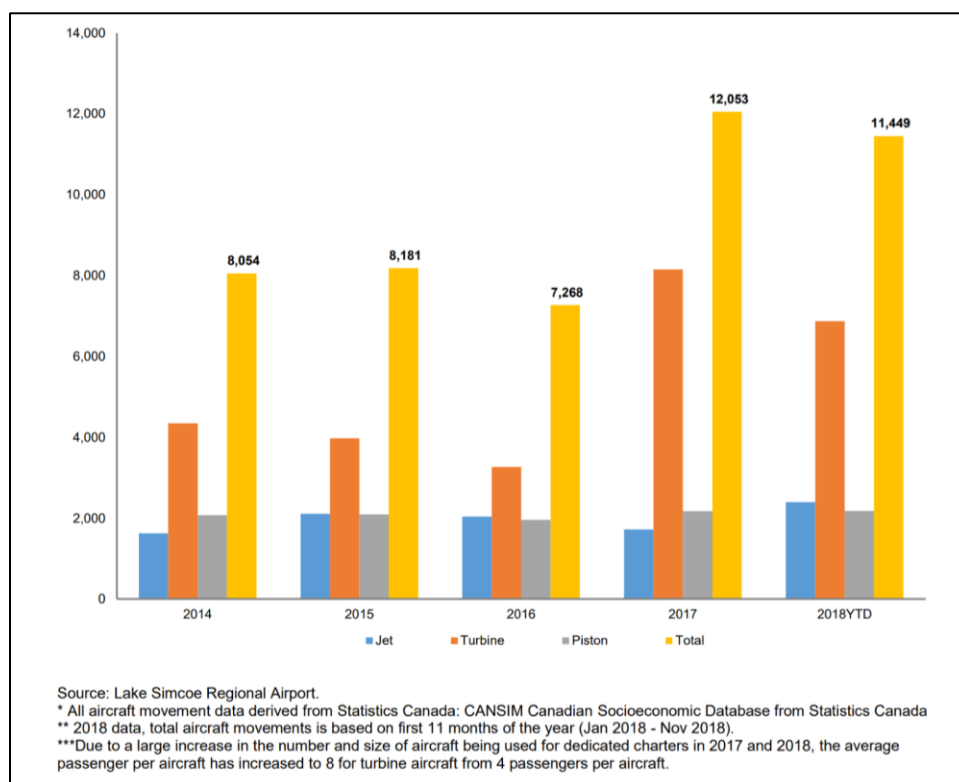
³⁵ Economic Development Sub-Committee (May 2019). Lake Simcoe Regional Airport (CYLS) – 2018 Economic Impact Study – FINAL REPORT. Retrieved June 15, 2023 from <https://simcoe.civicweb.net/document/68137/EDS202019-316%0Schedule%21.pdf?handle=0EC11F76F3E94EC386B542DD15973C1C>

Chart 13. CYLS Aircraft Movements (2011 - November 2018)



“CYLS has also been handling greater volumes of passengers over the years leading up to 2017, with traffic exceeding 12,000 passengers annually”. “The bulk of passengers (over 8,000) were handled on turbine aircraft”. “Larger aircraft and increased movements contributed to the greater number of passengers handled at the airport”. “The growth of jet aircraft movements at CYLS in recent years results in a corresponding growth of jet passengers. “These high-value customers are critical to the continued growth of the airport as they support a wide range of high paying jobs such as aircraft mechanics and pilots”.

Chart 14. CYLS Passenger Movements (2014 - November 2018)



8.1.4.2 Assessment of the airport as a gateway into Severn Township (focus on tourism)

Lake Simcoe Regional Airport is an economic generator for the City of Barrie, Simcoe County, and the Province of Ontario³⁶. “Ongoing operations of the airport directly support 100 jobs earning an estimated \$8.4 million in wages”. Including indirect and induced impacts, the employment base at CYLS contributes \$26.0 million in GDP and \$60.6 million of economic output to the regional and provincial economy.

The airport is home to skilled and high-paying jobs across a variety of industries including but not limited to law enforcement, air ambulance services, aircraft and vehicle maintenance, flight training and corporate aviation. These occupations not only serve a

³⁶ Economic Development Sub-Committee (May 2019). Lake Simcoe Regional Airport (CYLS) – 2018 Economic Impact Study – FINAL REPORT. Retrieved June 15, 2023 from <https://simcoe.civicweb.net/document/68137/EDS202019-316%0Schedule%21.pdf?handle=0EC11F76F3E94EC386B542DD15973C1C>

growing corporate jet presence but drive the provision of public services such as medevac and police services to ensure the health and safety of the surrounding region.

In addition to the associated economic benefits of the airport, CYLS also plays a critical role in the Southern Ontario Airport Network (SOAN). As one of the 11 SOAN members, CYLS is responsible for strategically planning for future air passenger demand by making the necessary investments using a phased-in and demand-based approach. With passenger traffic in the region expected to double by 2043, SOAN airports must ensure that the infrastructure is in place to accommodate the forecasted passenger and cargo growth for the region. In conclusion, CYLS has an opportunity to contribute to the future economic development and job creation in the region. With a strong existing employment base and an opportunity to capitalize on the continued economic and air passenger growth in Southern Ontario, it is important that the Township of Severn view the airport as an asset that complements other regional economic development initiatives.

8.2 Provincial Assessment

8.2.1 Impact of the Provincial Policy Statement:

“The Provincial Policy Statement [as a whole] provides policy direction and minimum standards on matters related to land use planning and development aiming to improve quality of life for Ontarians”³⁷; ³⁸. The Provincial Policy Statement influences Severn in its vision for land use planning and growth management, i.e., in terms of efficient use of land and infrastructure, encouraging the use of existing urban areas, supporting the creation of compact, complete communities that are walkable, offering a nice mix of housing, employment, and services. The provincial goal is to develop “strong, sustainable, and resilient communities and a clean, healthy environment with enhanced social well-being. Additionally, the province pursues a “competitive economy optimizing use of land, resources and public investment in infrastructure and public service facilities”.

The Provincial Policy Statement encourages environmental protection, of natural heritage features and areas, including wetlands, woodlands, and wildlife habitats. It requires municipalities to consider environmental impacts when making land use

³⁷ Ontario Government (Effective May 1, 2020). Provincial Policy Statement, 2020 Under the Planning Act. Retrieved June 13, 2023 from <https://files.ontario.ca/mmah-provincial-policy-statement-2020-accessible-final-en-2020-02-14.pdf>

³⁸ MHBC Planning Limited (September 2022). Township of Severn New Official Plan Draft 2022.

decisions and encourages them to prioritize the conservation and restoration of natural resources. The Provincial Policy Statement recognizes the importance of agriculture and rural areas in Ontario. It requires municipalities to protect prime agricultural land and support the viability of the agricultural sector. This influences how the Township of Severn plans for the preservation of agricultural lands and supports rural activities. For example, directions include “promoting affordable housing, employment security/financial well-being and transportation choices (specifically transit), conserving biodiversity, resources and cultural heritage while protecting essential ecological processes, improving public health and safety, providing for food and fibre production as well as for increased, diversified recreational opportunities including parks and open spaces”. The Township of Severn needs to take these policies into account when planning for development and protecting its natural environment as the province would like to “minimize undesirable effects of development, particularly environmental and social impacts.

The policy “recognizes challenges linked with diversity within populations and among economic activity, the pace of growth and physical and natural conditions”. As well, “the provincial policy-led planning system recognizes and addresses complex interrelationships among environmental, economic and social factors in land use planning... supporting a comprehensive, integrated and long-term approach”. While “some policies provide flexibility in implementation, it is requested that “provincial interests are upheld” and that “cross-boundary matters are coordinated to complement the actions of other planning authorities and promote mutually beneficial solutions”.

In the spirit of building trust and reconciliation, “consultation with Indigenous communities [is imperative], particularly on planning matters that could affect section 35 Indigenous or treaty rights”.³⁹ Furthermore, going forward, “planning authorities are encouraged to build constructive, cooperative relationships through meaningful engagement with communities to facilitate knowledge-sharing in land use planning processes, and while informing decision-making”.

The Township of Severn recognizes that “Provincial Plans and agreements are senior documents and as such prevail when there is a conflict between the Official Plan and Provincial Plans”⁴⁰. The “protection or restoration of The Great Lakes – St. Lawrence

³⁹ “Canadian Bar Association - Municipal Duty to Consult and Land Use Planning Law in Ontario.”

⁴⁰ MHBC Planning Limited (September 2022). Township of Severn New Official Plan Draft 2022.

River Basin” and The Growth Plan for the Greater Golden Horseshoe (2020), in which the Township of Severn resides, need to be considered in planning⁴¹

8.2.2 De-amalgamation of counties/regions in Ontario

The de-amalgamation of counties/regions debate is relevant for Severn as a provincial facilitator has been assigned to the County. “Vast amounts of research have found that consolidation fails to produce promised cost savings, rarely leads to more efficient service delivery, and reduces the ability of citizens to be involved in the life of their local governments”. When “de-amalgamation is offered as a solution, the idea has some merit: if the new municipality has become inefficient, costly, and less responsive to local need, then simply undo the work of amalgamation and return the municipality to its original borders”. Given the controversies, there would need to be a community consensus to move forward with such a plan. A better goal may be to diversify representation in official committees and local governments and work strategically with stakeholders to achieve initiatives.⁴²

8.2.3 Outlook: Tourism / Domestic Tourism

Like elsewhere, post-pandemic tourism operations in Severn are predicted to be profitable. According to the State of the Ontario Tourism Industry Report, “In 2018, Ontario was home to 200,000 tourism businesses and employed 400,000 Ontarians across a range of sub-sectors, including culture and heritage, recreation, entertainment, food and beverage, attractions, transportation, and accommodation, and travel services”⁴³. Further, the sector contributed over \$5 billion in annual tax revenues for the province, benefiting numerous adjacent industries”. As a leader in recreation and leisure in Ontario, Severn is an essential contributor to this success. It will be essential to continue to invest in infrastructure supporting the growth of Severn’s economic driver

“Consumer interest in cultural and nature-based tourism presents opportunities to create innovative, sustainable tourism offerings that engage in intercultural exchange”⁴⁴ Severn could collaborate with Indigenous and Francophone populations to develop

⁴¹ <https://files.ontario.ca/mmah-place-to-grow-office-consolidation-en-2020-08-28.pdf>

⁴² <https://www.fraserinstitute.org/sites/default/files/de-amalgamation-in-canada.pdf>

⁴³ Ontario Chamber of Commerce and Tourism Industry Association of Ontario (2022). State of the Ontario Tourism Industry. Retrieved June 23, 2023 from <https://occ.ca/wp-content/uploads/State-of-the-Ontario-Tourism-Industry-Report-December-13-2022-FINAL.pdf>

⁴⁴ Ontario Chamber of Commerce and Tourism Industry Association of Ontario (2022). State of the Ontario Tourism Industry. Retrieved June 23, 2023 from <https://occ.ca/wp-content/uploads/State-of-the-Ontario-Tourism-Industry-Report-December-13-2022-FINAL.pdf>

tourism. Indigenous tourism is of growing interest as prior to Covid-19 it was arguably “the fastest growing tourism sector in Ontario, with 1 in 3 international visitors to Canada expressing an interest in Indigenous tourism experiences. Creating sustainable tourism/agri-tourism opportunities will also cater to the growing community of tourists who prefer these kinds of experiences and offer alternate income sources. Cannabis, sports/wellness-based, and the film also could present several promising opportunities for the future of tourism and hospitality in the area.

Severn’s tourism industry has faced increased threats due to the impact of the pandemic. Some businesses accumulated debt to remain financially viable during the pandemic, however, recovery is predicted as early as 2024⁴⁵. As well, the number of regular visitors and investors from the U.S. has dwindled and been slow to return to Northern Ontario. Additionally, business Travel has been slower to return. It will be essential to raise awareness to possible consumers of the possibility of Severn to host transient travel, meetings, and conventions. Severn could try marketing to ‘gateway cities like Greater Toronto and Ottawa that play an essential role in attracting visitors interested in traveling to other areas.

Several areas present barriers to tourism development such as taxes and lacking transit/safe travel options, limited housing affordability, workforce, and labour as well as access to reliable high-speed broadband present challenges. Provincial and federal taxes present barriers to growth (e.g., provincial beer tax, federal excise tax). While other taxes are geared toward growth (e.g., Municipal Accommodation Tax), these could be retooled to maximize their benefits. Lack of comprehensive, affordable public transportation within and between Ontario destinations limits travel and commuting options, precludes opportunities for multi-destination travel, and impacts business recruitment and retention. Limited availability of affordable housing impacts workforce recruitment, retention, and dispersion to rural tourism economies. Workforce and labour challenges could adopt a targeted strategy by helping people to reconceptualize related careers, optimizing work placement opportunities for students, retaining international workers, and promoting job-ready skills in the school curriculum. Some areas of Ontario remain underserved in terms of internet connection, placing rural and Indigenous tourism economies at a disadvantage in the digital age.

Global challenges could present risks and disruption of travel to the area including those associated with climate change, another pandemic and/or more. Experts suggest focusing on the domestic market as a good option to revive the sector and mitigate risk

⁴⁵ “Fall 2022 Tourism Outlook.”

associated with global events or by investing in attracting international visitors. Ensuring decision-making is data-driven to each locality and region is important⁴⁶.

8.2.4 Outlook: Ontario's Aggregate Industry

Mineral aggregate resources (sand, stone, gravel, clay, and other aggregate materials) are a critical component of Ontario's economy (GDP), providing jobs, taxes and outputs from Severn including key building materials for infrastructure and for building residential and non-residential structures^{47 48 49 50}. "The Ontario Stone, Sand and Gravel Association (OSSGA) is a non-profit industry association representing over 280 sand, gravel and crushed stone producers and suppliers of valuable industry products and services. Collectively, members produce a large majority of the approximately 164 million tonnes of aggregate consumed annually on average in the province to build and maintain Ontario's infrastructure needs. OSSGA works in partnership with government and the public to promote a safe and competitive aggregate industry contributing to the creation of strong communities in the province"⁵¹ That said, higher interest rates have been discouraging builds.

"Because Canada is a small open economy, the global balance between saving and investment matters"⁵². "Torres et al. (2017) discuss how urbanization, population growth, and aging infrastructure present challenges for the sustainable management of non-renewable aggregate resources and ultimately result in social and environmental concerns"⁵³. "It will become especially important that a reliable and affordable supply of aggregates be available for the GTHA, where the population is projected to surpass 10

⁴⁶ <https://occ.ca/wp-content/uploads/State-of-the-Ontario-Tourism-Industry-Report-December-13-2022-FINAL.pdf>

⁴⁷ Daily Commercial News, "Dwindling Aggregate Supply Will Lead to Significant Infrastructure Costs: Study - Constructconnect.Com," August 23, 2022.

⁴⁸ Ontario Chamber of Commerce and Tourism Industry Association of Ontario (2022). State of the Ontario Tourism Industry. Retrieved June 23, 2023 from <https://occ.ca/wp-content/uploads/State-of-the-Ontario-Tourism-Industry-Report-December-13-2022-FINAL.pdf>

⁴⁹ Staff, "Severn Quarry's Efforts Recognized with Community Relations Award," March 1, 2022.

⁵⁰ Perry, McIntosh (2022). Township of Severn: Transportation Master Plan Update. Presentation.

⁵¹ Daily Commercial News, "Dwindling Aggregate Supply Will Lead to Significant Infrastructure Costs: Study - Constructconnect.Com," August 23, 2022.

⁵² Bank of Canada, "Higher Interest Rates Are Working," n.d.

⁵³ Ontario Chamber of Commerce and Tourism Industry Association of Ontario (2022). State of the Ontario Tourism Industry. Retrieved June 23, 2023 from <https://occ.ca/wp-content/uploads/State-of-the-Ontario-Tourism-Industry-Report-December-13-2022-FINAL.pdf>

million over the next two decades⁵⁴. The cost of transport of materials needs to be reviewed on how to make longer hauls more affordable to reach farther markets⁵⁵

“According to Philpot et al. (2020), the scarcity of aggregate resources often means mining and quarrying operations are occurring in areas that are ecologically sensitive and near population centres.” “Concerns include the potential for groundwater contamination; disruption to local watersheds, ecosystems, and habitats; noise pollution, dust, and poor air quality resulting from blasting and trucking; the sheer size of aggregate pits and quarries; land use opportunity costs; and the longer timeline required to see the rehabilitation of a pit or quarry site realized”. “Campbell (2014) writes that negative visual aesthetics, traffic, and adverse effects on road conditions also must be considered”. Importantly, “for Ontario to meet its climate targets, it will need to significantly reduce GHG emissions from the transportation sector, which is the leading source of emissions in the province”.⁵⁶

8.2.5 Historical trend assessment of Average Annual Daily Traffic (AADT) counts along Highways 11, 12 and 400 (that intersect Severn Township)

The Transportation Master Plan Updates hope to “develop and enhance the transportation network in an integrated fashion with other development planning”, supporting short-term, medium-term and long-term growth to 2031, 2041 and finally through 2051. As previously mentioned, the Transportation Master Plan Draft Update from June 2023, outlined several updated objectives including “realigning transportation policy and investment to meet varied, changing transportation needs of residents, businesses and visitors, considering all modes of travel- walking, cycling, driving, goods movement, and transit.”⁵⁷

Travel by automobile is the dominant form of transport in Severn. The County realizes considering provincial road projects is important to support efficient and reliable movement of residents, visitors and goods throughout Severn and elsewhere in the Country. The County wishes “to respond to growth pressures especially in South Simcoe, adapt to growing seasonal traffic especially along Georgian Bay and the North of the County, respond to changes in the provincial highway network with the recent 400-404 link and Highway 400 capacity improvements (and others as planned), to increase connectivity to the Greater Toronto Area, and to address capacity concerns

⁵⁴ https://www.ossga.com/multimedia/2022-08-12-080021-88685/ossga_report-final.pdf

⁵⁵ https://www.ossga.com/multimedia/2022-08-12-080021-88685/ossga_report-final.pdf

⁵⁶ https://www.ossga.com/multimedia/2022-08-12-080021-88685/ossga_report-final.pdf

⁵⁷ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

and manage traffic through and around settlement areas.”⁵⁸ The County also identified a need to review road jurisdiction and identify potential road transfers through a county road rationalization process⁵⁹

There is a road network development process in place to model existing and future road capacity issues which create a list for road improvement projects based on travel demand.⁶⁰ The County presented that currently, and for the future, “most congestion issues take place on the provincial road network, including highways 400, 11, 93, 89 and 26 and sections of highway 12 which increases travel on County roads 21, 88, 90 and 93 as alternate routes.”⁶¹ The Division Road Corridor with limits at Highway 12 and Highway 11 is recommended as a candidate for a road jurisdiction transfer to the County Road network in a post 2031 phase⁶².

Three scenarios for improvements are being considered based on projected effectiveness of different future network alternatives. A) A Base Case which represents a baseline scenario with committed/funded projects, the current transit system maintained with no added investment and under construction/funded projects for active transportation considered.⁶³ B) A Trend Scenario with planning continued as per the previous ten years emphasizing need to handle capacity constraints due to increased travel demand via road network project scoring, with ongoing transit operations and planned expansion/investment and on-road/off-road routes identified or C) a Higher Sustainability option to rebalance focus towards more sustainable modes of transit, selected road improvements via road network project scoring for priority, a higher impact road network and transit service that is optimized integrating all local and County service as well as active transportation routes identified and prioritized for shorter-term implementation with higher-order facilities.⁶⁴ At evaluation, the Higher Sustainability option was marked as the most effective for creating connected communities, efficient goods movement and transit as a viable choice for everyday travel as well as the best catalyst for safe, connected active transport, responsible forward-looking stewardship and a better protected environment.⁶⁵

⁵⁸ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁵⁹ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶⁰ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶¹ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶² https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶³ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶⁴ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

⁶⁵ https://www.simcoe.ca/Planning/Documents/SimcoeTMP_Phase-II_2023-06-22.pdf

8.3 Federal Assessment

8.3.1 Impacts of government policies (provincial/federal) should Canada close its borders again

The pandemic influenced Canada's surface trade, up to \$390 million was lost per day, as well as job opportunities while Canadian borders were closed with the United States. Additionally, international tourism waned and is estimated to recover in 2024 at the earliest which will impact economic activity. Lack of mobility for businesses in a pandemic, limits the amounts of parts that are transported across and within borders from place to place leading to shortages of materials.⁶⁶

8.3.2 The economic impact of rising interest rates

Governor Tiff Macklem (2023) of the Bank of Canada explains that higher interest rates are being used to control inflation and cool down the economy. "The goal is to achieve price stability with an inflation rate of around 2 percent per year." "When the economy is overheated and inflation is high, raising interest rates makes borrowing more expensive, which reduces borrowing and lowers the demand for goods and services." This decrease in demand allows the economy to catch up, easing inflation. Canada has already increased the policy interest rate eight times from 0.25 percent to 7.2 percent since July 2023, and the effects are starting to show. "Borrowing rates have gone up, spending has declined, and inflation is falling." Even though interest rates keep increasing "the economy continues to run hotter than expected, despite interest rates being at the highest levels in decades"⁶⁷. The Banks will continue to assess the impact and adjust interest rates accordingly. However, the path to achieving two percent inflation is uncertain, and there are risks that could push inflation higher or slow economic growth more than anticipated. The Bank is committed to restoring price stability and will take necessary actions if needed"⁶⁸.

9. Preliminary Recommendations

As the Project Team transitions into Phase II of the Economic Development Strategy, a preliminary set of recommendations have been identified that must go through a vetting and validation process as a component of the planned consultation and engagement activities. Furthermore, it is expected that once residents and the business community

⁶⁶ https://www.thestar.com/opinion/contributors/what-the-pandemic-taught-us-about-the-canada-u-s-border/article_1e1fe64e-bda1-5f98-a9b7-b34e930c62bd.html

⁶⁷ "CityNews."

⁶⁸ Bank of Canada, "Higher Interest Rates Are Working."

are consulted, this will support the Project Team in the identification of a further set of gaps and opportunities for which to support the development of additional recommendations. It is these recommendations that will form the basis of the strategic priorities for which to guide the Township's economic development efforts forward over the next five years.

The following set of preliminary recommendations focuses on business retention and expansion; tourism and recreation; community capacity; and arts, culture and the creative economy:

Focus on Business Retention and Expansion

1. The Township should develop a series of incentives, programs, and policies, in the form of a Community Improvement Plan, that encourages existing building owners to convert vacant building spaces into leasable commercial, residential, and/or mixed-use spaces.
2. The Township should develop and execute a marketing strategy and outreach campaign to attract year-round business retailers, service providers, and/or experienced operators to the downtown settlement areas throughout the Township.
3. The Township should formalize its business concierge program by establishing a defined business visitation schedule and provide regular updates on the key outcomes.
4. The Township should evaluate the feasibility of adding a single FTE to handle economic development and tourism.
5. The Township should consult the County to establish a supportive strategy to assist the County in pursuing economic opportunities focused on climate change and biodiversity initiatives.
6. With a clustering of 22 local business establishments that are classified as NAICS 112110: "beef cattle ranching and farming, including feedlots", the Township should investigate and understand their supply chain needs to identify local gaps which can be fulfilled through business investment attraction.
7. With a clustering of 120 local business establishments that are classified as NAICS 236110: "residential building construction, the Township should investigate and understand their talent and supply chain needs to identify local gaps which can be fulfilled through talent and business investment attraction strategies.

Focus on Tourism and Recreation

1. The Township should explore opportunities with local businesses to expand their tourism offering during shoulder/off-season periods through products and services development, supported by joint marketing and promotional efforts (in partnership with Tourism Simcoe County).

2. The Township should develop and execute a local outreach campaign to educate local government organizations, private-sector businesses and others involved in tourism development and promotion, to ensure they are all aligned and focus on conveying the same township-wide messaging, tourism assets and value propositions.
3. The Township should develop a series of year-round single/multi-day tourism packages through collaboration with tourism operators, strategic partners and Tourism Simcoe County.

Community Capacity

1. The Township should undertake an updated community capacity study/assessment to ensure its community and social infrastructure, including municipal programs and services are in place and are able to accommodate its planned population growth.
2. The Township should increase the supply of shovel-ready employment lands to accommodate investment-ready development opportunities.
3. If Orillia's municipal boundary is expanded to include some of the proposed areas within Severn, the Township should develop a series of recommendations (to be negotiated and agreed upon with the City of Orillia) that can help the Township offset the lost property tax revenues.

Focus on the Arts, Culture, and the Creative Economy

1. The Township should develop and launch a "Downtown Beautification Initiative" focused on the Arts by increasing public art in the downtowns (such as murals, mosaics, window paintings, statues, flowerpots, fountains), embedding art into natural resources and amenities, and beautifying the Township's downtowns' recycling and garbage bins by a local artist or designer.
2. The Township should continue to allocate resources, including financing to the implementation of the municipal signage plan. That includes an emphasis on promoting connectivity and utilization between waterfront – trails – retail – recreation areas.

10. Next Steps / Phase II Overview

Phase II – Public Consultation Process

Item	Date
Engagement/Consultation Planning	August 3 – September 5
Online Survey	September 11 – October 6
Focus Group Discussions 1:1 Meetings	September 26-27
Validation Workshop and Visioning Session	December 6
Submission of Report 2: Draft Strategy	Week of January 8
Presentation of Report 2	Week of January 22
Completion of Staff Review Allocation	Week of February 5

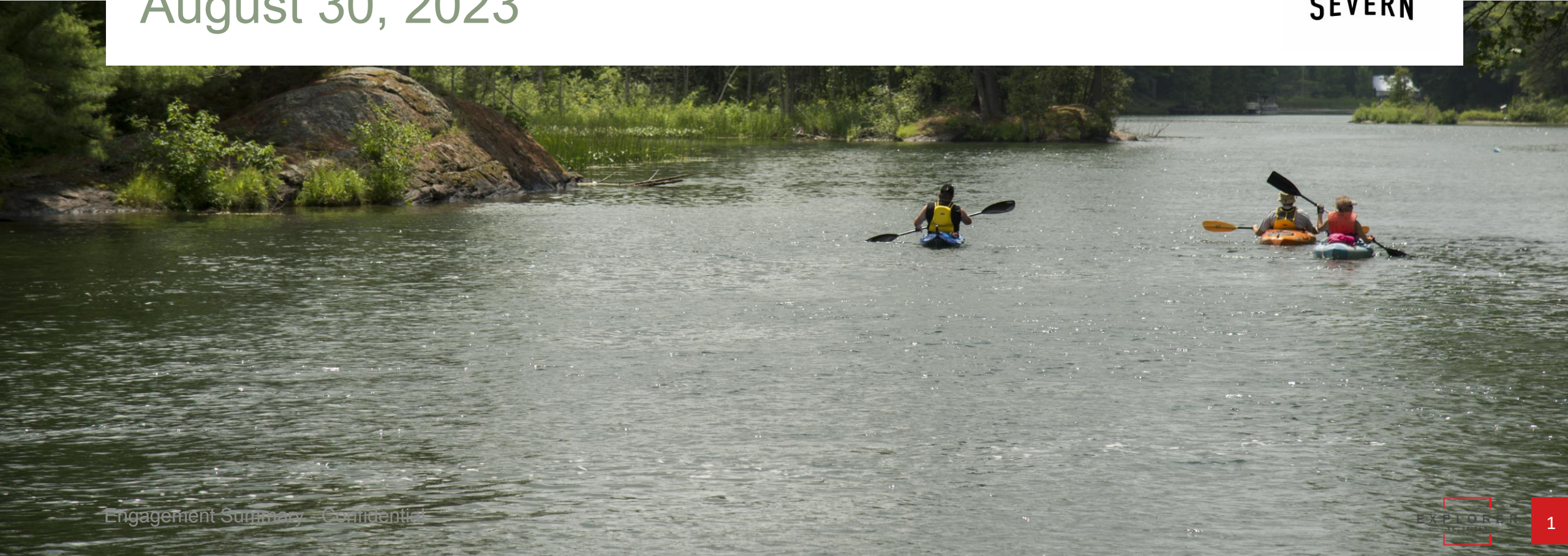
Phase III – Economic Development Strategy

Item	Date
Submission of Report 3: Final Strategy	Week of February 26
Presentation of Report 3	Week of March 11

Township of Severn

Economic Development Strategic Plan

Phase I Preliminary Report Presentation August 30, 2023



Township of Severn

Economic Development Strategic Plan

Table of Contents

1. Background Research and Documentation Review
2. Baseline Economic Analysis
3. Full-Spectrum Sector Analysis
4. Economic and Market Trends Analysis
5. Situational Analysis (SWOT)
6. Preliminary Recommendations
7. Next Steps / Phase II and III Overview

Township of Severn

Economic Development Strategic Plan

Background Research and Documentation Review

The Project Team conducted a thorough review of ten past projects, policies, and plans relevant to the preparation of the Township of Severn Economic Development Strategy.

The following sub-sections summarize the key takeaways and highlight the most relevant aspects capable of providing situational context to the Project Team for which to further investigate, challenge and validate in a 2023 context.

Township of Severn

Economic Development Strategic Plan

Background Research and Documentation Review

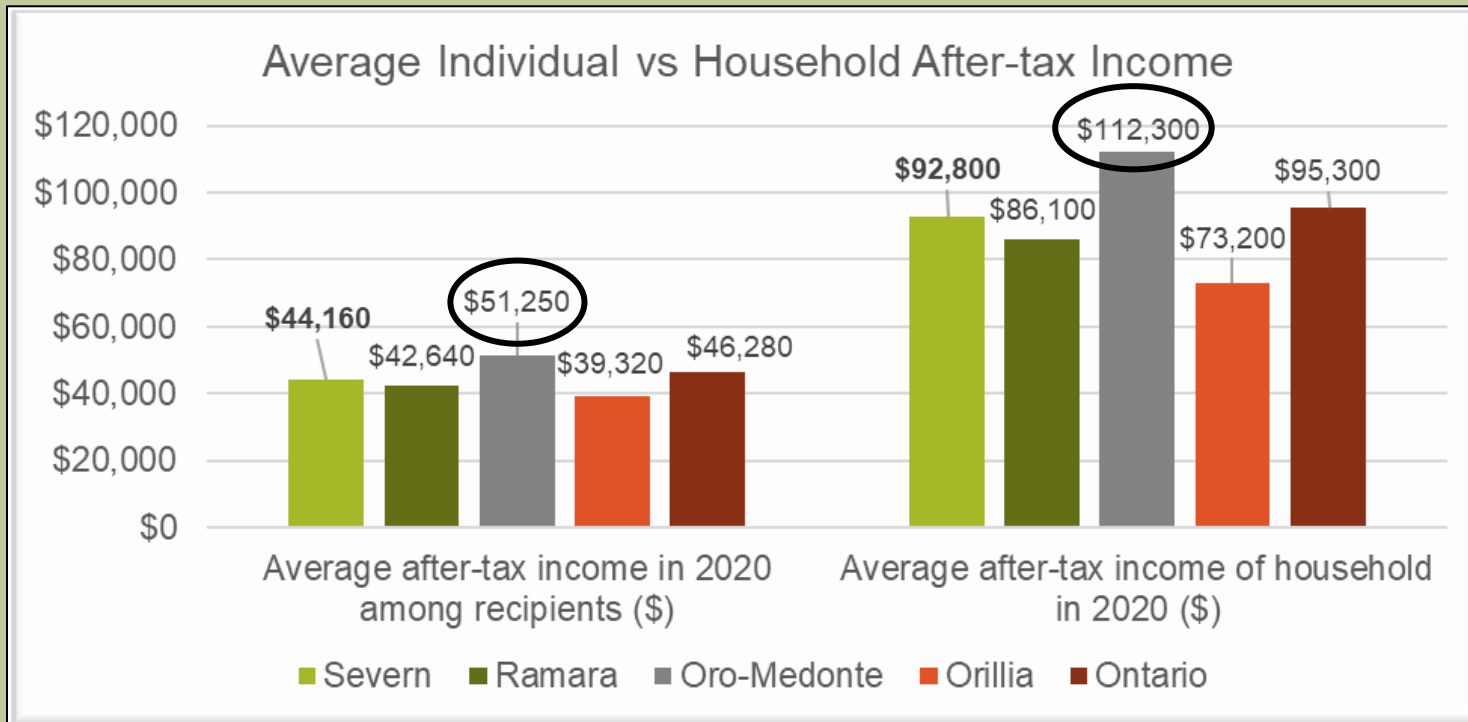
1. Ontario Lake Country BR+E Project (2016)
2. The Couchiching Community Safety and Well-being Plan (2021-2025)
3. A Place To Grow: Growth Plan for the Greater Golden Horseshoe (2020)
4. Provincial Policy Statement (2020)
5. Township of Severn Official Plan (Draft 2022)
6. Severn Recreation Master Plan (2022)
7. Severn Transportation Master Plan (Draft 2023)
8. Signage Strategy and Implementation Plan (2023)
9. Strategic Plan (2023-2026)
10. County of Simcoe Official Plan (2023)
11. County of Simcoe Economic Development Office Ec Dev Strategy (2021-2025)
12. Development Charges Background Study (2019)

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Average Individual vs Household After-tax Income (2021)



Oro Medonte reported the highest average after-tax income and the highest after-tax household income

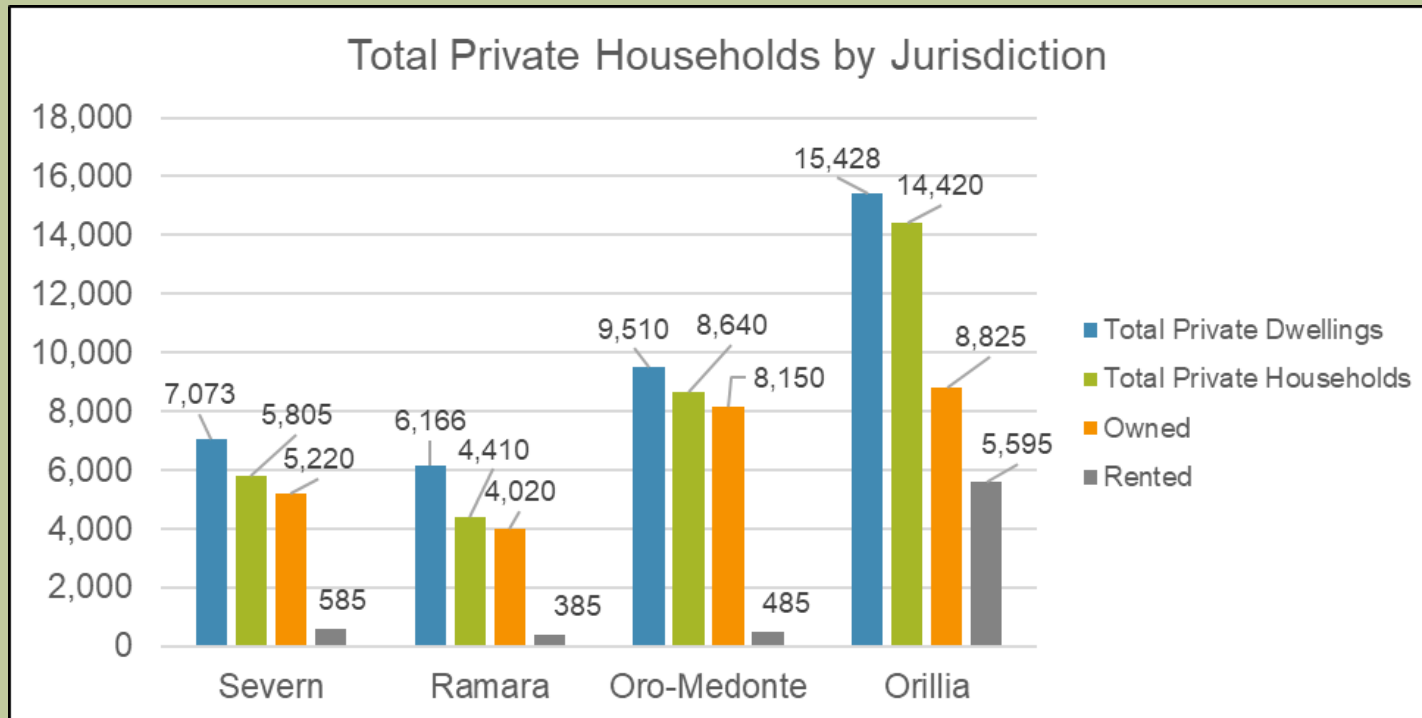
15% and 21% respectively over Severn Township residents

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Total Private Households (2021)



Percentage of Homes Owned

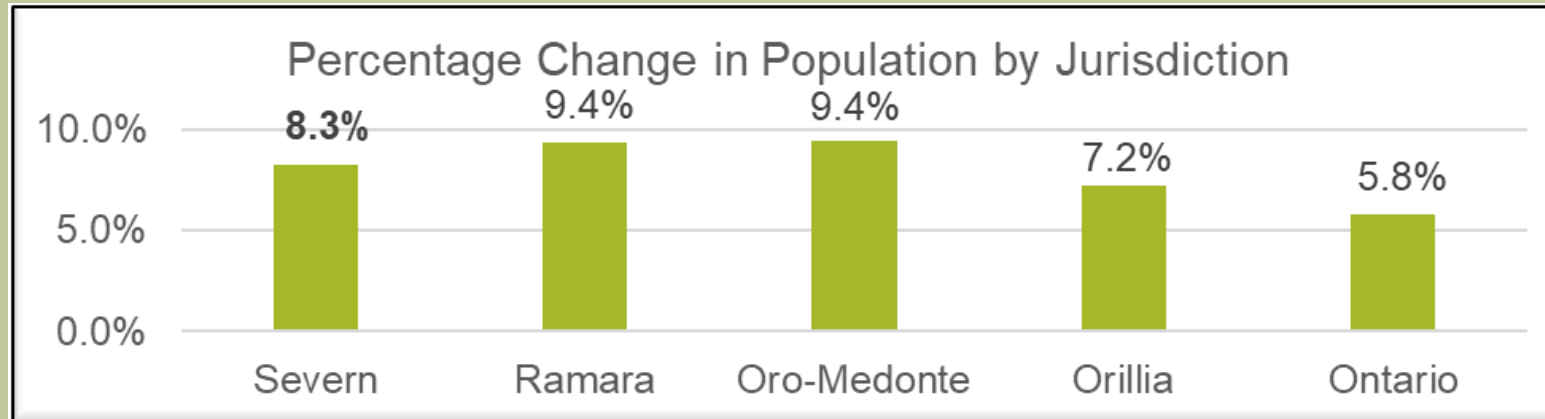
- Oro Medonte: 94%
- Ramara: 91%
- Severn: 90%
- Ontario: 68%
- Orillia: 61%

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Population and Population Change (2016-2021)



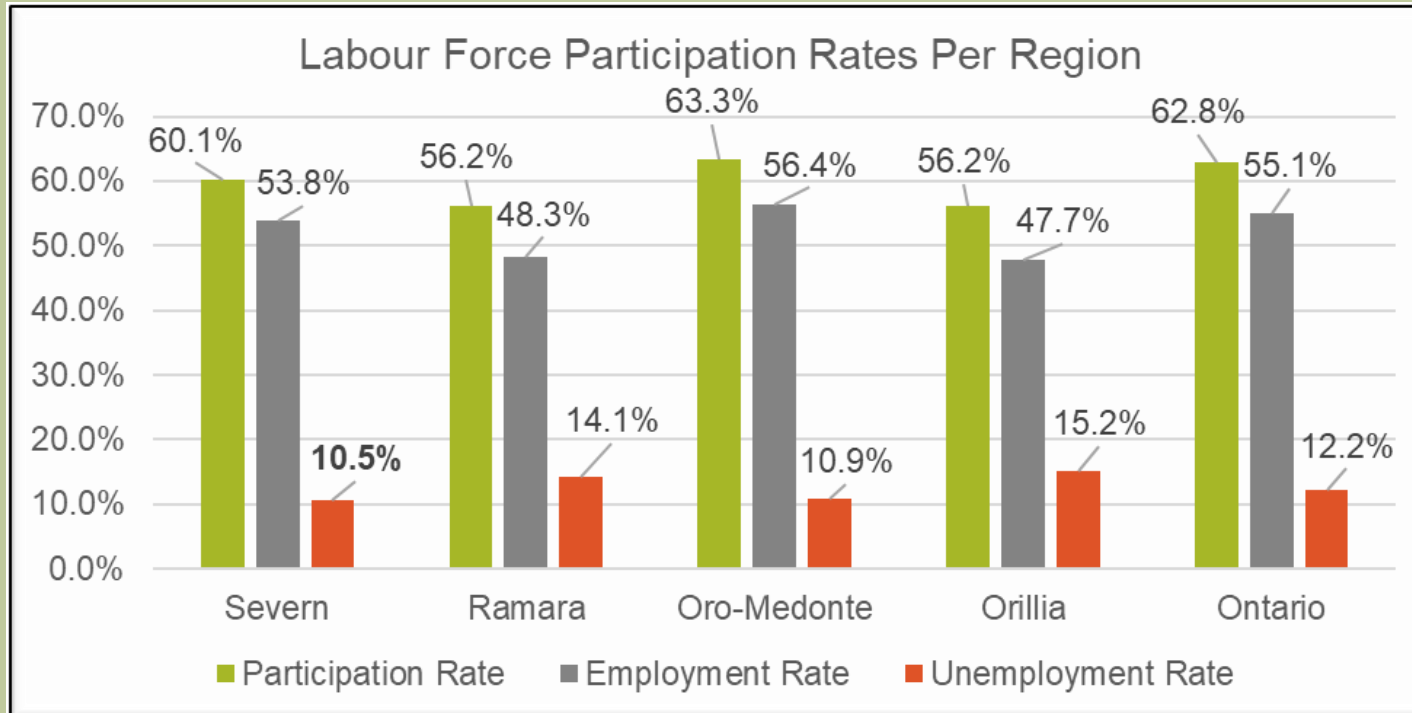
- Ramara / Oro Modente shared the highest percentage in population growth
- Severn grew at a faster rate than Orillia and the province of Ontario

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Labour Force Participation Rates (2021)



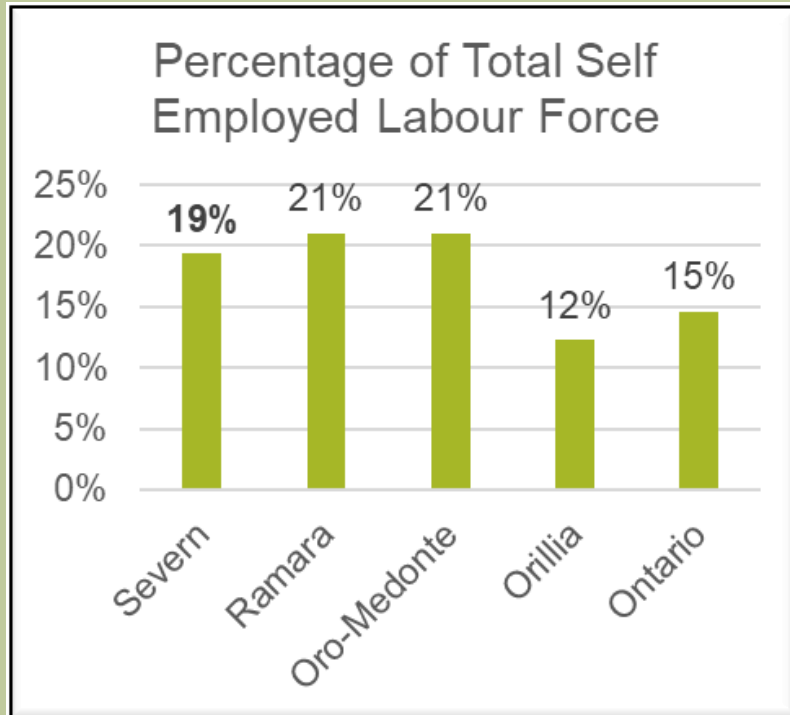
Severn reported the lowest unemployment rate

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Percentage of Self Employment (2021)



Ramara / Oro Modente shared the highest percentage of its workforce who were self-employed

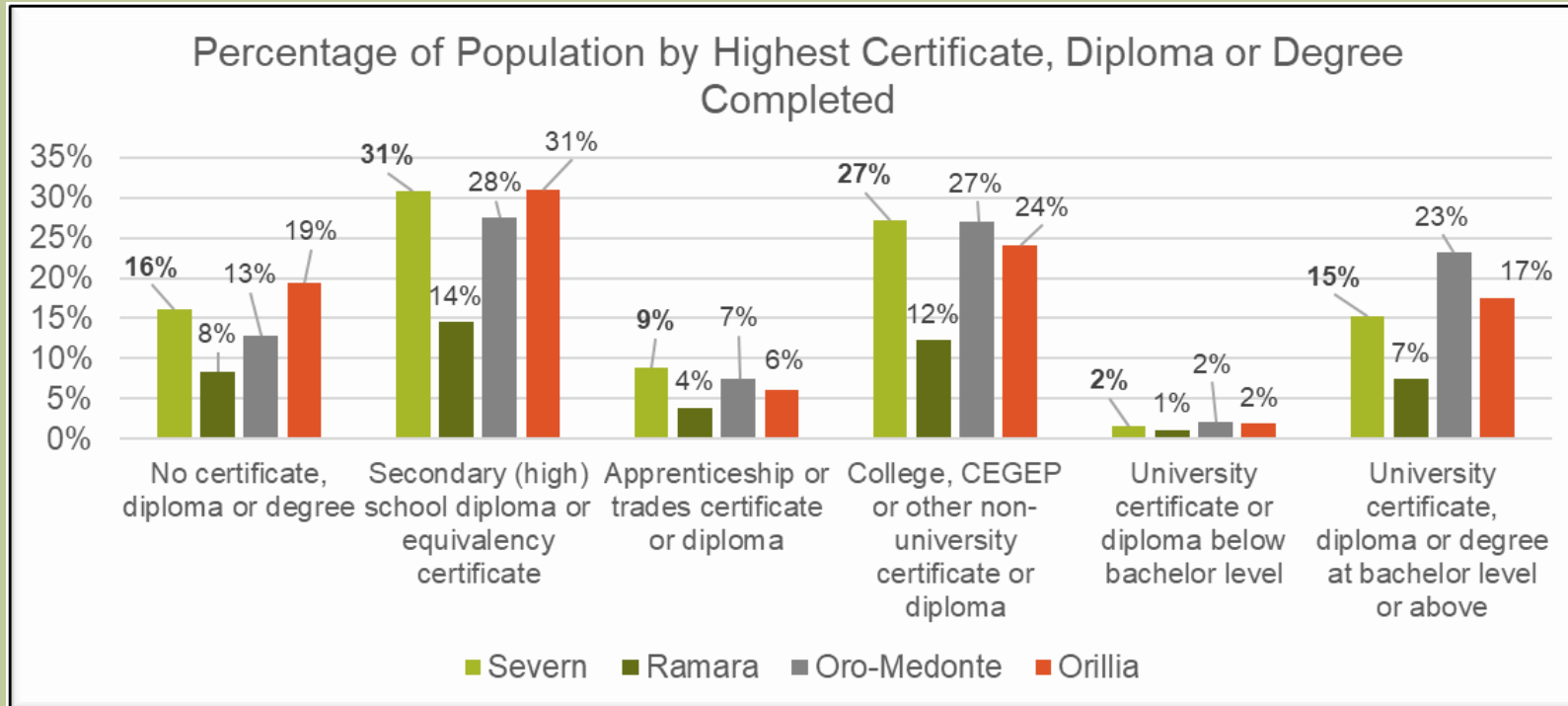
Severn had a higher percentage of self-employment than Orillia and the provincial average

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Highest Certificate, Diploma or Degree (2021)



47% of Severn residents have a high school diploma or less – similar to Orillia

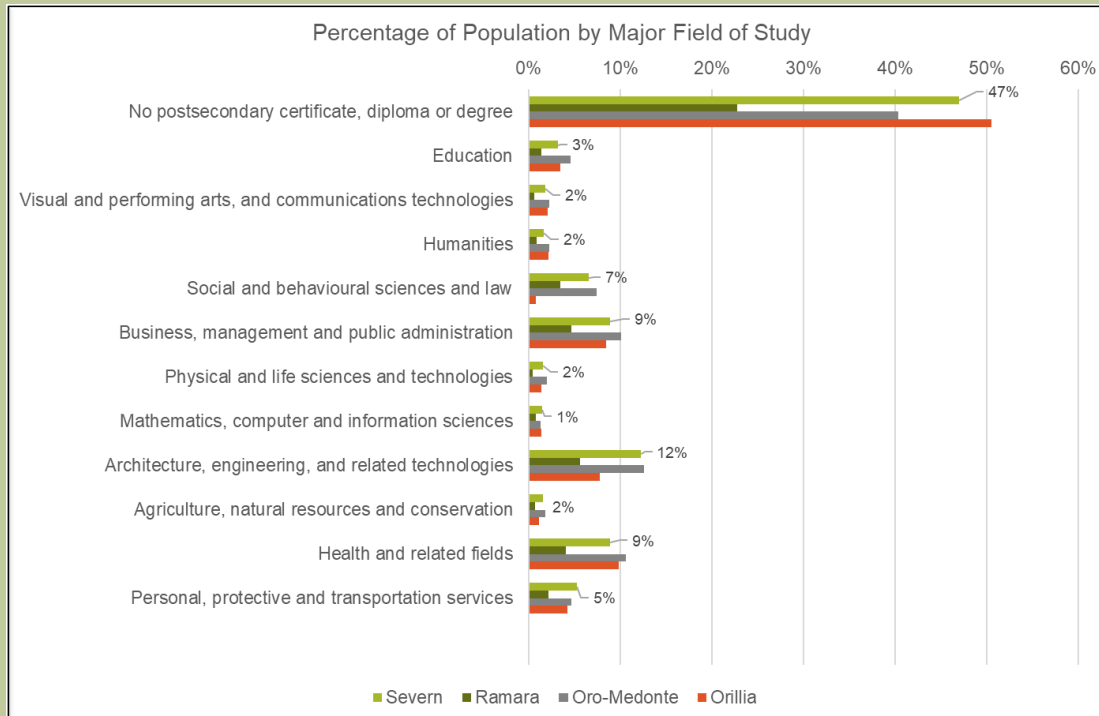
52% of Oro Medonte residents have a college education or higher, compared to 44% in Severn

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Labour Force by Major Field of Study (2021)



For those who pursued a post-secondary education, most completed studies in:

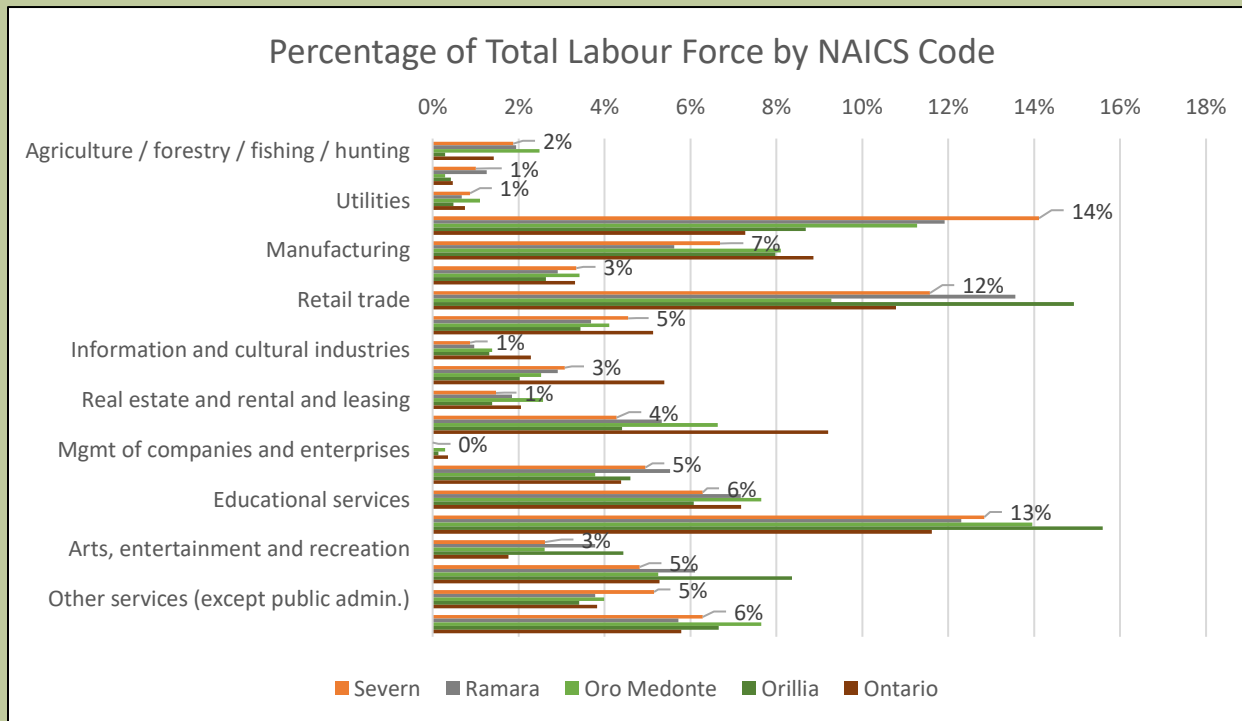
- Architecture, engineering, and related technologies (12%)
- Business, management and public administration (9%)
- Health and related fields (9%)

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Labour Force by Industry (2021)



- Severn’s top industries by labour force:
1. Construction (14%)
 2. Health care and social assistance: 13%
 3. Retail: 12%

Severn’s prevailing industries by labour force are similar to the comparable jurisdictions.

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Number of Businesses (2020) vs Size of Labour Force (2021)

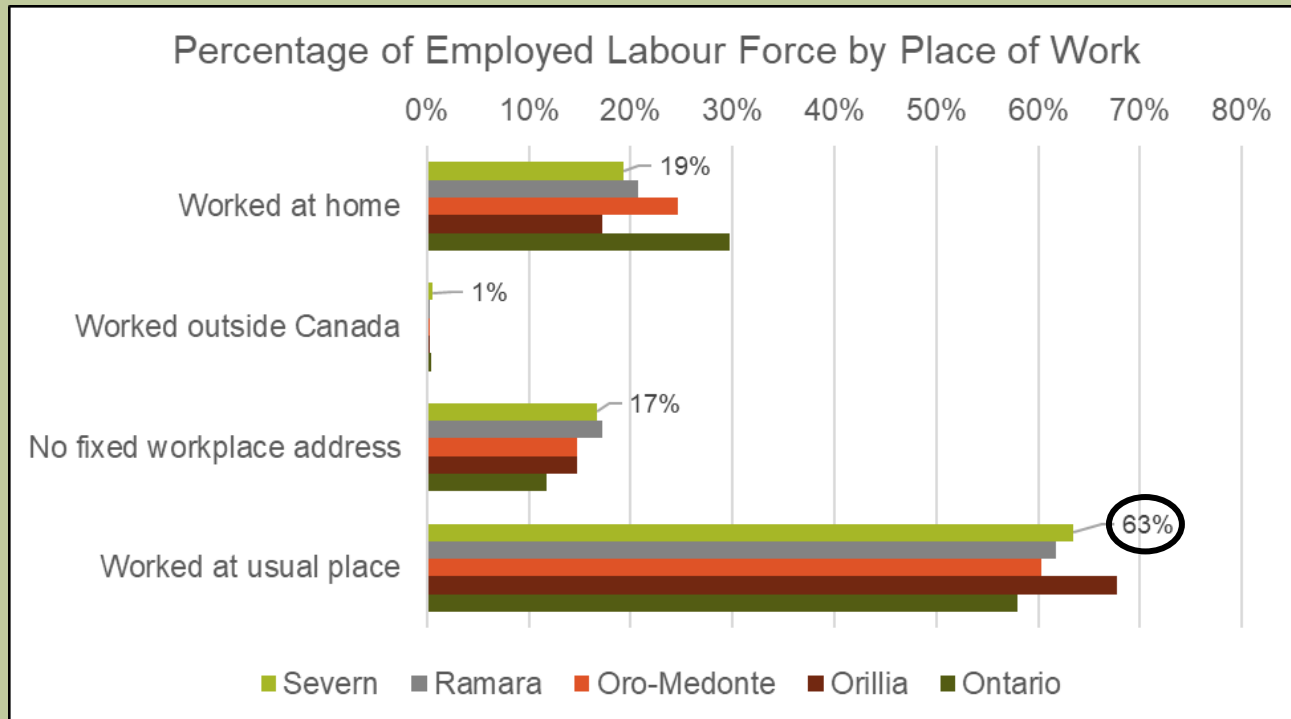
Rank	Number of Businesses (2020) - Canada Business Counts	Size of Labour Force (2021) - Statistics Canada
1	23 - Construction (421) *	23 Construction (1,055) *
2	53 - Real estate and rental and leasing (261)	62 Health care and social assistance (960)
3	54 - Professional, scientific and technical services (170)	44-45 Retail trade (865)
4	81 - Other services (except public administration) (153)	31-33 Manufacturing (500)
5	44-45 - Retail trade (131)	61 Educational services (470)
6	56 - Administrative and support, waste management and remediation services (122) *	91 Public administration (470)
7	11 - Agriculture, forestry, fishing and hunting (104) *	81 Other services (except public admin.) (385)
8	52 - Finance and insurance (97)	56 Administrative and support, waste (370) *
9	62 - Health care and social assistance (93)	72 Accommodation and food services (360)
10	48-49 - Transportation and warehousing (74)	48-49 Transportation and warehousing (340)
11	31-33 - Manufacturing (64) *	54 Professional, scientific and technical services (320)
12	72 - Accommodation and food services (47)	41 Wholesale trade (250)
13	41 - Wholesale trade (40)	52 Finance and insurance (230)
14	71 - Arts, entertainment and recreation (34)	71 Arts, entertainment and recreation (195)
15	61 - Educational services (20)	11 Agriculture / forestry / fishing / hunting (140) *
16	51 - Information and cultural industries (11)	53 Real estate and rental and leasing (110)
17	22 - Utilities (*)	21 Mining / quarrying / oil-gas extraction (75) *
18	21 - Mining, quarrying, and oil and gas extraction (7) *	22 Utilities (65) *
19	55 - Management of companies and enterprises (7)	51 Information and cultural industries (65)
20	91 - Public administration (0)	55 Mgmt of companies and enterprises (0)

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Percentage of Employed Labour Force by Place of Work (2021)



Majority of people worked from their usual place of work

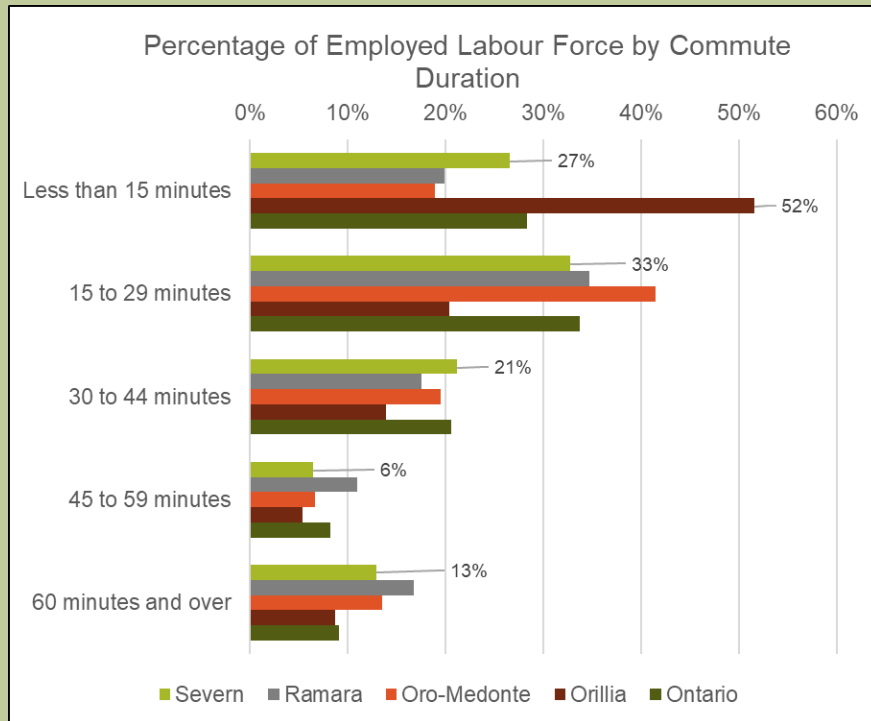
The remaining workforce primarily worked from home or did not have a fixed place of work

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Percentage of Employed Labour Force by Commute Duration (2021)



60% of Severn residents had a commute of less than 30 minutes which is in line with the provincial average (62%)

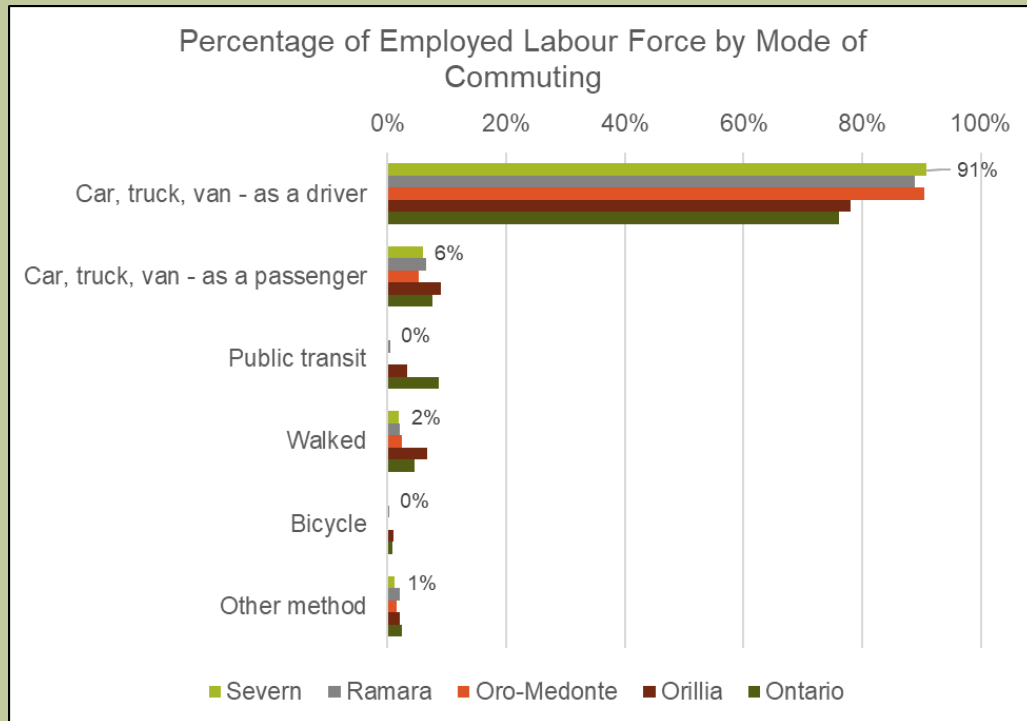
52% of Orillia residents commute less than 15 minutes to work and 72% less than 30 minutes

Township of Severn

Economic Development Strategic Plan

Baseline Economic Analysis

Percentage of Employed Labour Force by Commute Duration (2021)



91% of the Township's labour force commuted to work by 'car, truck, or van, as a driver'

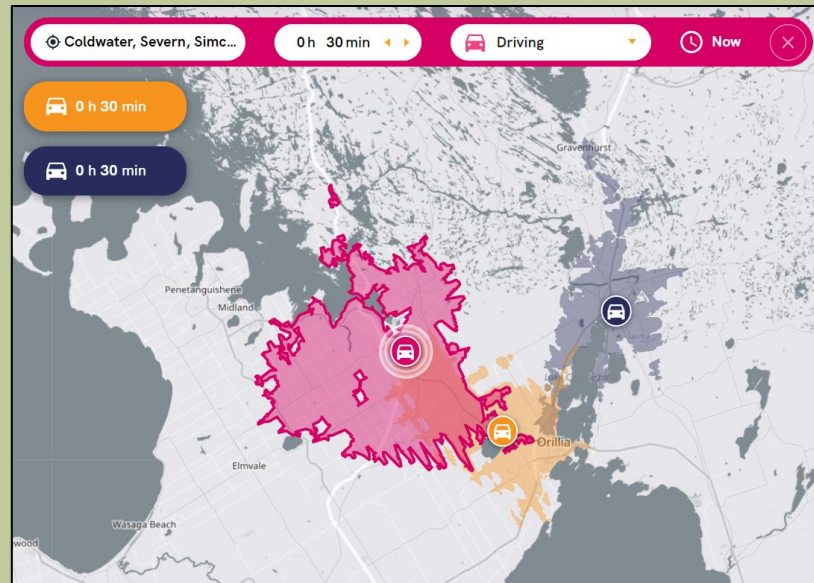
The 7% who walked in Orillia corresponds with the high percentage of people who live within a 15 minute commute from work

Township of Severn

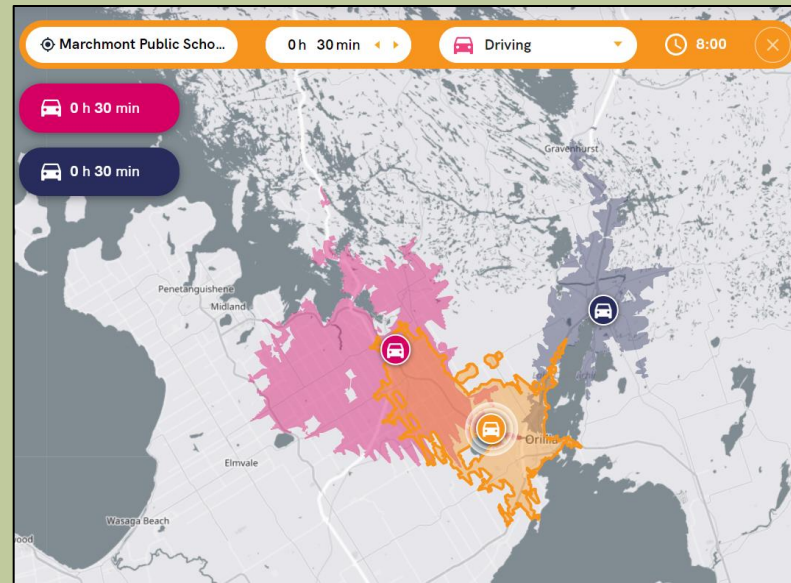
Economic Development Strategic Plan

Baseline Economic Analysis

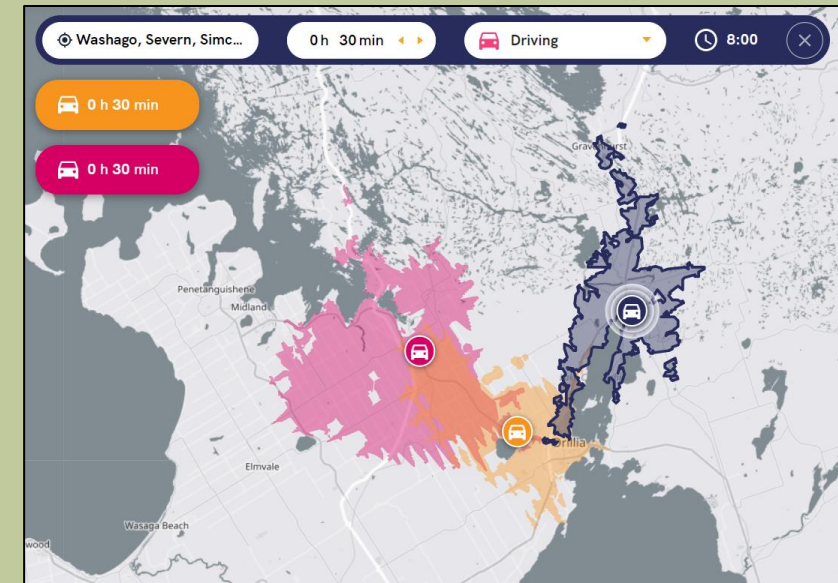
30-Minute Commute Time Coverage Map by Vehicle Departing at 8:00am



Coldwater



Marchmont



Washago

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Business Counts (December 2020)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
11	Agriculture, forestry, fishing and hunting	104	84	20
21	Mining (Aggregate)	7	0	7
22	Utilities	9	8	1
23	Construction	421	241	180
41	Wholesale trade	40	22	18
51	Information and cultural industries	11	3	8
52	Finance and insurance	97	81	16
53	Real estate and rental and leasing	261	238	23
54	Professional, scientific and technical services	170	125	45
55	Management of companies and enterprises	7	6	1
56	Administrative and support, waste management and remediation services	122	77	45
61	Educational services	20	16	4
62	Health care and social assistance	93	59	34
71	Arts, entertainment and recreation	34	19	15
72	Accommodation and food services	47	27	20
81	Other services (except public administration)	153	104	49
91	Public administration	0	0	0

The top three industries in Severn (by number of business establishments) were:

1. Construction (421)
2. Real estate and rental and leasing (261)
3. Professional, scientific and technical services (170)

* 1,110 establishments without employees

* 486 establishments with employees

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Business Count Location Quotient Analysis (December 2020)

Business Count Location Quotient (LQ) Analysis					
NAICS 2-digit	Industry	Township of Severn Business Count	Province of Ontario Business Count	Location Quotient	Strength
11	Agriculture, forestry, fishing and hunting	104	47,646	1.69	High
21	Mining, quarrying, and oil and gas extraction	7	1,738	3.12	High
22	Utilities	9	2,954	2.36	High
23	Construction	421	141,030	2.31	High
31-33	Manufacturing	64	36,181	1.37	High
42	Wholesale trade	40	39,385	0.79	Moderate
44-45	Retail trade	131	92,622	1.10	Moderate
48-49	Transportation and warehousing	74	105,856	0.54	Low
51	Information	11	22,059	0.39	Low
52	Finance and insurance	97	91,125	0.82	Moderate
53	Real estate and rental and leasing	261	302,650	0.67	Low
54	Professional, scientific, and technical services	170	201,110	0.65	Low
55	Management of companies and enterprises	7	15,173	0.36	Low
56	Administrative and support and waste management and remediation services	122	58,062	1.63	High
61	Educational services	20	17,525	0.88	Moderate
62	Health care and social assistance	93	104,020	0.69	Low
71	Arts, entertainment, and recreation	34	25,037	1.05	Moderate
72	Accommodation and food services	47	44,366	0.82	Moderate
81	Other services (except public administration)	153	94,890	1.25	Moderate
91	Public Administration	0	1,393	N/A	N/A
Total		1,865	1,444,822		

When compared to the province, the LQ analysis indicates that Severn has a high concentration of the following six industries:

1. Mining (3.12)
2. Utilities (2.36)
3. Construction (2.31)
4. Agriculture (1.69)
5. Administrative & Support (1.63)
6. Manufacturing (1.37)

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Mining (Aggregate) (LQ = 3.12)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2111	Oil and gas extraction	0	0	0
2121	Coal mining	0	0	0
2122	Metal ore mining	0	0	0
2123	Non-metallic mineral mining and quarrying	5	0	5
2131	Support activities for mining, and oil and gas extraction	2	0	2

Majority of establishments were classified as “non-metallic mineral mining and quarrying” with three focused on “sand and gravel mining and quarrying”.

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Utilities (LQ = 2.36)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2211	Electric power generation, transmission and distribution	9	8	1
2212	Natural gas distribution	0	0	0
2213	Water, sewage and other systems	0	0	0

Majority of establishments were classified as “electric power generation, transmission and distribution” with seven focused on “other electric power generation”.

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Construction (LQ = 2.31)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
2361	Residential building construction	120	65	55
2362	Non-residential building construction	30	20	10
2371	Utility system construction	6	3	3
2372	Land subdivision	13	12	1
2373	Highway, street and bridge construction	4	2	2
2379	Other heavy and civil engineering construction	5	1	4
2381	Foundation, structure, and building exterior contractors	46	16	30
2382	Building equipment contractors	70	40	30
2383	Building finishing contractors	84	57	27
2389	Other specialty trade contractors	43	25	18

Majority of establishments were classified as “residential building construction” (no subset).

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Agriculture, Forestry, Fishing and Hunting (LQ = 1.69)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
1111	Oilseed and grain farming	15	10	5
1112	Vegetable and melon farming	2	1	1
1113	Fruit and tree nut farming	0	0	0
1114	Greenhouse, nursery and floriculture production	3	1	2
1119	Other crop farming	19	16	3
1121	Cattle ranching and farming	26	24	2
1122	Hog and pig farming	0	0	0
1123	Poultry and egg production	2	2	0
1124	Sheep and goat farming	2	2	0
1125	Aquaculture	0	0	0
1129	Other animal production	15	13	2
1131	Timber tract operations	0	0	0
1132	Forest nurseries and gathering of forest products	1	1	0
1133	Logging	6	4	2
1141	Fishing	0	0	0
1142	Hunting and trapping	2	2	0
1151	Support activities for crop production	4	3	1
1152	Support activities for animal production	6	4	2
1153	Support activities for forestry	1	1	0

Majority of establishments were classified as “cattle ranching and farming” with 22 focused on “beef cattle ranching and farming, including feedlots” .

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Administrative and Support, Waste Management, and Remediation Services (LQ = 1.63)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
5611	Office administrative services	4	4	0
5612	Facilities support services	0	0	0
5613	Employment services	4	3	1
5614	Business support services	14	14	0
5615	Travel arrangement and reservation services	4	4	0
5616	Investigation and security services	3	3	0
5617	Services to buildings and dwellings	83	43	40
5619	Other support services	6	3	3
5621	Waste collection	1	0	1
5622	Waste treatment and disposal	1	1	0
5629	Remediation and other waste management services	2	2	0

Majority of establishments were classified as “services to buildings and dwellings” focused on janitorial (x19) and landscaping (x54) services.

Township of Severn

Economic Development Strategic Plan

Full-Spectrum Sector Analysis

Manufacturing (LQ = 1.37)

NAICS Code	NAICS Description	Total Establishments	Without employees	Total, with employees
3111	Animal food manufacturing	0	0	0
3112	Grain and oilseed milling	0	0	0
3113	Sugar and confectionery product manufacturing	0	0	0
3114	Fruit and vegetable preserving and specialty food manufacturing	0	0	0
3115	Dairy product manufacturing	1	1	0
3116	Meat product manufacturing	0	0	0
3117	Seafood product preparation and packaging	0	0	0
3118	Bakeries and tortilla manufacturing	1	0	1
3119	Other food manufacturing	1	1	0
3121	Beverage manufacturing	1	0	1
3122	Tobacco manufacturing	0	0	0
3123	Cannabis product manufacturing	0	0	0
3131	Fibre, yarn and thread mills	0	0	0
3132	Fabric mills	0	0	0
3133	Textile and fabric finishing and fabric coating	0	0	0
3141	Textile furnishings mills	0	0	0
3149	Other textile product mills	0	0	0
3151	Clothing knitting mills	0	0	0
3152	Cut and sew clothing manufacturing	1	1	0
3159	Clothing accessories and other clothing manufacturing	0	0	0
3161	Leather and hide tanning and finishing	0	0	0
3162	Footwear manufacturing	0	0	0
3169	Other leather and allied product manufacturing	0	0	0

Majority of establishments were classified under the following five manufacturing sub-categories:

- Dairy product
- Bakeries and tortilla
- Other food
- Beverage
- Cut and sew clothing

Township of Severn

Economic Development Strategic Plan

Economic and Market Trends Analysis

Key Takeaways

Regional Assessment

- **Growth in Severn:** One of the fastest growing regions within the Greater Golden Horseshoe
- **Housing Trends and Economic Opportunities:** The housing market in Severn reflects a growing trend of people relocating to the area for recreation, tourism, and a remote work setting.

Provincial Assessment

- **Tourism Outlook:** Post-pandemic tourism is predicted to be profitable, contributing significantly to the provincial economy.
- **Provincial Policy Influence:** The guidance of the Provincial Policy Statement shapes Severn's land use and development strategies, focusing on efficient land use, compact communities, environmental protection, and support for agriculture. Adherence to these policies is essential for sustainable growth at the provincial level.
- **Aggregate Industry Significance:** The importance of Ontario's mineral aggregate industry, encompassing materials like sand and gravel, resonates at the provincial level due to their role in infrastructure. Addressing ecological concerns and optimizing transportation efficiency is of provincial significance.

Township of Severn

Economic Development Strategic Plan

Economic and Market Trends Analysis

Key Takeaways

Federal Assessment

- **Impacts of Border Closures:** The pandemic caused significant daily losses in Canadian surface trade, impacted job opportunities with anticipated recovery of international tourism by earliest 2024.
- **Economic Impact of Rising Interest Rates:** Higher rates make borrowing costlier, reducing demand for goods and services and easing inflation.

Township of Severn

Economic Development Strategic Plan

Economic and Market Trends Analysis

Key Takeaways

Current Happenings:

- Severn Township is experiencing rapid growth as seen by building permits issued and a 'hot' housing market.
- Provincial Policy Statement (PPS) guides land use, emphasizing efficiency, environment, agriculture, and Indigenous engagement.
- Pandemic led to economic losses, disrupted trade, and closed borders impacting job opportunities.

Outlook Today:

- Township sees ongoing growth in building permits, driven partly by pandemic effects.
- Competitive housing market and rising local job opportunities.
- PPS continues influencing planning with focus on environment, heritage, agriculture, and tourism.
- International tourism may recover by 2024; Bank of Canada increased interest rates to control inflation.

Township of Severn

Economic Development Strategic Plan

Economic and Market Trends Analysis

Key Takeaways

Impact on Township:

- Growth benefits local economy, attracts residents, and potentially boosts tourism.
- PPS shapes land use, emphasizing environmental, agricultural, and community factors.
- Closed borders affect tourism and economic activity.
- Rising interest rates impact local economy, borrowing, spending, and investments.

Influence on Thinking:

- Officials must balance urban services with rural lifestyle, focus on infrastructure, transportation, and aging population needs.
- Align planning with PPS, emphasizing sustainable growth, conservation, and Indigenous collaboration.
- Should consider reduced international tourism impact, diversify economic drivers, and monitor interest rate changes for adjustments.

Township of Severn

Economic Development Strategic Plan

Situational Analysis (SWOT)

A Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis was undertaken, and which formed the basis of the Situational Analysis.

This analysis included an evaluation and assessment in the areas of:

- Business and Industry
- Tourism and Recreation
- Lifestyle
- Arts, Culture, and the Creative Economy

The SWOT Analysis will be expanded during the planned engagement activities.

Township of Severn

Economic Development Strategic Plan

Preliminary Recommendations

Focus on Business Retention&Expansion

1. The Township should develop a series of incentives, programs, and policies, in the form of a Community Improvement Plan, that encourages existing building owners to convert vacant building spaces into leasable commercial, residential, and/or mixed-use spaces.
2. The Township should develop and execute a marketing strategy and outreach campaign to attract year-round business retailers, service providers, and/or experienced operators to the downtown settlement areas throughout the Township.
3. The Township should formalize its business concierge program by establishing a defined business visitation schedule and provide regular updates on the key outcomes.
4. The Township should evaluate the feasibility of adding a single FTE to handle economic development and tourism.

Township of Severn

Economic Development Strategic Plan

Preliminary Recommendations

Focus on Business Retention & Expansion (Cont'd)

5. The Township should consult the County to establish a supportive strategy to assist the County in pursuing economic opportunities focused on climate change and biodiversity initiatives.
6. With a clustering of 22 local business establishments that are classified as NAICS 112110: “beef cattle ranching and farming, including feedlots”, the Township should investigate and understand their supply chain needs to identify local gaps which can be fulfilled through business investment attraction.
7. With a clustering of 120 local business establishments that are classified as NAICS 236110: “residential building construction, the Township should investigate and understand their talent and supply chain needs to identify local gaps which can be fulfilled through talent and business investment attraction strategies.

Township of Severn

Economic Development Strategic Plan

Preliminary Recommendations

Focus on Tourism&Recreation

8. The Township should explore opportunities with local businesses to expand their tourism offering during shoulder/off-season periods through products and services development, supported by joint marketing and promotional efforts (in partnership with Tourism Simcoe County).
9. The Township should develop and execute a local outreach campaign to educate local government organizations, private-sector businesses and others involved in tourism development and promotion, to ensure they are all aligned and focus on conveying the same township-wide messaging, tourism assets and value propositions.
10. The Township should develop a series of year-round single/multi-day tourism packages through collaboration with tourism operators, strategic partners and Tourism Simcoe County.

Township of Severn

Economic Development Strategic Plan

Preliminary Recommendations

Focus on Community Capacity

11. The Township should undertake an updated community capacity study/assessment to ensure its community and social infrastructure, including municipal programs and services are in place and are able to accommodate its planned population growth.
12. The Township should increase the supply of shovel-ready employment lands to accommodate investment-ready development opportunities.
13. In the event that Orillia's municipal boundary is expanded to include some of the proposed areas within Severn, the Township should develop a series of recommendations (to be negotiated and agreed upon with the City of Orillia) that can help the Township offset the lost property tax revenues.

Township of Severn

Economic Development Strategic Plan

Preliminary Recommendations

Focus on the Arts, Culture, and the Creative Economy

14. The Township should develop and launch a “Downtown Beautification Initiative” focused on the Arts by increasing public art in the downtowns (such as murals, mosaics, window paintings, statues, flowerpots, fountains), embedding art into natural resources and amenities, and beautifying the Township’s downtowns’ recycling and garbage bins by a local artist or designer.
15. The Township should continue to allocate resources, including financing to the implementation of the municipal signage plan. That includes an emphasis on promoting connectivity and utilization between waterfront – trails – retail – recreation areas.

Township of Severn

Economic Development Strategic Plan

Next Steps

Phase II and III Overview

Phase II – Public Consultation Process

Item	Date
Engagement/Consultation Planning	August 3 – September 5
Online Survey	September 6 – October 8
Focus Group Discussions 1:1 Meetings	September 26-28
Validation Workshop and Visioning Session	December 6
Submission of Report 2: Draft Strategy	Week of January 8 th
Presentation of Report 2	Week of January 22 nd
Completion of Staff Review Allocation	Week of February 5 th

Phase III – Economic Development Strategy

Item	Date
Submission of Report 3: Final Strategy	Week of February 26 th
Presentation of Report 3	Week of March 11 th

Township of Severn

Economic Development Strategic Plan

Contact Details



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