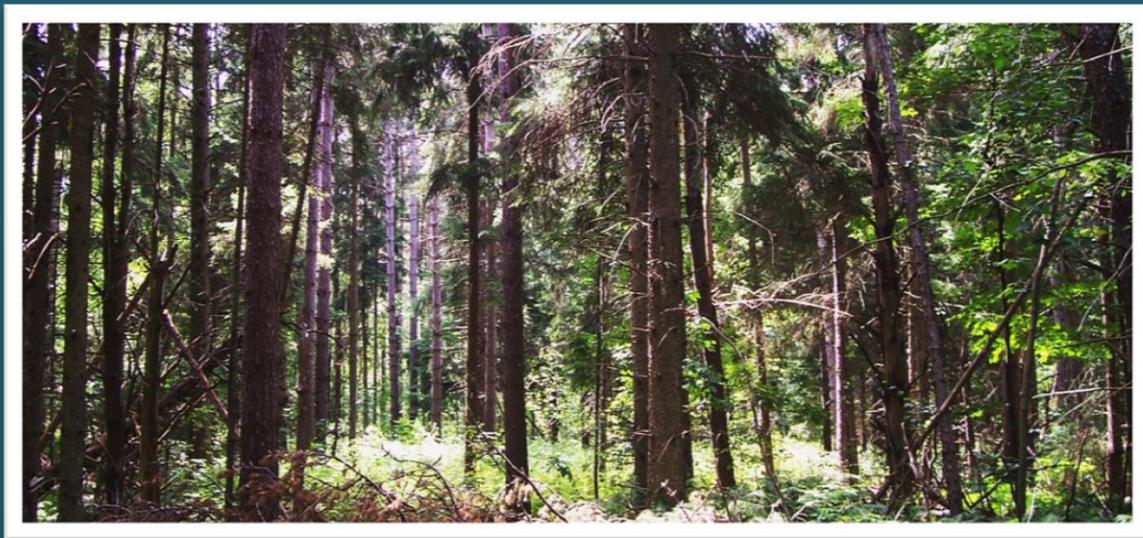
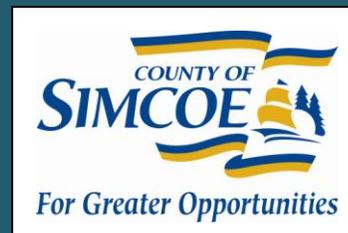


County of Simcoe

10-Year Economic Development Strategic Plan



June 17, 2011





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PART II: SUPPORTING RESEARCH & APPENDICES



Section 1: Introduction



1 Introduction

The County of Simcoe has experienced significant growth in recent years. Its population has risen nearly 30% in the last 15 years, and as the Greater Toronto Area continues to expand north into South Simcoe, this growth should be expected to continue. This is reinforced by the Growth Plan for the Greater Golden Horseshoe, which forecasts the County to add an additional 131,000 residents by the year 2031.

This growth is expected to create significant opportunities for the County to attract new business investment and employment opportunities. The size of the County, its strategic role as a hub for commercial and tourist traffic to and from Ontario's north, and the diverse nature of the County's communities position it well to capitalize on trends emerging in the provincial, national and global economies. However, there are a number of actions that the County will need to undertake – both in the short term, and over a longer 10-year planning horizon – to be effective in its efforts.

1.1 Objectives + Outcomes

The recently created County of Simcoe Economic Development Office has been given a mandate to develop a coordinated approach to regional economic development that is premised on working closely with its member municipalities and other local economic development organizations that also have economic development as part of their mandate. The County realizes that this will require looking at new ways of forming partnerships with its stakeholders, as well as other senior levels of government, if the region is to move forward with a stronger and more united approach to economic development.

More strategically however, this effort will assist in informing the challenges and opportunities that will confront the County as a whole in the coming years and identify the actions required to ensure lasting and sustainable economic growth and guide the strategic investment of both public and private sector resources in ways that fully exploit the region's assets.

Overall guidance and direction for the creation of the County of Simcoe Economic Development Strategy was provided by the County's Economic Development Office with input from members of the County's extended leadership team, as well as the Warden and members of County Council. Consideration has also been given to a number of other initiatives determined to have a direct impact on the overall direction for the regional economic development strategy. These include the Simcoe County Growth Plan, the County of Simcoe Strategic Plan as well as the economic development strategies developed by the County's lower tier municipalities.



1.2 Approach

The goal of any economic development strategy is to improve the livability and quality of life of a community through sustained economic growth. This results in the creation of high quality jobs, as well as wealth and investment.

A critical component to the development of any regional economic development strategy must be a solid understanding of that region's performance against a range of economic indicators combined with an analysis of current and emerging business and industrial investment trends.

This document is comprised of two major components – **the 10-year economic development strategic plan** provides an understanding of the County's recent economic performance and the opportunities to drive growth and investment in the region and sets out a framework for the County to achieve a more regional economic development vision. It also provides an overview of the issues and opportunities confronting the County in its efforts to develop a regional economic development program. **Part II** of the report provides the results of a more detailed economic base analysis of the region as well as summaries of the project's consultation efforts.

The approach employed in the completion of this work has involved the following steps:

- **An environmental scan and literature review of available data, reports, studies, and economic development strategies considered relevant to the completion of this report.**
- **The development of a regional and sub-regional economic profile that highlights key patterns of change in relation to a variety of demographic and innovative indicators.**
- **A regional consultation effort that included focus groups and stakeholder interviews and a community survey.**
- **A detailed assessment of the region's economy to determine the key issues impacting the County's ability to attract and retain business investment.**
- **The identification of key sectors and regional opportunities that will drive future economic growth.**
- **Consideration of key performance indicators to ensure effective implementation of the economic development strategy.**

While this strategy has been prepared for the County of Simcoe, it also takes into account the unique position of the County as part of a larger regional economy and the ongoing efforts of its member municipalities to drive economic development and investment in their communities. However, the County also recognizes that lower tier municipalities often do not have the resources necessary to effectively compete on provincial, national or international level and that many of the opportunities that could



transform the local and indeed the regional economy require the collaboration and support of multiple partners and senior levels of government. The County sees the Economic Development Office as one of the structures for bringing business leaders and stakeholders together to formulate the ideas and implementation efforts necessary to attract innovation and real economic growth to the region.

1.2.1 Notes on the Data

It should be noted that this report uses a wide variety of data to support an economic base analysis for the County of Simcoe. Every effort has been made to ensure consistent time series, and that the most recent data has been used where available.



Section 2: A Regional Economic Development Approach



2 A Regional Economic Development Approach

2.1 Building Partnerships for Economic Growth and Opportunity

It is fair to say that there are many barriers to acting regionally in matters of economic development and that no one system exists for resolving competing interests among cities, counties and towns in a region. Regions by their nature are fundamentally labour markets, as opposed to imposed political jurisdictions and generally do not have the resources, the identity or the cultural traditions that allow them to make effective economic development decisions on a regional basis.¹

Despite the challenge however, regions across the province, across the country and indeed around the world have recognized the potential strength in their coming together and have taken steps to more effectively drive a culture and a spirit of cooperation and collaboration as it relates to economic development.

A literature review of best practice approaches to regional economic development suggests that, while there are many models, successful partnerships are emerging that demonstrate the following key elements:

- An inclusive, organic, home grown process that brings together key stakeholders from across the region to plan together;
 - **Requires cutting across existing jurisdictional boundaries and ‘old boy’ networks and bringing together advocates for economic growth together with those that advocate for economic opportunity**
- The provision of both objective and timely information about what’s happening in the region to use as a basis for planning;
 - **Provides a common platform to work with and a reality check on outmoded assumptions that people may be relying on in their decision making**
- An analysis of the region’s unique competitive assets and challenges, and where the least amount of effort could make the biggest difference;
 - **Recognizes the need for more effort to identify strategic leverage points in a region as a way to capitalize on limited resources**
- An operational plan that resembles a political campaign and identifies who is accountable for carrying out which pieces of the plan;

Many of the fundamental drivers of economic growth, such as access to sustainable sources of energy and water, smart transportation and logistics, R+D facilities, colleges and universities and financial services, function on a regional level, as should public programs such as workforce development, entrepreneurship and business retention and recruitment.

The Council on Competitiveness, COLLABORATE: Leading Regional Innovation Clusters, 2010

¹ The Council on Competitiveness, COLLABORATE: Leading Regional Innovation Clusters, 2010



- Requires a focused implementation effort that capitalizes on the unique contributions of a wide range of partners while maintaining accountability.²

2.2 Effective Regional Leadership

The larger question that needs to be answered in the context of a regional economic development however, is what kind of leadership effort will be required if a region is to harness individual strategies and the area's unique assets in order to accelerate economic growth, job creation and collective prosperity.

The most obvious component to effective regional economic development leadership is the idea of acting regionally and thinking globally. While this is often more easily said than done, this broad mandate can be broken down further to better inform and illustrate the approach the County of Simcoe must consider in the development of its regional economic development agenda.

First, is the notion of **TELLING A REGION'S STORY**. A region cannot be expected to act like a region without a compelling, unifying narrative that reflects a shared sense of identity and place. As can be appreciated, establishing and maintaining a strong regional identity is an ongoing exercise, one that is only accomplished through the development of a collective vision and the creation of integrated marketing strategy and implementation plan.

The second requirement for demonstrating strong regional leadership is **HAVING THE RIGHT PEOPLE AT THE TABLE** to get things done. The types of actions or tasks that emerge from an economic development strategy often require a range of stakeholders to ensure effective implementation. These stakeholders in turn must have the knowledge, networks and position within the broader community to bring other individuals and organizations to the table to accomplish the task at hand, or to have their message heard. College and university presidents or hospital CEOs are often seen as being 'above the fray' and well positioned to assist in assembling key stakeholders. This approach was evident in the establishment of SWEA – the South West Economic Alliance.

The proposition for acting like a region must also **DEMONSTRATE REGIONAL VALUE** for participants. This can involve leveraging regional resources for the purposes of joint marketing or purchasing, standardizing approaches to programs such as Business Retention and Expansion (BR+E) through tool kit development, but it can also mean a 'Simcoe first' rather than competitive approach to attracting new business investment thereby enhancing the region's ability to capture a greater proportion of economic growth.

Competing as low-cost producer of land and labour is a race to the bottom in economic development and not effective in building a sustainable local or regional economy.

Prosperity is the fundamental goal for all economic development. The ultimate evaluation of economic development initiatives should be whether the people impacted attain a higher standard of living.

The Council on Competitiveness, Measuring Regional Innovation

² Jobs for the Future, Building Partnerships for Economic Growth and Opportunity, 2011



Regions and indeed firms around the world have recognized the need to **BUILD AN INNOVATION ECOSYSTEM** that recognizes that innovation in the knowledge economy happens at the intersection between different disciplines where face to face interaction is both supported and encouraged. This requires both the networks to enable face to face encounters, but also the supply chain elements (for business development and investment) that could be missing in a community.

The last consideration for demonstrating effective regional economic development leadership was the need to **ESTABLISH INDICATORS AND METRICS** that are both relevant and realistic. While championing a change agenda is a challenge, the identification of appropriate metrics or measures can illustrate regional value for effort and resources and more effectively tie economic development goals to a region's decision making processes. This is particularly true when consideration is given to the need to plan and provide for serviced employment land.

Having initiated the creation of a regional economic development strategy, the County has already recognized the need to foster and support greater collaboration and cooperation across the various players in the region in order to effect real economic growth for its residents.

The approach to effective regional leadership discussed above provides a strong framework on which to develop a regional economic development agenda and is reinforced through the strategy's implementation plan presented in Section 7 of the report.



Section 3: Regional Economic Development Overview



3 Regional Economic Development Overview

This section of the strategic plan explores the existing local economic development and regional collaboration efforts in the County of Simcoe. The local economic development efforts across the County are divided into four geographic areas. They are South Simcoe, West Simcoe, Northwest Simcoe and Northeast Simcoe. The division provides an equitable geographic review of sectors or areas of economic development interest. In addition, as will be seen in Section 4, the municipalities in each of these regions share similar economic characteristics and market opportunities.

3.1 Existing Local Economic Development Efforts

Many of the County's lower tier municipalities are engaged in some form of economic development programming and the range of efforts suggests that there is great diversity of economic interests throughout the County of Simcoe. A review of planning and economic development documents was undertaken to determine the economic development priorities and sectors or areas of interest for each municipality in the County of Simcoe and inform the direction for a regional economic development strategy. The Cities of Barrie and Orillia have also been reviewed given the role of these communities in the future economic growth of the County. The target sectors or areas of interest for each municipality are displayed in Figure 1.

South Simcoe – The municipalities in South Simcoe are the Towns of Innisfil, Bradford West Gwillimbury and New Tecumseth and Townships of Adjala-Tosorontio and Essa.

Recently, the Town of Innisfil completed a municipal strategy, entitled *Inspiring Innisfil 2020 – A Strategy for the Future*, aimed at bringing together community development, economic development and tourism and culture. The strategy states the economic vision as:

'Innisfil will open its doors to business, giving enterprises good reasons to locate here and stay'

The strategy also states that a business-friendly environment with tools, strategic direction and promotion are necessary requirements to realize the economic vision. The key economic development priorities for the Town were to:

- Make economic development a **top priority** by providing the necessary funding and support
- Attract entrepreneurs and small business by providing **tools and training**
- **Appeal** to businesses and professionals to relocate to Innisfil in creative and knowledge-based fields



- **Retain** local business and help them expand
- Put more effort into the development of the **agricultural economy** and
- Develop and promote **tourism and culture**.

The strategy also outlines many tourism and culture priorities for the Town. The leading priority in this group is to develop tourism partnerships and networks with organizations such as Tourism Barrie, Simcoe County Tourism and the Regional Tourism Organization 7 (RTO 7). Actions in the strategy attempt to capitalize on the tourism assets and fill tourism gaps, including Big Bay Point Resort, Lake Simcoe and Georgian Downs assets. This strategy also provides direction to strengthening the depth of tourism and recreational experiences, which include festivals and events, outdoor recreation, commercial accommodations, amateur sports competitions, culinary events, artisan venues, and heritage properties.

FIGURE 1: MUNICIPALITY AND SECTOR OR AREAS OF INTEREST

Municipality	Sectors/Areas of Interest
South Simcoe	
Township of Adjala-Tosorontio	Agriculture sector and non-intrusive and complementary small business.
Town of Bradford West Gwillimbury	Food processing, warehousing, distribution, retailing & service, machinery, chemical & fabricated metal, plastics.
Township of Essa	Agriculture sector.
Town of Innisfil	Entrepreneurs and small businesses in creative and knowledge based industries, agriculture, tourism, recreation, culture sectors.
Town of New Tecumseth	Serviced employment areas that provide a range of job opportunities.
West Simcoe	
Township of Clearview	Serviced employment areas that provide a range of job opportunities.
Town of Collingwood	Tourism and recreation, post-secondary, high technology, medical and health, airport-related sectors.
Township of Springwater	Professional, scientific and technical services, agriculture/ agribusiness, tourism, construction, advanced manufacturing, wholesale trade.
Town of Wasaga Beach	Tourism and recreation sectors.
Northeast Simcoe	
Town of Midland, Town of Penetanguishene, Township of Tay and Township of Tiny	Tourism, culture, knowledge based industries and health care.
Northwest Simcoe	
Township of Oro-Medonte	Agriculture, aggregate, tourism, airport-related industries.
Township of Ramara	Agriculture, aggregate, tourism & recreational sectors.
Township of Severn	Agriculture, aggregate, tourism & recreational sectors.
City of Barrie	Transportation & warehousing/wholesale trade, manufacturing, construction, professional, scientific + business services, health industries.
City of Orillia	Post-secondary education, Ontario Provincial Police training, health care, advanced manufacturing, tourism.

Source: Lower tier municipal Official Plans, websites, economic development strategies, 2011.



The Town of Bradford West Gwillimbury also has an economic development strategy along with dedicated staff to implement the actions. The Town encourages growth in the food processing, warehousing and distribution, retailing & service, machinery manufacturing, chemical & fabricated metal manufacturing and plastics manufacturing sectors. The immediate proximity to Highway 400, the strategic employment lands in the west end of the Town, proximity to the Greater Toronto Area and rapid population growth provide an attractive environment for business investment.

The Town of New Tecumseth is home to the largest private sector employer (Honda of Canada Mfg. Inc.) in the County. The Town is engaged in economic development by ensuring there are serviced employment areas that provide a range of job opportunities.

The two townships (Essa and Adjala-Tosorontio) do not have municipally adopted economic development strategic plans; however, the official plans state that the agricultural sector is an area of interest for development. These two communities also encourage non-intrusive and complementary small business development.

West Simcoe – The municipalities in West Simcoe include the Townships of Springwater and Clearview and Towns of Collingwood and Wasaga Beach.

The Township of Springwater completed its first economic development strategy in 2010. The strategy document states the following vision:

‘The Township of Springwater will be known as a prosperous community with market opportunities that enable new business investment and economic growth across a broad range of industry.’

Five economic development goals are:

1. Investment readiness by enhancing business retention, expansion and attraction efforts.
2. Pursue partnership and outreach in the community by taking a leadership role in collaborating with the County.
3. Effective marketing and promotion of Springwater by ensuring effective promotion of local assets, workforce skills and opportunities for business investment.
4. Growth in key industries by ensuring business development and employment growth in the professional, scientific and technical services, agriculture, agri-business, tourism, construction, advanced manufacturing and wholesale trade industries
5. Enhance capacity of community infrastructure by enhancing physical, social and service infrastructure.

Collingwood serves as a leading Ontario example of a community located farther away from the Greater Toronto Area that can draw international investment and reach global clients.

The Township’s implementation of the strategy requires engagement with the local business community, other levels of government and economic development partners.

The Township of Clearview states in the municipal strategic plan an area of interest is servicing employment areas that provide a range of job opportunities.



Historically, the Town of Collingwood has had considerable success in attracting manufacturing, tourism, and recreational investment to its community. The recreational amenities that the area offers have also been a contributing factor in the attraction of entrepreneurs, and more recently, the resulting growth in technology-related industries. Many of these firms have started as small enterprises, but have grown into international markets. Collingwood serves as a leading Ontario example of a community located farther away from the Greater Toronto Area that can draw international investment and reach global clients.

The Town has completed Business Retention & Expansion studies for the knowledge base and medical/health sectors to help ensure these sectors remain viable. A primary outcome from this effort was the development of an Industrial Land Strategy that more accurately reflects the changing needs of local businesses.

Collingwood is also home to assets such as the Collingwood General & Marine Hospital and Georgian College regional campus. The County of Simcoe has been a significant contributor to the Hospital through approximately \$2.0 million in funding commitments for the time period 2007 to 2016.

The Town of Wasaga Beach is a seasonal resort community that has made tourism a vital component of its economy. Famous for its beach, the Town is striving to become a sustainable multi-seasonal tourism location. Recent economic development efforts include improving the utilization of the natural resources of Wasaga Beach Provincial Park, trying to attract a franchise affiliated hotel and strengthening the depth of tourism and recreational experiences.

Northwest Simcoe – Municipalities in northwest Simcoe County include the Towns of Midland and Penetanguishene and Townships of Tay and Tiny. These four municipalities do not have formal economic development strategies, but they have identified tourism, culture, knowledge based and health care industries as areas of strategic growth in discussions with councils and senior management staff. In addition, the Town of Midland is currently one of 5 communities included in a Martin Prosperity Institute Study of the creative rural economy in Ontario.

Northeast Simcoe – Municipalities of northeast Simcoe County include the Townships of Oro-Medonte, Ramara and Severn. The Township of Oro-Medonte completed a framework for an economic development strategy in 2010. One of the key themes that emerged was the need to share the responsibility of development with other organizations and neighbouring municipalities. Development in Oro-Medonte will require coordinated effort with other municipalities and levels of government regarding the financing of municipal infrastructure and services. The report recognized a need to understand what products and services the community can support, including an assessment of alternative energy (i.e. solar and wind) business opportunities. The findings also stated a need to engage and develop the agriculture, aggregate and tourism sectors. Although the framework does not mention the airport, *Proposed Amendment #1 to the Growth Plan for the Greater Golden Horseshoe* identifies the Lake Simcoe Regional Airport as an economic employment district (further explained in Section 4.0).

Proposed Amendment #1 to the Growth Plan for the Greater Golden Horseshoe identifies the Lake Simcoe Regional Airport as an economic employment district.



Neither the Townships of Ramara and Severn have a formal economic development function or mandate; however, these two municipalities recognize through their Official Plans that the agriculture, aggregate and tourism & recreational sectors are integral components of the economy.

City of Barrie – The City of Barrie completed its economic development strategy and action plan in 2009. This plan laid out five bold goals for the City, which were to:

1. Establish the community as a regional Centre of Excellence for Health and Wellness by facilitating projects that advance research & development, innovation, investment and business growth in the health industries.
2. Enable the development of a vibrant downtown that is recognized for its quality of place and diverse range of natural, arts and cultural experiences.
3. Be strategic in its approach to economic growth by engaging with business, entrepreneurs, institutions and all levels of government to ensure an economy that is globally competitive and sustainable.
4. Support all levels of government and the private sector to become a regional centre for business support and innovation that will drive small and medium enterprises (SME) growth and entrepreneurship.
5. Develop an identifiable, dynamic and consistent marketing message that will attract new business and entrepreneurs by promoting Barrie's business strengths, the quality of the workforce and its exceptional liveability factors.

Establish the [Barrie] community as a regional Centre of Excellence for Health and Wellness.

Barrie has strong assets that serve a regional service function for the County. Three notable assets include the Royal Victoria Hospital, Georgian College and the SpringBOARD Innovation Centre. The County of Simcoe has been a major contributor to the success and expansion of the Royal Victoria Hospital and Georgian College. The SpringBOARD Innovation Centre has been established by private sector, public and community partners to accelerate the creation and growth of innovative and new business ideas and help launch new products and services. The economic benefit of this centre will create jobs, attract investment and attract talent to the City of Barrie and County of Simcoe.

City of Orillia –The City of Orillia's vision, as laid out in the economic development strategy, is to be a *prosperous community where economic growth fully capitalizes on the city's natural beauty and spirit of entrepreneurship and embraces global and social change*. Five goals are identified to help realize this vision, they are to:

1. Capitalize on the city's educational assets by continuing to engage the post-secondary and training institutions (i.e. Lakehead University, Georgian College and the O.P.P. Headquarters).
2. Place an emphasis on lifestyle by continuing to invest and upgrade the quality of place attributes that create a desirable place to live.
3. Target strategic growth in the health care, manufacturing, professional services and construction sectors.
4. Strengthen the business community by supporting cultural tourism, implementing a business retention and expansion program that addresses the

When the [Lakehead University] site is developed over the next 10-15 years, the university will accommodate 7,000 students and provide research and development in areas of social and environmental sustainability.



needs of businesses on a sector by sector basis and facilitating new business networks with Lakehead University and Georgian College.

5. Develop effective marketing and promotion by creating a new logo, enhancing the website content and creating a comprehensive community profile.

Orillia has had a number of economic development successes since completing its economic development strategy in 2008. With the help of the Government of Canada's Knowledge Infrastructure Program, the County of Simcoe, the City of Orillia and other funding sources, Lakehead University opened in September 2010 its new LEED Platinum campus on an 85-acre site donated by the City. When the site is developed over the next 10-15 years, the university will accommodate 7,000 students and provide research and development in areas of social and environmental sustainability. Lakehead University's presence in Orillia will provide the regional population with an option to remain in the area for university education. The skills and knowledge gained from the programs will help the region transition to a knowledge-based economy. In *Lakehead University – Orillia Campus Plan 2009-2013* a series of recommendations are outlined that emphasize comprehensiveness of programming, commitment to diversity and internationalization, support of University research and commitment to sustainability.

Another significant asset is the Orillia Soldiers Memorial Hospital. The County of Simcoe has contributed to strategic capital investments in the past and intends to continue making investments in this hospital in future years. Over \$1.5 million has been committed by the County of Simcoe to the Orillia Hospital for the time period 2007 to 2016.

Having identified the areas of economic interest for the lower tier municipalities in the Simcoe County area, the following discussion will explore examples of existing regional economic development collaboration efforts occurring in the County.

3.2 Existing Regional Collaboration Efforts

There are a number of significant regional economic development efforts underway in Simcoe County and the cities of Orillia and Barrie, as identified in Figure 2.

The Simcoe County sub-area is serviced by four **Community Futures Development Corporations (CFDCs)**: Nottawasaga Futures; Centre for Business and Economic Development, North Simcoe and Orillia & Area. These CFDCs are funded by the Federal Economic Development Agency for Southern Ontario (FedDev Ontario). They provide a variety of economic development and small business programs and services. Their delivery of services includes:

- Business information and planning services
- Access to capital for small business and medium sized businesses and social enterprises
- Strategic community planning and socio economic development and
- Support for community based projects.



The Nottawasaga Futures CFDC is engaged in economic development projects in South Simcoe. Two notable projects that they lead are:

- *The South Simcoe Economic Alliance* - a partnership between the five municipalities in south Simcoe. The Alliance targets strategic sector growth in food processing, plastics and advanced manufacturing (specifically fabricated metal, machinery and chemicals).
- *The Green Economy Transition Centre* - a research and education centre that initiates, supports and facilitates green economic best practices. This Centre is a partnership across the levels of government, businesses and universities. Local businesses can benefit from this Centre by accessing current research and resources that enable the business owners to evaluate and implement cost-cutting and sustainability strategies.

The Centre for Business and Economic Development CFDC is located in Collingwood, but services a large geographic area that includes the western part of Simcoe County, communities in Grey County, Dufferin County and the Town of Orangeville. A notable project this CFDC has been engaged in is the promotion of local careers in health care to elementary and secondary school students.

North Simcoe CFDC and Orillia & Area CFDC are primarily engaged in business information and planning services and access to capital. However the North Simcoe CFDC completed a Business Retention and Expansion project in its member municipalities to identify opportunities and actions to build business relationships and retain local employment.

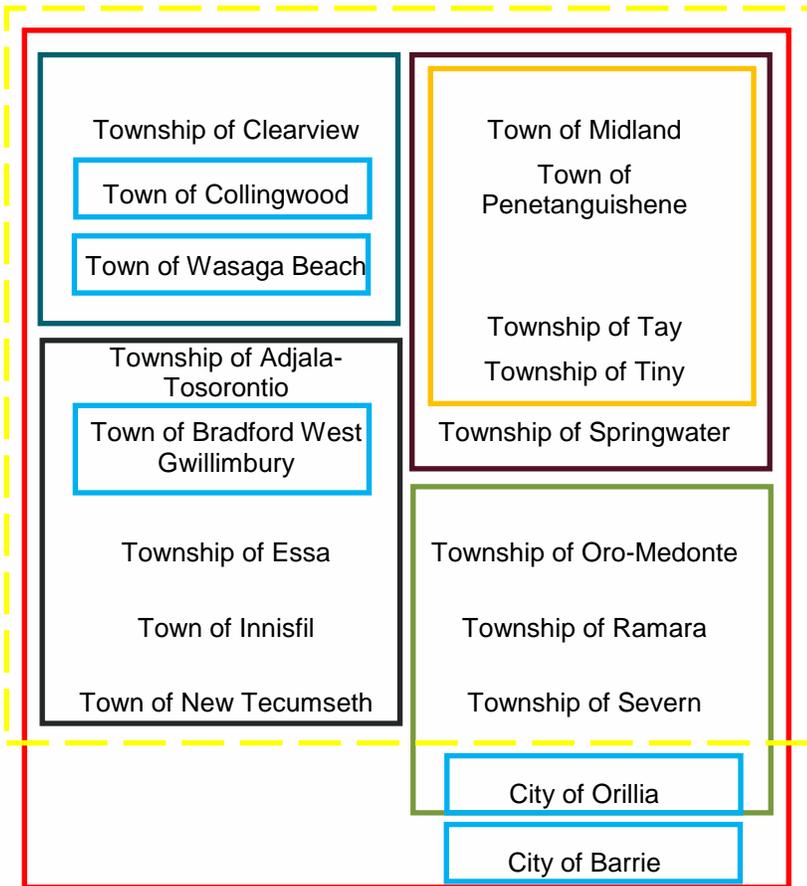
The Towns of Collingwood, Blue Mountains, and Wasaga Beach and Township of Clearview are collaborating to create a **South Georgian Bay Regional Economic Development Plan**. These communities share many similarities and draw a considerable amount of tourism and travel to the area. Their tourism assets include ski hills and resorts, accommodations, beaches and provincial parks. The Regional Plan includes six themes and strategic objectives that will help these communities prosper. They are:

- Creating jobs – stimulate small business and entrepreneurship.
- Workforce development – establish a skilled workforce to meet existing and future businesses' needs.
- Tourism – increase visitor expenditures in the region.
- Agriculture – support farmers in the region.
- Investment readiness – make the region more attractive to prospective investors.
- Regional communications – communicate the region's many advantages.

The four member municipalities in **North Simcoe** have expressed interest in creating an **economic development organization** that will drive business and investment growth in three target industries: tourism, knowledge-base and health care. The stakeholders driving this effort are soliciting support from cottage community residents and their established business networks.



FIGURE 2: REGIONAL ECONOMIC DEVELOPMENT EFFORTS



Legend

- Centre for Business and Economic Development, South Georgian Bay Regional Economic Development Plan
- Nottawasaga Futures, South Simcoe Economic Alliance
- North Simcoe CFDC
- Orillia and Area CFDC
- North Simcoe economic development effort
- Regional Tourism Organization 7
- Local municipal economic development office
- - - County of Simcoe



The Ministry of Tourism and Culture has established Regional Tourism Organizations (RTOs) throughout the province in response to recommendations coming from the *Ontario Tourism Competitiveness Study*. Simcoe County is part of **RTO 7** along with the counties of Grey and Bruce. RTOs are independent, industry led and not-for profit. Each one has received funding from the Ministry of Tourism and Culture for building and supporting competitive and sustainable tourism regions. This organization's priority projects include destination development, waterways product development, winter tourism research, green/sustainable tourism, digital mapping of tourism assets and amenities and coordinated signage.

The **County of Simcoe's Economic Development Office** has also initiated a number of regionally significant initiatives that include: the creation of a local food policy, and provision of educational business workshop sessions. However, many of the strategic funding commitments that the County has made over the previous years had economic development implications. The County's \$30 million in funding to the Simcoe County Hospital Alliance for 2007 to 2016 will ensure health care services remain in the area. A \$20 million funding commitment to the Royal Victoria Hospital in Barrie will ensure this hospital serves the larger Simcoe County area. The County has also committed start-up funding costs to the Lakehead University Orillia campus which will help in establishing this campus. In addition, the County has also committed funding to Georgian College in Barrie for a new Health and Wellness Centre. This Centre will offer a wide range of health-related education programs and community-accessible teaching health care clinics.

Other regional economic development collaborations involve not only local stakeholders, but the provincial ministries, post-secondary education institutions and federal government departments are also involved in these efforts. The SpringBOARD Innovation Centre represents a good example of different levels of government (i.e. Ministry of Research and Innovation, National Research Council of Canada Industrial Research Assistance Program, City of Barrie and Georgian College) collaborating closely to create a business incubator.

Having explored the strategic economic development directions for the Simcoe County area lower tier municipalities and collaboration efforts between municipalities, the next section will describe the context for economic growth as mandated by the Province of Ontario through the *Places to Grow Growth Plan for the Greater Golden Horseshoe*. In addition, the section will explore some of the demographic, labour force and business attributes that have shaped the County.

The Health and Wellness Centre will offer a wide range of health-related education programs and community-accessible teaching health care clinics.



Section 4: **Simcoe County's Economy**



4 Simcoe County's Economy

4.1 Context for Economic Growth

In 2006, the Province of Ontario released the *Growth Plan for the Greater Golden Horseshoe* (the Growth Plan), which set out a vision and policies to better manage growth, to plan for complete communities and to protect the natural environment. The Simcoe area, which is comprised of Simcoe County and the cities of Barrie and Orillia, represented a unique area of the Greater Golden Horseshoe. The Province developed a strategic vision in its paper *Simcoe Area: a Strategic Vision for Growth* to help manage growth under its intense development pressures and important environmental assets. The paper laid out a vision grounded in the Growth Plan for sustainable growth, aimed at increasing job creation and improving quality of life while curbing sprawl and protecting the natural environment and farmland.

The key priorities for ensuring sustainable growth were by:

- identifying key urban nodes to focus growth and intensification and allocating population and employment to these areas to curb sprawl;
- proposing strategic employment areas to optimize the Highway 400 corridor and create the conditions for investment in manufacturing jobs;
- proposing a resolution to the Barrie-Innisfil boundary issue, to provide certainty and allow Barrie to develop as the main urban centre;
- preserving the environment and reducing pressure on natural areas and watersheds;
- protecting the valuable farmland and recreational areas upon which the area's agricultural and tourism industries depend; and
- supporting key infrastructure priorities, including transportation and enhanced water, wastewater and stormwater management systems to protect the Lake Simcoe, Nottawasaga River and Severn watersheds (Simcoe Area: A Strategic Vision for Growth, June 2009, pp.1-2).

The Growth Plan establishes for the Simcoe sub-area a 2031 population forecast of 667,000 residents and employment forecast of 254,000 jobs. These increases are intended to represent steady and manageable growth. In addition, much of the growth is directed more to existing urban areas and less to greenfield areas. The six largest urban areas are the Cities of Barrie and Orillia, the Town of Collingwood, and the communities of Alliston in the Town of New Tecumseth, Bradford in the Town of Bradford West Gwillimbury and the Midland/Penetanguishene growth node. These communities are serviced by municipal water and wastewater and can potentially attract a range of housing types and job opportunities and can accommodate growth through intensification. The community with the greatest potential to attract the largest amount of future population and employment growth is the City of Barrie, identified as an Urban Growth Centre in the Growth Plan.

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Proposed Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2006, released in October 2010, provides an amendment and implementation tools for the Simcoe sub-area. The Proposed Amendment builds on key government initiatives including the Barrie-Innisfil boundary resolution. The amendment focuses on:

- *identifying urban nodes that are the focus for growth and intensification to help curb sprawl;*
- *allocating population and employment growth to support these nodes and other serviced settlement areas;*
- *outlining a process for assessing land needs to meet the growth forecasts to 2031 and manage the supply of land available for development; and*
- *identifying focused, limited use, strategic employment areas to optimize the Highway 400 corridor and create the opportunity for investment in manufacturing jobs (Proposed Amendment 1 to the Growth Plan for the Greater Golden Horseshoe, 2006, October 2010, pp.1-2.).*

The urban nodes are expanded in this paper to include the Towns of Midland and Penetanguishene. The following defined Strategic Employment Areas and Economic Districts have the following permitted uses:

- *Bradford West Gwillimbury Strategic Industrial Employment Area* – The area is divided into four areas (Areas A, B, C, D). Although permitted uses vary by area, uses include manufacturing, assembly, fabrication and processing of mechanical equipment, food processing, warehousing, distribution centres, research facility including laboratories, warehouses, training facilities, data centres, offices and some employment-support uses.
- *Innisfil Heights Strategic Industrial Employment Area* – Permitted uses in this area are limited to manufacturing, warehousing, assembly, processing, research facilities, outdoor storage uses that depend on access to Highway 400 and employment supportive uses.
- *Lake Simcoe Regional Airport Economic Employment District* – Permitted uses include airport facilities and accessory uses, airport-related manufacturing, assembly, maintenance, processing, fabrication, storage and warehousing, research establishments, wholesaling establishments and office uses.
- *Rama Road Economic Employment District* – Permitted uses are limited to tourism-related and recreational uses that accommodate large area commercial activities that are destinations that serve the needs of visitors.

This proposed amendment revises allocated population and employment growth in the nodes and other settlement areas; however, the total forecasted population and employment remains unchanged. The distribution is provided in Figure 3. According to the Growth Plan, the City of Barrie will have a population of 210,000 residents and 101,000 jobs, but the County of Simcoe's combined municipalities will have a larger population of 416,000 residents and 132,000 jobs. The region of the County with the largest projected population is South Simcoe with 197,000 residents and 68,400 jobs followed by West Simcoe with 104,600 residents and 27,700 jobs.

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FIGURE 3: SIMCOE SUB-AREA DISTRIBUTION OF POPULATION AND EMPLOYMENT, 2031

	Population	Employment
County of Simcoe	416,000	132,000
South Simcoe	197,000	68,400
Township of Adjala-Tosorontio	13,000	1,800
Town of Bradford West Gwillimbury	50,500	18,000
Township of Essa	21,500	9,000
Town of Innisfil	56,000	13,100
Town of New Tecumseth	56,000	26,500
West Simcoe	104,600	27,700
Township of Clearview	19,700	5,100
Town of Collingwood	33,400	13,500
Township of Springwater	24,000	5,600
Town of Wasaga Beach	27,500	3,500
Northwest Simcoe	57,400	23,300
Town of Midland	22,500	13,800
Town of Penetanguishene	11,000	6,000
Township of Tay	11,400	1,800
Township of Tiny	12,500	1,700
Northeast Simcoe	57,000	12,600
Township of Oro-Medonte	27,000	6,000
Township of Ramara	13,000	2,200
Township of Severn	17,000	4,400
City of Barrie	210,000	101,000
City of Orillia	41,000	21,000
Total Simcoe Sub-Area	667,000	254,000

Source: Proposed Amendment 1 (2010) to the Growth Plan for the Greater Golden Horseshoe, 2006, Schedule 7, p.12.

* Note: Regional areas to the County of Simcoe were added to the Schedule.

It is important to note, however, that in order for the local municipalities to meet these population and employment targets, as laid out in the *Strategic Vision*, a high level of investment in municipal servicing (i.e. water, sewer and roads infrastructure) is required. The level of servicing to the strategic employment areas and employment districts specifically may be beyond the financial capacity of the local municipalities and require provincial support to achieve the population, employment and intensification targets laid out in the Growth Plan.

4.2 Attributes of Simcoe County's Economy

Demographic Attributes - The County of Simcoe as a whole has experienced pronounced population growth over the last decade and a half, adding an estimated 62,845 people between 1996 (pop. 221,746) and 2010 (pop. 284,591), for a growth rate of 28.3%. This outpaced the provincial growth rate of 22.9% over the same time period. Population is most heavily concentrated in South and West Simcoe, though recently growth has been evenly dispersed throughout the County. Growth in the City of Barrie has far outpaced the County, a trend that is echoed in labour force growth as well.

The County added an estimated 62,845 people between 1996 (pop. 221,746) and 2010 (pop. 284,591), for a growth rate of 28.3%.



Despite the rate of growth, the County's population is also aging. The proportion of its population over the age of 45 increased from 38.3% in 2001 to 43.7% in 2006, compared with 40.1% of the provincial population. An interesting general geographic trend exists whereby the population to the south of the County is generally younger than that to the north. This can be attributed in part to the availability of affordable housing and the proximity to the GTA. In the County as a whole, the population under the age of 45 *decreased* by 1.5% between 2001 and 2006, in contrast to a 22.7% rate of growth in the population over the age of 45.

The County of Simcoe's immigrant (foreign-born) population as a share of total population was only 12.1% – well below the provincial average of 27.9%. Within the County, this share was highest in South Simcoe, at 13.7%. The growth in the County's immigrant population has lagged behind the rest of the Province, though the City of Barrie enjoyed a high rate of growth at 37.6%, even outpacing its rate of population growth over the same time period.

Similarly, Simcoe County has a small base of visible minorities – as of 2006, only 2.7% of its population were visible minorities, compared to 22.8% of the provincial population. However, the visible minority population in the County has grown at a rate faster than the province between 2001 and 2006 (28.2% vs. 27.5%). Much like immigration trends, the share of this group is slightly higher in Barrie and South Simcoe than other areas of the County. Linguistic diversity is also limited, with English being the mother tongue of 87.9% of the population, and the current primary language of 95.5% of the population. However, a small segment of the population is French speaking and concentrated in Northwest Simcoe.

Between 2001 and 2006 the segment of the population that identifies as aboriginal has grown at a high rate throughout the County. As a whole, the aboriginal identity population grew by 3,520 to 13,040 persons, an increase of 37.0%, echoing the rapid growth rate of the aboriginal population in the province (28.8% between 2001 and 2006), over four times faster than overall population growth.

Currently, only 17.1% of Simcoe County's working age population holds a bachelor's degree or higher, lagging the province by over 13%. Higher concentrations of university-educated persons exist in West and Northeast Simcoe than South and Northwest Simcoe. Between 12 and 13% of each region holds an apprenticeship or trades certification, and between 25% and 27% of each region has a college certification; however, over 45% of Simcoe County's working age population has a high school diploma or less, a higher proportion than in the province or Barrie (though lower than Orillia). Among those with post-secondary education, fields of study were most concentrated in architecture, engineering and related technologies; business, management and public administration; and health, parks, recreation and fitness.

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The County has relatively high average household income (\$73,624) compared to Barrie and Orillia, though behind the provincial average (\$77,967). In addition, Simcoe County has a greater high-earners (over \$100,000/year) share (28.8%) than Ontario (24.0%), Barrie (23.0%) and Orillia (13.4%). Average household income in the County



rose by 19% between 2000 and 2005, the highest of any of the comparator jurisdictions.

Labour Force and Employment Characteristics - The County's 2010 estimated unemployment rate of 8.1% is lower than that of Barrie and Orillia, and Ontario. Historically, the County's unemployment rate has been lower than these three areas. Overall labour force growth in the County reached 26.0% between 2001 and 2010 – far outpacing the 17.1% growth in population experienced over the same time period. South Simcoe is home to 44.1% of the County's labour force, though it has experienced slower growth compared to the West. The County labour force growth rate sits between Barrie, which has been a driver of growth throughout the region, and Orillia, which has lagged. It is worth pointing out though that the County, together with Barrie and Orillia, functions as a regional economy. This makes the performance of any one of these areas highly dependent on the others, either for investment or labour.

The County's labour force in 2010 is most heavily concentrated in manufacturing (16.6% of the labour force), retail trade (11.6%), construction (9.5%) and health care and social assistance (9.1%). During the more recent period of 2006 to 2010, labour force growth was broad-based, with 13 industry groups showing more than 10% growth led by manufacturing at 16.3%, despite more recent province-wide downturns in this sector. The industries displaying uniformly high growth throughout all parts of the County – where no sub-region has grown by less than 25% in industry resident labour force – include construction, educational services, and health care and social assistance. Conversely, declines have also been seen throughout nearly all parts of the County in the agriculture industry. The resident labour force growth is mixed geographically. Northeast Simcoe's labour force has grown slowly and in some cases declined in certain industries, whereas the City of Barrie has shown universal growth that has significantly outpaced the surrounding County.

From an occupational perspective, the groups that show the highest concentrations in the County in 2010 are sales and service occupations (25.9% of the labour force), trades, transport and equipment operators and related occupations (19.1%) and business, finance and administration occupations (15.0%), which have shown high growth in each of the County's sub-regions as well. These occupational categories represent a steadily increasing share of the workforce as compared to 2001 and 2006, whereas most other occupations have stagnant growth or slight declines. Social science, government, health, and sales and service occupations have shown consistently high levels of growth since 2001, and manufacturing and primary industry occupations appear to have rebounded recently despite declines in the earlier part of the decade.

Commuting patterns vary by region. In South Simcoe, many residents work within this geographic area, but more than 21% of the resident labour force that commute to Toronto and Newmarket. West and Northwest Simcoe capture a relatively high share of their commuting labour force in local jobs. Residents in Northeast Simcoe are most likely to commute to Orillia or Barrie for employment opportunities.

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Building on these findings, the cities of Barrie, Orillia and Toronto represent the primary destinations of workers that commute out from the County daily. This can be explained in part by the high concentrations of professional service, retail, health and public administration employers that exist in these areas. West and Northwest Simcoe are able to retain the highest share of their labour force in the County, while Northeast Simcoe loses the highest share, primarily to Barrie and Orillia, despite having the highest share that works from home. South Simcoe sees a large portion of its workforce commute to Barrie and areas to the south, primarily in York Region (i.e. Newmarket) and the City of Toronto.

Industry Sector Analysis - To complement the discussion of the labour force and to place the County's economic performance into broader context, it is useful to examine the level and degree of industrial concentration throughout the County as it compares to the rest of Ontario. This assessment can lead to an understanding of the economic diversity in the County, and is measured for the constituent regions of the County to provide an idea of the geographic distribution of industrial specialization in the County as well.

To conduct this analysis, location quotients (LQs) have been calculated. LQs are a commonly used tool in local/regional economic analysis, as they measure the degree to which employment or businesses are concentrated in a certain geographic area relative to a larger benchmark geography. LQs compare the County of Simcoe's industry sector labour force concentration relative to the Province of Ontario.

An LQ greater than 1.0 for a given sector indicates a local labour force concentration as compared to the Province of Ontario, and may be an indication of competitive advantage with respect to the attraction of that industry sector. An LQ equal to 1.0 for a given sector suggests that the study area has the same concentration of economic activity as the overarching region. Finally, an LQ of less than 1.0 suggests that the community has a low relative employment concentration, and thus does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching provincial average may also represent the export base of the participating municipality (both in terms of products or services). Workers (and businesses) in these industry sectors may have chosen to locate in the community due to certain local or regional competitive advantages. These competitive advantages are important to identify as they can provide a basis for subsequent attraction of investment in those industries.

Based on this analysis (see Figure 4), the industries in Simcoe County showing the highest labour force concentrations relative to Ontario in 2006 are:

- Construction (1.57)
- Agriculture, forestry, fishing and hunting (1.42)
- Arts, entertainment and recreation (1.32)

This is unchanged from 2001, where the same three industries were the only ones with high labour force LQs in the County. Though they have high concentrations, the agriculture and arts, entertainment and recreation industries are relatively small

The cities of Barrie, Orillia and Toronto represent the primary destinations of workers that commute out from Simcoe County daily.

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employers in the County. Yet given their strong local concentrations, they represent significant growth opportunities as well, suggesting that the County is uniquely positioned to pursue growth in tourism, agri-tourism, and culture sectors from a labour force perspective. The construction industry, on the other hand, is largely population-centred and local-serving. However, the County may be able to leverage the relatively large construction labour force it possesses to drive growth in new industry segments, such as green building and construction or trades related to energy efficiency.

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Though the three industries discussed above are the most highly concentrated, the County has a broad industrial base of industries that perform near or above the provincial average in terms of local labour force concentration. Of twenty major industry groups, twelve show average labour force concentrations, spread across both goods and services-producing industries. Location quotients in these industries remained mostly static between 2001 and 2006, though the educational services and real estate, rental and leasing industries saw notable increases in their location quotients.

FIGURE 4: LOCATION QUOTIENTS, SIMCOE COUNTY, 2001 & 2006

LQ	2006	2001
High (≥ 1.25)	Construction (1.57)	Agriculture, forestry, fishing and hunting (1.60)
	Agriculture, forestry, fishing and hunting (1.42)	Construction (1.52)
	Arts, entertainment and recreation (1.32)	Arts, entertainment and recreation (1.42)
Average (0.75 - 1.25)	Manufacturing (1.15)	Manufacturing (1.16)
	Public administration (1.10)	Public administration (1.13)
	Accommodation and food services (1.05)	Transportation and warehousing (1.12)
	Retail trade (1.03)	Other services (except public administration) (1.02)
	Transportation and warehousing (0.99)	Retail trade (1.01)
	Utilities (0.98)	Accommodation and food services (0.99)
	Other services (except public administration) (0.97)	Health care and social assistance (0.98)
	Real estate and rental and leasing (0.97)	Administrative and support, waste management and remediation services (0.97)
	Wholesale trade (0.97)	Wholesale trade (0.95)
	Health care and social assistance (0.95)	Utilities (0.91)
	Administrative and support, waste management and remediation services (0.94)	Real estate and rental and leasing (0.88)
	Educational services (0.93)	Educational services (0.82)
Low (≤ 0.75)	Professional, scientific and technical services (0.62)	Information and cultural industries (0.59)
	Mining and oil and gas extraction (0.61)	Professional, scientific and technical services (0.59)
	Management of companies and enterprises (0.60)	Finance and insurance (0.47)
	Information and cultural industries (0.60)	Mining and oil and gas extraction (0.46)
	Finance and insurance (0.47)	Management of companies and enterprises (0.27)

Source: Derived from Statistics Canada (Census of Population, 2001 & 2006) by Millier Dickinson Blais Inc.



In both 2001 and 2006, five industries had low labour force location quotients in the County. Except for mining and oil and gas extraction – for which there is little to no resource base to support employment in the region – those industries were:

- Professional, scientific and technical services
- Management of companies and enterprises
- Information and cultural industries
- Finance and insurance.

This may be of some concern to the County, as these industries largely produce higher-order services, comprise jobs that pay high wages and require higher levels of skill and education, and support other businesses in a wide range of other industries. The low labour force concentration in these industries is likely related to the higher presence of jobs and businesses in these industries that are located in larger centres like Toronto and Barrie. These industries had markedly fewer jobs in the County than the resident labour force, suggesting that better employment opportunities in these industries exist outside the County.

Figure 5 examines labour force LQs in 2006 in each of Simcoe County's four geographic sub-regions, the City of Barrie and the City of Orillia to better understand the distribution of these labour force concentrations. Not surprisingly, the construction industry has a high LQ (represented in italics and bold) in every County sub-region and in the City of Barrie. The arts, entertainment and recreation industry has high LQs everywhere except Northwest Simcoe and Barrie, and has particularly high LQs of 4.85 in Orillia and 2.62 in Northeast Simcoe, likely owing to the proximity to Casino Rama. The agriculture industry has high LQs in every County sub-region except Northwest Simcoe. There are very low LQs in this industry in Barrie and Orillia.

The construction industry has a high LQ in every County sub-region and in the City of Barrie



FIGURE 5: LOCATION QUOTIENTS BY INDUSTRY AND REGION, SIMCOE COUNTY, 2006

Industry	South Simcoe	West Simcoe	Northwest Simcoe	Northeast Simcoe	City of Barrie	City of Orillia
11 Agriculture, forestry, fishing and hunting	1.58	1.60	0.65	1.49	0.21	0.17
21 Mining and oil and gas extraction	0.31	0.35	1.17	1.23	0.29	0.67
22 Utilities	0.86	1.01	1.25	1.02	1.03	0.51
23 Construction	1.58	1.54	1.33	1.80	1.26	1.09
31-33 Manufacturing	1.25	0.92	1.58	0.80	1.04	0.60
41 Wholesale trade	1.27	0.86	0.55	0.73	1.10	0.65
44-45 Retail trade	0.95	1.12	1.17	0.98	1.22	1.27
48-49 Transportation and warehousing	1.20	0.82	0.79	0.84	1.13	0.54
51 Information and cultural industries	0.63	0.69	0.44	0.53	0.84	0.48
52 Finance and insurance	0.49	0.51	0.45	0.35	0.62	0.44
53 Real estate and rental and leasing	0.86	1.43	0.70	0.88	1.05	0.95
54 Professional, scientific and technical services	0.59	0.69	0.50	0.75	0.62	0.49
55 Management of companies and enterprises	0.49	1.16	0.34	0.34	0.75	0.50
56 Administrative and support, waste management and remediation services	1.02	0.98	0.67	0.95	0.97	1.08
61 Educational services	0.87	0.99	0.88	1.07	0.99	0.84
62 Health care and social assistance	0.77	0.96	1.36	1.02	0.97	1.25
71 Arts, entertainment and recreation	0.88	1.30	1.27	2.62	0.98	4.85
72 Accommodation and food services	0.91	1.38	0.96	1.07	1.13	1.82
81 Other services (except public administration)	0.92	0.95	0.95	1.17	0.97	0.97
91 Public administration	1.32	0.89	0.82	1.10	1.15	1.09

Source: Derived from Statistics Canada (Census of Population, 2006) by Millier Dickinson Blais Inc.

This analysis also reveals that the manufacturing industry is highly concentrated in both South Simcoe and Northwest Simcoe, where major manufacturing operations exist in New Tecumseth and Midland. West Simcoe, Northeast Simcoe and Barrie had average LQs in manufacturing.

Other industries that had high LQs in at least one of the County's sub-regions include:

- Real estate and rental and leasing (1.43, West Simcoe)
- Accommodation and food services (1.38, West Simcoe)
- Health care and social assistance (1.36, Northwest Simcoe)
- Public administration (1.32, South Simcoe)
- Wholesale trade (1.27, South Simcoe)
- Utilities (1.25, Northwest Simcoe)



Key Business Characteristics - A detailed review of the business patterns data for the period between 2005 and 2010 for the County of Simcoe provides an understanding of the growth or decline of businesses over the 6-year period and the key characteristics that define the County's business community. When combined with the broader industry sector analysis discussed previously, the business patterns information will assist in understanding the key industry opportunities for the County of Simcoe.

Understanding the trends in business growth in the community provides valuable insight into the shape that future growth and investment in the County might take. It also provides an indication of where the priorities of the County should lie, especially with regards to program development and delivery, and strategic planning.

In June 2010, there were a total of 16,343 businesses in the County. In terms of concentration, the following sectors (identified in Figure 6) exhibit the highest proportion of business establishments:

- Construction (3,072 businesses, 18.8% of total)
- Professional, scientific and technical services (1,836 businesses, 11.2% of total)
- Retail trade (1,464 businesses, 9.0% of total)
- Real estate and rental and leasing (1,399 businesses, 8.6% of total) and
- Other services (except public administration) (1,337 businesses, 8.2% of total).

In June 2010, there were a total of 16,343 businesses in the County.

However, when the indeterminate category (self-employed) is removed, the five sectors with the highest business establishment proportions are:

- Construction (1,265 businesses, 19.2% of subtotal)
- Retail trade (856 businesses, 13.0% of subtotal)
- Other services (except public administration)³ (666 businesses, 10.1% of subtotal)
- Professional, scientific and technical services (566 businesses, 8.6% of subtotal) and
- Health care and social assistance (457 businesses, 7.0% of businesses).

It is also valuable to examine the change in business concentration by industry, so as to better understand areas of emerging opportunity and importance to the Simcoe County economy. Figure 6 provides an indication of the concentration of business establishments by two digit NAICS codes from 2005 and 2010. The categories that have experienced the largest concentration increases include:

- Finance and insurance (2.8% of all businesses establishments to 4.5%, +1.7%)
- Health care and social assistance (2.7% to 3.8%, +1.1%)
- Real estate and rental and leasing (7.7% to 8.6%, +0.9%)

³ Other Services comprises establishments not classified to any other sector.



FIGURE 6: NUMBER OF BUSINESS ESTABLISHMENTS BY INDUSTRY, SIMCOE COUNTY, 2005 AND 2010

Industry (NAICS)	June 2005		June 2010	
	Total	% of Total	Total	% of Total
All Industries	16,712	100.0%	16,343	100.0%
11 Agriculture, forestry, fishing and hunting	1,114	6.7%	1,021	6.2%
21 Mining and oil and gas extraction	34	0.2%	41	0.3%
22 Utilities	34	0.2%	26	0.2%
23 Construction	3,433	20.5%	3,072	18.8%
31-33 Manufacturing	766	4.6%	655	4.0%
41 Wholesale trade	719	4.3%	624	3.8%
44-45 Retail trade	1,846	11.0%	1,464	9.0%
48-49 Transportation and warehousing	826	4.9%	778	4.8%
51 Information and cultural industries	160	1.0%	166	1.0%
52 Finance and insurance	470	2.8%	737	4.5%
53 Real estate and rental and leasing	1,283	7.7%	1,399	8.6%
54 Professional, scientific and technical services	1,850	11.1%	1,836	11.2%
55 Management of companies and enterprises	414	2.5%	511	3.1%
56 Administrative and support, waste management and remediation services	842	5.0%	915	5.6%
61 Educational services	126	0.8%	160	1.0%
62 Health care and social assistance	459	2.7%	620	3.8%
71 Arts, entertainment and recreation	368	2.2%	330	2.0%
72 Accommodation and food services	723	4.3%	627	3.8%
81 Other services (except public administration)	1,222	7.3%	1,337	8.2%
91 Public administration	23	0.1%	24	0.1%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Of the total 16,343 establishments, over 6,800 (41.9%) of them are located in South Simcoe and over 5,000 (30.7%) are located in West Simcoe (Figure 7). The construction industry has the largest business concentration in each of the four regions of the County. The professional, scientific and technical services, other services, real estate and retail trade industries also have high business concentrations in each of the four regions.

In South Simcoe, business concentration growth has been strongest in the construction Industry (+2.9%), other services (+2.3%) and administrative and support, waste management and remediation services (+1.7%) industries over the five year time period. In West Simcoe, the three industries posting the largest concentration gains were professional, scientific and technical services (+1.7%), health care and social assistance (+1.7%) and other services (+1.2%).

The construction industry has the largest business concentration in each of the four regions of the County.



FIGURE 7: BUSINESS ESTABLISHMENT CHARACTERISTICS, GEOGRAPHIC AREAS OF SIMCOE COUNTY, 2005 AND 2010

South Simcoe	West Simcoe	Northwest Simcoe	Northeast Simcoe
Total Business Establishments (% of Simcoe County Total), 2010			
6,842 (41.9%)	5,015 (30.7%)	2,478 (15.2%)	2,008 (12.3%)
Top 5 Total Industry Concentrations of Businesses (Industry, No. Of Businesses), 2010			
Construction (1,372)	Construction (867)	Construction (418)	Construction (415)
Professional, scientific and technical services (759)	Professional, scientific and technical services (560)	Retail trade (296)	Professional, scientific and technical services (247)
Other services (except public administration) (564)	Real estate and rental and leasing (507)	Professional, scientific and technical services (270)	Retail trade (167)
Real estate and rental and leasing (531)	Retail trade (482)	Real estate and rental and leasing (216)	Real estate and rental and leasing (145)
Retail trade (519)	Other services (433)	Other services (except public administration) (195)	Other services (except public administration) (145)
Top 3 Growth Industry Concentrations for Businesses with Employees (Industry, Increase % in Concentration), 2005 to 2010			
Construction (+2.9%)	Professional, scientific and technical services (+1.7%)	Construction (+1.4%)	Other services (except public administration) (+3.2%)
Other services (except public administration) (+2.3%)	Health care and social assistance (+1.7%)	Professional, scientific and technical services (+1.4%)	Administrative and support, waste management and remediation services (+2.5%)
Administrative and support, waste management and remediation services (+1.7%)	Other services (except public administration) (+1.2%)	Finance and insurance (+0.8%)	Agriculture, forestry, fishing and hunting & Health care and social assistance (+1.9%)

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

In Northwest Simcoe, the three industries showing the strongest concentration gains were the construction (+1.4%), professional, scientific and technical services (+1.4%) and finance and insurance (+0.8%). In Northeast Simcoe, the gain was driven primarily by other services (+3.2%) and administrative & support, waste management & remediation services (+2.5).

Overall, business establishments in the County of Simcoe are overwhelmingly characterized by small companies and enterprises that employ less than 10 people. In 2010, excluding the businesses consisting of the self-employed – which themselves are small enterprises – there were 6,566 businesses that had employees (Figure 8). Of these businesses, 3,824 (58.2%) of them had 1-4 employees. An additional 1,378 businesses, or 21.0% of the subtotal, employed 5-9 people. The five industries with the highest number of establishments employing between 1 and 9 people were:

- Construction (1,104 businesses)

Overall, business establishments in the County of Simcoe are overwhelmingly characterized by small companies and enterprises that employ less than 10 people.



- Retail trade (617 businesses)
- Other services (except public administration) (615 businesses)
- Professional, scientific and technical services (509 businesses)
- Health care and social assistance (346 businesses)

The industries with the highest number of establishments employing between 10-49 employees was different and fewer than the small businesses employing 1 to 9 people. These industries were:

- Retail trade (190 businesses)
- Accommodation and food services (157 businesses)
- Construction (151 businesses)
- Health care and social assistance (93 businesses)

In supporting future growth and investment in the County of Simcoe, it is essential to understand and support the needs of these small businesses. This is particularly relevant in light of existing research and trends which suggest that an overwhelming percentage of new business investment in a community is derived from companies already located there.



FIGURE 8: NUMBER OF BUSINESS ESTABLISHMENTS BY INDUSTRY AND SIZE, COUNTY OF SIMCOE, JUNE 2010

Industry (NAICS)	Subtotal	1-9 Employees	10-49 Employees	50+ Employees
All Industries	6,566	5,202	1,122	242
11 Agriculture, forestry, fishing and hunting	298	241	49	8
21 Mining and oil and gas extraction	27	12	14	1
22 Utilities	18	10	8	0
23 Construction	1,265	1,104	151	10
31-33 Manufacturing	325	214	64	47
41 Wholesale trade	295	220	67	8
44-45 Retail trade	856	617	190	49
48-49 Transportation and warehousing	237	198	29	10
51 Information and cultural industries	66	50	14	2
52 Finance and insurance	188	146	42	0
53 Real estate and rental and leasing	209	188	17	4
54 Professional, scientific and technical services	566	509	54	3
55 Management of companies and enterprises	53	44	7	2
56 Administrative and support, waste management and remediation services	395	323	65	7
61 Educational services	59	48	8	3
62 Health care and social assistance	457	346	93	18
71 Arts, entertainment and recreation	142	84	43	15
72 Accommodation and food services	425	233	157	35
81 Other services (except public administration)	666	615	49	2
91 Public administration	19	0	1	18

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Conversely, large companies in Simcoe County – those that employ over 50 people – have a much different sector composition than small business concentrations. Naturally, different strategies must be employed to support those sectors where a larger share of employment is concentrated in these larger firms. The industries with the highest number of establishments in this category are:

- Retail trade (49 businesses)
- Manufacturing (47 businesses)
- Accommodation and food services (35 businesses)
- Health care and social assistance (18 businesses)
- Public administration (18 businesses).

The Simcoe sub-area distribution of population and employment forecasts growth for the lower-tier municipalities. Much of the growth is directed to the existing urban areas and less to Greenfield areas.

In summary, the County is experiencing population and labour force growth. The aging population indicates a need for business and health care services to support this population base. The lower educational attainment levels in the County compared to

Naturally, different strategies must be employed to support those sectors where a larger share of employment is concentrated in these larger firms.



the Province indicate a need for developing educational and training programs for the labour force. The significantly lower shares of jobs to labour force indicate a need to create more local jobs and retain more of the labour force.

The County is positioned favourably to pursue growth in tourism, agri-tourism and culture sectors as it has the large labour force concentration. The County also has a large construction sector which can drive growth in new industry segments such as green building and construction. Large business concentration gains are in finance and insurance and health care and social assistance. These industry sectors will be further examined in the following section.



Section 5: Advancing the Creative Industries



5 Advancing the Creative Industries

It is clear from the above analysis that the County of Simcoe is as diverse economically as it is geographically. While some of the municipalities in the County have encouraged entrepreneurship and growth in high-technology, knowledge-based industries, many areas of the County remain actively engaged in traditional, export-oriented economic activity, such as agriculture and manufacturing. Others similarly rely on external investment and spending in the form of accommodations and tourism, while still others have invested heavily in construction and local-serving industries like retail trade to respond to their burgeoning population growth.

The County need not turn its back on those strengths and assets, which have supported its many municipalities well. However, as the economic turmoil of the past three years has shown all too well, it must also recognize that it will not be able to sustain its future job growth from the attraction of large-scale manufacturing plants that employ hundreds of people at a single site. While the retention and expansion of those employers is important to maintain the regional labour force that they support, it is becoming increasingly clear that economic growth is driven by the proliferation of small, innovative enterprises that employ fewer people. Where the County will function best is in creating strategies and programs that identify and support those creative businesses and encourage them to grow and succeed.

This premise of ‘creativity’ or a ‘creative economy’ should not be met with scepticism. What it ultimately refers to is the idea that economic growth is built upon *people* – what they know, what they do, and where and how they work. A creative economy does not ignore the manufacturing or agriculture industries; instead, it finds ways to create new synthetic bio-composite materials from farm waste that can be used in building more efficient cars. It does not ignore the construction and building industries, but instead looks for ways to design and engineer houses that have a lower environmental impact without increasing costs.

To achieve sustainable prosperity in this evolving and dynamic economy, the County of Simcoe must recognize where it can build upon its traditional foundations in order to create and support these new, *creative* economic opportunities. To do so, the County must create the conditions to both attract and *develop* businesses and industries that will employ an increasingly skilled, savvy and flexible workforce. It is a combination of these job opportunities, a network of reliable and accessible network of services and institutions, and a regional commitment to preserving and extending a strong quality of place that will position the County to succeed in this, changing, creative and competitive economy.

To that end, four industry segments have been identified where the County of Simcoe is seen to have the ‘starting conditions’ for a competitive, attractive value proposition.



For each of these industries, this value proposition is seen to include the following elements:

- An existing concentration of qualified employees and businesses in the industry, or those related to it;
- A growth trend in related employment and labour force indicators;
- The presence of large strategic assets, infrastructure and institutions that can supply labour, research, investment and other inputs into the industry;
- A supportive network of related businesses, business support organizations and public sector stakeholders to facilitate the attraction, retention and expansion of businesses in that industry;
- An opportunity to grow the industry at a *regional* scale.

To support this definition, we have drawn on the Canadian Business Patterns Data and other statistical indicators discussed above to identify the establishment that are present within specific industry segments. We have further identified potential areas of economic opportunity for the County through background research and stakeholder consultations with major institutions, political representatives, and business interests throughout the County.

Ultimately, the four target industry segments identified contribute to a broader understanding of a creative, knowledge-based economy present in the County, which as noted, build upon many elements of the 'traditional' economy including manufacturing, construction, and health care. These target industries are:

- **Cultural industries**
- **Tourism industries**
- **Green industries**
- **Health and wellness industries**

5.1 Overview of Target Industries

To capture the full extent and influence of these industries in Simcoe County, each of the above categories has been defined at the 6-digit NAICS level based upon both official definitions from other jurisdictions, and extensive background research. A full description of the constituent NAICS categories is provided in Part 2 of this report, with an overview of each industry in the sections to follow.



FIGURE 9: BUSINESS ESTABLISHMENTS BY TARGET INDUSTRY, 2005-2010, SIMCOE COUNTY

Industry	June 2005			June 2010			2005 - 2010	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% Increase Total	% Increase Subtotal
All Industries	16,712	10,432	6,280	16,343	9,777	6,566	-2.2%	4.6%
Cultural	844	556	288	856	588	268	1.4%	-6.9%
Tourism	1,146	537	609	994	413	581	-13.3%	-4.6%
Green	2,780	1,916	864	2,790	1,841	949	0.4%	9.8%
Health & Wellness	1,010	306	704	1,161	396	765	15.0%	8.7%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Figure 9 indicates the total number of businesses in each target industry in Simcoe County for June 2005 and 2010. As of June 2010, there are a total of 5,801 businesses in these 4 target industries, comprising 35.5% of all businesses in the County. Green industries comprise the highest share of the County's businesses among these target industries, with a total of 2,790 businesses or 17.1% of all businesses in the County.

In terms of total businesses, which include businesses in the 'Indeterminate' category consisting of the self-employed and those businesses not reporting employees, the target industry showing the greatest growth in business establishments between 2005 and 2010 is health and wellness, which grew by 151 businesses or 15.0%. Modest growth in business establishments was also experienced in the green and cultural industry segments, with a 13.3% decline in the number of tourism establishments over the same time period.

When looking only at businesses reporting employees, the number of establishments in the four target industries grew by 98 businesses, or 4.0%. Green industries showed the fastest rate of growth among business with employees, adding 85 businesses for a 9.8% rate of growth followed closely by health and wellness, which grew at a rate of 8.7%.

FIGURE 10: BUSINESS ESTABLISHMENTS BY TARGET INDUSTRY AND SIZE, 2010, SIMCOE COUNTY

Industry	No. Of Firms with Employees	1-9 Employees		10-49 Employees		50+ Employees	
		Subtotal	% of industry	Subtotal	% of industry	Subtotal	% of industry
All Industries	6,566	5,202	79.2%	1,122	17.1%	242	3.7%
Cultural	268	228	85.1%	37	13.8%	3	1.1%
Tourism	581	330	56.8%	199	34.3%	52	9.0%
Green	949	804	84.7%	135	14.2%	10	1.1%
Health & Wellness	765	556	72.7%	163	21.3%	46	6.0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Within this subtotal, businesses can be further broken down by the number of employees. As seen in Figure 10, 79.2% of all businesses reporting employees in the County have less than 10 employees, as of June 2010. Among the target industries,



cultural and green industries have the highest share of small businesses, at 85.1% and 84.7% of all businesses with employees, respectively. The tourism industry has only 56.8% of its businesses in this category, with the highest share of businesses with 10 to 49 (34.3%) and over 50 (9.0%) employees among the target industries. Given that this industry incorporates larger establishments in accommodation, food services venues and recreation facilities, this is perhaps not surprising. It does however point to the fact that these target industries have very different compositions and structures, which call for different responses in terms of the delivery of business services and assistance from the County and its constituent municipalities.

5.2 Cultural Industries

General perceptions of the creative economy often focus first on arts and culture. As discussed above, the creative economy encompasses a much broader range of economic activity; however, cultural industries themselves are an important contributor to regional economies, and can contribute significantly to both economic diversification and enhancing quality of place. This can in turn be important for attracting talented workers and new investment to the County. Thus, cultural industries comprise an important segment of the broader creative economy, though they remain specifically focused on creative artistic and aesthetic activity.

The County has a strong base of cultural activity from which to attract new cultural workers and businesses, particularly in South and West Simcoe, where they are supported by both a growing resident population and an active tourist market. In some places, efforts to qualify and quantify this industry are robust; the South Georgian Bay region (which includes the Simcoe County municipalities of Collingwood and Wasaga Beach) have undertaken a cultural mapping project, and Collingwood has an Arts + Culture Committee to support the many cultural workers and small enterprises in its region. While these efforts are less formal in other parts of the County, there are large culture and heritage attractions (such as Ste. Marie-among-the-Hurons) as well as smaller artisans, studios and galleries contributing to the economy across the County. In addition, the large French and Aboriginal populations in the County present opportunities for further growth in the cultural sector. Furthermore, educational programs such as Georgian College's School of Design and Visual Arts are equipping the cultural sector with skilled workers adept in new creative technologies and forms of production.

To better capture the impact of the cultural sector in the County, they are defined according to Statistics Canada's Framework for Cultural Statistics, which describes in detail those industries contributing to the creation, production, distribution, manufacturing and provision of support services for the culture sector – referred to as the 'creative chain'. From this framework, cultural industries are deemed to include the following sectors:



FIGURE 11: CULTURAL INDUSTRIES

Advertising	Antiques	Architecture
Art Dealers	Book Stores	Culture Support Services
Design	Independent Artists, Writers and Performers	Internet Publishing
Libraries and Archives	Motion Pictures and Video Industries	Museums and Heritage Sites
Music Stores	Performing Arts	Photography
Pottery and Ceramics	Printing	Publishing Industries
Radio and Television	Software Publishers	Sound Recording

Figure 12 shows the number and change in cultural enterprises in Simcoe County and each its regions for 2005 and 2010. There were a total of 856 cultural enterprises in the County in 2010, up 1.4% from 2005 (+12 businesses). South Simcoe (+6) and West Simcoe (+34) also saw increases in the number of cultural enterprises, with the fastest rate of growth occurring in West Simcoe (+11.9%); together these two regions account for over 75% of the cultural sector in the County. Northwest (-11) and Northeast (-17) Simcoe both lost creative enterprises over the same time period.

Interestingly, despite overall business growth in the sector, Simcoe County and South and West Simcoe saw declines in the number of businesses with employees (i.e. the subtotal), meaning that all growth in cultural sector in these areas was driven by small home-based businesses or the self-employed. This pattern is reversed in Northeast Simcoe, where despite a 15.3% decrease in cultural enterprises, those reporting employees rose by 8.0% (+2 businesses).

FIGURE 12: CULTURAL INDUSTRIES, BUSINESS ESTABLISHMENTS BY REGION, 2005-2010, SIMCOE COUNTY

	June 2005			June 2010			2005 - 2010	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% Increase Total	% Increase Subtotal
Simcoe County	844	556	288	856	588	268	1.4%	-6.9%
South Simcoe	319	224	95	325	240	85	1.9%	-10.5%
West Simcoe	286	174	112	320	218	102	11.9%	-8.9%
Northwest Simcoe	128	72	56	117	63	54	-8.6%	-3.6%
Northeast Simcoe	111	86	25	94	67	27	-15.3%	8.0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Figure 13 reports the number of cultural businesses reporting employees by size for the County and each of its regions. In the County, 85.1% of all creative enterprises with employees have less than 10 employees. This further confirms findings from Figure 12 that growth in this sector is driven by small, often independent, businesses, entrepreneurs and owner-operators. Given that businesses in this industry are defined



by their cultural output, providing opportunities for networking, distribution and sales are critical to the health and growth of this industry.

Similarly high percentages of small businesses exist in each of the County's regions, with the lowest share (77.8%) in Northwest Simcoe. Only three cultural businesses in the entire county are large employers with over 50 employees.

FIGURE 13: CULTURAL INDUSTRIES, BUSINESS ESTABLISHMENTS BY SIZE AND REGION, 2010, SIMCOE COUNTY

	# of Firms with Employees	1-9 Employees		10-49 Employees		50+ Employees	
		Subtotal	% of industry	Subtotal	% of industry	Subtotal	% of industry
Simcoe County	268	228	85.1%	37	13.8%	3	1.1%
South Simcoe	85	74	87.1%	10	11.8%	1	1.2%
West Simcoe	102	85	83.3%	17	16.7%	0	0.0%
Northwest Simcoe	54	42	77.8%	10	18.5%	2	3.7%
Northeast Simcoe	27	27	100.0%	0	0.0%	0	0.0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

5.3 Tourism Industries

Simcoe County, as a function of its size and geography, has a diverse array of tourism assets based on both its natural heritage and its cultural amenities. These assets range from large-scale recreational assets such as Ski Snow Valley and Casino Rama, to convention and resort tourism at Nottawasaga Inn and Horseshoe Valley Resort, to small scale and seasonal tourism in the County's small towns, festivals and recreational areas. Collectively, the industry is an important source of economic activity for the County. Though not generally considered as such, tourism is largely an export-oriented industry, given that it brings in spending and investment largely from outside the County that then gets re-circulated throughout the local economy.

The economic importance of the industry is being reinforced by the introduction of the new Regional Tourism Organization for the area (RTO 7), which has a mandate to develop product and investment for the industry, and has already forged ahead in creating product development plans for emerging, 'creative' segments such as green and sustainable tourism. In addition, another area of activity for the Regional Tourism Organization – customer service and training – can be reinforced by programming at Georgian College in hospitality, recreation and tourism.

To capture the full extent of the tourism industry in the County, the following analysis includes businesses from these categories:

- Accommodations, including hotels and motels, resorts, cottages and cabins, and campgrounds;
- Entertainment and recreation, including arts, culture, heritage, gambling and sport;
- Food and drink, including full and limited-service restaurants and caterers;
- Retail, including souvenir stores and rental places;



- Scenic and sightseeing transportation, and;
- Travel services, including agents and tour operators.

A segment of the tourism industry, concentrated in entertainment and recreation, consists of businesses related to performing artists and facilities that are captured in the cultural industries above, and are therefore excluded from this analysis.

Figure 14 demonstrates the total number of tourism establishments in the County and its regions for 2005 and 2010. There are 994 tourism businesses in the County as of June 2010, down 152 businesses or 13.3% from 2005. In fact, the number of tourism businesses declined in every region within the County as well, with the greatest percentage loss occurring in Northeast Simcoe (-23.7%). Each region also saw a decline in businesses reporting employees save for South Simcoe, which added 2 tourism businesses in this category. The poor performance of tourism businesses may be due to the fact that the industry is closely related to patterns in consumer and visitor spending, which has decreased substantially in the last two years due to the effects of the economic recession.

FIGURE 14: TOURISM INDUSTRIES, BUSINESS ESTABLISHMENTS BY REGION, 2005-2010, SIMCOE COUNTY

	June 2005			June 2010			2005 - 2010	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% Increase Total	% Increase Subtotal
Simcoe County	1,146	537	609	994	413	581	-13.3%	-4.6%
South Simcoe	395	195	200	351	149	202	-11.1%	1.0%
West Simcoe	392	179	213	342	136	206	-12.8%	-3.3%
Northwest Simcoe	220	85	135	195	76	119	-11.4%	-11.9%
Northeast Simcoe	139	78	61	106	52	54	-23.7%	-11.5%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Figure 15 illustrates the distribution of tourism businesses in the County by employee size. The tourism industry differs from cultural industries in important ways; a greater share of its total businesses report employees, and greater share of those businesses are medium to large-sized. In the County as a whole, 34.3% (or 199 businesses) of tourism businesses with employees employ 10 to 49 people, with a further 9% (or 52 businesses) employing more than 50 people. South and West Simcoe together have over 70% of the tourism businesses with employees in the County. South Simcoe has the highest share of small businesses (1-9 employees) at 61.9%, while Northeast Simcoe has the lowest share, at 51.9%.

The higher number of medium and large businesses in the tourism industry is likely attributable to the fact that the sector includes all eating places and accommodations. Thus, any large restaurants, hotels or resorts, which generally require a large support and service staff, are included in these totals. While these businesses may drive a large share of tourism investment in the County, the 330 small tourism businesses in the County – in addition to the 413 self-employed businesses – also must be considered as an important element of the County’s tourism offering.



FIGURE 15: TOURISM INDUSTRIES, BUSINESS ESTABLISHMENTS BY SIZE AND REGION, 2010, SIMCOE COUNTY

	# of Firms with Employees	1-9 Employees		10-49 Employees		50+ Employees	
		Subtotal	% of industry	Subtotal	% of industry	Subtotal	% of industry
Simcoe County	581	330	56.8%	199	34.3%	52	9.0%
South Simcoe	202	125	61.9%	60	29.7%	17	8.4%
West Simcoe	206	111	53.9%	73	35.4%	22	10.7%
Northwest Simcoe	119	66	55.5%	45	37.8%	8	6.7%
Northeast Simcoe	54	28	51.9%	21	38.9%	5	9.3%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

5.4 Green Industries

Green industries represent a significant opportunity for communities looking to transform their export-based industries in order to capitalize on emerging trends in renewable energy, green technology manufacturing, green building products, and other sub-industries. While green industries incorporate a significant amount of creativity associated with adaptation and the development of new technologies, they also include large elements of traditional export-oriented industries such as manufacturing, agriculture and construction. For this reason, many communities in Simcoe County have a substantial existing base of operations and establishments that have the potential to support growth and expansion of green industries.

There are also existing efforts among economic development practitioners and organizations in the County to drive an economic agenda affiliated with the green economy. A particular effort of note in this regard is South Simcoe's Green Economy Transition Centre, which shares information and best practices to businesses and communities, and involves a range of government, university and private sector partners.

The County's post-secondary institutions have also made a clear commitment to green economy principles and developing a labour force to capitalize on opportunities in the County. Lakehead University's Orillia Campus was built to a LEED Platinum standard – the highest recognition for environmental efficiency – and offers academic programming (such as a major in Environmental Sustainability) that promote green economy knowledge and skills. Similarly, Georgian College's Centre for Sustainable Technologies and School of Engineering Technology both represent an opportunity to create a supply of 'green collar' workers, which can in turn attract new business investment in the region in the form of companies that want access to this trained workforce.

One concern in placing an economic focus on green industries or the 'green economy' is that it is difficult to define. Millier Dickinson Blais has sought to rectify this issue, adapting a definition drawn primarily from the State of Washington's Department of



Community, Trade and Economic Development, which breaks down green industries into the following sub-categories:

- Biofuels
- Environmental consulting and support
- Energy efficiency (manufacturing and development)
- Green building (new construction, including architects, project developers and green realty firms)
- Recycled materials
- Renewable energy generation (including from waste, biomass, wind, solar, fuel cells etc.)
- Renewable energy systems
 - Construction (residential and non-residential)
 - Support (design, engineering and financing)
 - Transmission and distribution

A small segment of these categories primarily associated with design services have been captured in the cultural industries analysis above, and are excluded from this analysis to avoid duplication.

These categories have been corresponded to NAICS classifications (see Part 2 of this report) in order to understand the breadth of businesses in the above segments that are present in Simcoe County. A closer examination of the business patterns data suggests that the largest share of these businesses fall into construction, specialty trades contracting and real estate; while these industries are not exclusively involved in green building, energy efficiency and retrofitting, it is nevertheless important to capture them in this definition to understand the potential for these activities in the County.

As seen in Figure 16, there are 2,790 businesses related to the green industry in Simcoe County. This has remained at generally the same level since 2005, adding only 10 businesses – however, given the decline in manufacturing and slowdowns in the construction sector in recent years, this is impressive nonetheless. A large share (66%) of these businesses is in the ‘indeterminate’ or self-employed category, again largely reflective of independent operators in housing and construction-related sectors that are captured in this definition. Modest growth in green businesses between 2005 and 2010 can be seen in South (2.6%) and West (3.4%) Simcoe, with declines in Northwest (-4.5%) and Northeast (-7.2%) Simcoe. However, among businesses with employees, growth was seen in all parts of the County, with South Simcoe leading the charge adding 54 businesses or 16.5% growth.



FIGURE 16: GREEN INDUSTRIES, BUSINESS ESTABLISHMENTS BY REGION, 2005-2010, SIMCOE COUNTY

	June 2005			June 2010			2005 - 2010	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% Increase Total	% Increase Subtotal
Simcoe County	2,780	1,916	864	2,790	1,841	949	0.4%	9.8%
South Simcoe	1,096	768	328	1,125	743	382	2.6%	16.5%
West Simcoe	854	588	266	883	598	285	3.4%	7.1%
Northwest Simcoe	441	288	153	421	263	158	-4.5%	3.3%
Northeast Simcoe	389	272	117	361	237	124	-7.2%	6.0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Figure 17 further divides those green businesses reporting employees by size. Much like cultural industries, green industries are overwhelmingly characterized by small businesses; 84.7% of businesses with employees in the County have less than 10 employees. To further illustrate this point, of the 2,790 total green businesses in the County, just 10 (0.3%) employ more than 50 people. In every region in the County, over 80% of the green businesses reporting employees are small businesses.

FIGURE 17: GREEN INDUSTRIES, BUSINESS ESTABLISHMENTS BY SIZE AND REGION, 2010, SIMCOE COUNTY

	# of Firms with Employees	1-9 Employees		10-49 Employees		50+ Employees	
		Subtotal	% of industry	Subtotal	% of industry	Subtotal	% of industry
Simcoe County	949	804	84.7%	135	14.2%	10	1.1%
South Simcoe	382	327	85.6%	51	13.4%	4	1.0%
West Simcoe	285	239	83.9%	43	15.1%	3	1.1%
Northwest Simcoe	158	129	81.6%	27	17.1%	2	1.3%
Northeast Simcoe	124	109	87.9%	14	11.3%	1	0.8%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

This is an important consideration; contrary to popular opinion, green industries are not likely to be driven in many places by major operators and employers, such as wind turbine manufacturers or large waste processing facilities. Rather, they are likely to be dispersed throughout the County as smaller operations in a wide range of other industries, including research, specialty trades, engineering, and agribusiness. The green economy should be understood in these terms, and initiatives to grow and expand this sector should be responsive to these trends.

5.5 Health and Wellness Industries

A final – though perhaps, most critical – industry that will form a foundation of Simcoe County's economy in the future is health & wellness. Health and wellness industries



include traditional health care delivery operations, including hospitals, clinics and doctors' offices. However it is defined to also include a wider range of functions such as health-related research and development (including private-sector operators such as Elcan Optical Technologies in Midland); personal care and support industries; and social assistance. This industry is important to consider as both an export-oriented industry, in terms of the development and commercialization of health-related products and innovations, as well as an industry closely tied to community health, vitality and quality of life.

This industry is of strategic importance to the County first and foremost due to demographics. The County's population is aging; 43.7% of its population was over the age of 45 in 2006, and the large 'boomer' cohort of the population is beginning to enter retirement age in 2011. As such, there will be significant local and regional demand for health care services, which will demand investment and innovation into the sector.

The County's \$30 million in funding to the Simcoe County Hospital Alliance for 2007 to 2016 will ensure health care services remain in the area to meet that demand. An additional \$20 million funding commitment to the Royal Victoria Hospital in Barrie will ensure this hospital serves the larger Simcoe County area as well. In addition, the County has also committed funding to Georgian College in Barrie for a new Health and Wellness Centre. This Centre will offer a wide range of health-related education programs and community-accessible teaching health care clinics. Programs in social work at Lakehead University in Orillia will also help to supply workers in the social assistance industry.

Using a number of sources including the website canadianwellness.ca, an industry-based definition of the health and wellness sector was developed for Simcoe County using NAICS categories (see Part 2), which includes the following segments:

- Alternative and complementary health
- Behavioural and mental health
- Fitness, exercise and sport
- Medical and pharmaceutical manufacturing
- Food, nutrition and health stores
- Personal care
- Pet wellness
- Physical medicine and rehabilitation
- Research and development

Some elements of the health and wellness sector related to fitness and sport, and research and development are accounted for among the other target industries reviewed above and are excluded from the analysis of this sector to avoid duplication.

Figure 18 demonstrates that the number of health and wellness establishments in Simcoe County increased 15.0% (+151 businesses) between 2005 and 2010, to a total of 1,161. By region, the highest absolute increase was seen in South Simcoe (+63), followed by West Simcoe (+39), Northwest Simcoe (+28) and Northeast Simcoe (+21); however, in percentage terms, Northeast Simcoe had the highest growth rate at



25.0%. Growth occurred disproportionately in the self-employed (indeterminate) category. Though every region except Northwest Simcoe also experienced some growth in businesses reporting employees (subtotal), this growth was slower than overall business growth in health and wellness industries.

FIGURE 18: HEALTH AND WELLNESS INDUSTRIES, BUSINESS ESTABLISHMENTS BY REGION, 2005-2010, SIMCOE COUNTY

	June 2005			June 2010			2005 - 2010	
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal	% Increase Total	% Increase Subtotal
Simcoe County	1,010	306	704	1,161	396	765	15.0%	8.7%
South Simcoe	358	131	227	421	158	263	17.6%	15.9%
West Simcoe	353	94	259	392	117	275	11.0%	6.2%
Northwest Simcoe	215	54	161	243	83	160	13.0%	-0.6%
Northeast Simcoe	84	27	57	105	38	67	25.0%	17.5%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.

Figure 19 indicates the distribution of health and wellness establishments reporting employees according to the size of the business. Of the 765 businesses in this category in the County in 2010, 556 or 72.7% of them are small businesses with less than 10 employees. The health and wellness industry does not have as high of a share of small businesses as the cultural or green industries, but has a higher share than the tourism industry. Northeast Simcoe has the highest share of small businesses at 80.6%.

Again, excepting Northeast Simcoe, each region has between 20% and 25% of its health and wellness businesses employing between 10 and 49 employees, with between 4.7% and 6.9% of businesses reporting more than 50 employees. This larger category is comprised mainly of larger institutional employers, such as long-term care facilities and hospitals, as well as the food, nutrition and health stores category, which includes supermarkets and drug stores.

FIGURE 19: HEALTH AND WELLNESS INDUSTRIES, BUSINESS ESTABLISHMENTS BY SIZE AND REGION, 2010, SIMCOE COUNTY

	# of Firms with Employees	1-9 Employees		10-49 Employees		50+ Employees	
		Subtotal	% of industry	Subtotal	% of industry	Subtotal	% of industry
Simcoe County	765	556	72.7%	163	21.3%	46	6.0%
South Simcoe	263	184	70.0%	61	23.2%	18	6.8%
West Simcoe	275	206	74.9%	56	20.4%	13	4.7%
Northwest Simcoe	160	112	70.0%	37	23.1%	11	6.9%
Northeast Simcoe	67	54	80.6%	9	13.4%	4	6.0%

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2005 & 2010) by Millier Dickinson Blais Inc.



In summary, the County of Simcoe has a significant opportunity to drive business growth, employment and investment in the target industries of culture, tourism, green industries and health & wellness. Though there are unique opportunities in each of these industries, they all build upon traditional strengths of the County's economy, and there are opportunities to drive growth in all of these sectors in every area of the County. In addition, they are all characterized by a concentration of small and medium-sized enterprises. Through the application of targeted investment and business support, entrepreneurs and SMEs in each of these target industries can produce innovative products and services that will contribute to the sustainable economic growth and prosperity of the County of Simcoe.



Section 6: Framing an Economic Development Strategy



6 Framing an Economic Development Strategy

6.1 Strategy Development Process

The County of Simcoe lays out a framework for delivering results in its 2010 Strategic Plan. It states a vision “*to be a Community acting for the Greater Good of all*”. This vision is based on seven values the County believes will guide their decision making: stewardship, leadership, integrity, innovation, respect, accountability and cooperation. The County recognizes that they are confronted with challenges. The *Growth Plan for the Greater Golden Horseshoe* and *Proposed Amendment 1 to the Growth Plan* ensure that they will have continued population and employment growth to 2031. This growth has implications in the form of added infrastructure funding for roads, environmental services, social housing, and long-term care. Added to the growth challenge are program funding for social services.

The result is that the County of Simcoe is confronted with unique challenges. In creating the first economic development strategy for the County, consideration has been given to a wide range of information related to the County’s economic development strengths, weaknesses, opportunities and threats. This process has been accomplished in part through a review of effective regional economic development approaches, a review of current economic development efforts and an analysis of economic data that illustrates Simcoe County’s four unique geographic areas, the competitive position of these areas and the strategic sectors that the County needs to focus on to ensure that it remains regionally competitive.

A broad based consultation process was also undertaken. Beginning in the later part of the summer of 2010 and into the fall, an online survey was open for input from business owners, managers and residents. Participants were asked questions ranging in topics from business ownership, growth expectations and export markets to Simcoe County investment opportunities and growth challenges. This method of consultation garnered over 120 responses. In September 2010, input was sought from a targeted group of business and economic development stakeholders at four focus groups throughout the County, one in each geographic area. This resulted in an additional 60 people providing their input on the direction and focus for the County’s economic development strategy. Key economic development stakeholders representing school boards, colleges and major employers were contacted in October and November for their input into this project. A further 35 interviews were completed for their input into the project. Finally, in January and February 2011 interviews with Mayors and Deputy Mayors of the Simcoe County member municipalities were contacted to provide their input. Nearly 250 people have participated in this project to provide comment on the opportunities and challenges that Simcoe County faces in advancing economic growth and the priorities that should be reflected in the direction and development of the first economic development strategy for the County.



The approach to the consultation has allowed the strategy to be informed by a broad range of perspectives, experiences and ideas, and provided an understanding of the expected role of the County in economic development.

6.2 Major Themes

For a regional economic development strategic plan to be successful requires support and buy in from local economic development stakeholders. Based on the regional economic development review, policy environment review, an understanding of the findings from the economic analyses and the results of an extensive community consultation process, several key themes emerged around which to frame the economic development strategic plan. These themes are:

- **Create a value proposition for regional economic development cooperation;**
- **Provide compelling and coordinated marketing and promotion efforts for the County;**
- **Advocate on behalf of regional priorities;**
- **Capitalize on post-secondary institutions to support regional innovation, education and workforce development;**
- **Provide strategic support to small and medium sized enterprises;**
- **Foster a health services and medical technologies cluster in the County;**
- **Foster a green and environmental technologies cluster in the County, and;**
- **Support growth in regional tourism, agri-tourism and cultural development.**

The further justification for these themes is described as follows.

6.2.1 Create a value proposition for regional economic development cooperation

A significant message that emerged from the community consultations and from the review of local municipality economic development mandates was that there were a large number of stakeholders already engaged in economic development. Stakeholders expressed concern over any duplication of existing services. Stakeholders felt that an additional regional economic development layer will need to provide added value if there is to be a spirit of cooperation. Some stakeholders perceive there to be a 'silo mentality' in the way that lower-tier municipalities approach economic development, and sense that 'turf wars' may emerge as a result. The County



needs to be cognizant of these attitudes and educate the local municipalities and decision makers on an ongoing basis about the County's economic development role.

Some of the stakeholder input suggested that the County's value-added proposition could be to act as a 'broker and facilitator' of regional economic development information and research. These research interests could be focused on identifying best practice communities for municipal financial and regulatory tools, and initiatives for labour force replacement, enhanced social services delivery and attracting immigrants. Regardless of the economic development related research interest, the County will need to seek out the support of local municipalities and funding commitments from economic development stakeholders such as the North Simcoe CFDC or Nottawasaga Futures CFDC.

6.2.2 Provide compelling and coordinated marketing and promotion efforts for the County

As previously mentioned, there are several local municipalities and economic development organizations in the County. Many are already engaged in marketing and promoting their communities and regions within Simcoe County. In addition, Regional Tourism Organization 7 (RTO 7) is also likely to allocate funding to regional marketing and promotion efforts. As a result, there is a need to communicate the County's marketing and promotion role and clarify this with other economic development organizations, local municipalities and the RTO.

There is a need to shift the focus of tourism marketing from 'pass-through' marketing to destination development marketing and promotion of off-highway attractions. For example, the Collingwood area has been successful at generating tourists and visitors to the area. However, many of these tourists may not be experiencing other attractions in Simcoe County. The market bundling of tourism attractions throughout the County could lure tourists to other attractions that are off the Highway 26 corridor. Of particular interest for tourism in Simcoe County is the presence of both Aboriginal populations and French speaking populations. The story and culture of these populations can be better integrated with other tourism attractions.

Aside from tourism marketing, there is a need for the County of Simcoe to engage in more effective external marketing and investment attraction initiatives. While external marketing is an expensive endeavour for economic development offices, having the County coordinating this effort and better leveraging their resources with a consistent and targeted marketing message increases the chances of investment attraction success.

6.2.3 Advocate on behalf of regional priorities

The County of Simcoe area is seen to have significant assets that can be better leveraged for economic development including: high-value agricultural lands, a



regional hospital, a regional airport, a rail network, and broadband telecommunications. These assets require both public and private sector investment to increase and enhance the economic development potential of the region.

Agricultural Assets – The County has a diversity of agricultural lands within its borders; among them is first class farmland in South Simcoe, including much of the Holland Marsh area – often referred to as the breadbasket of Ontario. These lands should be considered a distinctive, high priority asset for the County to both protect and promote. On one hand, this means ensuring that development planned in and around these areas – while important – do not compromise the ecological integrity of these lands or their ability to generate the agricultural output upon which much of the County and the Greater Toronto Area rely. On the other, it means using the County’s profile to promote the importance of the local agricultural industry to potential consumers and investors – including the food processing industry, major food purchasers such as restaurants and wholesalers, and visitors looking to experience culinary and agri-tourism experiences.

Hospital Infrastructure - The Royal Victoria Hospital in Barrie has received \$450 million for a redevelopment and expansion project. When completed, RVH will double in size and have over 1,000 new employees and physicians.⁴ This project is a significant asset and its expansion will increase the health care services capacity to the region. In addition, the Province’s health care spending is increasing as the population is aging and the demand on services is increasing. All of these economic and population trends will place greater strain on RVH and the network of hospitals in Simcoe County.

Airport and Employment Area Servicing Infrastructure - The Simcoe Regional Airport in the Township of Oro-Medonte is another significant infrastructure asset with great potential for the County. *Proposed Amendment 1* to the *Growth Plan for the Greater Golden Horseshoe* refers to this area as the Lake Simcoe Regional Airport Economic Employment District. The permitted uses are largely industrial in nature, but the servicing of water, sewer and roads to these areas along with the other strategic employment areas (i.e. Bradford West Gwillimbury, Innisfil Heights) and economic districts (i.e. Rama Road) will require investment beyond the financial capacity of the local municipalities. These employment areas help achieve the Province’s *Places to Grow* objectives and the County will need to advocate on behalf of the municipalities to the Province. The servicing of these lands will require provincial support, which was stated several times in consultations with local municipal staff and councils. These lands also offer the potential to attract major employers that will create high-value employment opportunities.

Road Infrastructure - Simcoe County is serviced with a 400 series highway from its south to north border. There are also provincial roads (i.e. Highways 26, 11 and 89) that connect the communities together over a large geographic area. Future improvements to these highways and the long term expansion project to link Highway 400 to Highway 404 north of Bradford will improve the County’s location for business and accessibility for travellers and visitors. The Simcoe County *Transportation Master*

⁴ RVH Phase 1 Expansion Project, <http://www.rvh.on.ca>, viewed on April 28th, 2011.



Plan calls for various approaches to accommodate the population and employment projections through the County road and highway network. These include: expansion to provincial and county roads to, including on County Roads 88, 89 and 90; the ten-laning of Highway 400 between Highway 9 and the Highway 11 interchange; the development of a by-pass from Wasaga to Collingwood; and curbing demand, through (for example) the introduction of designated truck routes and improved public transportation options. The County will need to continue advocating to the Province for the maintenance and enhancements of these road infrastructure projects.

Rail Infrastructure - Rail lines provide a low carbon emissions alternative to road transportation. According to senior County staff, the mainline that runs through the County from north to south is important rail infrastructure. The collector rail line (Barrie Collingwood Railway) is the only line that feeds into the major rail artery, CP Rail, which connects directly into the North American rail network. Efforts should be made by the County to ensure that this infrastructure link remains viable.

Telecommunications Infrastructure - A high speed telecommunications network is a critical infrastructure requirement for the knowledge-based economy. An accessible network encourages small businesses or home-based businesses to work in Simcoe County's smaller communities, but enables them to service a larger market. Many stakeholders during consultations stated the importance of telecommunications availability and reliability for businesses to remain in the area. Communities such as Collingwood have been successful at building a knowledge based sector of the economy in large part due to the telecommunications services that have allowed people to work in the community and enjoy a high quality of life experience. The concern that was raised during the consultation process was the pockets of areas un-serviced by the telecommunications providers. Improved enhancements to the network should address these gaps and improve scalability.

6.2.4 Capitalize on post-secondary institutions to support regional innovation, education and workforce development

Access to post-secondary education is of key importance to economic prosperity. Post-secondary institutions have a role to play in developing the workforce, but they can also act as catalysts for business investment and attraction efforts. Simcoe County is fortunate to have two post-secondary institutional assets: Georgian College and Lakehead University – Orillia Campus. Both these schools benefit the larger regional area as they equip the population for knowledge-based and creative economy employment opportunities. Furthermore, these schools provide post-secondary educational options for the regional population and can prevent, to a limited extent, out migration of youth to larger centres with universities and colleges.

There are plans to expand the Lakehead University – Orillia Campus have expansion plans to grow enrolment to 7,000 students, which will have a significant spill over benefit to Orillia and the regional economy.



Both schools offer signature educational programs in green/environmental technologies, but their combined programming in rural and Aboriginal health have the potential to create a significant competitive advantage over other regions.

Green/Environmental Technologies - Georgian College's Centre for Sustainable Technologies offers an industry-based applied research laboratory and labs for specialized studies including design, high-voltage electrical, surveying, materials testing and instruction. This facility includes geo-thermal heating, high efficiency motion-sensor lighting and heat controls and other environmentally sustainable construction designs. This innovative Centre offers engineering technology programs in:

- Electrical engineering technician – power
- Civil engineering technician (construction) and
- Civil engineering technology.

Some of the major donors for the development of this centre have included the Province of Ontario, Hydro One, PowerStream, construction associations, engineering and land use planning firms, and an electrical power systems software firm.

The Lakehead University – Orillia Campus is being built to a LEED Platinum standard. The Campus Plan for 2009 to 2013 states that the campus will be a demonstration project of sustainable development and environmental management. In addition, this plan states the campus will promote research and development initiatives in social and environmental sustainability.⁵ This school provides the theoretical knowledge base for students to apply this knowledge in local industries.

Health and Wellness – Georgian College embarked on a \$65 million capital project to create the Centre for Health and Wellness. This Centre will include community-accessible teaching health care clinics where the public can access health care and the students can gain valuable clinical experience. The four health clinic areas include an oral health clinic, optical clinic, massage therapy clinic and Georgian Nurse Practitioner-Led clinic. It will also include a new Aboriginal Resource Centre, which includes a class room, stone garden and fire pit that will be used for ceremonial gatherings. Space in the 172,000 sq.ft. facility will permit enrolment in health and wellness studies to double and help to meet the region's demand for health care professionals. In addition, this facility will provide 400 new full and part time jobs for staff and faculty.⁶

Tourism – Georgian College's School of Hospitality, Tourism and Recreation offers a wide range of programs in hospitality management, culinary management and recreation. These programs provide the labour force with skills training to service the regional tourism industry.

As these two schools continue to develop their programming, technology and knowledge transfer for the local businesses and labour force will become increasingly

⁵ *Lakehead University – Orillia Campus Plan 2009-13*, Lakehead University, p.2.

⁶ Georgian College, Health and Wellness Centre Quick Facts, <http://www.georgianc.on.ca/healthandwellness/quick-facts/>, viewed on April 28th, 2011.



important. Simcoe County will need to foster, where it can, an environment that encourages research partnerships between industry and post-secondary institutions and entrepreneurial ventures that apply institutional research to industry.

6.2.5 Provide strategic support to small and medium enterprises

Access to business services and financing was regarded as an important element to ensuring future business growth. Many economic development stakeholders in Simcoe County have already recognized the importance of supporting small and medium sized enterprises. The CFDCs support these businesses through their financial assistance and business advisory services. In addition, the SpringBOARD Innovation Centre also supports these enterprises by providing mentoring services, business expansion services and providing guidance to take early-stage ideas to market. This innovative organization is in its early stages and the County should provide strategic support to this organization to enable more small businesses to develop in the County. Expansion of a virtual incubation centre and enhancements to broadband infrastructure will help businesses grow and mature into sustainable businesses.

There are many successful small businesses in the County. Some of these companies were directly engaged in the project. A key message from the online survey was that a majority of them expect to perform stronger in the short term. The survey also suggested that they need services to focus on business networking sessions and web-marketing seminars to help with business viability. Over the longer term, local business successes should be promoted by the County as part of its business attraction efforts.

6.2.6 Foster a health services and medical technologies cluster in the County

The development of a health services and medical technologies cluster in the County of Simcoe can support the economic growth of the County in multiple ways. With the knowledge that the population is aging in all parts of the County, demand will continue to increase for the provision of health care services. As stated above, the \$450 million expansion of The Royal Victoria Hospital in Barrie – in which the County of Simcoe has been a partner – will be instrumental in meeting that demand, and drive direct and indirect employment benefits in the thousands. Much of this employment will include highly-trained (and compensated) physicians and medical technologists. Indeed, both labour force, employment and business concentration in health care services - including among medical practitioners, has increased in recent years. This growth has been consistent across all areas of the County, and is of particular importance in areas such as Northwest Simcoe that has more limited access to advanced medical care.

The demand for health care services in the County is also being met with supply; as previously discussed, Georgian College's new Health and Wellness Centre will greatly increase the medical training capacity in the County by doubling current enrolment and



housing clinics in which local residents can receive services and students can gain practical experience.

Finally, by bringing together advanced medical expertise, research and learning opportunities in health and medical sciences, and world-class facilities for medical practice, the County has a unique opportunity to realize and support the growth of innovative research and development activity in health sciences and medical technologies, producing a regional 'cluster' in this area. The conditions discussed above, coupled with successful private sector operators such as Elcan Optical Technologies in Midland, provide the seeds necessary for cluster development in this sector. The County should explore ways to encourage dialogue, information sharing and formalized technology transfer and commercialization to encourage the development of a health sciences cluster that can export its expertise in the form of new technologies, devices & procedures, while also meeting local demand.

6.2.7 Foster a green and environmental technologies cluster in the County

The opportunities for growth and development of a green economy were identified across the County – both through informal consultations and formal economic development and planning documents. The County's existing strengths in employment and business composition have centred on construction, manufacturing and agriculture. Incorporating green practices and environmental technologies is seen as a way to enhance and add value to these traditional industries, and derive new sources of income and wealth – such as the conversion of on-farm waste and biomass to renewable fuels and bio-products.

As discussed in a previous theme, the County has seen major institutional investment in green economy industries – specifically in environmental technology. Lakehead University – Orillia's new LEED Platinum campus has emerged as a model for green building in the County, while Georgian College's Centre for Sustainable Technologies will focus specifically on training and research in green construction and utilities. In bringing together public and private sector funding and in-kind support, the latter example is a model institutional program for stimulating the growth of a cluster in environmental technologies. The research conducted in the Centre is designed to be incorporated into technologies that can be capitalized on by the private sector, and improve the infrastructure and environmental efficiency in the public sector. Similar partnerships have emerged elsewhere in the County, such as South Simcoe's Green Transition Centre, which is designed to share and mobilize updated virtual information and best practices related to green business and community development.

Given that opportunities associated with green technologies are being pursued throughout the County already, the County can play an important role in advancing a coordinated green economy agenda. While separate parts of the County have already been successful at accessing institutional, local, provincial and federal funds in support of green technology development and research, the scale that can be achieved by



advancing a collaborative effort can make the County an undisputed leader in this effort.

6.2.8 Support growth in regional tourism, agri-tourism and cultural development

The importance of tourism was a consistent message that emerged during the consultation. Stakeholders emphasized the range of unique tourism and cultural assets, from water-based recreation on major provincial destinations such as Georgian Bay and Lake Simcoe, to business and resort-style tourism at Nottawasaga Inn and Fern Resort, to culture and heritage attractions such as Discovery Harbour. This is reinforced by business and employment trends that show a consistent pattern of growth in accommodation and arts, entertainment and recreation industries.

However, also common across the County was the sense of a lack of coordination, and a limited appreciation of the economic value of tourism and culture. While generally strong, the industry is also highly subject to consumer spending patterns and is seen to need greater organizational infrastructure to provide support on an ongoing basis. It is often noted that despite the County's diverse attractions and close proximity to large markets, it is still seen as a pass-through and not an ultimate destination.

The new RTO administrative framework can provide a springboard for redefining the County from a tourism and culture perspective based on local assets. Regional diversity in language and heritage, focused on French and aboriginal populations, is a unique quality in Ontario that the County can further capitalize on. In addition, the County's strong agricultural heritage can be developed to further a sustainable agri-tourism product in the County, especially in those areas that do not benefit from a major recreational or seasonal attraction. The County can and should work with this organization and other regional destination marketing organizations to build capacity and provide marketing support to culture and heritage workers and businesses, agricultural operators looking to expand into the tourism market, and 'traditional' tourism operators in all parts of the County.



Section 7: Recommendations



7 Recommendations

The goals of the strategy represent the overall vision and desired outcomes from the strategic planning process and present a view of the type of ‘community’ that Simcoe County hopes to become. By definition, they provide direction and guide the development of relevant strategies, projects and programs.

7.1 Vision Statement

Vision statements present an image of future success, based on what is attainable in reality – it should be built on the strengths, opportunities and capacity of a community.

In preparing the County of Simcoe Economic Development Strategy we have built upon the **VISION** established in the County of Simcoe’s Strategic plan, which is “*to be a community acting for the greater good of all.*”

A key consideration in the development of this Strategy for the County of Simcoe is the anticipated new economic development programming as it strives to fulfil its potential as it acts for the greater good of all. The resulting foundational **PRINCIPLES** for the delivery of economic development services at the County reflect the findings and results received during the project.

the foundational principles

- *Build awareness of the economic development goals;*
- *Build relationships with economic development stakeholders and the business community;*
- *Leverage the networks and activities of stakeholders, and;*
- *Deliver programs that add value for the County and stakeholders.*

7.2 Goals, Objectives, Actions

By definition, economic development goals should seek to build on local strengths, mitigate the weaknesses and convey the desired outcomes of the strategic planning process. Objectives will define what is to be accomplished while the actions outline how this is to be accomplished.

The **GOALS, OBJECTIVES** and associated **ACTIONS** that follow are built around the County’s desire to assume a greater leadership role with respect to engaging regional stakeholders and fostering a supportive and innovative regional economy.



the goal statements

The County of Simcoe's Economic Development Strategy is underpinned by four high level goals, intended to anchor all strategic initiatives or ensuing actions on the part of the County's Economic Development Office. These goals also support the vision for the County as stated in the Strategic Plan as well as the foundational principles.

The goals and actions should be viewed as a starting point based on current community input and research. It is not meant to serve as an exhaustive list of all activities that could or will engage the County's economic development staff. New actions will emerge throughout the lifespan of this Strategy and partnership organizations will emerge or change. For effective implementation by County staff, they must continually assess how these new actions contribute to the overall success of the strategy.

GOALS	OBJECTIVES
Foster partnerships and outreach in the community	<ul style="list-style-type: none">• The County will demonstrate leadership and advocacy through the creation of collaborative partnerships to advance economic growth, business development and entrepreneurship.
Pursue effective regional marketing and promotion	<ul style="list-style-type: none">• The County will consistently and effectively market its local strengths and assets to regional stakeholders and businesses, external investors and visitors, and potential residents.
Support an innovative business culture	<ul style="list-style-type: none">• The County will build upon its existing strengths and assets to become a leader in Ontario for research and development, investment, education & training and entrepreneurship in the health & wellness and green & environmental technologies industries.
Foster growth in regional tourism and cultural industries	<ul style="list-style-type: none">• The County will be recognized provincially and nationally for its thriving tourism and cultural industries, with communities that offer a diverse range of rural, recreational and cultural experiences.



The associated actions that serve to implement the economic development goals and objectives are provided and prioritized as **SHORT TERM** (1-3 years), **MEDIUM TERM** (4-6 years) and **LONG TERM** (7-10 years).

It should be noted that prioritization of these recommendations is intended to reflect a logical sequence of activities, with each action in the strategy contributing to a greater level of success as it relates to economic development and investment in the community. A more detailed implementation plan will be required to address the budget, resources and detailed timing of each action.

7.3 Performance Measurement

The effective implementation of the recommended actions for the County of Simcoe Economic Development Department must be accompanied by effective performance measurement and monitoring. As a relatively new department that is ultimately accountable to the County's lower tier municipalities – and, by extension, its tax-paying citizens – the Economic Development Office must ensure that they are meeting the goals set out for them and agreed upon by the community, as represented by County Council.

Performance measures are a tool to evaluate the effectiveness of an organization's activities. By tracking and reporting on its efforts, the Economic Development Office will be more likely to:

- Be accountable and responsive to the expectations of its stakeholders;
- Be able to demonstrate the return on investment into the department and the programs it supports;
- Improve its performance by learning from prior efforts, and;
- Receive additional support (in the form of staff, funding and other resources) to pursue its mandate.

To that end, this strategy provides a series of potential performance measurements associated with each goal statement. These performance measures are preliminary suggestions to inform a more detailed accounting and evaluation of the department's activities, which should be developed in partnership with the department's stakeholders – and most importantly, communicated to its stakeholders.



taking action

GOAL 1: FOSTER PARTNERSHIPS AND OUTREACH IN THE COMMUNITY

Objective – The County will demonstrate leadership and advocacy through the creation of collaborative partnerships to advance economic growth, business development and entrepreneurship.

Required Actions	Potential Partners	EDO Role	Timing
<p>1. Collaborate with local municipalities to provide financial solutions for having the necessary infrastructure and services in place in the strategic employment areas and districts, within the current County and provincial growth management framework</p> <ul style="list-style-type: none"> ○ This includes advocating to the Province on behalf of the County municipalities to develop and implement alternative fiscal tools (e.g. increase of municipal debt capacity and/or debt relief) to secure financing for new employment-related servicing and development 	<p>Local municipalities and economic development offices County planning, transportation & engineering and finance departments Province of Ontario</p>	<p>Partner</p>	<p>Short to medium term</p>
<p>2. Advance a strategic visioning project and strategy for the Lake Simcoe Regional Airport to ensure that the economic potential of the site and its surrounding lands is maximized.</p> <ul style="list-style-type: none"> ○ As part of this effort, undertake a case study review of other regional airports to determine the appropriate capacity, level of investment required, and mandate of the Airport as it relates to others in the Greater Toronto Area and Central Ontario. 	<p>Georgian College City of Barrie Township of Oro-Medonte Orillia and Area CFDC</p>	<p>Lead and Partner</p>	<p>Short term</p>



<p>3. Undertake a workforce development strategy for the County of Simcoe in partnership with the regional training boards, educational institutions and employment services organizations that will:</p> <ul style="list-style-type: none"> ○ Identify opportunities to provide improved training and skills development to students and businesses through Lakehead University and Georgian College ○ Develop worker replacement and retraining programs to address workforce demands created by the aging of the labour force ○ Explore mechanisms to retain local youth and young professionals by creating local youth employment opportunities and co-op programs ○ Work with local secondary schools to address educational gaps in emerging disciplines (particularly science, technology, engineering and mathematics - STEM) that support the target industries. ○ Provide funding and communication support to advance the above objectives. 	<p>Georgian College and Lakehead University Simcoe County District School Board Simcoe Muskoka Catholic District School Board York South Simcoe Training and Adjustment Board Simcoe Muskoka Workforce Development Board</p>	<p>Partner</p>	<p>Short term</p>
<p>4. Build opportunities for the County’s member municipalities to pursue a range of approaches to job creation and sustainable economic growth through the creation of standardized economic development tools, including:</p> <ul style="list-style-type: none"> ○ A Business Retention + Expansion Toolkit (with implementation guidelines, surveys, database templates, and funding sources) ○ A Downtown Revitalization Toolkit (with appropriate resources – see above) ○ A Customer Service Training Toolkit for Tourism 	<p>Local municipalities and economic development offices CFDCs and Small Business Centres</p>	<p>Lead</p>	<p>Short term</p>



<p>5. Collaborate with local municipalities and economic development offices to create an immigrant attraction and settlement services program to attract and retain workers and residents, with a particular focus on meeting employment needs in the County’s target sectors.</p>	<p>Simcoe County Social Services Local municipalities and economic development offices</p>	<p>Partner</p>	<p>Short term to long term</p>
<p>6. Support the efforts of Royal Victoria Hospital to develop its status as a teaching hospital by working with partners to build a business case for the attraction of a post-secondary medical school to the County</p>	<p>Royal Victoria Hospital City of Barrie</p>	<p>Partner</p>	<p>Medium term to long term</p>
<p>7. Promote the continuation of enhanced, high-speed telecommunications bandwidth into underserved areas in the County as a means to encourage home based occupations and businesses.</p>	<p>Local municipalities and economic development offices OMAFRA County of Simcoe departments</p>	<p>Partner</p>	<p>Medium term</p>
<p>8. Convene a forum of public and private stakeholders to assess the future viability sustainability and optimal use of the Barrie-Collingwood railway.</p>	<p>City of Barrie, City of Collingwood and affected local municipalities, County of Simcoe departments</p>	<p>Lead and Partner</p>	<p>Short to long term</p>
<p>9. Provide ongoing input to the strategic planning and program development of Georgian College and Lakehead University – Orillia Campus to ensure that programs and courses support the County’s target sectors, workforce development needs and efforts to attract creative workers and innovative businesses.</p>	<p>Georgian College Lakehead University</p>	<p>Partner</p>	<p>Medium to long term</p>



<p>10. Work in conjunction with local municipalities and economic development offices and CFDCs to identify the ways to promote and support existing programming related to areas such as succession planning, and developing marketing plans, export plans or business expansion plans.</p>	<p>Local municipalities and economic development offices CFDCs</p>	<p>Lead and Partner</p>	<p>Short to long term</p>
<p>11. Work with local municipalities, CFDCs and small business support agencies to create a master directory of business services available in all parts of the County, for promotion on the County economic development website. This resource should also include:</p> <ul style="list-style-type: none"> ○ A master list of external public sector funding programs available to businesses (e.g. FedDev's Investing in Business Innovation program) ○ A list of business mentors and ambassadors in the County available to provide business assistance and coaching 	<p>Local municipalities and economic development offices, CFDCs Small Business Centres</p>	<p>Partner</p>	<p>Short term</p>
<p>12. Develop a stronger partnership with the SpringBOARD Innovation Centre in Barrie to encourage and support entrepreneurship, innovation, commercialization and investment into knowledge-based industries in the County.</p> <ul style="list-style-type: none"> ○ Become a funding partner of the SpringBOARD Centre to facilitate a more regional approach to business outreach and service delivery ○ Promote County success stories that have attracted investment or generated growth through use of the Centre's services. ○ Explore the feasibility of a virtual incubation program to be delivered through the Centre which would allow its services to be more easily accessed in other parts of the County. 	<p>SpringBOARD Innovation Centre City of Barrie</p>	<p>Partner</p>	<p>Short-term</p>



<p>13. Advocate to the Ministry of Research and Innovation to locate or designate a Regional Innovation Centre in Simcoe County, in order to access additional provincial support, promotion and funding.</p> <ul style="list-style-type: none"> ○ Currently Markham is the closest member of the Ontario Network of Excellence; there are 12 locations between London and Port Hope, and none in Simcoe County. ○ This can be achieved either through the expansion of SpringBOARD or through collaboration with the post-secondary institutions on a new Centre. 	<p>SpringBOARD Innovation Centre Lakehead University Georgian College CFDCs Ministry of Research and Innovation</p>	<p>Lead</p>	<p>Short-term to medium term</p>
<p>14. Work with the County’s post-secondary educational institutions to formalize technology transfer opportunities and policies, which will allow for the creation of new innovative businesses emerging from university and college course work and research.</p>	<p>Lakehead University Georgian College CFDCs</p>	<p>Partner</p>	<p>Medium term</p>

<p>Performance Measures:</p> <ul style="list-style-type: none"> • Amount of infrastructure funding to support development in the County’s strategic employment areas and districts • Leveraged funding to support the Lake Simcoe Regional Airport strategic visioning and planning project • Student enrolment at Georgian College and Lakehead University • New educational and training programs offered at Georgian College and Lakehead University • Leveraged funding to support workforce development projects • Uptake of immigrant integration and settlement services • Memorandum of Understanding for a post-secondary medical program in the County • Telecommunications percentage coverage across Simcoe County • Number of seminars and training opportunities offered throughout the County, supported by regional economic development stakeholders • County and partner funding commitment for the SpringBOARD Innovation Centre • Number of County businesses using the SpringBOARD Innovation Centre



GOAL 2: PURSUE EFFECTIVE REGIONAL MARKETING AND PROMOTION

Objective – The County will consistently and effectively market its local strengths and assets to regional stakeholders and businesses, external investors and visitors, and potential residents.

Required Actions	Potential Partners	EDO Role	Timing
<p>1. Undertake the development of a County of Simcoe Marketing Strategy and Implementation Plan that gives consideration to the tools, tactics, media and resources required to raise the County’s profile and identity as an ideal place for business and investment. Particular focus in this effort should be given to the County’s target sectors, and include the following considerations:</p> <ul style="list-style-type: none"> ○ Specific messaging that supports the attraction of businesses, investment, tourist and potential residents to the County. ○ Potential lead generation and direct marketing efforts to support investment in the County’s target sectors. ○ Detailed community profiles for the County and four geographic sub-areas using the information presented and delivered in the Economic Development Strategic Plan materials. ○ Detailed industry profiles for each of the County’s target sectors that illustrate the capacity of the local business community and workforce, and include value propositions for investment. ○ The promotion of local business success stories geared towards the County’s target industries. 	<p>City of Barrie City of Orillia Local municipalities and economic development offices CFDCs</p>	<p>Lead & Partner</p>	<p>Short term to medium term</p>
<p>2. Develop a County Business Portal to function as a tool for site locators, investors and businesses looking to expand.</p>	<p>Local municipalities and economic development offices</p>	<p>Lead</p>	<p>Medium term</p>



<ul style="list-style-type: none"> ○ This tool would amalgamate the business directories and inventories of serviced and un-serviced industrial and commercial land from the lower-tier municipalities. ○ A master database should be developed that is searchable by business category, parcel size/zoning and servicing, and geographic location, and mapped using the County's GIS capabilities. 			
<p>3. Create a dedicated, standalone website for Simcoe County economic development, to incorporate the messaging and materials developed as part of the marketing strategy and implementation plan suggested above.</p>		Lead	Short term
<p>4. Produce quarterly economic development newsletters geared to business and investment interests and distribute to regional business community, ICI realtor community and target market sector decision makers.</p>		Lead	Short term
<p>5. Develop profiles for the promotion of the County's strategic employment areas and employment districts to the ICI realtor community and target market sector decision makers, and make available through the County's economic development website.</p>		Lead	Medium to long term
<p>6. Develop an annual report which profiles major investment successes, new development, infrastructure improvements and features significant businesses and entrepreneurial accomplishments.</p> <ul style="list-style-type: none"> ○ Distribute these annual reports (as electronic documents) to the business community, lower tier 	Local municipalities and economic development offices	Lead	Short to long term



municipalities and economic development officers, and ICI realtors to inform them of opportunities in the County.

Performance Measures:

- Leveraged funding commitment from economic development stakeholders to support regional marketing
- Number of visitors to the Simcoe County economic development website
- Number of leads generated through various channels (ICI realtor community, trade shows, etc.)
- Number and value of investments attracted to the County through various channels (website, trade shows etc.)
- Number of downloads of employment area profiles from the County website.
- Subscription and distribution of County economic development newsletters and annual report



GOAL 3: SUPPORT AN INNOVATIVE BUSINESS CULTURE

Objective – The County will build upon its existing strengths and assets to become a leader in Ontario for research and development, investment, education & training and entrepreneurship in the health & wellness and green & environmental technologies industries.

Required Actions	Potential Partners	EDO Role	Timing
<p>1. Conduct a regional target sector assessment and profile for the health and wellness industry, as to better understand the scope, depth and breadth of this industry’s value chain in Simcoe County.</p> <ul style="list-style-type: none"> ○ As defined in this report, this sector profile should include physical medicine and health practitioners, nutrition, medical technologies and devices manufacturing, and research & development related to health and wellness in the County 	Local Health Integration Networks City of Barrie City of Orillia Georgian College Lakehead University Local municipalities and economic development offices CFDCs	Lead and partner	Short term to medium term
<p>2. Develop a targeted health and wellness sector marketing strategy and industry profile that can be used in attraction of health industries investment and recruitment of education and health care professionals and practitioners to the County.</p>	Local municipalities and economic development offices City of Barrie City of Orillia Georgian College Lakehead University CFDCs	Lead and partner	Short term to medium term
<p>3. Convene a collaborative Working Group of institutional, municipal and other public-sector stakeholders to advance the establishment of a regional flagship centre for the development of best practices and delivery of Aboriginal and Rural Health Care. The following constituencies should be engaged in this effort:</p>	Georgian College Lakehead University City of Orillia City of Barrie Simcoe Muskoka District Health Unit	Lead and partner	Medium term to long term



<ul style="list-style-type: none"> ○ Lakehead University, which has courses related to social work and education ○ Georgian College’s Health and Wellness Centre, which includes an Aboriginal Resource Centre ○ Royal Victoria Hospital and Soldier’s Memorial Hospital who could house a research and treatment ○ Potential funding and administrative support partners at both upper and lower tiers 	<p>Simcoe County Social Services Chippewas of Rama First Nations Local Health Integration Networks</p>		
<p>4. Partner with County hospitals and educational institutions to actively increase its health care profile in the Province among private businesses and public sector stakeholders, by:</p> <ul style="list-style-type: none"> ○ Hosting provincial and federal health and wellness conferences in Simcoe County (e.g. HealthAchieve) ○ Featuring successful private enterprises in health and medical technologies, such as Elcan Optical Technologies, in County economic development marketing 	<p>City of Barrie Royal Victoria Hospital City of Orillia Orillia Soldiers’ Memorial Hospital Other health care providers in Simcoe County</p>	<p>Partner</p>	<p>Medium term</p>
<p>5. Use business directories and databases to identify and map Simcoe County companies with the capacity to provide specific support to key green energy sectors, including solar, wind and biomass.</p> <ul style="list-style-type: none"> ○ As an outcome of this process, promote the availability of incentives available through the Green Energy Act to engage in FIT (feed-in tariff) and microFIT (for on-farm power generation) programs to County companies. 	<p>Local municipalities and economic development offices CFDCs</p>	<p>Lead</p>	<p>Short term</p>
<p>6. Facilitate the ongoing collaboration of the Centre for Sustainable Technologies at Georgian College with</p>	<p>Georgian College Local municipalities and</p>	<p>Partner</p>	<p>Short term to medium</p>



<p>County establishments in the construction trades, engineering and utilities sectors through</p> <ul style="list-style-type: none"> ○ Explore opportunities to support the application of research through the Centre’s new civil technology program in addressing County infrastructure developments. 	<p>economic development offices</p>		<p>term</p>
<p>7. Collaborate with Nottawasaga Futures CFDC to expand and promote the availability and accessibility of its Green Economy Transition Centre’s online tools for green technology funding, business development and employment, by:</p> <ul style="list-style-type: none"> ○ Becoming a funding partner of the Centre ○ Providing logistical and financial support to both South Simcoe and other County municipalities to host green business seminars, networking functions and other events to support the growth and development of a County-wide cluster. 	<p>Nottawasaga Futures CFDC Other CFDCs Local municipalities and economic development offices</p>	<p>Partner</p>	<p>Short term to medium term</p>
<p>8. Work with business services delivery organizations and partners in the agriculture sector to produce guides/prospectuses and host feasibility workshops for operators to invest in on-farm business opportunities in the green economy value chain.</p> <ul style="list-style-type: none"> ○ These opportunities can include the production of crop for the production of bio-fuels, and the generation of energy from farm waste. ○ This can leverage partner resources, such as OMAFRA’S Green Energy Information Bundle 	<p>Agriculture and Agri-Food Canada Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) Ontario Federation of Agriculture CFDCs Holland Marsh Growers’ Association Simcoe County Farm Fresh Marketing Association Food Partners Alliance of Simcoe County</p>	<p>Partner</p>	<p>Medium term</p>

**Performance Measures:**

- Number of stakeholders supporting a regional target sector assessment and profile for the health and wellness industry.
- Leveraged funding to support a regional target sector assessment and profile for the health and wellness industry.
- Student enrolment in Aboriginal Health programming at Lakehead University and Georgian College
- Number of health and wellness and green economy conferences held in Simcoe County that were supported by regional stakeholders
- Number of new business incorporations in the County's target sectors
- Growth in the number of local jobs in the County's target sectors
- Leveraged funding from regional economic development stakeholders to advance the County's target sectors
- Funding leveraged from provincial and federal programs to support Simcoe County businesses



GOAL 4: FOSTER GROWTH IN REGIONAL TOURISM AND CULTURAL INDUSTRIES

Objective – The County will be recognized provincially and nationally for its thriving tourism and cultural industries, with communities that offer a diverse range of rural, recreational and cultural experiences.

Required Actions	Potential Partners	EDO Role	Timing
<p>1. Continue to work with the Regional Tourism Organization (RTO) to ensure the priorities of Simcoe County tourism operators are prioritized in the RTO’s marketing, investment and product development projects and expenditures, and that ongoing market and consumer research is conducted.</p>	<p>Regional Tourism Organization (RTO) 7</p>	<p>Partner</p>	<p>Short term & ongoing</p>
<p>2. Develop a searchable database and asset map of tourism and culture assets, organizations, attractions and events in the County. Utilize this database to create a list of ‘high value’ investment and redevelopment opportunities in the culture and tourism sector throughout the County.</p> <ul style="list-style-type: none"> ○ Look to partner with South Georgian Bay to expand the similar exercise undertaken there in 2009-2010. 	<p>RTO 7 Local municipalities and economic development offices Destination Marketing Organizations (DMOs) CFDCs Sumac</p>	<p>Lead and Partner</p>	<p>Short term to medium term</p>
<p>3. Promote tourism and culture assets of Simcoe County through a central County tourism website, which should:</p> <ul style="list-style-type: none"> ○ Link to partner RTO and Destination Marketing Organization (DMO) websites and resources ○ Include visitor and economic impact information, for both potential tourists and investors ○ Incorporate the asset map discussed above. ○ Include a ‘storytelling’ element in which local cultural enterprises and workers share and promote their experiences working and living in the County. 	<p>RTO 7 Local municipalities and economic development offices CFDCs DMOs Sumac</p>	<p>Lead and Partner</p>	<p>Short term to medium term</p>



<p>4. Raise awareness of the economic contribution of the County's agriculture and agri-food assets and its Food Charter by promoting the consumption of local agricultural products among food purchasers (i.e. County restaurants, specialty food stores) and encouraging investment in and visitation to agri-tourism enterprises in County economic development and tourism marketing. This should focus specifically on products from the Holland Marsh and other high-yield agricultural areas.</p>	<p>RTO 7 Food Partners Alliance of Simcoe County Holland Marsh Growers' Association Simcoe County Farm Fresh Marketing Association York Region Tourism Chambers of Commerce</p>	<p>Partner</p>	<p>Medium term to long term.</p>
<p>5. Develop a tourism business development resource toolkit to aid entrepreneurs and operators, focused on specific segments (e.g. agri-tourism). This can leverage provincial resources and tools such as OMAFRA'S 'Developing an Agri-Tourism Operation in Ontario' fact sheet.</p>	<p>Ministry of Tourism and Culture (MTC) Ministry of Agriculture, Food and Rural Affairs (OMAFRA) CFDCs</p>		
<p>6. Work with local arts and culture organizations and municipalities (e.g. Collingwood Arts & Culture Committee, Chambers of Commerce) to develop and host an Arts and Culture Summit to discuss ways to better recognize and enhance the economic value of culture in the County.</p>	<p>RTO 7 Local municipalities and economic development offices Chambers of Commerce BIAs/ Boards of Trade</p>	<p>Lead and partner</p>	<p>Short term to medium term</p>
<p>7. Partner with the RTO and Directors of Lakehead University and Georgian College tourism programs to foster linkages and networking opportunities in these sectors, and explore the creation of a regional certification or standards program for tourism operators.</p>	<p>Lakehead University Georgian College</p>	<p>Partner</p>	<p>Medium term to long term</p>



<p>8. Advocate to, and build relationships with, local media (e.g. Barrie Examiner, A-Channel, Rogers TV, SNAP newspapers) to regularly profile and feature a culture/tourism business in the County, providing small financial/in-kind support if necessary.</p>	Local media	Partner	Short term & ongoing
<p>9. Expand and promote events that support cultural enterprises and cultural tourism, including:</p> <ul style="list-style-type: none"> ○ Doors Open events (e.g. Huronia) ○ Aboriginal events and festivals ○ Francophone heritage and history ○ Gallery and studio tours ○ Museums and archives 	RTO 7 DMOs	Partner	Short term to medium term
<p>10. Promote the awareness of provincial funding programs for cultural investment and tourism development to municipalities and operators, and work with partners to assist in developing funding applications. Potential funds include:</p> <ul style="list-style-type: none"> ○ OMAFRA: Rural Economic Development ○ MTC: Tourism Development Fund, Celebrate Ontario ○ Ontario Trillium Foundation 	OMAFRA MTC CFDCs Local municipalities and economic development offices	Partner	Short term and ongoing

<p>Performance Measures:</p> <ul style="list-style-type: none"> ● Number of new business incorporations in accommodations, arts, entertainment and recreation, and cultural industries in the County ● Local employment in accommodations, arts, entertainment and recreation, and cultural industries in the County ● Enrolment and graduation in tourism, hospitality and recreation programs in the County's post-secondary educational programs ● Level of visitation, economic impact, and visitor satisfaction, as measured through provincial tourism statistics and consumer research surveys
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- Number of festivals and events hosted in the County, emphasizing growth in shoulder season events
- Funding secured through provincial agencies (e.g. OMAFRA Rural Economic Development, MTC Tourism Development Fund) in support of tourism and culture businesses



7.4 Implementation

The findings from the supporting background research and analysis presented in Part II of this project have formed the basis for the development of the goals, objectives and actions contained in the economic development strategic plan. The effect is to have the County of Simcoe assume a larger collaborative role to drive economic development to the county and extend its influence in a way that will garner economic prosperity for its residents and businesses.

With the completion of the Economic Development Strategic Plan the County's Economic Development Office will begin the business planning process that incorporates the short-term priorities set out in the strategy and articulates the resources required to move forward with the strategy's implementation.

As part of that effort, the following sub-sections outline the most effective means for measuring performance and dedicating both human and financial resources over time. In addition to serving as a guide for the County's Economic Development Office, it is hoped that the strategy will provide an opportunity to more effectively engage with other economic development stakeholders in the county and the private sector.

7.4.1 Current Economic Development Structure

Since the County of Simcoe's economic development office formed, it has been housed in the County's Corporate Services department. A Manager of Economic Development was hired in 2009. This Manager currently reports to the Director of Planning, Development and Tourism, a business unit of the County's Corporate Services Division. The County has a Corporate Services Committee that is responsible for developing recommendations on matters related to Roads and Engineering, Environmental Services, Forestry, Risk Management and Planning. The Committee is represented by eleven County Council members, including the Warden, and reports to Simcoe County Council.

While an organizational review is not a requirement of this study, the County could consider whether this is the most effective reporting relationship.

7.4.2 Recommended Economic Development Structure

As demonstrated in the economic development strategic plan, the County's role in advancing economic development initiatives is not intended to duplicate or overlap with other local or regional efforts, but rather complement work that is underway or initiate actions that offer regional benefit in the drive to attract and sustain economic growth across the region. As such, the key responsibilities of the Economic Development Office are seen to include the following:

- *Marketing:* county-wide marketing strategies, strategic employment area marketing
- *Advocacy:* Communicating on behalf of member municipalities to federal and provincial governments for physical and infrastructure projects
- *Networking:* Provide forums for business and local municipalities to network and share insights



- *Coordination*: Leading joint projects such as workforce development
- *Communications*: Maintaining a consistent message and approach to public relations – consistent in communication

7.4.3 Resource Requirements

The 2011 budget for the Economic Development Office is reported as \$222,700. This amount includes salaries and benefits, as well as advertising and promotions.

The recommendations contained in the Plan suggest that additional one-time expenditures will be required for the Economic Development Office to implement critical actions in the coming years. The following are estimated expenditures associated with actions recommended to be undertaken in the **short term** (1-2 years) by the Economic Development Office.

- Creation of a County marketing and implementation strategy, including funds for an economic development website and advertising and promotions collateral
 - **\$80,000 - \$90,000**
- Toolkit development for economic development education and training
 - **\$10,000 - \$20,000**
- The development of community & industry sector profiles
 - **\$15,000 - \$25,000**
- Additional meeting and administrative costs associated with partnership development (i.e. working groups, in-kind promotions) on areas of regional importance
 - **\$5,000 - \$10,000**

In addition, the expanded role for the Economic Development Office in areas of partnership development, marketing and promotions, and project coordination suggests the need for one additional mid-level staff person (i.e. **an economic development officer**). The responsibilities of this position will need to be formalized, but the staff person could be required to advance the marketing, research and collaboration efforts to provide support to the projects identified above. Based upon average economic development officer salaries, this position could require an annual (ongoing) expenditure of **\$60,000 - \$65,000**, plus employee benefits.

There are other funding and resource considerations for implementing strategic priorities over the **medium (3-5 years) to long term** that merit discussion here as well, including:

- Detailed target sector assessment and sector marketing strategy for the health and wellness industries
 - **\$25,000 - \$35,000**
- A full asset mapping exercise for the County's culture and tourism sectors



- **\$30,000 - \$40,000**

Additionally, as the Economic Development Office looks to advance strategic partnerships with other organizations throughout the County of Simcoe to drive business development and investment attraction on an ongoing basis, the County will need to consider funding strategic initiatives outside of the Economic Development Office budget, including:

- Partnership funding to the SpringBOARD Innovation Centre in Barrie
- Additional operating or program funding to Lakehead University and/or Georgian College