LAKE COUNTRY | BR+E GROWING TOGETHER!

# PROJECT REPORT 2016


*With the Support of the Government of Ontario*

BR+E · Orillia Area CDC – Your Business Success Centre · County of Simcoe EDO – Economic Development Office · Orillia Economic Development – Put Your Business in Play · Township of Oro-Medonte – Proud Heritage, Exciting Future · Chippewas of RAMA First Nation · Township of Severn · Township of Ramara – "Proud History - Progressive Future"

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# ACKNOWLEDGEMENTS

This project was made possible thanks to 160 local business owners and operators who took the time and effort to provide us with their valuable input.

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## Thanks also to:

Lisa Avery, Avery Information Services Ltd.
Michael Hawke, Technical Support
Stephen Morris, OMAFRA
Catherine Oosterbaan, OMAFRA
Samantha Vessios, Administrative Support, CDC
Casino Rama Resort
Community Opportunities Development Committee, CDC
Executive Pulse Inc.
Georgian Bay Printers
Maple Lane Design
Orillia Pro Net

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# INTRODUCTION & BACKGROUND

Business Retention and Expansion (BR+E) is an economic-development initiative supported by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA). Funding was made available through the Rural Economic Development (RED) Program. Through a structured business survey, the BR+E project promotes a dialogue with local businesses to identify issues, concerns and potential opportunities in the business community. Findings from the BR+E survey are used to develop community-based economic development strategies.

## Rationale for study

Following the success of the 2011 Orillia BR+E study and the subsequent progress made to enhance the municipalities' business environment, the implementation of a regional BR+E study was identified as a key priority. The region identified includes the City of Orillia, the Townships of Oro-Medonte, Ramara and Severn, and the Chippewas of Rama First Nation. For the purpose of this report, all references to the region or regional initiatives are meant to include the above noted areas.

The BR+E program is an internationally recognized process undertaken to enhance the business environment in a municipality or region by eliminating barriers to economic growth.

## Purpose

According to statistics, the majority of new job growth in any community – up to 80 percent – comes from existing business. The BR+E process was initiated as a means to survey area businesses. The survey was expected to provide a picture of the local business climate and identify major issues that may be impeding the success or expansion of local business operations. Information gathered through this survey was designed to enable the municipal and county Economic Development Offices and their community partners to assist local business in identifying and realizing growth potential and opportunities. The BR+E program would also provide local Economic Development Offices with the perspective of local business on the economy, community and relationships with the municipalities and other key stakeholders.

## Community partners

The 2016 Lake Country BR+E Project was spearheaded by the Orillia Area CDC and became a reality through the collaborative efforts of the City of Orillia, the Townships of Oro-Medonte, Ramara and Severn, the Chippewas of Rama First Nation and the County of Simcoe.

Local funding for the program was provided by the CDC, the City of Orillia, the Townships of Oro-Medonte, Ramara, Severn, Rama, and the County of Simcoe, and was largely based on the number of businesses in each community. The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) provided matching funding for the program through its Rural Economic Development (RED) Program.

# PHASES OF THE BR+E PROJECT

### Phase 1

In mid-2014 a Leadership Team was formed, comprised of municipal and county staff representatives. In the latter part of 2014 and the first half of 2015, the CDC initiated the implementation of a BR+E program by coordinating the efforts of the municipal & county economic development representatives, as well as provincial funders.

A Community Task Force was recruited to expand and enhance the depth of experience of the Leadership Team. The Task Force members were strategically invited to join the Task Force to ensure regional representation of the business community.

In July 2015 Gary Staines was contracted, through the CDC, as the BR+E Program Coordinator. Additional assistance, including database support, came from Michael Hawke, who participated in the 2011 Orillia BR+E project.

In this phase of the project, volunteer interviewers were recruited and trained, our local survey was written, and a marketing strategy developed.

To encourage participation in the survey, a direct-mail campaign was started in late August, 2015 and followed up by email, phone calls and in-person connections. Businesses invited to participate represented a cross-section of the local economy in an effort to deliver the most accurate picture of the local business climate.

### Phase 2

BR+E surveys were conducted over a seven-month period from September 2015 to March 2016. The interviewers met face-to-face with approximately half of the 160 businesses interviewed. The other half of the businesses completed the survey by telephone interview or independently.

### Phase 3

Preliminary analysis of the qualitative and quantitative survey data was completed by Lisa Avery, Avery Information Services Ltd. It was then presented to and reviewed by the Leadership Team, who made some fundamental changes to the presentation structure of the preliminary reports in order that it better reflect the significance of the results on a municipal/area level, as well as a regional level.

### Phase 4

A community action planning session was held in order to provide community stakeholders and participants with an opportunity to review the research and results, as well as to invite input on developing community action plans.

The findings from the community action planning session were consolidated, as were initiatives currently underway within our communities. The Leadership Team utilized this information to generate the recommended next steps.

### Phase 5

The final BR+E Report was compiled. Overall findings from the BR+E Project have culminated in this final report to be used to develop community-based economic development strategies. The findings will also be presented in a series of presentations to the community and local councils.

# METHODOLOGY

## Business selection/sampling

Calculations made during the OMAFRA-sponsored BR+E training sessions indicated that, for the results of the survey to be statistically accurate to within plus /minus 10 percent for the region and plus/minus 15 percent for each of our participating areas, a pre-determined number of local businesses, representing small, medium and large employers from all sectors of the local economy, would need to be surveyed.

The Community Task Force employed a random sampling method for selecting survey participants that guaranteed inclusion of particular subgroups of interest within the business community. Part of this process involved members of the Task Force using the two-digit North American Industry Classification System (NAICS) business sector coding to ensure adequate representation of businesses randomly chosen from each sector of the local economy.

A total of 160 businesses were surveyed, achieving the degree of accuracy required by OMAFRA guidelines for the regional data.

In Orillia, 43 businesses of a targeted 41, were surveyed; in Oro-Medonte, 40 businesses of a targeted 40, were surveyed; in Rama, 6 of a targeted 10, were surveyed; in Ramara, 32 of a targeted 36, were surveyed; and, in Severn, 39 of a targeted 38, were surveyed.

Generally, the Community Task Force struggled to engage the targeted number of businesses in the interview process. In a large number of cases, there was no response received to the invitations to participate and in the case of those who declined to participate, the reasons noted included too little time, and the length of the survey.

It is also important to note that the smaller the business community is, the percentage of businesses required to participate increases. As such, it can become more difficult to engage the required number of businesses to meet a higher level of statistical accuracy.

Businesses that had agreed to participate were invited to be interviewed by a staff and volunteer team member. Alternatively, they could self-complete the questionnaire, on paper or electronically.

## Survey Process

Each business to be interviewed received advanced digital copies of the relevant surveys. Surveys which were conducted in person, were attended by at least one member of the BR+E project Leadership Team present to record responses and, when available, a volunteer or another Leadership Team member on hand to ask the survey questions. This data was entered on-line, into the database system, during the interview.

Face-to-face interviews lasted an average of one hour. Overall, businesses who participated indicated they were happy to be involved in the process and to have their views solicited.

In response to several requests to participate via self-directed means, an electronic survey was made available. Approximately half of the businesses preferred to use this method because they could fill it in at their own pace, when they had time available.

The survey data from these respondents was entered into the database by the Project Coordinator as quickly as possible after receiving the information.

The survey employed a 'Skip It' rule – if a business owner chose not to answer a question it was skipped, no questions asked.

## Data Overview

Information was collected regarding qualities of the businesses (area, industry, number of employees, age of business etc.) and opinions of the business owners. Specifically, opinions regarding business climate, municipal and community services, workforce factors, future plans and business development were solicited. The Executive Pulse (EPulse) database system was used for storing survey results. This is a well-structured database designed to minimize data entry errors by forcing rules regarding what responses can be entered in each field. Raw data was then provided by EPulse for further analysis.

## Analysis

Lisa Avery, Avery Information Services Ltd. tabulated and summarized the data using a customized statistical software package. Quantitative data was summarized by area and, where appropriate by industry. Qualitative aspects of the data were coded into recurring themes. These themes are referred to as emergent themes, those that arise from a careful reading of the data and then grouping similar comments. In some instances, a business made multiple comments or, commented on multiple themes. These were coded separately to capture all the information provided by the businesses. It should be noted that the response rates on the qualitative questions were low, with fewer than half of the businesses providing comments to any one question. Thus, while the findings represent the information collected, caution must be used drawing conclusions from the qualitative components of the survey.

## SWOT

The Leadership Team and Community Task Force met several times to discuss BR+E key findings and recommendations. With the survey results, the team was able to identify the strengths, weaknesses, opportunities and threats (SWOT) for both the region as a whole (see below) and for each of the municipal/area partners (see accompanying sections). In some cases, there are items that are listed in multiple categories of the SWOT. This can be attributed to a number of factors. For example, the cost of electricity is noted as a weakness because it can reduce the competitiveness of a business. It is also noted as a threat because the cost of electricity is decided upon by a third party provider, and therefore, is generally outside of our control.

**S**
STRENGTHS

- QUALITY OF LIFE
- LOCATION (ACCESS TO MAJOR HIGHWAYS AND THE PROXIMITY TO BOTH THE GTA AND THE NORTH)
- SUPPORT FROM LOCAL RESIDENTS

**W**
WEAKNESSES

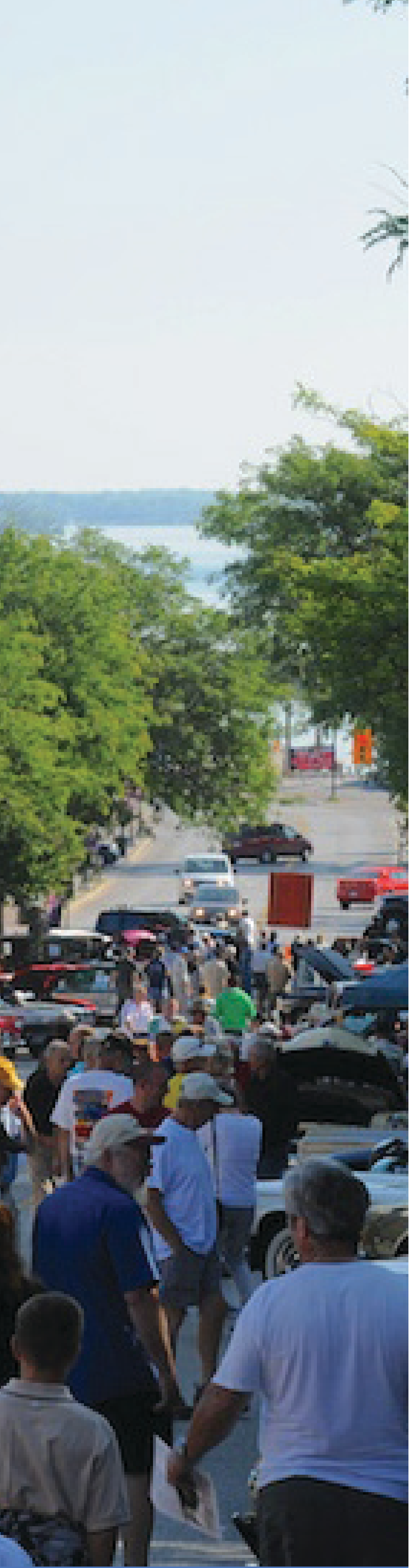
- INTERNET SERVICES
- COST OF ELECTRICITY
- PUBLIC TRANSPORTATION
- RECREATION FACILITIES
- PLANNING & PERMITTING AND DEVELOPMENT PROCESSES

**O**
OPPORTUNITIES

- JOB OPPORTUNITIES
- GROWTH AND DEVELOPMENT / REVITALISATION
- INTERNET SERVICES
- REDUCE BARRIERS TO THE PLANNING AND DEVELOPMENT PROCESS
- RECREATION FACILITIES

**T**
THREATS

- POOR INTERNET SERVICES
- SLOW RESIDENTIAL GROWTH
- LACK OF SKILLED WORKFORCE
- SEASONAL WEATHER
- ELECTRICITY COSTS



# RECOMMENDATIONS

The process for reviewing key findings and recommendations also yielded four municipal/area specific goals to be addressed by our municipal/area partners and five regional goals to be addressed by a Community Action Planning Process.

## Municipal/Area Goals

Given the need for our project partners to address these individually, the Leadership Team recommended that these goals be shared with each of the project partners for further review, evaluation and the development of specific action items that are relevant for their respective area. The municipal/area goals include:

- Reduce barriers to the planning and development processes
- Foster regional collaboration for short and long term development and growth to ensure investment readiness
- Improved internet services (affordability, access, speed, reliability)
- Improved cost of electricity

## Regional Goals

The Leadership Team recommended a Community Action Planning Process to review the following goals and develop specific action items for our region to address:

- Celebrate and promote our regional strengths (from a business attraction and economic development perspective)
- Support the expansion of small businesses (with 100 or fewer employees) and entrepreneurs
- Enable growth and assist businesses in leveraging new opportunities (including recreational facilities, new developments, festivals and events)
- Better align the workforce with the needs of the employers
- Develop innovative regional transportation options

## Community Action Planning

A Community Action Planning meeting was held, with 29 community members in attendance, representing 9 local businesses and 19 community stakeholders. The group members reviewed the key findings and draft regional goals, they evaluated the initiatives that already existed or had been initiated to address issues raised through the survey process, and they developed a comprehensive list of potential community action items to address the regional goals.

Subsequently, the Leadership Team met to review the results of the Community Action Planning meeting, and further prioritized those items that presented the greatest likelihood of successful results in both the short and long term.

# PRIORITY ACTIONS (FOR NEXT 18 MONTHS)

The following list of regional action-item possibilities have been identified as the most important, realistic and attainable action items for the community to pursue in the next 18 months.

## 1 Develop a "Love Your Community Campaign"

Taking a regional approach, share positive stories, promote our area's assets, encourage pride in our community, and promote regional collaboration. Possible activities to support this could include the development of a communications strategy for good news stories; investigating best practices for "Love Your Community Campaigns" (i.e. Hamilton); investigating the use of new technology (i.e. PingStreet App, regionally) for communications; host "Doing Business in Your Community" workshops; re-invigorating 'Shop Local' campaigns.

Potential Lead: Regional Economic Development Working Group which includes representation from the CDC, the City of Orillia, Townships of Oro-Medonte, Severn & Ramara, and the Chippewas of Rama First Nation

## 2 Develop a "Regional Investment Attraction Strategy"

Ideas offered for addressing this could include hosting a business attraction/investor forum and/or familiarization (FAM) tours; developing business ambassadors to share their experience/stories, including local business owners, entrepreneurs, realtors, etc.; sharing local success stories with potential investors; and, building on the current regional investment website as a tool for promotion.

Potential Lead: Regional Economic Development Working Group which includes representation from the CDC, the City of Orillia, Townships of Oro-Medonte, Severn & Ramara, and the Chippewas of Rama First Nation

## 3 Enhance existing, and develop new training opportunities for local industry

Considerations to enhance current activities could include improved access to programs through technology (i.e. webinars); expanding offering to include recent topics identified by local businesses such as health & safety, succession planning, incorporating, and marketing; and, working with municipal health & safety representatives to provide training support for local businesses (i.e. through Rama).

Potential Lead(s): CDC, Chippewas of Rama First Nation, Lakehead University, Georgian College

## 4 Develop a regional welcome package for businesses

As part of a regional business welcome package, it is recommended that contact information for all business support organizations in the area be included and that consideration be given to the development of incentives with local partners or influencers (i.e. banking incentives, etc.)

Potential Lead(s): Local Chambers of Commerce, Business Improvement Areas

## Other Actions (for next 3 – 5 years)

Over the next three to five years, the remaining action-item possibilities listed below are recommended for the community to pursue.

### 1 Host a "Home Grown" entrepreneurial event

The purpose of such an event would be to connect local entrepreneurs to resources that will support research, development and innovation.

Potential Lead(s): Local Chambers of Commerce, Henry Bernick Entrepreneurship Centre

### 2 Encourage and support businesses to better align store hours with major festivals and events taking place nearby

In support of this action item, it will be important to ensure that there is a comprehensive marketing strategy developed that will encourage and boost these efforts. Tracking, promoting and celebrating the social and economic benefits is also important.

Potential Lead(s): Business Improvement Areas and Chambers of Commerce

### 3 Improve dialogue between event organizers, businesses and accommodations

Improved communications are recommended in an effort to encourage more overnight stays, tourism package development, and pooled resources.

Potential Lead: Ontario's Lake Country

### 4 Develop packages for sports tourism conferences/events

These targeted packages can help to draw visitors to community businesses and attractions; and, promote return visits.

Potential Lead(s): Ontario's Lake Country, Sport Orillia and/or Chambers of Commerce

### 5 Develop a Workforce Communications Event

An event would bring industry and education stakeholders together to better understand & action topics identified.

Potential Lead(s): Simcoe Muskoka Workforce Development Board and County of Simcoe EDO

### 6 Develop innovative regional transportation options

Support & leverage public and/or private transportation initiatives to facilitate access to a larger labour market.

Potential Lead(s) : County of Simcoe , Regional Economic Development Working Group which includes representation from the CDC, the City of Orillia, Townships of Oro-Medonte, Severn & Ramara, and the Chippewas of Rama First Nation


FRUITS DE
L'ONTARIO


MARIPOSA MARKET

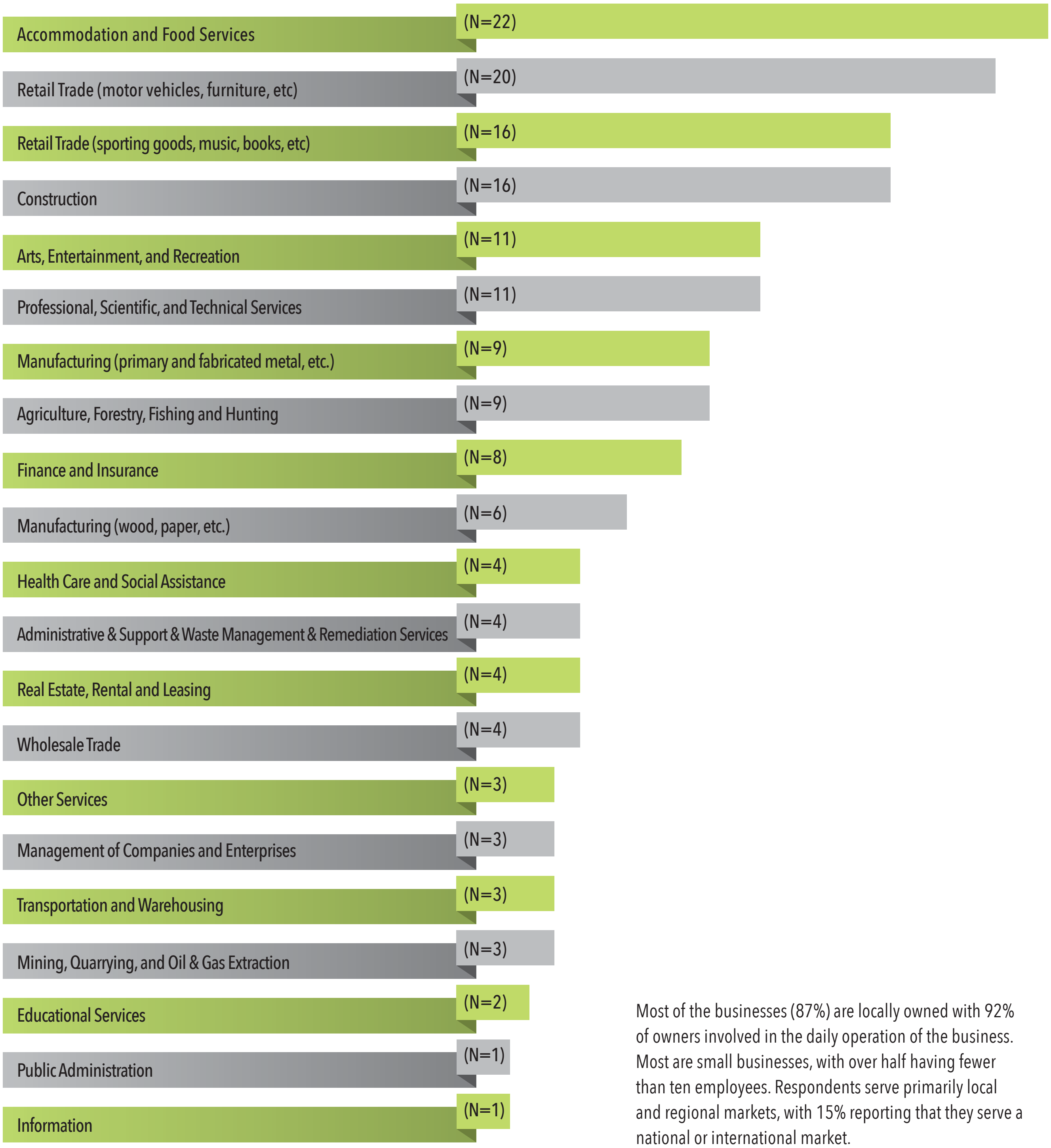
BR+E
Growing Together!

# LAKE COUNTRY

## SURVEY SUMMARY REPORT

# 2016

# BUSINESS INFORMATION



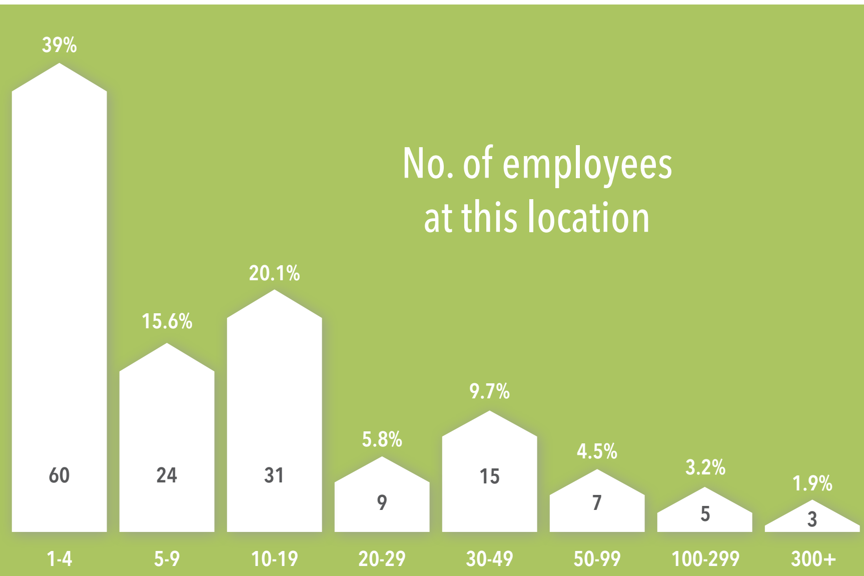

Most of the businesses (87%) are locally owned with 92% of owners involved in the daily operation of the business. Most are small businesses, with over half having fewer than ten employees. Respondents serve primarily local and regional markets, with 15% reporting that they serve a national or international market.

OF THE BUSINESSES SURVEYED

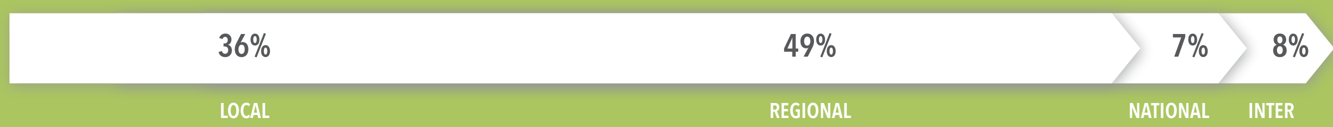
# 87%

LOCALLY OWNED AND OPERATED

No. of employees at this location




PRIMARY MARKETS INCLUDE:

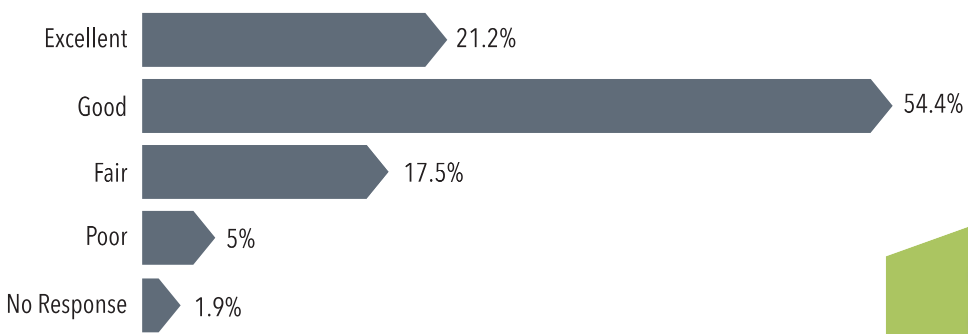



The number of employees at each business surveyed reveals an interesting paradox; while most of the businesses in the survey employ fewer than ten people, the largest eight businesses surveyed employ at least one third of the workforce represented by the survey.

# BUSINESS CLIMATE

Businesses are positive about the region as a place to do business, with only eight businesses indicating they felt it was a poor business environment.

### WHAT IS YOUR GENERAL IMPRESSION OF THIS COMMUNITY AS A PLACE TO DO BUSINESS?




### IN THE PAST 3 YEARS HAS YOUR ATTITUDE ABOUT DOING BUSINESS IN THIS COMMUNITY CHANGED?

An improving economy was cited by most areas as a reason for positive change while lack of growth and workforce difficulties – both quality and quantity of workers were cited as reasons for negative change. Area-specific summaries are available in the area chapters.

**22%** MORE POSITIVE

**19%** MORE NEGATIVE

# BUSINESS FACTORS

## TOP THREE BUSINESS FACTORS RATED EXCELLENT BY AREA

| ALL REGIONS | ORILLIA | ORO-MEDONTE | RAMA | RAMARA | SEVERN |
|---|---|---|---|---|---|
| QUALITY OF LIFE | QUALITY OF LIFE | QUALITY OF LIFE | MUNICIPAL PROPERTY TAXES | QUALITY OF LIFE | QUALITY OF LIFE |
| SUPPORT FROM LOCAL RESIDENTS | SUPPORT FROM LOCAL RESIDENTS | AVAILABILITY OF ADEQUATE ELECTRICITY | AVAILABILITY OF HEALTH & MEDICAL SERVICES | SUPPORT FROM LOCAL RESIDENTS | AVAILABILITY OF HEALTH & MEDICAL SERVICES |
| AVAILABILITY OF ADEQUATE ELECTRICITY | AVAILABILITY OF ADEQUATE ELECTRICITY | SUPPORT FROM LOCAL RESIDENTS | QUALITY OF LIFE | SUPPORT FROM MUNICIPALITY | SUPPORT FROM LOCAL RESIDENTS |

## TOP THREE BUSINESS FACTORS RATED POOR BY AREA

| ALL REGIONS | ORILLIA | ORO-MEDONTE | RAMA | RAMARA | SEVERN |
|---|---|---|---|---|---|
| COST OF ELECTRICITY | MUNICIPAL PROPERTY TAXES | COST OF ELECTRICITY | AVAILABILITY OF ADEQUATE HOUSING | COST OF ELECTRICITY | COST OF ELECTRICITY |
| INTERNET SERVICE | DEVELOPMENT/ BUILDING PERMIT PROCESS | INTERNET SERVICE | AVAILABILITY OF SPACE FOR RENT OR LEASE | DEVELOPMENT CHARGES | INTERNET SERVICE |
| MUNICIPAL PROPERTY TAXES | DEVELOPMENT CHARGES | CELLULAR PHONE SERVICE | PROXIMITY TO RAIL AND AIRPORTS | INTERNET SERVICE | AVAILABILITY OF NATURAL GAS |

# MUNICIPAL SERVICES

## TOP THREE LOCAL GOVERNMENT SERVICES RATED EXCELLENT BY AREA

| ALL REGIONS | ORILLIA | ORO-MEDONTE | RAMA | RAMARA | SEVERN |
|---|---|---|---|---|---|
| PARKS AND OPEN SPACES | PARKS AND OPEN SPACES | PARKS AND OPEN SPACES | POLICE SERVICES | FIRE SERVICES | FIRE SERVICES |
| FIRE SERVICES | FIRE SERVICES | SNOW REMOVAL | FIRE SERVICES | POLICE SERVICES | PARKS AND OPEN SPACES |
| POLICE SERVICES | LIBRARY SERVICES | GARBAGE/ RECYCLING | RECREATION FACILITIES | LIBRARY SERVICES | SUPPORT FROM LOCAL RESIDENTS |

## TOP THREE LOCAL GOVERNMENT SERVICES RATED POOR BY AREA

| ALL REGIONS | ORILLIA | ORO-MEDONTE | RAMA | RAMARA | SEVERN |
|---|---|---|---|---|---|
| PUBLIC TRANSIT | RECREATION FACILITIES | PLANNING, ZONING AND OTHER PERMITS | PUBLIC TRANSIT | CULTURAL FACILITIES | PUBLIC TRANSIT |
| PLANNING, ZONING AND OTHER PERMITS | PLANNING, ZONING AND OTHER PERMITS | LIBRARY SERVICES | PLANNING, ZONING AND OTHER PERMITS | RECREATION FACILITIES | RECREATION FACILITIES |
| RECREATION FACILITIES | STREET/ROAD REPAIR | PUBLIC TRANSIT | HEALTH DEPARTMENT/ HEALTH UNIT APPROVALS | PUBLIC TRANSIT | ECONOMIC DEVELOPMENT SERVICES |

### COMMUNITY SERVICES

Businesses were surveyed on their levels of satisfaction with respect to eight community services: child care, schools, post-secondary education, Workforce Planning and Development Board, the Chambers of Commerce, the Business Improvement Area and the Community Development Corporation (CDC). Overall, the CDC was ranked Excellent by the most businesses 29 (18%), and the Chambers of Commerce were second with 26 (16%) of businesses ranking them Excellent. The Business Improvement Area received the largest number of Poor rankings at 17 (11%), although the reasons for this are unclear. The Chambers of Commerce, which despite being ranked Excellent by a number of businesses were also ranked Poor by 13 (8%) of the businesses. Detailed results can be found in the Business Climate section of the Detailed Report.

# WORKFORCE

36% of businesses have increased their workforce in the past three years, 53% have remained the same and 9% have decreased their workforces. Oro-Medonte and Orillia each experienced large gains from a single manufacturing employer. Both Severn and Rama reported net job losses in the past three years. Job gains have been primarily in manufacturing, accommodation and food services and retail trade industries. Full industry and area details are in the Detailed Report.

### WORKFORCE CHANGES IN THE PAST THREE YEARS

| | NEW JOBS | LOST JOBS |
|---|---|---|
| ALL REGIONS | 444 | 69 |
| ORILLIA | 145 | 6 |
| ORO-MEDONTE | 241 | 12 |
| RAMA | 2 | 4 |
| RAMARA | 30 | 13 |
| SEVERN | 26 | 34 |

### WORKERS NEEDED

TRADES AND TECHNICIANS
LABOURERS
HOSPITALITY WORKERS
FINANCIAL WORKERS
MANAGEMENT POSITIONS
SALESPEOPLE
ENGINEERS
I.T. WORKERS
ADMINISTRATION
COOKS
HORTICULTURE/LANDSCAPING

# HIRING DIFFICULTIES

51% of businesses report hiring difficulties. Too few qualified workers and workers lacking the relevant experience are the major hiring challenges in the region. Other problems cited included difficulty in hiring seasonal workers, poor work ethic and difficulty with criminal record inspections. Employers were split evenly between those who perceived their hiring difficulties to be industry-based and those who perceived them to be community based. Recruitment through their personal networks was the most common way of hiring new employees, followed by employment centres and websites.

### HOW WOULD YOU RATE THE FOLLOWING FACTORS IN THIS COMMUNITY FOR YOUR BUSINESS NEEDS?


# TRAINING

Among the 27% of businesses that reported barriers to training, the most-cited reason was cost, followed by availability of local training.

Computer Skills and Health & Safety are the training programs that local businesses would find the most useful.

# BUSINESS OUTLOOK

Across the region 49 businesses intend to increase their workforce in the next 18 months, adding 236 jobs. Only a single business planned to reduce its workforce, by three employees. Lack of demand/economic growth was cited by 12 businesses and lack of necessary labour by three businesses as reasons for staying the same.

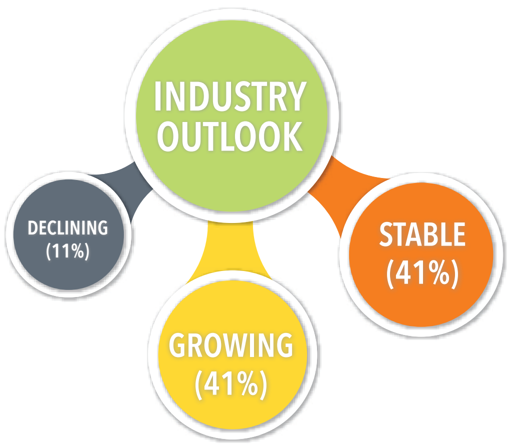
**59 (35%)**
**BUSINESSES PLAN TO EXPAND IN THE NEXT 18 MONTHS**

**7 (4%)** **BUSINESSES PLAN TO DOWNSIZE**

### NEW JOBS COMING UP

| | |
|---|---|
| ALL REGIONS | 236 |
| ORILLIA | 93 |
| ORO-MEDONTE | 55 |
| RAMARA | 28 |
| SEVERN | 60 |

# INDUSTRY




Industry outlook is generally positive. Particularly positive industries were manufacturing (wood and paper), wholesale trade, finance and insurance and NAICs code 56 (Administrative and support, waste management). Among the few reasons cited for decline were a slowing economy and changes in the weather.

50% (79) of businesses expect sales to increase in the next year, with 38% (59) expecting sales to be stable, 3 businesses anticipate a decrease and 10% (16) are unsure.

### OUT OF THE 160 BUSINESSES SURVEYED, THESE ARE THE INDUSTRIES WITH THE LARGEST EXPECTED NET GAINS IN THE WORKFORCE OVER THE NEXT 18 MONTHS.

| | ALL REGIONS | ORILLIA | SEVERN | ORO - MEDONTE | RAMARA | RAMA |
|---|---|---|---|---|---|---|
| 72 - Accommodation and Food Services | 46 | 0 | 29 | 3 | 14 | 0 |
| 32 - Manufacturing (wood, paper, printing, plastics etc.) | 39 | 29 | 3 | 7 | 0 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 34 | 17 | 4 | 9 | 4 | 0 |
| 62 - Health Care and Social Assistance | 20 | 20 | 0 | 0 | 0 | 0 |
| 33 - Manufacturing (primary and fabricated metal, etc.) | 15 | 0 | 0 | 15 | 0 | 0 |


# REGIONAL SWOT

## S — STRENGTHS

- QUALITY OF LIFE
- LOCATION (ACCESS TO MAJOR HIGHWAYS AND THE PROXIMITY TO BOTH THE GTA AND THE NORTH)
- SUPPORT FROM LOCAL RESIDENTS

## W — WEAKNESSES

- INTERNET SERVICES
- COST OF ELECTRICITY
- PUBLIC TRANSPORTATION
- RECREATION FACILITIES
- PLANNING & PERMITTING AND DEVELOPMENT PROCESSES

## O — OPPORTUNITIES

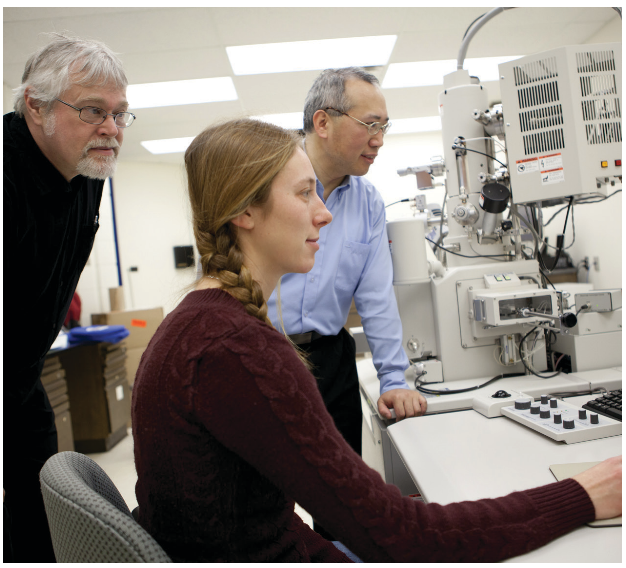
- JOB OPPORTUNITIES
- GROWTH AND DEVELOPMENT / REVITALISATION
- INTERNET SERVICES
- REDUCE BARRIERS TO THE PLANNING AND DEVELOPMENT PROCESS
- RECREATION FACILITIES

## T — THREATS

- POOR INTERNET SERVICES
- SLOW RESIDENTIAL GROWTH
- LACK OF SKILLED WORKFORCE
- SEASONAL WEATHER
- ELECTRICITY COSTS


BR+E
Growing Together!


LET IT BE



# ORILLIA SWOT

## S — STRENGTHS

- QUALITY OF LIFE
- SUPPORT FROM LOCAL RESIDENTS
- SCHOOLS AND POST SECONDARY INSTITUTIONS AND BUSINESS SUPPORT ORGANIZATIONS
- PARKS AND OPEN SPACES
- AVAILABILITY OF HEALTH AND MEDICAL SERVICES
- LOCATION

## W — WEAKNESSES

- MUNICIPAL TAXES
- COST OF ELECTRICITY
- DEVELOPMENT/ BUILDING PERMIT PROCESS
- DEVELOPMENT CHARGES
- RECREATION FACILITIES

## O — OPPORTUNITIES

- GROWTH & DEVELOPMENT
- DOWNTOWN REVITALISATION
- RECREATION FACILITIES
- DOWNTOWN PARKING
- JOB OPPORTUNITIES
- FARMER'S MARKET

## T — THREATS

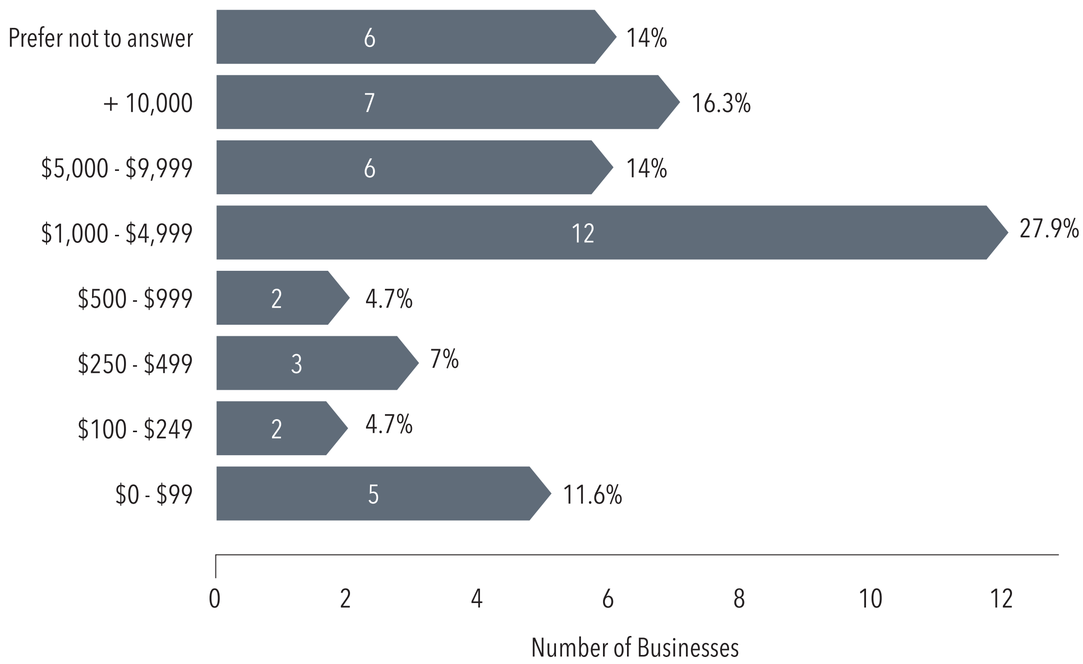
- SLOW RESIDENTIAL GROWTH
- LACK OF SKILLED WORKFORCE
- DEMOGRAPHICS
- PERCEPTION OF A LACK OF VISON/ PROGRESSIVE THINKING

### 2011 ORILLIA BR+E UPDATE

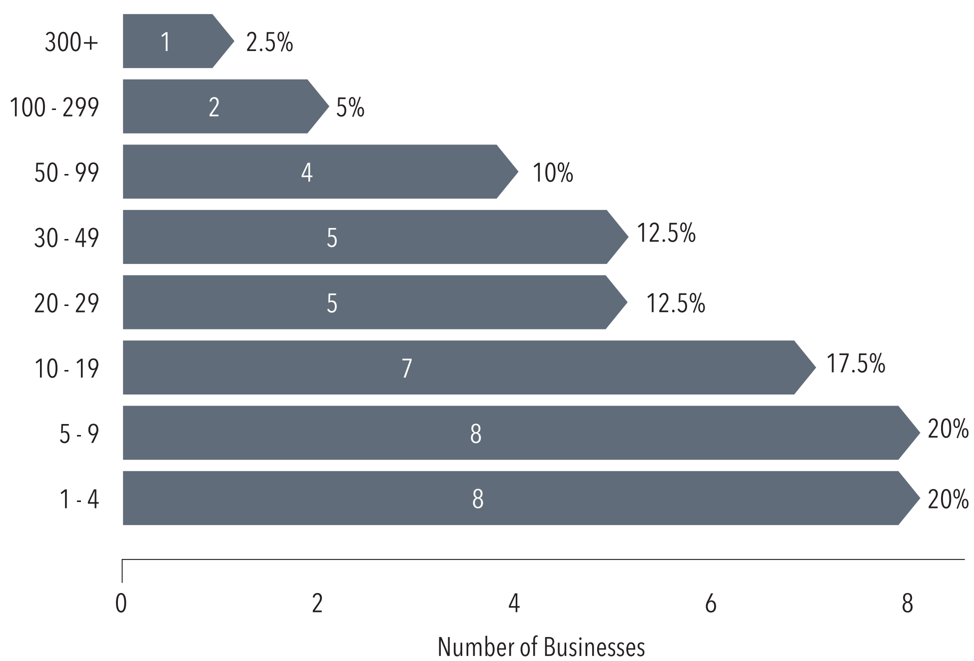
- Over 70% of business reported Good or Excellent support from local residents, suggesting some success from the Buy Local Initiatives.
- While there were many positive comments, there is still room for improvement in the delivery of municipal services and customer service should continue to be a priority.
- Businesses still perceive a lack of skilled workers, although this may be partly due to their hiring practices.
- There is a desire for local training programs, especially in health & safety/ first aid and computer skills.

# BUSINESS INFORMATION

## ANNUAL SALES (IN THOUSANDS)



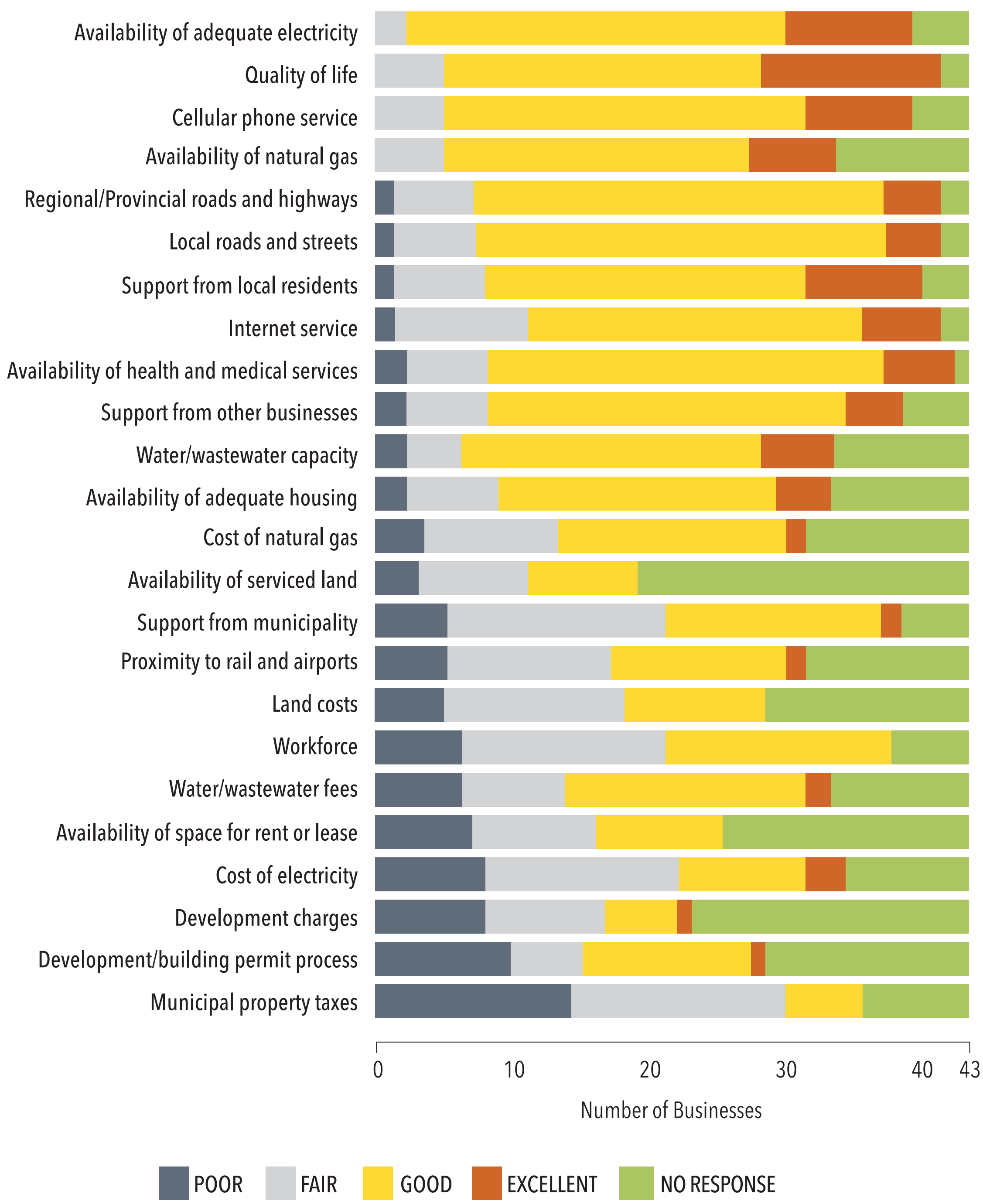

## NUMBER OF EMPLOYEES



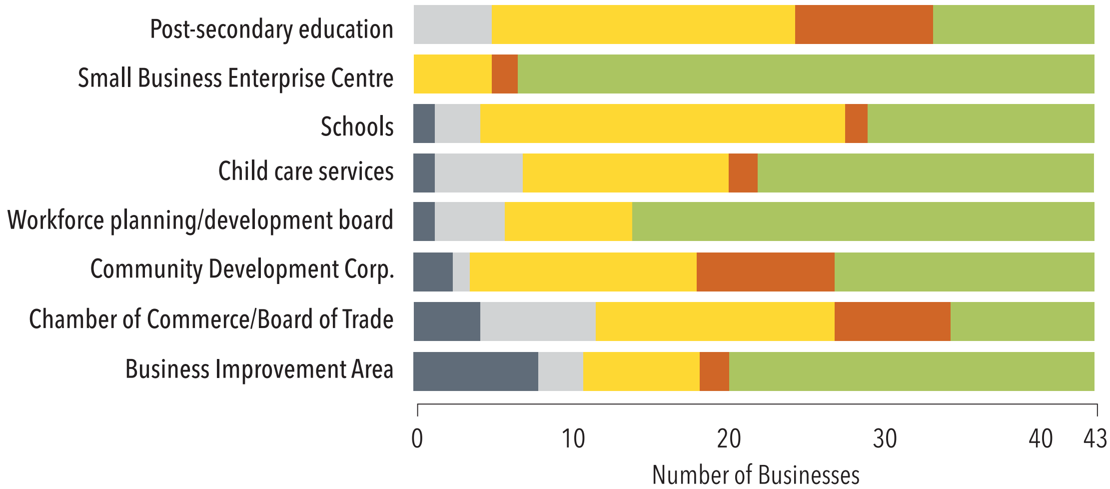
# ORILLIA BUSINESS CLIMATE

Overall 72% of businesses in Orillia thought it was a good or excellent place to do business. Most people reported their attitude to doing business in Orillia was unchanged over the past three years with 22% reporting feeling more positive and 19% feeling more negative. Positive changes in business climate were attributed to a change in municipal council, management changes within the business, location and a strong economy. Reasons cited for negative changes in attitude included: frustration with request for proposal (RFP) processes, an awkward downtown layout, quality of the workforce and lack of growth.

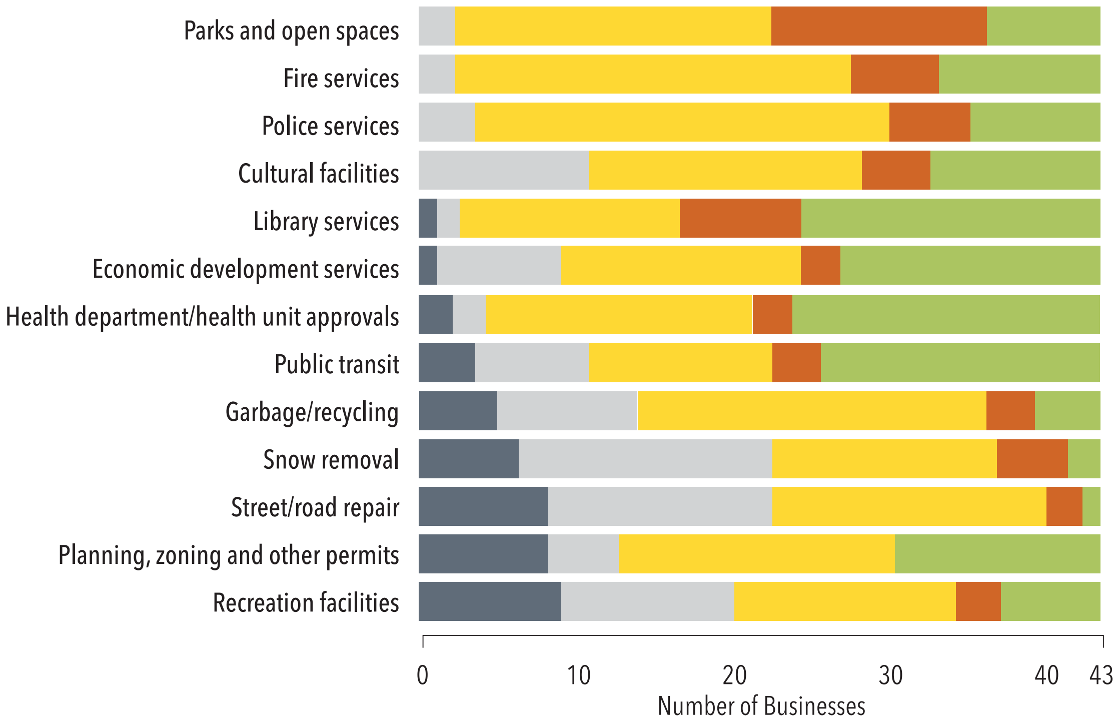
## ORILLIA BUSINESS FACTORS



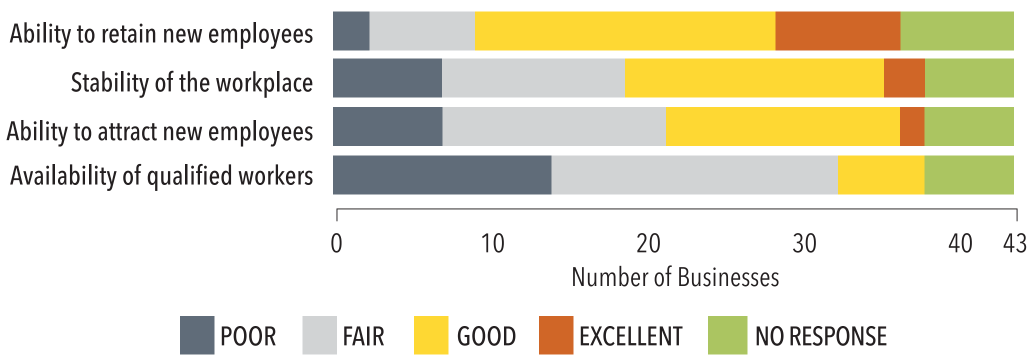
## ORILLIA COMMUNITY SERVICES




## ORILLIA LOCAL GOVERNMENT SERVICES




## ORILLIA WORKFORCE FACTORS



WF1: Job losses and gains by area and industry

The following table looks at each business that reported a job loss or gain in the previous three years. Each row represents a single business.

## ORILLIA

| INDUSTRY | INCREASES | DECREASES |
|---|---|---|
| 33 - Manufacturing (primary and fabricated metal, etc.) | 30 | 0 |
| 48 - Transportation and Warehousing, | 15 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 11 | 0 |
| 72 - Accommodation and Food Services | 10 | 0 |
| 72 - Accommodation and Food Services | 10 | 0 |
| 54 - Professional, Scientific, and Technical Services | 10 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 10 | 0 |
| 32 - Manufacturing (wood, paper, etc.) | 10 | 0 |
| 72 - Accommodation and Food Services | 7 | 0 |
| 53 - Real Estate and Rental and Leasing | 7 | 0 |
| 52 - Finance and Insurance | 5 | 0 |
| 72 - Accommodation and Food Services | 4 | 0 |
| 52 - Finance and Insurance | 3 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 3 | 0 |
| 41 - Wholesale Trade | 2 | 0 |
| 45 - Retail Trade (sporting goods, music, books, etc.) | 2 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 2 | 0 |
| 52 - Finance and Insurance | 2 | 0 |
| 54 - Professional, Scientific, and Technical Services | 1 | 0 |
| 52 - Finance and Insurance | 1 | 0 |
| 81 - Other Services | 0 | 1 |
| 54 - Professional, Scientific, and Technical Services | 0 | 2 |
| 62 - Health Care and Social Assistance | 0 | 3 |

# ORO-MEDONTE SWOT

## S
STRENGTHS

- QUALITY OF LIFE
- LOCATION
- AVAILABILITY OF ADEQUATE ELECTRICITY
- PARKS AND OPEN SPACES
- SNOW REMOVAL
- GARBAGE/RECYCLING

## W
WEAKNESSES

- PLANNING, ZONING AND OTHER PERMITS
- LIBRARY SERVICES
- PUBLIC TRANSIT
- INTERNET SERVICE
- DEVELOPMENT/ BUILDING PERMIT PROCESS

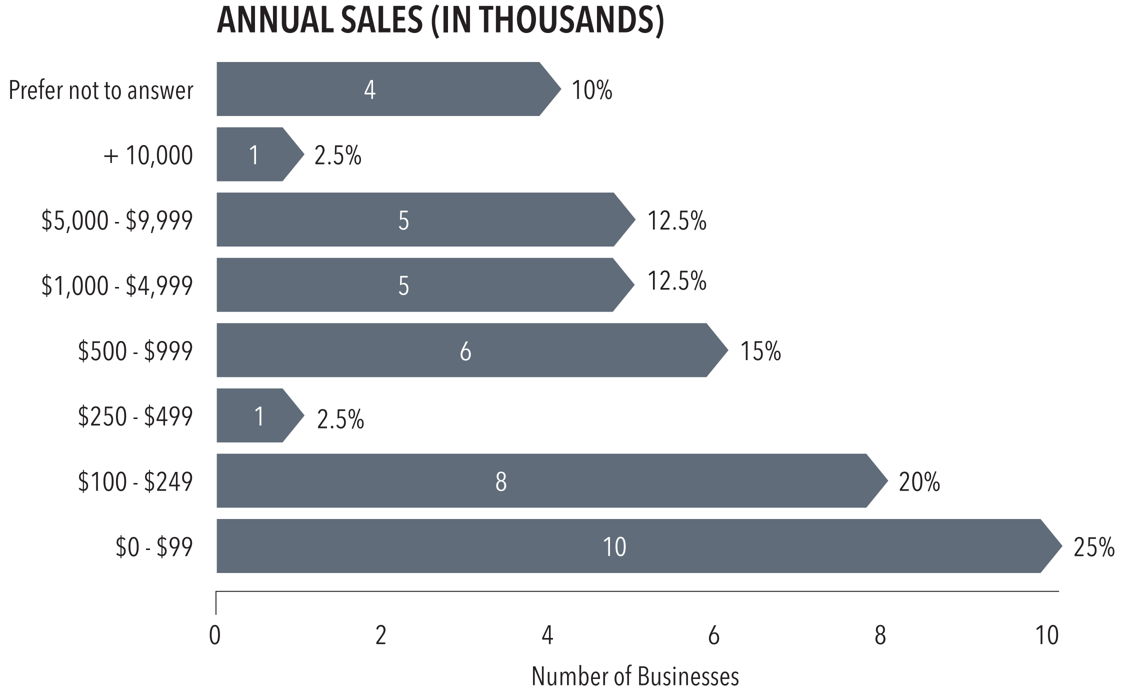
## O
OPPORTUNITIES

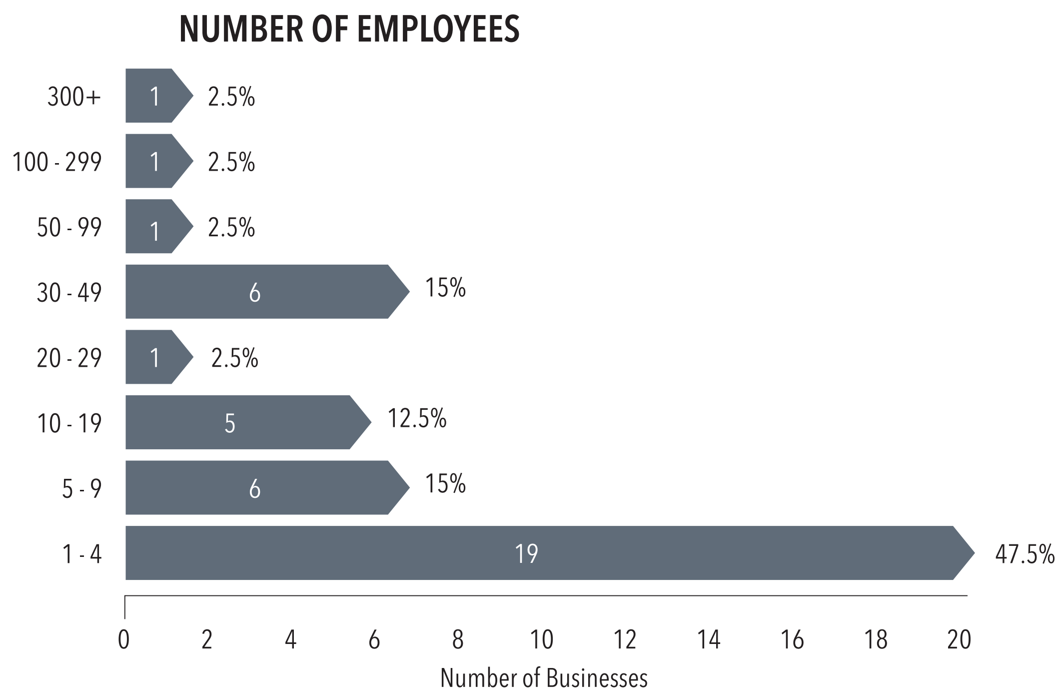
- INTERNET ACCESS
- GROWTH & DEVELOPMENT
- JOB OPPORTUNITIES
- IMPROVE MUNICIPAL PROCESSES

## T
THREATS

- ELECTRICITY COSTS
- INTERNET SERVICE
- CELLULAR PHONE SERVICE
- DEMOGRAPHICS
- SLOW RESIDENTIAL GROWTH
- SEASONAL WEATHER

## BUSINESS INFORMATION

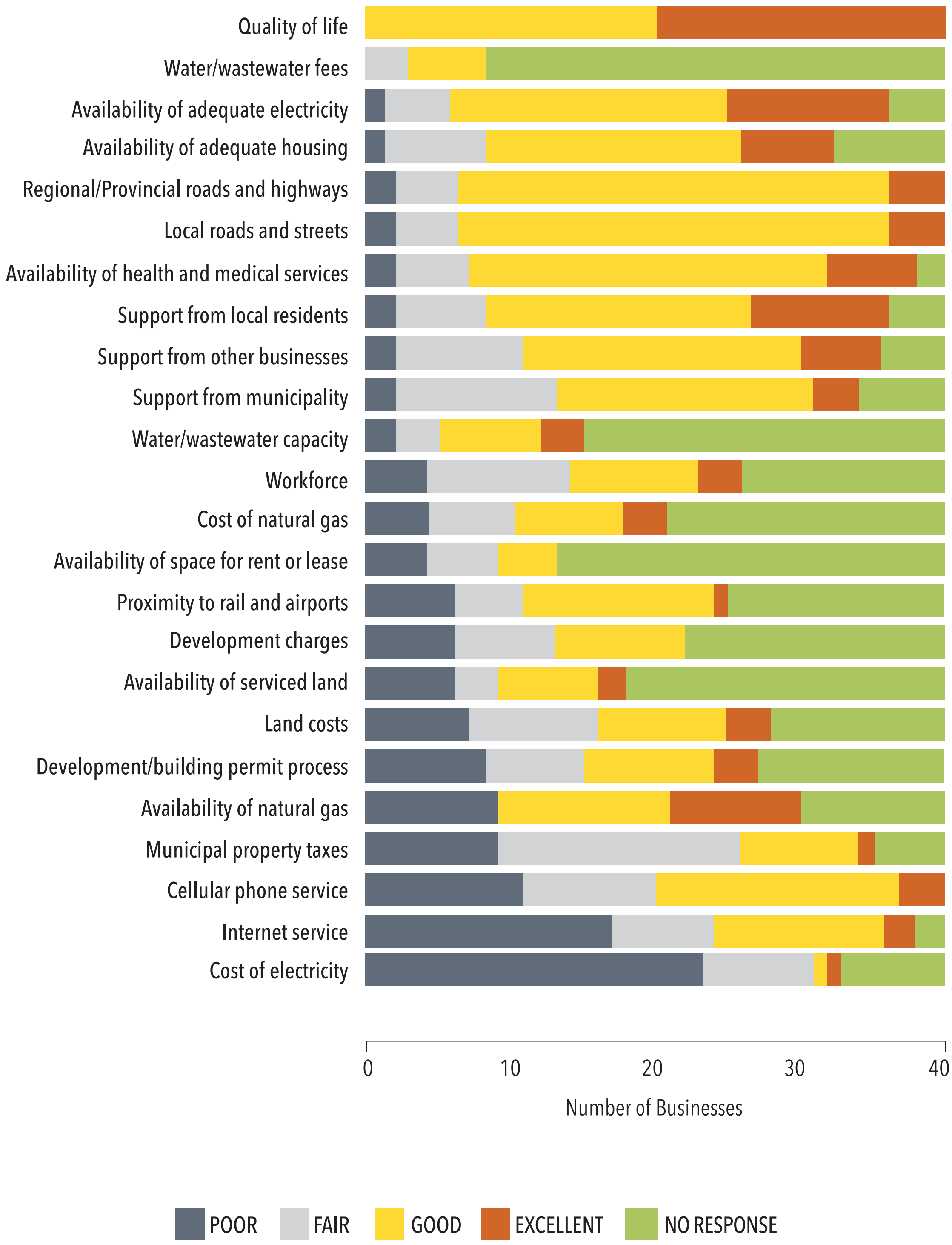


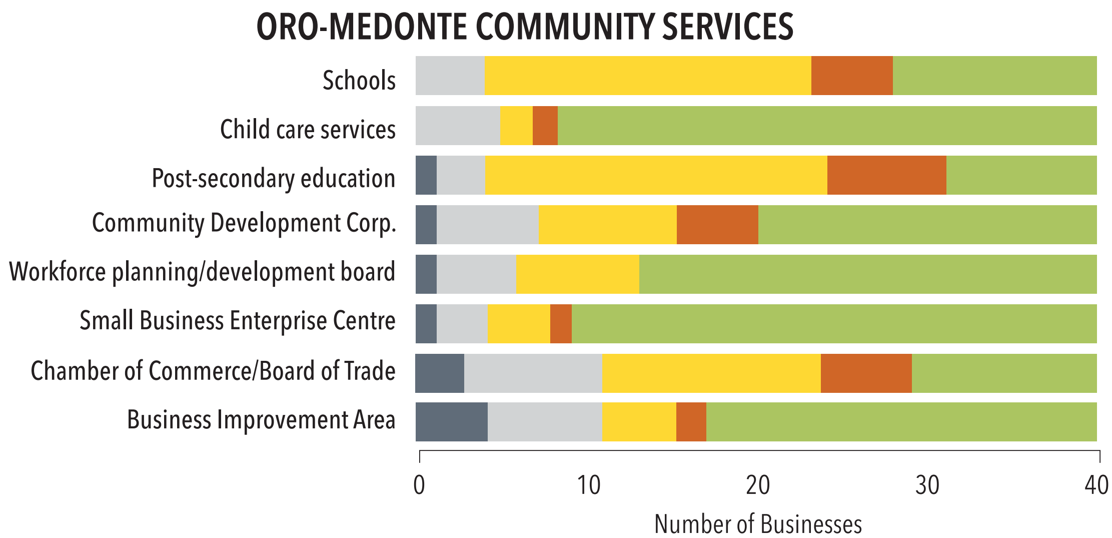



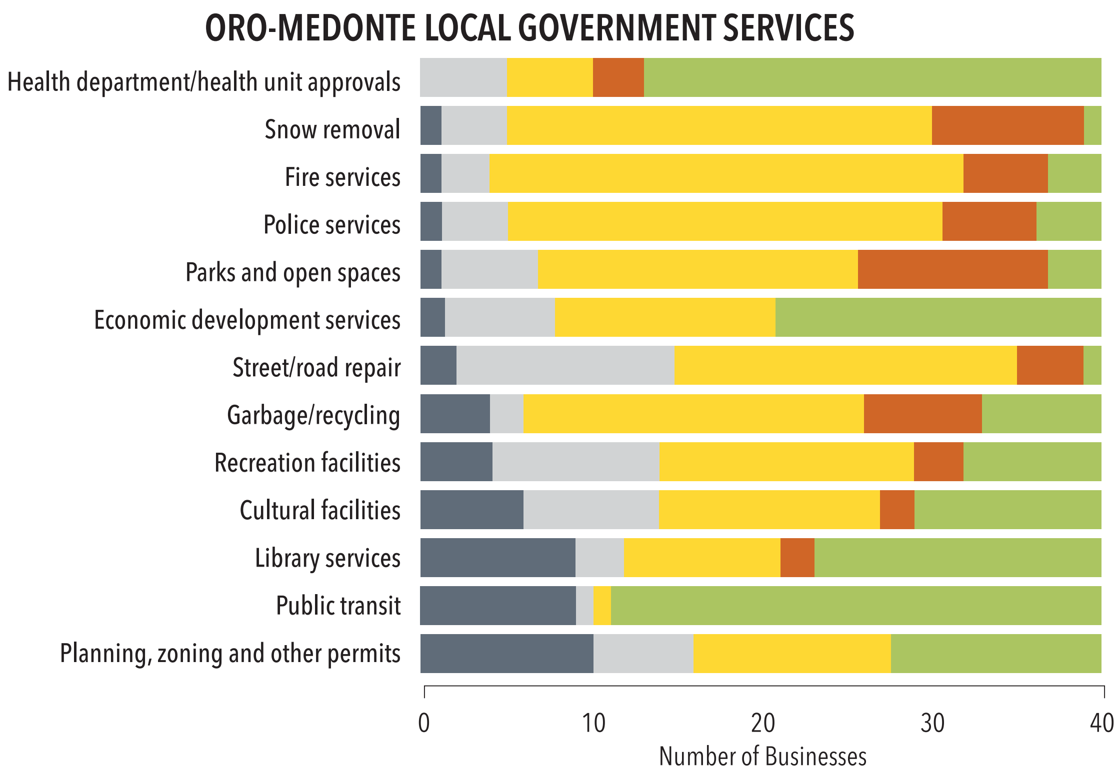

## ORO-MEDONTE BUSINESS CLIMATE

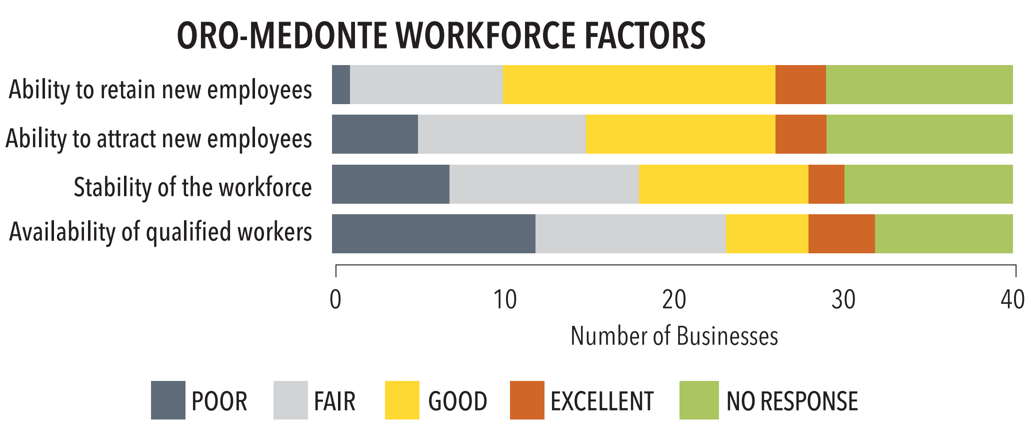
Overall 72% of businesses in Oro-Medonte thought it was a good or excellent place to do business. Most people reported their attitude to doing business in Oro-Medonte was unchanged over the past three years with 20% reporting feeling more positive and 20% feeling more negative. Positive changes in business climate were attributed to the Cycle Simcoe and Ontario's Lake Country initiatives, increased diversity in the region, a better business location, more home construction and positive development projects, in particular the Hitch House and Burl's Creek. Reasons cited for negative changes in attitude included: an increase in taxes, lack of internet services and other utilities, difficulty with the township office and more red tape, and the lack of skilled workers.

## ORO-MEDONTE BUSINESS FACTORS




ORO-MEDONTE COMMUNITY SERVICES
Schools
Child care services
Post-secondary education
Community Development Corp.
Workforce planning/development board
Small Business Enterprise Centre
Chamber of Commerce/Board of Trade
Business Improvement Area
0
10
20
30
40
Number of Businesses


ORO-MEDONTE LOCAL GOVERNMENT SERVICES
Health department/health unit approvals
Snow removal
Fire services
Police services
Parks and open spaces
Economic development services
Street/road repair
Garbage/recycling
Recreation facilities
Cultural facilities
Library services
Public transit
Planning, zoning and other permits
0
10
20
30
40
Number of Businesses


ORO-MEDONTE WORKFORCE FACTORS
Ability to retain new employees
Ability to attract new employees
Stability of the workforce
Availability of qualified workers
0
10
20
30
40
Number of Businesses
POOR
FAIR
GOOD
EXCELLENT
NO RESPONSE

WF1: Job losses and gains by area and industry

The following table looks at each business that reported a job loss or gain in the previous three years. Each row represents a single business.

| INDUSTRY | INCREASES | DECREASES |
|---|---|---|
| 33 - Manufacturing (primary and fabricated metal, etc.) | 200 | 0 |
| 72 - Accommodation and Food Services | 15 | 0 |
| 23 - Construction | 5 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 4 | 0 |
| 32 - Manufacturing (wood, paper, etc.) | 4 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 4 | 0 |
| 11 - Agriculture, Forestry, Fishing and Hunting | 3 | 0 |
| 61 - Educational Services | 2 | 0 |
| 32 - Manufacturing (wood, paper, etc.) | 2 | 0 |
| 55 - Management of Companies and Enterprises | 1 | 0 |
| 81 - Other Services | 1 | 0 |
| 11 - Agriculture, Forestry, Fishing and Hunting | 0 | 12 |

# RAMA SWOT

**S** STRENGTHS

- QUALITY OF LIFE
- LOCATION
- AVAILABILITY OF HEALTH AND
- MEDICAL SERVICES
- MUNICIPAL PROPERTY TAXES
- POLICE SERVICES
- FIRE SERVICES
- RECREATION FACILITIES

**W** WEAKNESSES

- PUBLIC TRANSIT
- PLANNING, ZONING AND OTHER PERMITS
- HEALTH DEPT./HEALTH UNIT APPROVALS

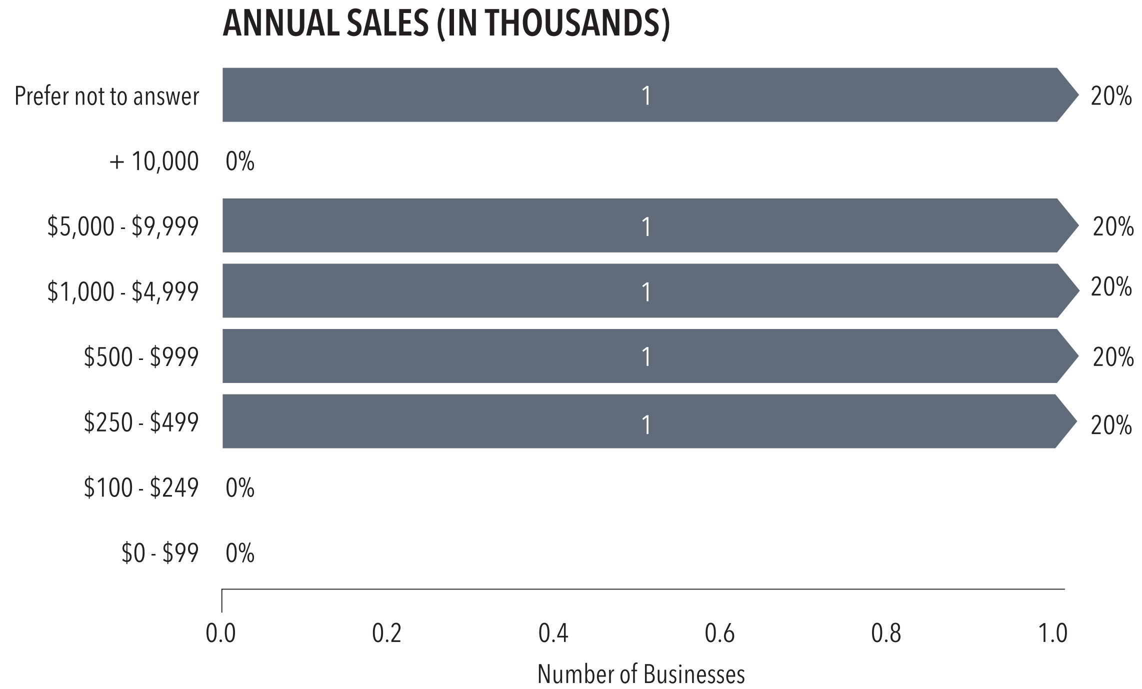
**O** OPPORTUNITIES

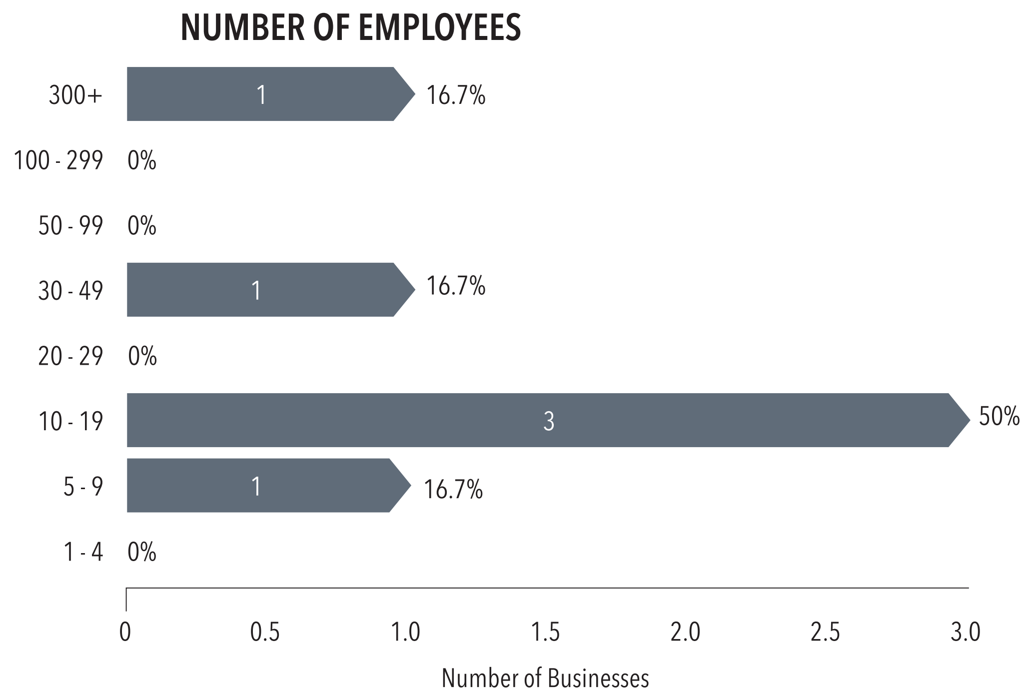
- TOURISM
- MORE INFRASTRUCTURE
- GROWTH & DEVELOPMENT

**T** THREATS

- AVAILABILITY OF ADEQUATE HOUSING
- AVAILABILITY OF SPACE FOR RENT OR LEASE
- PROXIMITY TO RAIL AND AIRPORTS
- SEASONAL WEATHER
- LACK OF SKILLED WORKFORCE

## BUSINESS INFORMATION

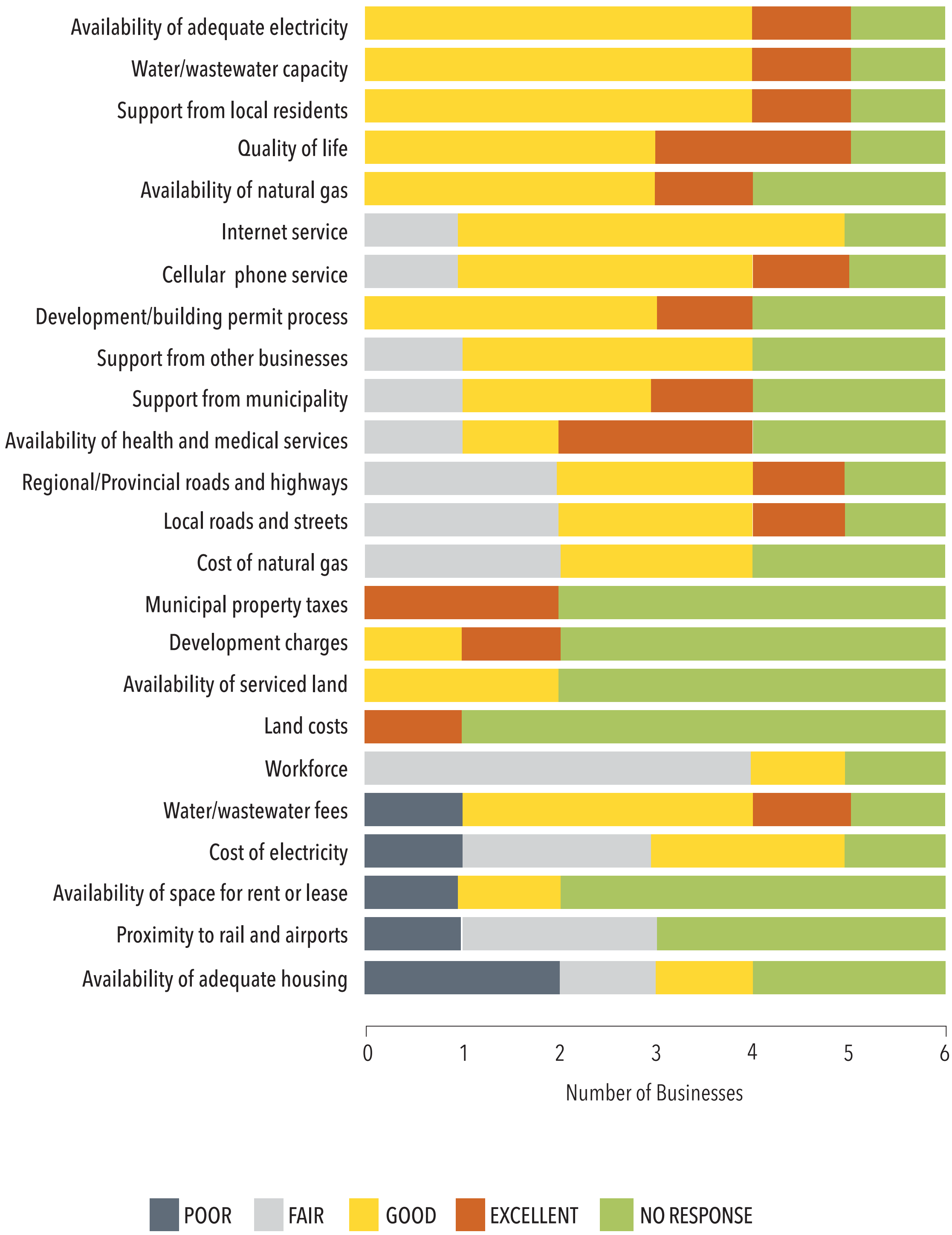


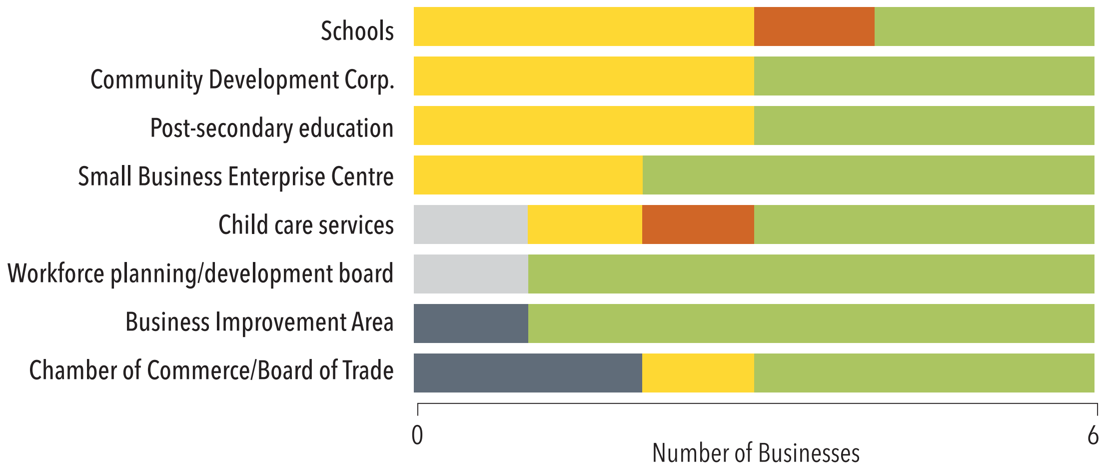

## RAMA BUSINESS CLIMATE

All of the businesses surveyed in Rama thought it was a good or excellent place to do business. Two businesses felt more positively about the area over the past three years and one felt more negatively. Positive changes in business climate were attributed to a change in management and increased demand for services. Declining tourism traffic was responsible for the negative change in attitude.

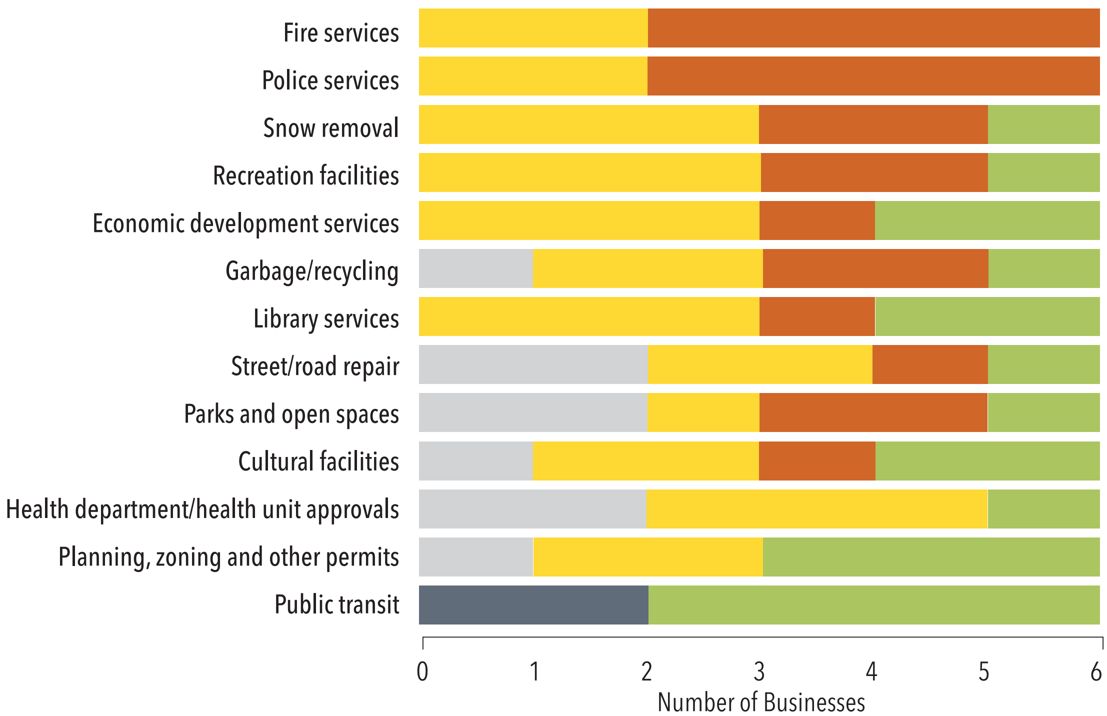
## RAMA BUSINESS FACTORS



## RAMA COMMUNITY SERVICES




## RAMA LOCAL GOVERNMENT SERVICES




## RAMA WORKFORCE FACTORS

WF1: Job losses and gains by area and industry

The following table looks at each business that reported a job loss or gain in the previous three years. Each row represents a single business.

## RAMA

| INDUSTRY | INCREASES | DECREASES |
|---|---|---|
| 71 - Arts, Entertainment, and Recreation | 2 | 0 |
| 45 - Retail Trade (sporting goods, music, books, etc.) | 0 | 4 |


# RAMARA SWOT

**S**
STRENGTHS

- SUPPORT FROM MUNICIPALITY
- SUPPORT FROM LOCAL RESIDENTS
- QUALITY OF LIFE
- LOCATION
- POLICE SERVICES
- FIRE SERVICES
- LIBRARY SERVICES

**W**
WEAKNESSES

- CULTURAL FACILITIES
- RECREATIONAL FACILITIES
- PUBLIC TRANSIT
- INTERNET SERVICE
- DEVELOPMENT CHARGES

**O**
OPPORTUNITIES

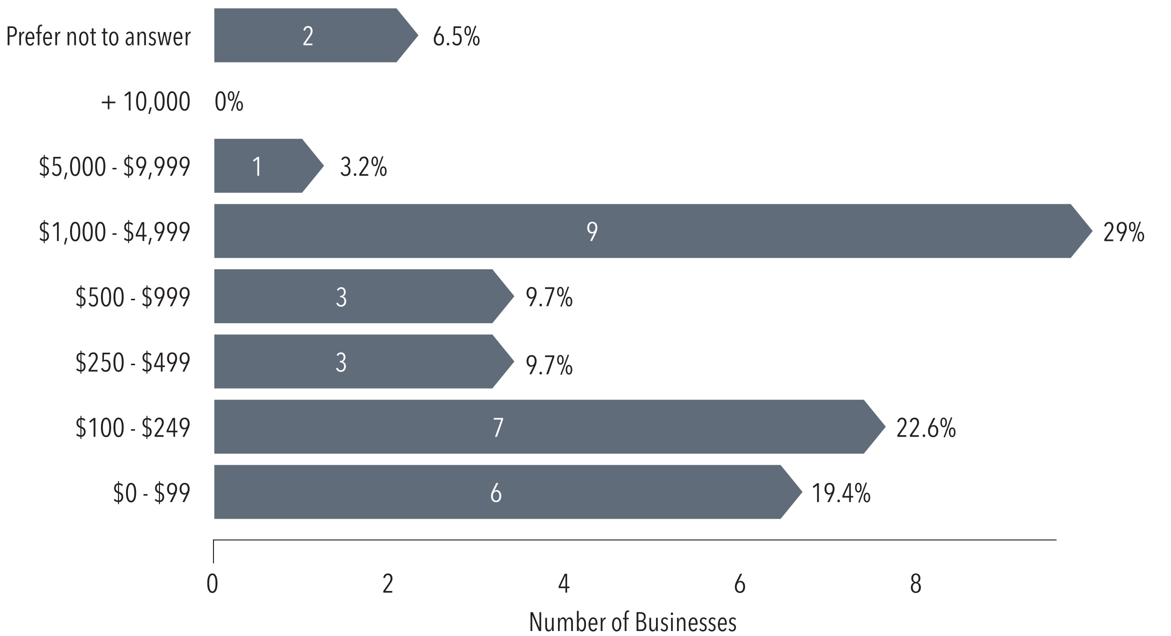
- INTERNET ACCESS
- JOB OPPORTUNITIES

**T**
THREATS

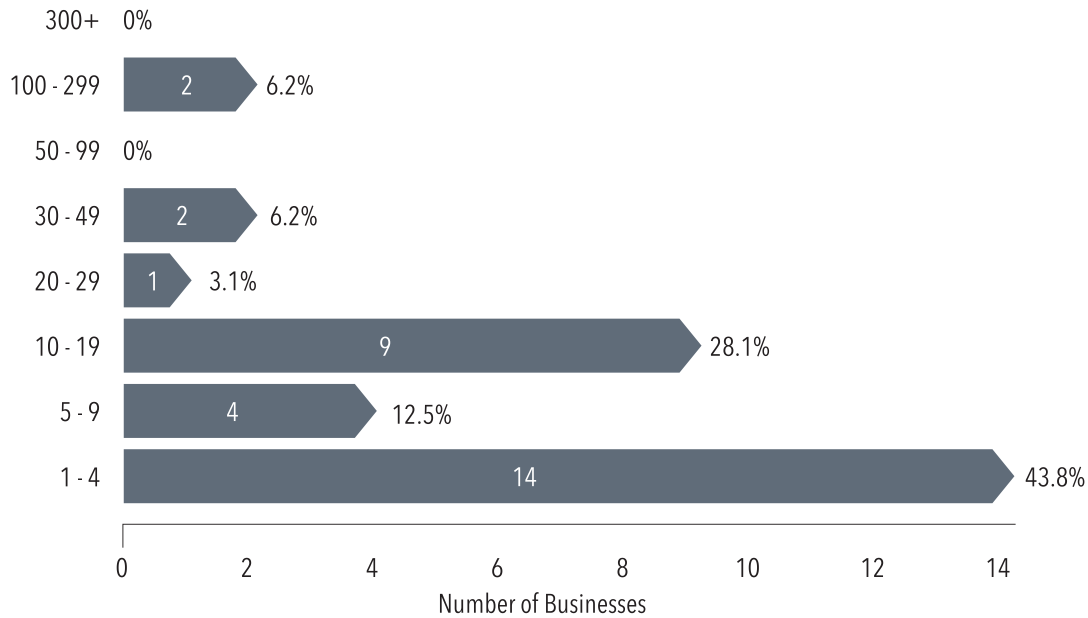
- ELECTRICITY COSTS
- DEMOGRAPHICS
- SLOW RESIDENTIAL GROWTH
- SEASONAL WEATHER
- LACK OF SKILLED WORKFORCE

## BUSINESS INFORMATION

### ANNUAL SALES (IN THOUSANDS)



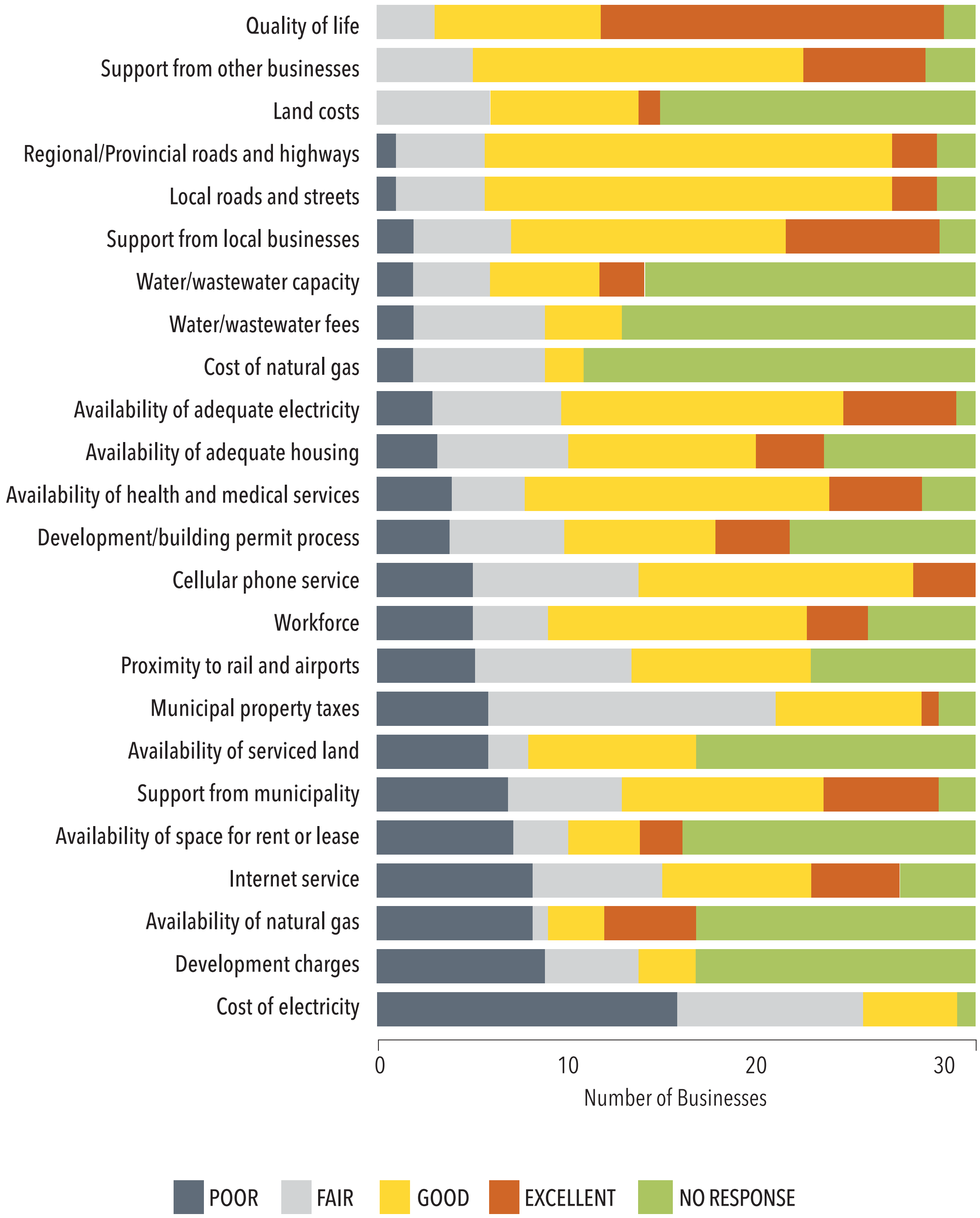

### NUMBER OF EMPLOYEES



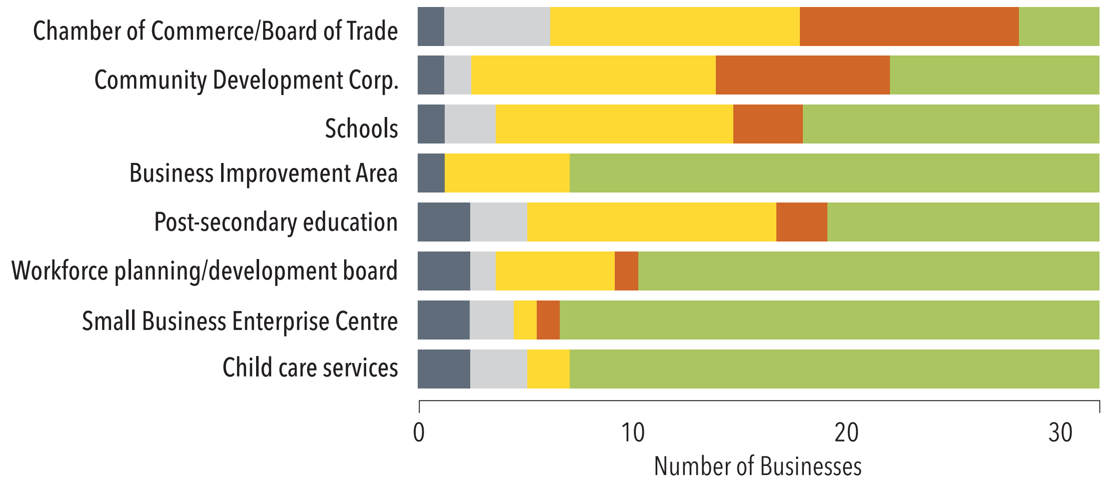

## RAMARA BUSINESS CLIMATE

Overall 75% of businesses in Ramara thought it was a good or excellent place to do business. Most people reported their attitude towards doing business in Ramara was unchanged over the past three years with 34% reporting feeling more positive and 16% feeling more negative. Several positive changes in business climate were attributed to the township: their involvement in Ontario's Lake Country, improvements in the planning department, simplification of paperwork, more professional building inspections and a better attitude toward businesses. Other positive changes came from a 'buy local' venture and increased customer base. Reasons cited for negative changes in attitude included: lack of cooperation among businesses, lack of tourism focus in the community, lack of growth, increased taxes and competition with internet businesses.

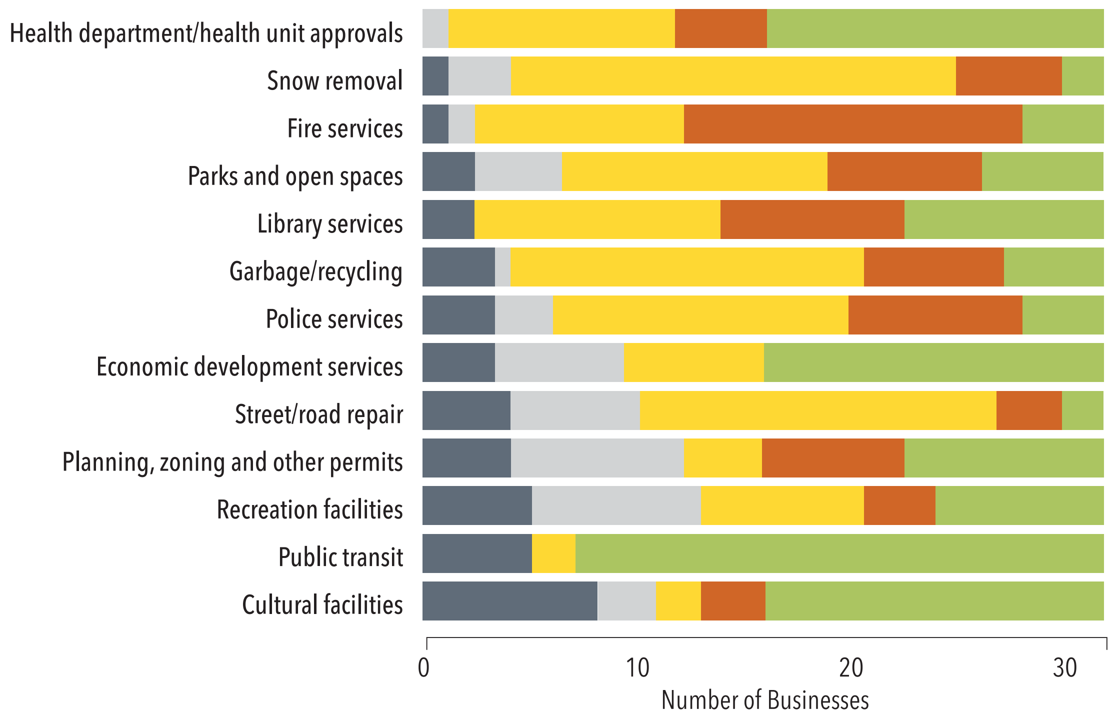
## RAMARA BUSINESS FACTORS



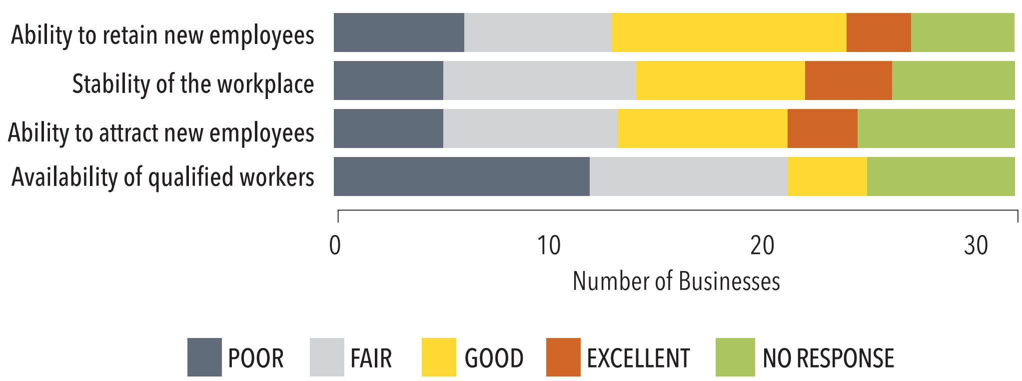
## RAMARA COMMUNITY SERVICES




## RAMARA LOCAL GOVERNMENT SERVICES




## RAMARA WORKFORCE FACTORS



WF1: Job losses and gains by area and industry

The following table looks at each business that reported a job loss or gain in the previous three years. Each row represents a single business.

## RAMARA

| INDUSTRY | INCREASES | DECREASES |
|---|---|---|
| 72 - Accommodation and Food Services | 15 | 0 |
| 41 - Wholesale Trade | 3 | 0 |
| 21 - Mining, Quarrying, and Oil and Gas Extraction | 2 | 0 |
| 23 - Construction | 2 | 0 |
| 23 - Construction | 2 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 2 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 2 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 1 | 0 |
| 23 - Construction | 1 | 0 |
| 52 - Finance and Insurance | 0 | 3 |
| 23 - Construction | 0 | 4 |
| 21 - Mining, Quarrying, and Oil and Gas Extraction | 0 | 6 |

# SEVERN SWOT

## S
STRENGTHS

- PARKS AND OPEN SPACES
- SUPPORT FROM LOCAL RESIDENTS
- QUALITY OF LIFE
- LOCATION
- POLICE SERVICES
- FIRE SERVICES

## W
WEAKNESSES

- ECONOMIC DEVELOPMENT SERVICES
- RECREATIONAL FACILITIES
- PUBLIC TRANSIT
- INTERNET SERVICES
- NATURAL GAS AVAILABILITY
- LACK OF GROWTH/ PROGRESSIVE THINKING
- INFRASTRUCTURE

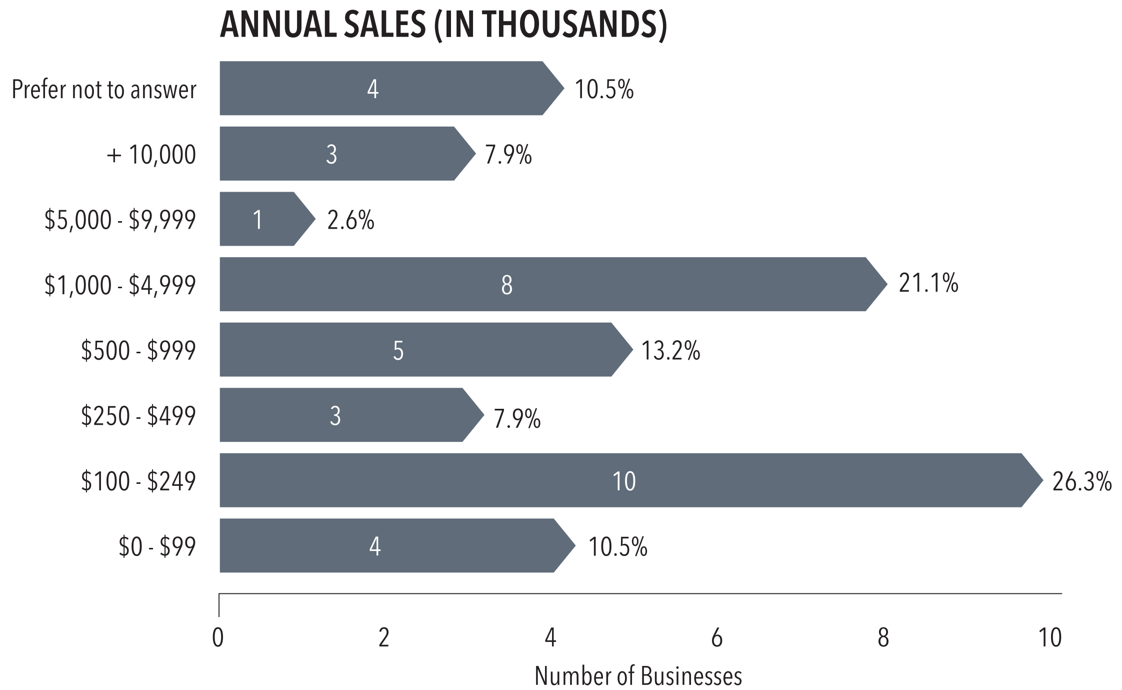
## O
OPPORTUNITIES

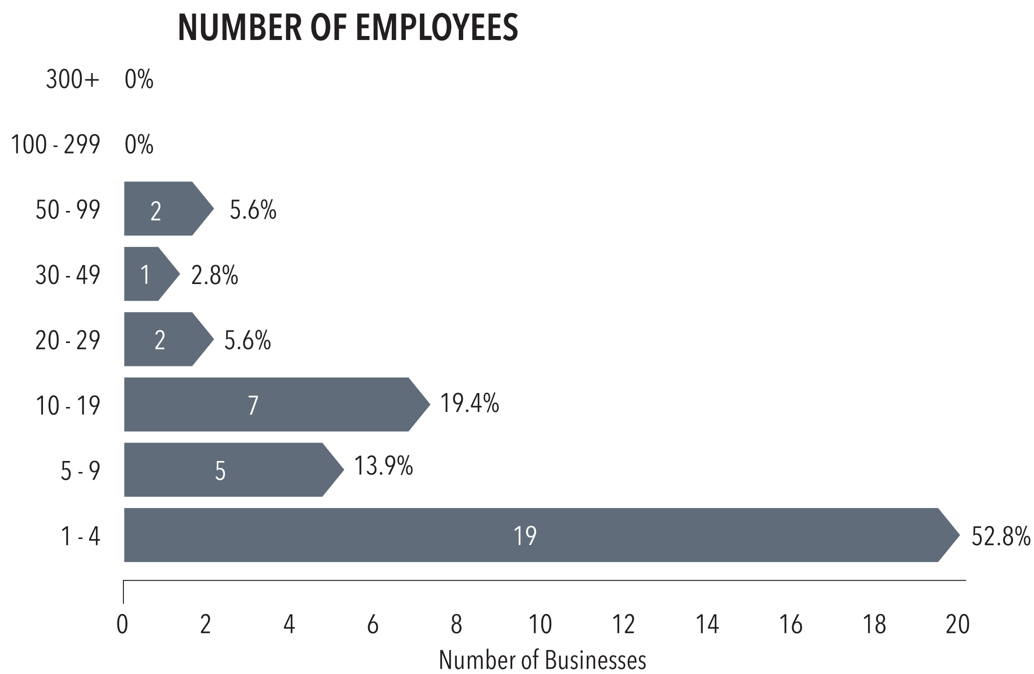
- AVAILABILITY OF HEALTH AND MEDICAL SERVICES
- INTERNET SERVICES
- JOB OPPORTUNITIES
- GROWTH & DEVELOPMENT

## T
THREATS

- DEMOGRAPHICS
- SLOW RESIDENTIAL GROWTH
- ELECTRICITY COSTS
- LACK OF SKILLED WORKFORCE

# BUSINESS INFORMATION

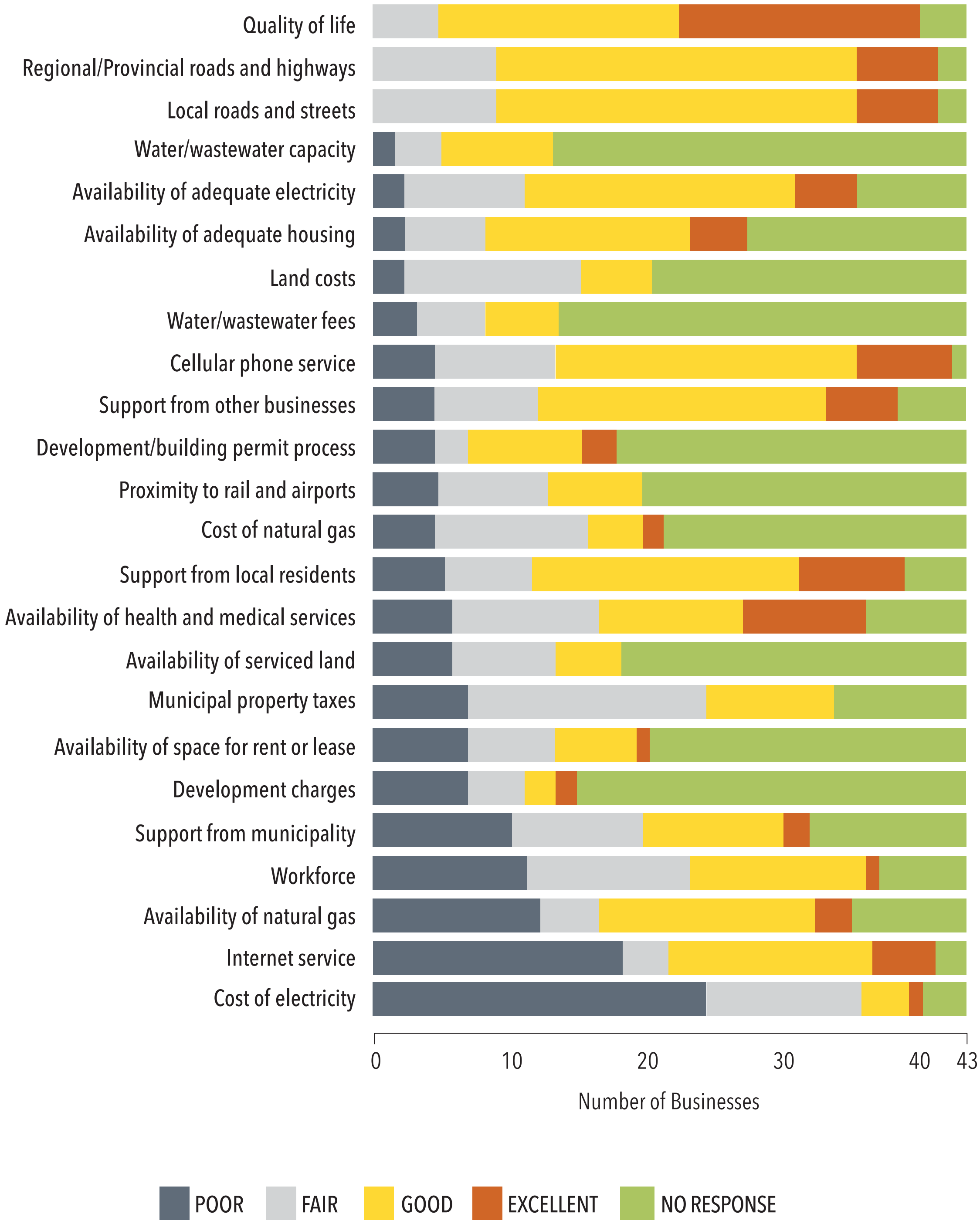


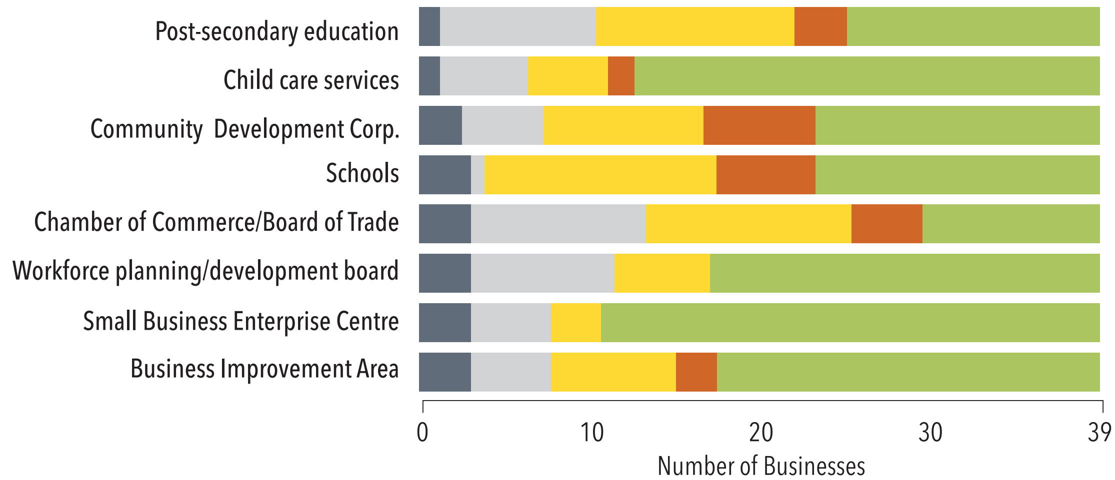

# SEVERN BUSINESS CLIMATE

Overall 66% of business in Severn thought it was a good or excellent place to do business. Most people reported their attitude to doing business in Severn was unchanged over the past three years with 16% reporting feeling more positive and 18% feeling more negative. Positive changes in business climate were attributed to an improved economy: new businesses, more activity and more cash available to businesses, improved sales and support from the BIA for new businesses. Reasons cited for negative changes in attitude included: zoning changes, increased taxes, high development charges, high utility bills and a difficult retail economy.

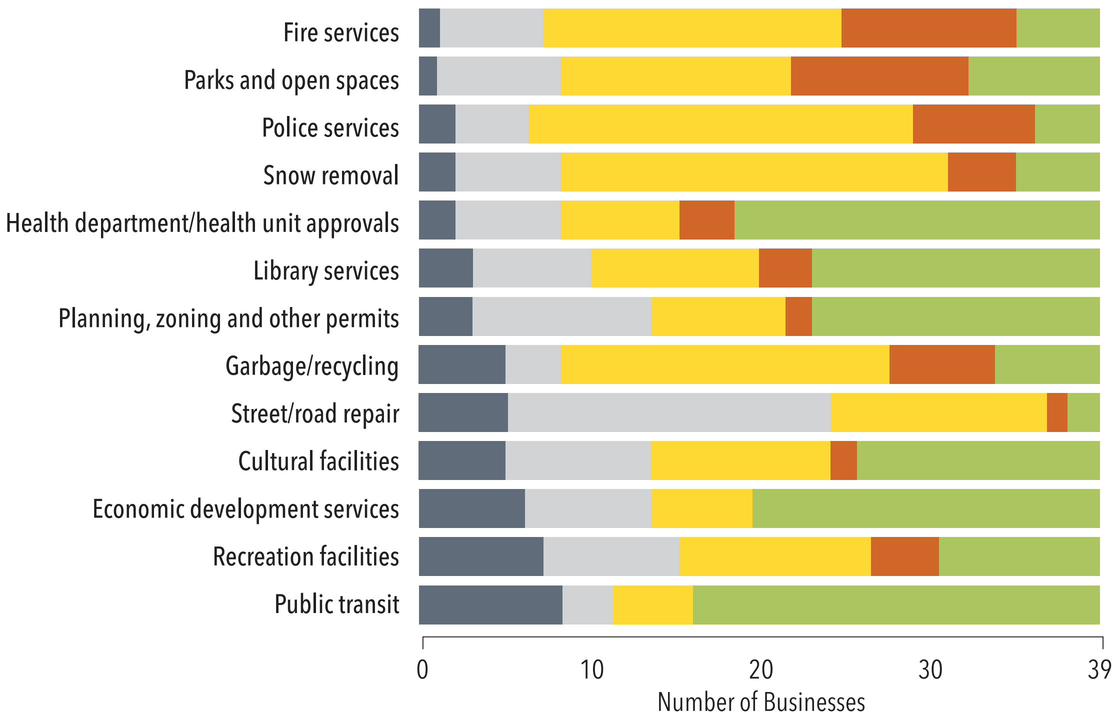
## SEVERN BUSINESS FACTORS



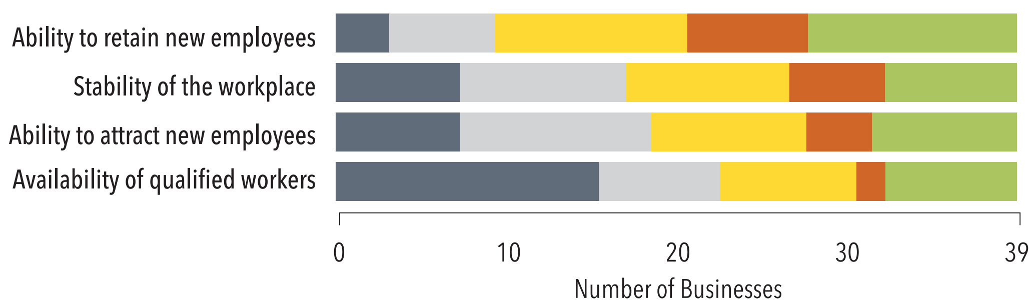
## SEVERN COMMUNITY SERVICES




## SEVERN LOCAL GOVERNMENT SERVICES




## SEVERN WORKFORCE FACTORS




POOR FAIR GOOD EXCELLENT NO RESPONSE

WF1: Job losses and gains by area and industry

The following table looks at each business that reported a job loss or gain in the previous three years. Each row represents a single business.

## SEVERN

| INDUSTRY | INCREASES | DECREASES |
|---|---|---|
| 45 - Retail Trade (sporting goods, music, books, etc.) | 10 | 0 |
| 72 - Accommodation and Food Services | 3 | 0 |
| 45 - Retail Trade (sporting goods, music, books, etc.) | 2 | 0 |
| 54 - Professional, Scientific, and Technical Services | 2 | 0 |
| 23 - Construction | 2 | 0 |
| 91 - Public Administration | 1 | 0 |
| 53 - Real Estate and Rental and Leasing | 1 | 0 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 1 | 0 |
| 71 - Arts, Entertainment, and Recreation | 1 | 0 |
| 55 - Management of Companies and Enterprises | 1 | 0 |
| 23 - Construction | 1 | 0 |
| 41 - Wholesale Trade | 0 | 1 |
| 33 - Manufacturing (primary and fabricated metal, etc.) | 0 | 2 |
| 71 - Arts, Entertainment, and Recreation | 0 | 2 |
| 44 - Retail Trade (motor vehicles, furniture etc.) | 0 | 4 |
| 33 - Manufacturing (primary and fabricated metal, etc.) | 0 | 25 |

# PROJECT REPORT 2016

B R + E
Growing Together!

Business Retention + Expansion Study
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