



Employment Land Strategy

Township of Oro-Medonte

Final Report

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Watson & Associates Economists Ltd.
905-272-3600
info@watsonecon.ca

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List of Acronyms and Abbreviations

| Acronym | Full Description of Acronym |
|----------------|---|
| COVID-19 | Coronavirus disease |
| G.D.P. | Gross domestic product |
| G.F.A. | Gross floor area |
| G.G.H. | Greater Golden Horseshoe |
| G.T.A. | Greater Toronto Area |
| G.T.H.A. | Greater Toronto and Hamilton Area |
| ha | Hectares |
| IMF | International Monetary Fund |
| L.Q. | Location Quotients |
| L.S.R.A. | Lake Simcoe Regional Airport |
| M.T.S.A. | Major Transit Station Area |
| M.Z.O. | Minister's Zoning Order |
| NAICS | North American Industry Classification System |
| N.F.P.O.W. | No Fixed Place of Work |
| O.P. | Official Plan |
| O.P.A. | Official Plan Amendment |
| P.P.S. | Provincial Policy Statement |
| R.E.D. | Rural Economic Development Program |



Executive Summary



Executive Summary

Background

The primary objective of this assignment is to provide an employment land strategy (E.L.S.) for Oro-Medonte, keeping in view the future regional/local economic and development trends that are anticipated to influence employment land needs across the Township over the next several decades. This study is necessary to ensure there is an adequate supply of employment lands to accommodate long-term demand and to satisfy the Township's employment objectives. The continued supply of employment lands will further provide increased local employment opportunities and help diversify the Township's tax base. To ensure the Township's employment lands remain competitive, this study examines the Township's applicable Official Plan (O.P.) policies within the context of the provincial and County planning policy framework, against anticipated economic trends and consumer demand patterns. This study will form a background to the Township's O.P. update to 2031 and further inform the 2051 employment projections to be undertaken as a part of Simcoe County's Municipal Comprehensive Review (M.C.R.) process.

The employment lands within the Township are governed by various regional and local policies. The employment designations provided in the Township's O.P. consist of the following:

- **Industrial** – Includes manufacturing, assembly, processing, fabrication, storage and/or warehousing uses, research establishments, wholesaling establishments, portable asphalt plants, and similar uses.
- **Airport** – Includes airport facilities and accessory uses, airport-related manufacturing, assembly, maintenance, processing, fabrication, storage and/or warehousing uses, research establishments, business offices, portable asphalt plants, and wholesaling establishments.
- **Oro-Centre Limited Service Industrial** – Includes outdoor storage uses, trucking terminals, and similar uses.
- **Oro-Centre Office/Industrial** – Includes manufacturing, assembly, processing and fabrication uses, warehousing uses, research establishments, business offices, institutional uses such as places of worship, and outdoor storage.



In addition, the Growth Plan, 2019 and a report for the **Lake Simcoe Regional Airport Economic Employment District** issued by the Minister of Infrastructure on September 24, 2012 pursuant to policy 6.4.3 of the Growth Plan, include the following uses for the Lake Simcoe Regional Airport Employment District:

“Uses are limited to airport facilities and accessory uses, airport-related manufacturing, assembly, maintenance, processing, fabrication, storage and warehousing, airport-related training facilities, research establishments, wholesaling establishments and office uses.”¹

It is important to note that the Township has received two Minister’s zoning orders (M.Z.O.s) adjacent to the Airport Area for development of the Automotive Innovation Park (approved November 1, 2019) and Medical Innovation Park (received October 30, 2020). These M.Z.O.s have the potential to significantly influence future employment growth within the Township over the next decade and beyond, which is discussed in further detail throughout this report.

What are Employment Lands and why are they Important to the Township?

Employment lands form a vital component of the Township’s land-use structure and are an integral part of the local economic development potential of the region. They are also home to many of the Township’s largest private-sector employers. Through development of its industrial land base, the Township is better positioned to build more balanced, complete, and competitive communities. Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Township of Oro-Medonte and the surrounding economic region.

Figure 1 summarizes the Township’s employment base by sector as of 2019. Employment represents the number of jobs located within the Township of Oro-Medonte. This includes the live/work labour force, including work at home employees, as well as in-commuters. While the Township’s economic base is relatively small, it is diverse, spanning a range of employment sectors from manufacturing, construction, accommodation and food services, administrative, professional, scientific and technical

¹ Lake Simcoe Regional Airport Economic Employment District Report issued by the Minister of Infrastructure on September 24, 2012 pursuant to policy 6.4.3 of the Growth Plan, Province of Ontario website – [Simcoe County employment areas and districts: Lake Simcoe Regional Airport economic employment district | Ontario.ca](https://www.simcoe.ca/development-and-growth/employment-areas-and-districts), accessed January 12, 2021.



services, to transportation and warehousing. The largest sector in the Township is manufacturing, accounting for 17% of the total employment base.

Figure 1
Township of Oro-Medonte
Employment Base by Sector, 2019

| Employment Sector | Share |
|---|-------|
| Agriculture, forestry, fishing and hunting | 2% |
| Mining, quarrying, and oil and gas extraction | 0% |
| Utilities | 1% |
| Construction | 9% |
| Manufacturing | 17% |
| Wholesale trade | 9% |
| Retail trade | 8% |
| Transportation and warehousing | 4% |
| Information and cultural industries | 1% |
| Finance and insurance | 1% |
| Real estate and rental and leasing | 1% |
| Professional, scientific and technical services | 4% |
| Administrative and support, waste management and remediation services | 5% |
| Educational services | 4% |
| Health care and social assistance | 5% |
| Arts, entertainment and recreation | 5% |
| Accommodation and food services | 9% |
| Other services (except public administration) | 4% |
| Public administration | 12% |

Source: Derived from EMSI data (employees only) by Watson & Associates Economists Ltd., 2020.

Drivers of Future Employment Growth in the Township of Oro-Medonte

The future population and employment growth potential of the Simcoe Area, including the Township of Oro-Medonte, is closely tied to the economic potential of the broader economic region. Regional economic growth and associated job creation represent key drivers of both local population and employment growth across the Township. As such, raising the economic profile of Oro-Medonte by leveraging the economic opportunities and strengths of the Simcoe Area, as well as the broader Greater Golden Horseshoe (G.G.H.) regional economy, represents a key economic development strategy within the Township.



As the population and employment base within the Township's commuter-shed

² grows, Oro-Medonte will become an increasingly desirable location for these workers to live, leading to steady population growth across the Township. Between 2016 and 2051, the employment base of the Simcoe Area, the Township's primary commuter-shed, is forecast to grow by approximately 409,000 people and 223,000 jobs.

Over the next 30 years, the Township's local employment base is also forecast to increase, generating a diversifying and growing range of employment opportunities for existing and new Township residents as well as in-commuters. The Township of Oro-Medonte offers opportunities for rural living with proximity to urban amenities, as well as recreational opportunities within the rural countryside. The Township's rural character offers a high quality of life which continues to drive net migration from a broad range of demographic groups including the 55-74 age group (i.e. Baby Boomers and younger seniors/empty nesters) as well as younger adults and their families.

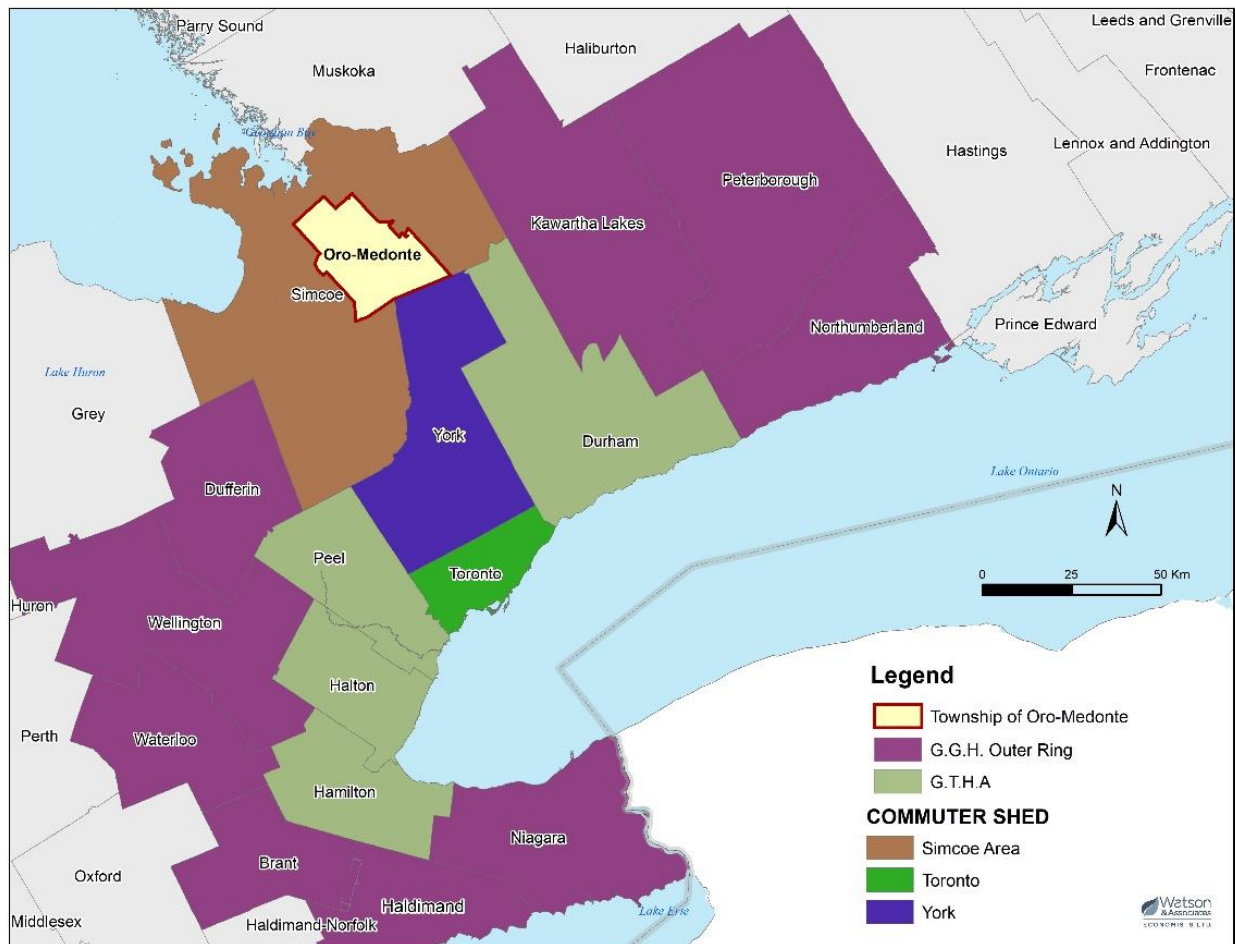
It is important to recognize that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another.

Continued population growth within the Township and surrounding commuter-shed represents a key source of future skilled and unskilled labour which local industries within the Township will increasingly need to draw upon as the local employment base continues to grow and diversify.

² A commuter shed is defined as the area the workers are known to commute to for employment, which is typically influenced by travel time or distance.



Figure 2
Township of Oro-Medonte
Commuter-Shed (2016)



The Township faces a number of opportunities and challenges with respect to the management and growth of its existing and future employment lands, in light of the evolving structural changes in the economy and disruptive factors which continue to influence the nature of the economy. One of these challenges relates to macro-economic trends over which the Township has limited control. This includes the relative strength of the global economy, international trade policy, and the competitiveness of the Canadian economic base relative to other established and emerging global markets.

In contrast to the above, the Township of Oro-Medonte has considerable control and ability to position itself in a positive manner when considering the Township's regional competitive ranking. This requires the Township to market itself as a preferred location for business development, equipped with the human capital in order to encourage on-



going innovation, entrepreneurship, small business development, and local investment retention.

A major factor for the future competitiveness of the Township's economic base relates to the structure, quality, and market "readiness" of its employment lands.

Vacant Employment Land Supply in the Township of Oro-Medonte

The Township currently has 633 hectares (ha) of land designated for employment uses, located in the southern portion of the Township; see Figure 4. Designated employment lands are clustered from the eastern-most edge to the western-most edge of the Township, with a large portion surrounding the Lake Simcoe Regional Airport as well as along Highway 11. Most clusters of designated employment lands have a mix of occupied and vacant lands. Table 5-1 summarizes the total vacant and occupied lands within the Township. Of the 633 ha of land designated for employment uses, 20% (or 130 ha) is vacant, and the remaining 80% is occupied. Of the occupied land, the Township has identified 27% (or 133 ha) as underutilized³, 26% (or 131 ha) as development constrained⁴, and the remaining 47% (237 ha) is occupied and unlikely to accommodate additional development.

³ Medium or large parcels (2 ha and larger) have been classified as underutilized based on the following criteria:

- Site is used as a construction laydown yard or for trailer parking. May include a small building for storage. Site is generally used to support off-site employment.
- Site has the opportunity for expansion or for a severance, as a large portion of the site is vacant. There could be plans for phased development or future expansion that the Township is aware of.
- Site is developed, but the building on the site is not being used (vacant building). Opportunity for redevelopment.

⁴ constrained lands are those which have environmental, ownership and/or access constraints that make (re)development unlikely in the short and medium time periods.



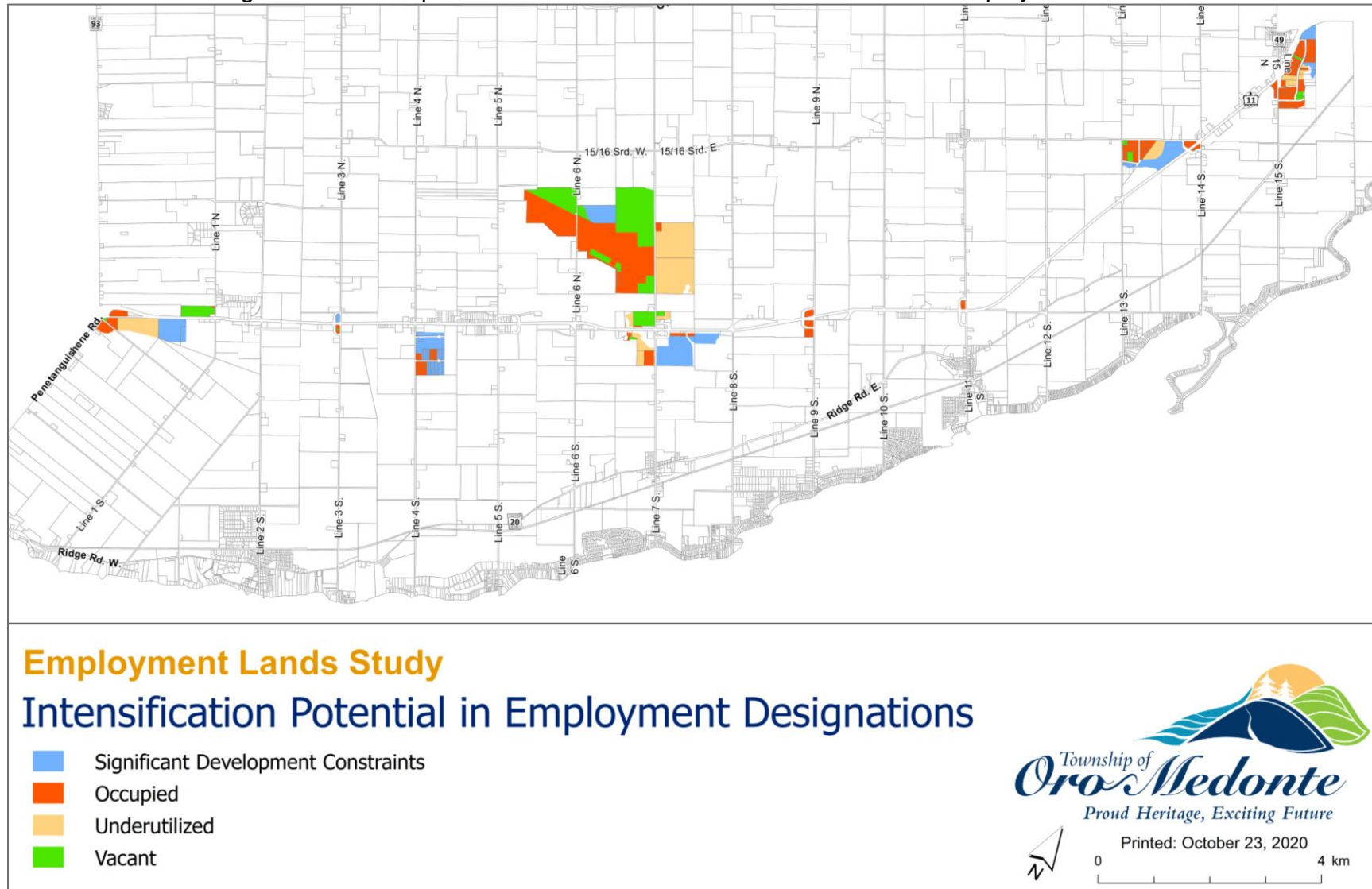
Figure 3
Township of Oro-Medonte
Designated Employment Lands by Status

| Official Plan Employment Land Designations | Total Area (ha) | Vacant Land (ha) | Occupied Land (ha) | | | % of Land Area | | |
|--|-----------------|---------------------|--------------------|-------------|-----------------------|----------------|-------------|---------------|
| | | | Underutilized | Constrained | Remaining Occupied | Total Area | Vacant Land | Occupied Land |
| Industrial | 297 | 17 | 119 | 77 | 83 | 47% | 13% | 56% |
| Airport | 265 | 102 | 0 | 17 | 146 | 42% | 78% | 32% |
| Oro-Centre Office/Industrial | 39 | 11 | 7 | 14 | 7 | 6% | 9% | 5% |
| Oro-Centre Limited Service Industrial | 34 | 1 | 8 | 24 | 2 | 5% | 0% | 7% |
| Total | 633 | 131 | 133 | 132 | 238 | 100% | 100% | 100% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020



Figure 4: Township of Oro-Medonte - Intensification Potential on Employment Lands



Source: Derived from mapping data provided by the Township of Oro-Medonte, 2020.



Long-Term Employment Forecast and Employment Land Needs

Over the next several decades, the Township's employment base is anticipated to steadily grow across a broad range of export-based and population-serving employment sectors. The Township, however, will be competing to attract and retain these sectors with other municipalities across the G.G.H. and beyond. To ensure the long-term competitiveness, growth, and diversity of the Township's economy, however, planning and marketing efforts must be geared toward both the broader strengths of the Township and its communities, as well as specific target sector investment attraction efforts.

To accommodate the steadily growing economic base within Oro-Medonte, the Township's land-use planning policies must anticipate the evolving nature of the local and regional economies and reflect the diverse needs of industry and businesses of all sizes over the long term. These policies must also offer a degree of flexibility and agility that allows for relatively rapid responses to unforeseen changes, which can be a critical competitive advantage relative to competitive markets.

As shown in Figure 5, the Township's employment base is forecast to reach approximately 11,500 by 2051. This represents an increase of approximately 5,000 jobs from 2020 to 2051, or an annual employment growth rate of 2.8%. Over the long term, additional employment is expected to provide increasing local job opportunities for the residents of Oro-Medonte and improve the Township's employment-to-population balance. Between 2020 and 2051, the Township's employment activity rate (ratio of jobs to population) is forecast to increase from 25% to 34%⁵

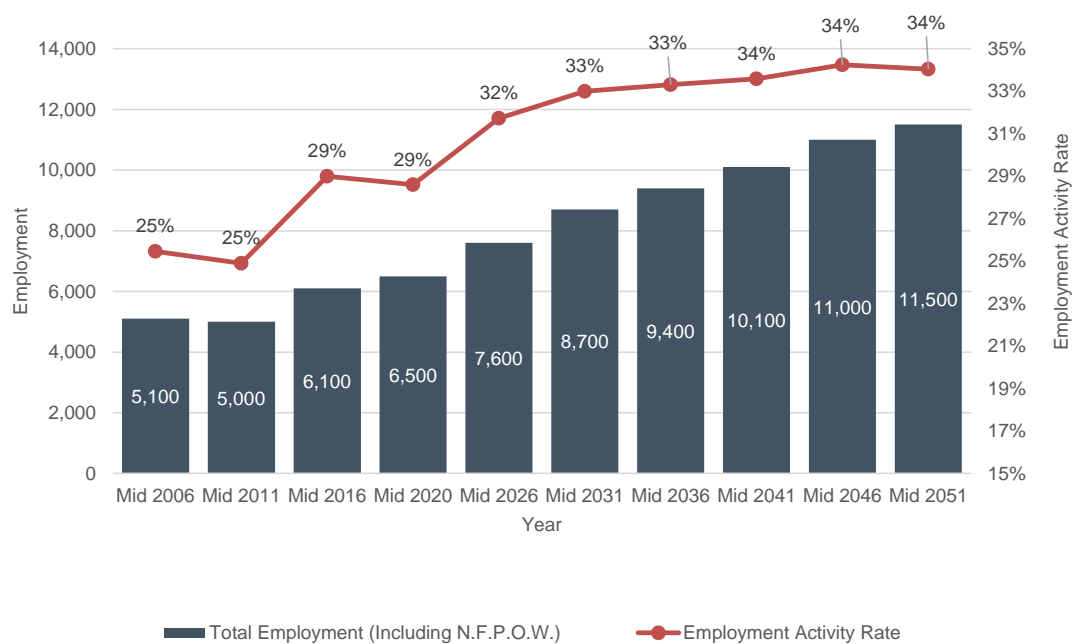
Structural changes in the macro-economy combined with technological innovation and improved regional broadband telecommunications have been, and will continue to be, key drivers of economic expansion in knowledge-based sectors as well as the steady

⁵ To determine employment activity rates, the population of the Township until 2031 is based on the 2020 Development Charges Background Study by Watson & Associates Economists Ltd.; population beyond 2031 to 2051 has been projected at an estimated annual growth rate of approximately 1.4%.



rise of the gig economy.⁶ As a result of these trends, the employment base in Oro-Medonte is anticipated to steadily increase in employment sectors which require physical building space and land needs as well as in employment sectors that can be increasingly accommodated at home or off-site. These trends are important to recognize as they will have a direct impact on the Township’s long-term requirements for employment land.

Figure 5
Township of Oro-Medonte
Employment Forecast, 2020 to 2051



Source: 2006 to 2016 derived from Statistics Canada Census Data; 2020 to 2051 forecast by Watson & Associates Economists Ltd., 2020.

Note: N.F.P.O.W. in the above figure is defined as no fixed place of work. Statistics Canada defines no fixed place of work employees as “persons who do not go to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”

⁶ The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.



In 2051, almost half the total employment growth across the Township of Oro-Medonte is anticipated to comprise employment land employment⁷ across a range of industrial sectors including warehousing and distribution, wholesale trade, manufacturing, construction, and utilities. In addition to the above-mentioned traditional industrial sectors, market demand on employment lands has been increasingly driven by growth in the “knowledge-based” or “creative class” economies, including employment sectors such as advanced manufacturing, professional, scientific, and technical services, finance, insurance, real estate, information and culture, health, and education.

As previously mentioned, the development of a new provincially approved 80+ ha (200+ acre) Automotive Innovation Park, located adjacent to the L.S.R.A, is anticipated to represent a large component of job growth in the Township’s employment lands over the next decade and beyond. The Automotive Innovation Park is designed to accommodate over 700,000 sq.ft. of industrial space used for mechanical and performance shops, research and development labs, training and research, as well as other private commercial uses.

The Automotive Innovation Park is anticipated to accommodate employment in automotive engineering, advanced manufacturing, and research and development within an integrated campus development. A key feature of this development includes a 4-kilometre motor circuit for performance testing, training, research, and commercial use,⁸ a feature that is land extensive and would be difficult to accommodate within urban settings. The facility is expected to ultimately create more than 700 full-time jobs and 1,800 construction jobs. Construction of the Automotive Innovation Park is anticipated to begin in 2021.⁹

Located adjacent to the Automotive Innovation Park, a 33 ha (82 acre) parcel is also planned as a Medical Innovation Park, which will accommodate advanced

⁷ Employment in industrial type buildings

⁸ Ontario Construction News, Article: *Officials break ground on automotive innovation park near Barrie that will get local economy back on track*, August 26, 2020.

⁹ Ibid.



manufacturing facilities focused on medical and personal protective equipment.¹⁰ In addition to manufacturing, the park is also proposed to include research laboratories and distribution/warehousing facilities. It is noted that the Medical Innovation Park is not located in an Employment Area, and therefore represents a portion of future employment land employment located outside Employment Areas in the Township. It is anticipated that the Medical Innovation Park will be developed within the next 10 years.

In contrast to other urban land uses (e.g. commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the Township. For the Township of Oro-Medonte to continue to be competitive and attractive to a broad range of industrial and commercial sectors, the Township needs to ensure that it has a sufficient supply and market choice of employment lands. Most notably, this should include medium to larger sites with good transportation access and infrastructure services (including internet and broadband connectivity which is becoming increasingly essential for the knowledge-based economy).

Currently, the Township's remaining inventory of designated, vacant employment lands available over the forecast horizon is estimated at 130 gross ha (approximately 320 gross acres). A further 127 gross ha (approximately 313 gross acres) of designated employment lands has been identified as underutilized, about 80 ha (198 acres) of which is subject to the M.Z.O. that was approved November 1, 2019 for the Automotive Innovation Park.

The supply of vacant employment lands, as well as the opportunities to accommodate intensification, fall short in accommodating the employment lands demand to 2051. It is anticipated that the Township will need to designate an additional 83 gross ha (205 gross acres) of employment lands to accommodate the employment lands employment forecast to 2051 (refer to Figure 6).

¹⁰ Medical Innovation Park gets Oro-Medonte Council Support for MZO. July 18, 2020. OrilliaMatters.com



Figure 6
Township of Oro-Medonte
Employment Land Needs to 2051

| | | |
|--|-------------------|-----------|
| Employment Growth on Employment Lands | A | 2,100 |
| Growth Accommodated through Intensification | B | 750 |
| Employment Growth Adjusted for Intensification | $C = A - B$ | 1,350 |
| Density Assumption (jobs/gross ha) | d | 7 |
| Land Required (ha) (C/d) | (1) | 193 |
| Gross Vacant Employment Land (ha) - Gross | (2) | 130 |
| Land Vacancy Adjustment (15% of Gross Vacant Land) | (3) | 20 |
| Gross Vacant Employment Land Adjusted for Land Vacancy (ha) | | 110 |
| Vacant Employment Land Need, Gross ha (Deficit) | $(1) - (2) + (3)$ | 83 |

Location Options for Potential Employment Land Expansion Areas

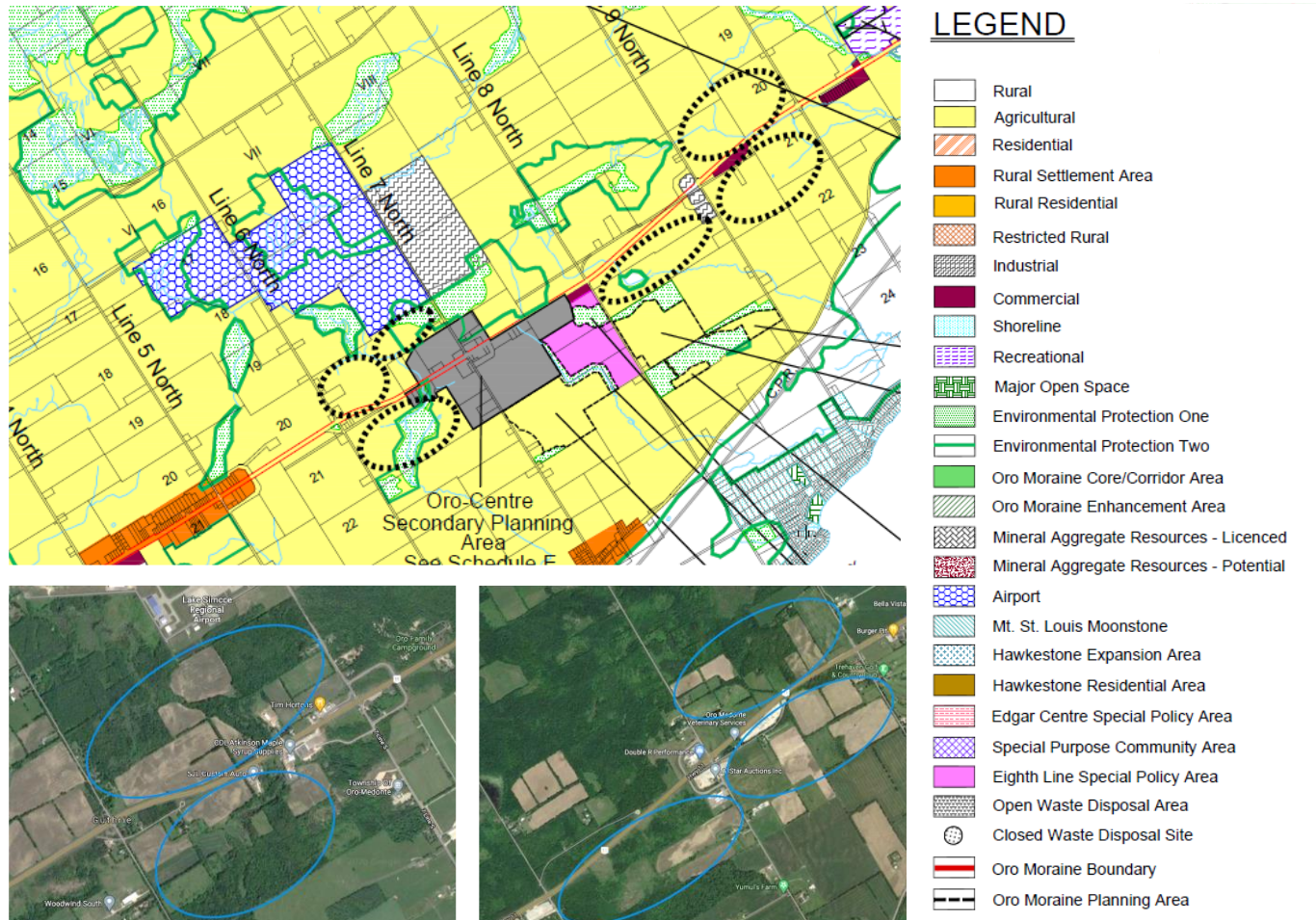
A framework for identifying employment land expansion options for the township has been identified. This includes size of parcels, access and visibility, contiguity, existing land use, and land-use compatibility with surrounding sites.

A number of potential new Employment Areas adjacent to and along Highway 11 within the Township of Oro-Medonte were considered in the analysis. This includes areas located north and south of Highway 11, and adjacent to the existing Employment Areas (including areas along Lines 6 – 9). Given the framework outlined above (and detailed in Chapter 8 of the report), two potential Employment Area expansion locations have been recommended as the best suited for the Township to prioritize.

These areas have been identified as potential locations of specific parcels for redesignation as employment lands.



Figure 7
Township of Oro-Medonte
Location Options for Employment Land Expansion



Policy Recommendations and Strategic Directions

In addition to the location options identified (refer to Figure 7), strategic directions and policy recommendations have been provided as part of the E.L.S. report that will assist the Township in effectively managing its supply of employment lands over the long term. These policy recommendations include the following:

- Aligning O.P. designations and zoning;
- Identifying promotional strategies for attracting businesses to the Township;
- Undertaking pre-feasibility assessments for vacant employment lands;



- Encouraging and defining appropriate employment-supportive uses on employment lands;
- Promoting growth on existing employment lands through intensification;
- Promoting and diversifying agriculture-related employment uses;
- Monitoring and tracking employment lands absorption as well as near-term and longer-term supply; and
- Building on the directions of the L.S.R.A. Strategic Plan, examine the current and long-term future use of the L.S.R.A. airport lands, including surrounding lands which could be used to develop synergies with Airport activities.



Report



Chapter 1

Introduction



1. Introduction

1.1 Terms of Reference

Watson & Associates Economists Ltd. (Watson), in partnership with Dillon Consulting Limited (Dillon), have been engaged by the Township of Oro-Medonte to undertake an Employment Land Strategy (E.L.S.). This E.L.S. will contribute to a long-term vision and planning policy framework which will enhance the Township's competitive position for employment lands employment. A key objective of this study is to assess the Township's long-term employment land needs to the year 2051, while also considering the adequacy and marketability of the Township's "market-ready" employment lands within the near term. The continued supply of employment lands will further provide increased local employment opportunities and help diversify the Township's tax base.

More specifically, this study provides the following:

- A review of the current provincial, Simcoe County, and local policy framework regarding employment lands. This includes, the Provincial Policy Statement, 2020 (P.P.S., 2020),¹ the Growth Plan for the Greater Golden Horseshoe, 2019 (Growth Plan, 2019),² Official Plan (O.P.) policies related to Employment Areas/lands as detailed by Simcoe County and the Township of Oro-Medonte. This review identifies potential gaps within the current policy framework.
- A review of regional and local macro-economic and demographic trends that are anticipated to impact the amount, type and location of the Township's long-term population and employment growth potential.
- An evaluation of the Township's current employment land supply and an assessment of "market readiness" of its employment lands within the context of evolving macro-economic trends and anticipated employment sectors.
- An assessment of longer-term employment land needs (i.e. supply versus demand) within the Township.

¹ Provincial Policy Statement, 2020. Ontario.

² A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, Ontario. Approved May 16, 2019; Amended August 28, 2020.



- Policy recommendations to promote and attract industrial growth in employment lands on an international stage.
- Location option framework and conceptual locations for future industrial/employment designations within the Township.

This study will form a background to the Township's O.P update to 2031 and further inform the 2051 employment projections to be undertaken as a part of Simcoe County's Municipal Comprehensive Review (M.C.R.) process.

1.2 What are Employment Lands and Why are They Important to the Township?

Employment lands (also known as industrial lands) typically include a broad range of designated lands, including light, medium and heavy industrial lands, business parks and rural industrial lands. Employment lands accommodate primarily export-based employment, including a wide range of industrial uses (e.g. manufacturing, distribution/logistics, transportation services), as well as specific commercial and institutional uses (e.g. office, service, ancillary/accessory retail) which generally support the industrial/business function of the Township's employment lands. A further discussion of the Township's employment lands within the context of current planning policy is provided in Chapter 2.

Employment lands form a vital component of Oro-Medonte's land-use structure and are an integral part of the local economic development potential of the economic region. They are also home to many of the Township's largest private-sector employers. Through development of its industrial land base, the Township is better positioned to build more balanced, complete, and competitive communities. Development typically accommodated on employment lands generates relatively strong economic multipliers (i.e. spin-off effects) that benefit the Township of Oro-Medonte directly and indirectly. In addition, employment lands development typically generates high-quality employment opportunities that can improve local socio-economic conditions (i.e. live/work opportunities). Furthermore, achieving non-residential growth adds to a community's assessment base, which can help support competitive property taxes and stronger municipal service levels. Industrial land development also tends to produce more positive net fiscal benefits for the community than other types of development (e.g.



residential and retail). Thus, a healthy balance between residential and non-residential development is considered an important policy objective for the Township of Oro-Medonte and the surrounding economic region.

In contrast to other land uses (e.g. commercial and mixed-use areas), employment lands provide the opportunity to accommodate export-based employment sectors that cannot be easily accommodated in other areas of the Township. For the Township of Oro-Medonte to continue to be competitive and attractive to a broad range of industrial and commercial sectors, the Township needs to ensure that it has a sufficient supply and market choice of serviced employment lands. Most notably, this should include a range of medium to larger sites with good transportation access.

1.3 Project Process

The E.L.S. has been prepared in two key phases. These phases, including key tasks and outcomes, are discussed in the following sections.

Phase 1: Evaluation of Employment Land Needs vs. Current Land Supply and Assessment of “Investment Ready” Employment Lands

Phase 1 included an assessment of macro-economic and policy context, followed by an evaluation of the Township’s current employment land supply, as well as near-term and longer-term needs. The evaluation has been undertaken in consultation with Township staff. Phase 1 of the study has been covered in Chapters 1 to 7.

Phase 2: Policy Recommendations

Phase 2 focuses on the amount and conceptual location of employment lands needed to meet future forecast demand to 2051, as well as recommendations for policy enhancements and strategies to promote and attract businesses and industrial growth in the Township. The report also provides some implementation tools for intensification of employment lands. Phase 2 of the study has been discussed in Chapter 8.



Chapter 2

Employment and Planning Policy Review



2. Employment and Planning Policy Review

2.1 Provincial Policy Context

2.1.1 Provincial Policy Statement, 2020

The P.P.S., 2020 provides high-level policy direction for planning and regulating the development and use of land within Ontario. All decisions that affect land-use planning for municipalities across Ontario must be consistent with the P.P.S., 2020. A few of the key over-arching policy directions are summarized below.

The policies in section 1 of the P.P.S., 2020, Building Strong Healthy Communities, provide guidance for facilitating efficient land use and development policies to support “strong, livable, healthy and resilient communities,” and protect the environment, public health, and safety of communities. Other policies in section 1 of the P.P.S., 2020 encourage the promotion of economic growth, diversification of the economic base, and employment opportunities in rural areas (Policy 1.1.4.1 f).

Facilitating economic development is outlined in Policy 1.3 of the P.P.S., 2020 and provides direction for a range of employment opportunities to ensure a diversified economic base. The policies encourage “facilitating the conditions for economic investment by identifying strategic sites for investment, monitoring availability and suitability of employment sites, including market-ready sites, and seeking to address potential barriers to investment” (Policy 1.3 c). The policies of section 1.3.2 on Employment Areas state that planning authorities should provide an appropriate mix and range of employment, opportunities for a diversified economic base, plan for, protect, and preserve Employment Areas, and ensure the necessary infrastructure is available. The O.P. review process is intended to assess current Employment Areas to ensure the designation is appropriate to the planned function of the Employment Area (Policy 1.3.2.2).



2.1.2 Growth Plan for the Greater Golden Horseshoe, 2019

The Growth Plan, 2019 outlines where and how growth and development should occur between now and 2051 within the Greater Golden Horseshoe (G.G.H.).¹ The Growth Plan, 2019 provides more detailed policy guidance for employment lands planning. The following highlights the relevant policies which inform the Township's E.L.S.:

- i. **Promoting development and economic competitiveness:** Economic competitiveness must be promoted through the efficient use of Employment Areas. This ensures sufficient land is available in appropriate locations to accommodate a variety of forecast employment growth, to plan better connected, integrated areas, and to align land-use planning and economic development goals to attract and retain investment and employment (Policy 2.2.5.1 a) to d)).
- ii. **Directing office, institutional and retail uses generally away from Employment Areas:** The Growth Plan, 2019 directs major office and appropriate major institutional uses to urban growth centres (U.G.C.s), major transit station areas (M.T.S.A.s), and other strategic growth areas with existing or planned frequent transit service. It also directs retail and office uses to locations that support active transportation and have existing or planned transit (Policy 2.2.5.2; Policy 2.2.5.3). It is noted that the Township of Oro-Medonte does not have a designated U.G.C. or identified M.T.S.A.s
- iii. **Guiding the planning of Employment Areas:** Municipalities are required to plan Employment Areas with transit-supportive built forms while minimizing surface parking and developing active transportation networks (Policy 2.2.5.4).
- iv. **Protecting lands near Goods Movement facilities:** The Growth Plan, 2019 directs municipalities to protect lands within settlement areas in proximity to major Goods Movement facilities for manufacturing, warehousing, and logistics, and appropriate ancillary facilities (Policy 2.2.5.5).
- v. **Designating and protecting Employment Areas:** Upper-tier municipalities are required to “designate all Employment Areas in official plans and protect them for appropriate employment uses over the long term” (Policy 2.2.5.6). In addition,

¹ A Place to Grow: Growth Plan for the Greater Golden Horseshoe, Office Consolidation, 2020, Ontario. Approved May 16, 2019; Amended August 28, 2020.



the Growth Plan, 2019 requires that municipalities prohibit residential and limit other sensitive uses that are not ancillary to the primary employment use, prohibit major retail uses and provide appropriate interface between employment and adjacent non-Employment Areas to maintain land-use compatibility (Policy 2.2.5.7). The Growth Plan, 2019 also identifies a number of criteria and conditions that must be met in order to consider the conversion of lands within Employment Areas to non-employment uses (Policy 2.2.5.9, 10, and 11).

- vi. **Identifying long-term population and employment projections:** Schedule 3 of the Growth Plan, 2019 outlines the population and employment projections for the County of Simcoe. The Growth Plan, 2019 forecasts 555,000 people and 198,000 jobs by 2051.
- vii. **Requiring municipalities to establish minimum density targets for all Employment Areas:** The Growth Plan, 2019 requires that all upper-tier municipalities establish minimum density targets, measured in jobs/ha, for all Employment Areas within settlement areas. These targets are to reflect current and anticipated type and scale of employment, as well as opportunities for intensification of Employment Areas on sites that support active transportation, are served by transit, and will be implemented through O.P. policies, designations, and zoning (Policy 2.2.5.13). It is acknowledged that the County of Simcoe has set the minimum density target for Oro-Medonte in accordance with the Growth Plan, 2006. This target may be revised through a M.C.R.
- viii. **Requiring lower-tier municipalities in the County of Simcoe to develop Official Plan policies to implement Economic Employment Districts:** The Growth Plan, 2019 requires the Township of Oro-Medonte's O.P. to have policies to support the economic employment district (Policy 6.4.6). The location, boundaries and appropriate uses have been established through consultation with the municipality and stakeholders (Policy 6.4.3). It is noted the economic Employment District is not a settlement area, yet the Growth Plan, 2019 states it is subject to Policy 2.2.5.5.
- ix. **Protecting Rural Areas Employment Uses:** The Growth Plan, 2019 states "existing employment areas outside of settlement areas on rural lands that were designated for employment uses in an official plan that was approved and in effect as of June 16, 2006 may continue to be permitted. Expansions to these



existing employment areas may be permitted only if necessary to support the immediate needs of existing businesses and if compatible with the surrounding uses” (Policy 2.2.9.5).

The Growth Plan, 2006 and Amendment 1 (2012) to the Growth Plan for the Simcoe sub-area was prepared and approved under the *Places to Grow Act, 2005*. The Growth Plan, 2006 contains the location, boundary of and uses permitted in the Lake Simcoe Regional Airport (L.S.R.A.) Economic Employment District issued by the Minister of Infrastructure on September 24, 2012 pursuant to Policy 6.4.3 of the Growth Plan. The L.S.R.A. Economic Employment District is identified and defined in the Growth Plan, 2006. The delineation of the L.S.R.A. Economic Employment District, as originally set out in the Growth Plan, 2006 Amendment 1, is presented on Figure 2-1.

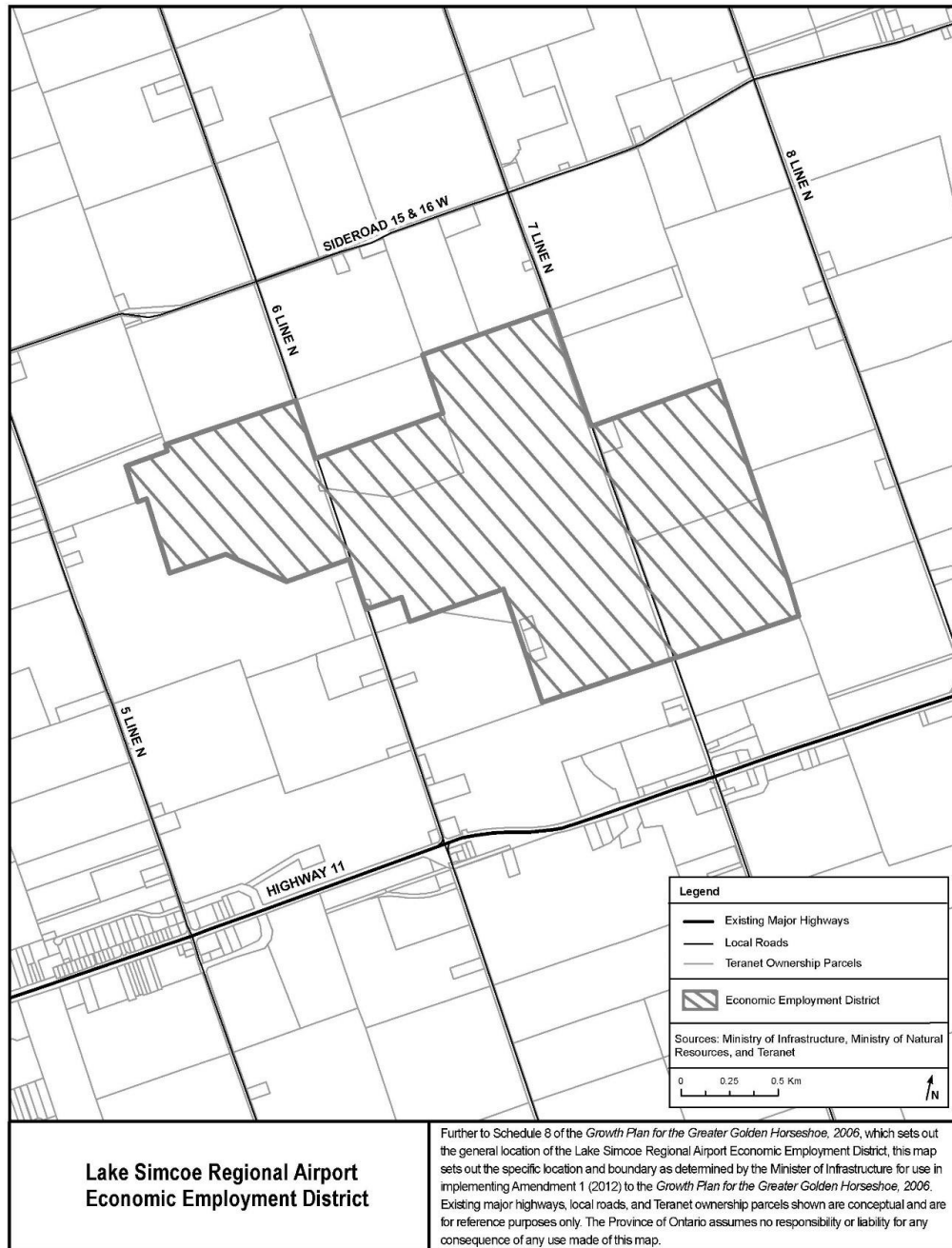
The Growth Plan, 2019 has also introduced a new policy framework that is intended to provide greater long-term protection for key Employment Areas that are provincially significant and to better coordinate efforts to support their contribution to economic growth and improve access to transit. Provincially Significant Employment Zones (P.S.E.Z.) are defined as:

Areas defined by the Minister in consultation with affected municipalities for the purpose of long-term planning for job creation and economic development. Provincially significant employment zones can consist of Employment Areas as well as mixed-use areas that contain a significant number of jobs.

There are no P.S.E.Z. within the Township of Oro-Medonte.



Figure 2-1
Lake Simcoe Regional Airport Economic Employment District



Source: <https://www.ontario.ca/document/simcoe-county-employment-areas-and-districts/lake-simcoe-regional-airport-economic-employment-district>, accessed December 2020.



2.1.3 Land Needs Assessment Methodology for the Greater Golden Horseshoe Region

On June 16, 2020, the Minister released the proposed Land Needs Assessment (L.N.A.) Methodology in the G.G.H. for consultation. The Minister formally issued the final methodology on August 28, 2020 in accordance with Policy 5.2.2.1 c of the Growth Plan, 2019² This methodology replaces the previous L.N.A. methodology for the G.G.H. that was issued on May 4, 2018. The revised L.N.A. methodology focuses on a more simplified and outcome-based approach in comparison to the 2018 L.N.A. methodology. Upper- and single-tier municipalities in the G.G.H. are required to use the methodology in combination with the policies of the Growth Plan, 2019 to assess the quantity of land required to accommodate forecast growth.

In accordance with the L.N.A. methodology, land needs are to be assessed across two different areas including Community Areas and Employment Areas, as defined below:

“Community Areas: Areas where most of the housing required to accommodate the forecasted population will be located, as well as most population-related jobs, most office jobs and some employment land employment jobs. Community areas include delineated built-up areas and designated greenfield areas.”

“Employment Areas: Areas where most of the employment land employment jobs are (i.e. employment in industrial-type buildings), as well as some office jobs and some population-related jobs, particularly those providing services to the Employment Area. Employment Areas may be located in both delineated built-up areas and designated greenfield areas.”³

The L.N.A. methodology prescribes the key steps to establishing Community Area and Employment Area land needs. The key steps for Community Area land needs are found in section 2 of the L.N.A. methodology, and in section 3 for Employment Area

² A Place to Grow: Growth Plan for the Greater Golden Horseshoe. Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020). Ontario. August 28, 2020.

³ Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 6 and 7.



land needs.^{4,5} This report has been prepared in accordance with the L.N.A. Methodology for the G.G.H. and the policies of the Growth Plan, 2019.

2.2 County Policy and Official Plan

The County of Simcoe O.P. (the Plan) was approved in 2016 by the Ontario Municipal Board (O.M.B.)⁶ and includes population and employment projections to the year 2031 by municipality. The Township of Oro-Medonte is estimated to have 27,000 people and 6,000 jobs by 2031. The County of Simcoe as a whole, including all municipalities, is forecast to have 416,000 people and 132,000 jobs by 2031. Growth policies in the Plan encourage multi-use development and expansion of employment opportunities, as well as potential expansion of existing rural Employment Areas.

The growth management framework of the Plan states the local municipalities will identify, plan for, protect and preserve Employment Areas within the local O.P.s for current and future employment uses (section 3.2.9). Conversion of employment lands within Employment Areas to non employment uses will be considered only through a municipal comprehensive review, where the following criteria can be demonstrated:

- There is need for the conversion;
- The local municipality will meet the employment forecasts allocated to the municipality pursuant to this Plan;
- The conversion will not adversely affect the overall viability of the Employment Area, and achievement of the intensification target, density targets, and other policies of this Plan;
- There is existing or planned infrastructure and public service facilities to accommodate the proposed conversion;
- The lands are not required over the long term for the employment purposes for which they are designated; and
- Cross-jurisdictional issues have been considered (section 3.2.10).

⁴ Land Needs Assessment Methodology for the Greater Golden Horseshoe (2020), pp. 8 to 14.

⁵ Ibid., pp. 15 to 18.

⁶ Now known as the Local Planning Appeal Tribunal (LPAT).



Rural Employment Areas that were established as of November 25, 2008 can continue to be recognized and may be considered for minor expansion if various conditions are met (sections 3.7.6 and 3.7.7).

The current Plan delineates strategic settlement Employment Areas and economic Employment Districts (section 3.9) with specialized employment opportunities for such lands.

- Strategic settlement Employment Areas are defined in the Plan as: “areas that are to be planned and protected for employment uses that require large lots of land and depend upon efficient movement of goods and access to Highway 400. These are not settlement areas. Major retail and residential uses are not permitted.” (section 5.8)
- Economic Employment Districts are defined in the Plan as those: “shown on Schedule 5.1.2 and are to be planned and protected for locally significant employment uses but are not settlement areas.” (section 5.8)
- Employment Areas are defined in the Plan as: “areas in an official plan for clusters of business and economic activities including, but not limited to, manufacturing, warehousing, offices, and associated retail and ancillary facilities.” (section 5.8)
- Rural Employment Areas are defined in the Plan as: “clusters of industrial and commercial uses, including vacant lands that are designated and zoned for such uses and are located in the Rural designation outside of settlement areas.” (section 5.8)

The Plan identified two strategic settlement Employment Areas and two economic Employment Districts in the County. These lands require comprehensive planning with direction from the Minister of Infrastructure to ensure long-term vitality and economic benefits (section 3.9). The strategic settlement Employment Areas and economic Employment District uses, locations, specific policies as well as protection of natural heritage systems or natural features and functions are to be determined in the applicable local O.P. The lands with this designation are considered greenfield area and subject to the density target of the respective municipality (section 3.9.7). Section 3.9.1 of the Plan is relevant to the economic Employment District within the Township of Oro-Medonte, and relevant to this study. Within the L.S.R.A. Economic Employment District, development will be in accordance with the directive issued by the Minister of Infrastructure on September 24, 2012.



The Plan identifies the growth projections for people and jobs and provides direction for the local municipal O.P.s to establish, protect, and develop employment uses and areas.

2.3 Township Policies and Official Plan

The Township of Oro-Medonte Official Plan (O.P.), October 2020 Office Consolidation intended to serve the Township to 2023. The O.P. has strategic objectives for growth, settlement, and economic development that play important roles in the future of employment uses. Section A2.7.2 of the O.P. includes a number of general policies to guide the economic development and employment uses:

- Establish, maintain and enhance employment lands that provide a range of job opportunities and a broad range of commercial and service facilities to meet the needs of the Township and beyond;
- Encourage the concentration of economic activity along Highway 11, or near the intersection of the 7th Line to act as one new area for employment, tourism, and retail uses;
- Direct employment, tourism, and retail uses to lands that can benefit from proximity to the airport; and
- Monitor trends for the supply of land for employment, to ensure that an adequate supply in appropriate locations is available at all times.

The O.P. identifies a range of land-use designations in section 3, four of which will be the focus of this study, including Industrial, Airport, Oro-Centre Limited Service Industrial and Oro-Centre Office/Industrial. Oro-Centre Limited Service and Oro-Centre Office/Industrial are located within the Oro-Centre Secondary Plan boundary (section C17). Lands designated within each land use have been identified within the current O.P. on Schedule A: Land Use, as shown in Figure 2-2. Lands designated within Oro-Centre are identified in the current O.P. on Schedule E and depicted in Figure 2-3. The following highlights the function and permitted uses within each designation:

- **Industrial:** These lands are intended to function as space for industrial employment opportunities, to maximize the existing infrastructure. Services including water and sewage will be private, with new land uses being limited to developments that require water usage only for employees. The design of



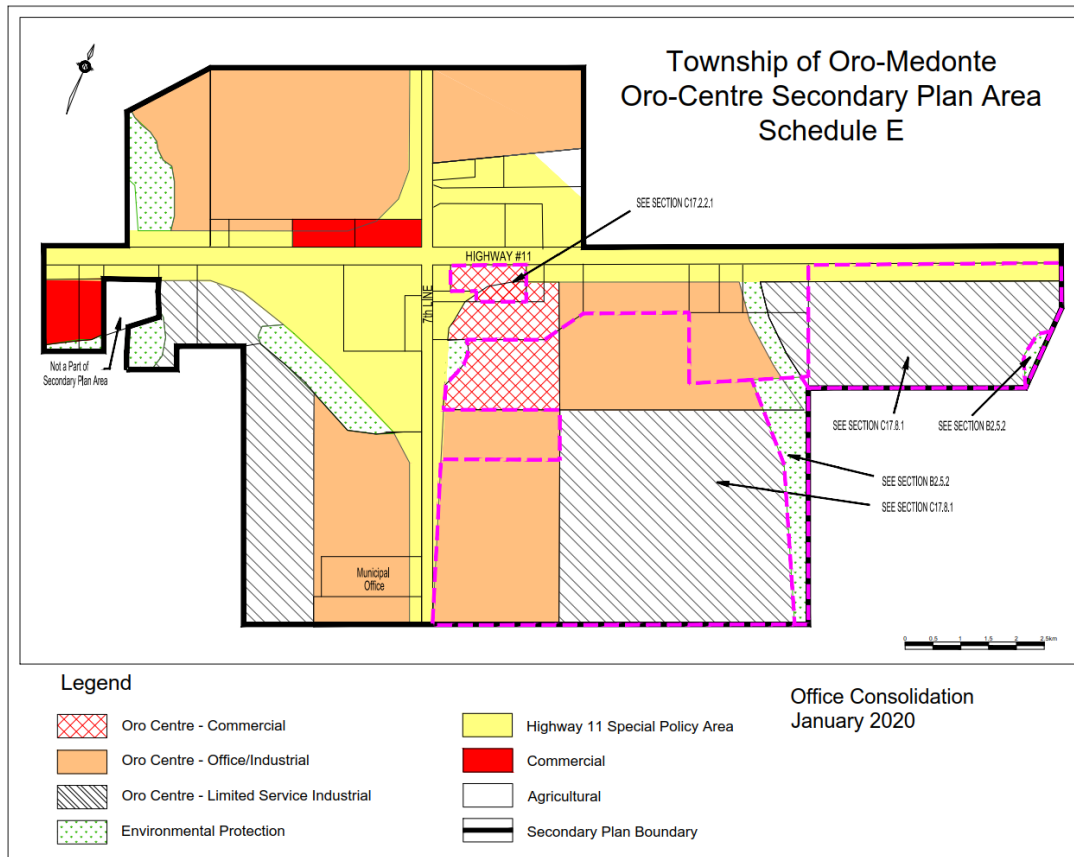
- new industrial development is intended to improve the appearance of the Highway 11 Corridor while also being sensitive to the rural development. The permitted uses include:
- a. manufacturing, assembly, processing, fabrication, storage and/or warehousing uses and research establishments, wholesaling establishments, portable asphalt plants and similar uses;
 - b. Accessory retail uses are also permitted, provided they occupy only a limited amount of the gross floor area of the industrial use; and
 - c. Parking lots for commuters or for a commercial use at another location may also be permitted.
- **Airport:** These lands include the L.S.R.A. The Airport lands play an important role in the regional economy and are intended to be privately serviced, with restricted uses of water that is only for employee uses. The designated land boundary is in alignment with the Minister of Infrastructure. The permitted uses include:
 - a. airport facilities and accessory uses; and
 - b. airport-related manufacturing, assembly, maintenance, processing, fabrication, storage and/or warehousing uses, research establishments, business offices, portable asphalt plants, and wholesaling establishments.
 - **Oro-Centre Limited Service Industrial:** These lands are not municipally or communally serviced; they are intended to be used for industrial uses that can contribute to the Township's economy. It is intended that the lands in this designation be primarily used for land-extensive uses. The permitted uses include:
 - a. outdoor storage uses, trucking terminals and similar uses;
 - b. outdoor storage, screened from adjacent roadways; and
 - c. outdoor recreational uses.
 - **Oro-Centre Office/Industrial:** These lands are not municipally or communally serviced; they are intended to function with a wide range of office and industrial land uses to support and generate employment opportunities within the Township. The development is intended to be aesthetically pleasing to contribute to the high-quality image of Oro-Centre. The permitted uses include:
 - a. manufacturing, assembly, processing, and fabrication uses;
 - b. warehousing uses;
 - c. research establishments;



- d. business offices;
- e. institutional uses such as places of worship;
- f. outdoor storage uses;
- g. accessory retail uses, less than 25% of the gross floor area; and
- h. outdoor storage area, screened from adjacent roadways.



Figure 2-3
Township of Oro-Medonte
Oro-Centre Secondary Plan Area, Schedule E



Source: Township of Oro-Medonte Official Plan

2.4 Zoning By-law

Zoning By-law 97-95, September 2020 Consolidation implements the policies of the Township of Oro-Medonte O.P. Based on data provided by the Township, the following employments zones are noted:⁷

- The **Rural Industrial (IR) Zone** applies to industrial uses that are not located in the settlement areas or adjacent to Highway 11.

⁷ These zones include lands not designated within the employment lands, such as lands designated Agricultural on Figure 2-2. For the purposes of the Employment Lands Strategy, lands designated for employment use are the primary focus of the analysis.



- The **Economic Development (ED) Zone** applies to industrial uses adjacent to Highway 11.
- The **Airport (AP) Zone** applies to lands that are the site of the L.S.R.A.
- The **Waste Disposal (WD) Zone** applies to the one open waste disposal site and the one closed waste disposal site in the Township.
- The **Mineral Aggregate Resource One (MAR1) Zone** applies to lands that are the site of a gravel pit.
- The **Mineral Aggregate Resource Two (MAR2) Zone** applies to lands that have been identified in the O.P. as having a potential use for aggregate extraction.
- The **Institutional (I) Zone** applies to lands that are used by the community, such as places of worship and schools.
- The **Future Development (FD) Zone** applies to lands in the Horseshoe Valley Village.

2.4.1 Minister's Zoning Order

The following Minister's Zoning Orders (MZO) have been issued in the Township of Oro-Medonte and are considered as part of this strategy:

- Minister's Zoning Order (O. Reg. 362/19) issued on November 1, 2019 to permit a range of automotive related industrial uses in addition to the already permitted airport related and other industrial uses. The subject lands are located within the L.S.R.A Economic Employment District in accordance with the Provincial Growth Plan and are located across Line 7 from the L.S.R.A. The lands have approximately 1,120 metres (3674 feet) of frontage on Line 7 North and are approximately 86.1 hectares (212.75 acres) in area. A Draft Plan of Subdivision Application was brought to Township of Oro-Medonte Council on January 13, 2021 for approval. This site plan was to facilitate phase one of the overall development plan and includes the motor sports track and associated building and pavilion and infrastructure to support this phase and future phases.
- Minister's Zoning Order (O. Reg. 609/20) issued October 30, 2020 to permit the development of an industrial park focusing on the manufacturing of



medical products and personal protective equipment. The subject lands are located on the east side of Line 7, south of Sideroad 15&16 East.

2.5 Summary of Policy Context and Gaps

The policies guiding employment opportunities at the County and Township level are critical to a successful economic future and employment growth.

- The P.P.S., 2020 and the Growth Plan, 2019 indicate the requirement for the County of Simcoe to identify long-term employment and population projections to 2051.
- Through coordination with the County's M.C.R., the Township shall review the employment land supply and demand, taking into consideration any of the conversions, to ensure the Township will have the appropriate amount of employment lands for a variety of employment uses to accommodate forecast growth to 2051.
- The Township includes an Economic Employment District, for the L.S.R.A. as defined by the Growth Plan, 2006. The Township must consider the limitations and future growth on and surrounding those lands, with specific policies to ensure long-term vitality.
- The Township does not have lands considered settlement areas; therefore, rural area policies on employment uses and the expansion of Employment Areas shall apply in accordance with Growth Plan section 2.2.9.5. This means expansion to existing Employment Areas is only permitted where necessary to support the immediate need of existing businesses and if compatible with the surrounding uses.
- The Township's zoning by-law should be updated to align with the Township's O.P., and to implement any modification that results from this E.L.S.



Chapter 3

Macro-Economic Trends



3. Macro-Economic Trends

The following chapter provides a summary of the macro-economic trends influencing regional labour force and employment trends within Ontario, Simcoe County, and the Township of Oro-Medonte. In examining the Township's employment lands, it is essential to understand the broader influences and factors that affect the regional economy as a whole. This section briefly examines recent macro-economic trends influencing labour force and employment trends at various levels, including nationally, provincially, the sub-provincial area (G.G.H.) and regionally (Simcoe County).

3.1 Global Economic Trends and International Trade

Following steady economic growth since the world economy rebounded from the 2008/2009 financial crisis, the world changed dramatically in 2020. The December 2019 outbreak of coronavirus disease (COVID-19) in Wuhan, China was officially declared a global pandemic by the World Health Organization (W.H.O.) on March 12, 2020 and has inflicted rising economic and human costs across the world. In response to the threat of further escalation associated with the spread of the virus, governments around the world implemented quarantine and “social distancing” practices in what has been referred to as the “Great Lockdown.”

To date, the downward impact of these containment measures on global economic output, commodity prices, and consumer spending has been severe. Economic sectors such as travel and tourism, accommodation and food, manufacturing, energy, and finance have been hit particularly hard. Furthermore, required modifications to social behavior (i.e. physical distancing) and increased work at home requirements resulting from government-induced containment measures and increased health risks have resulted in significant economic disruption largely related to changes in consumer demand and consumption patterns. Lastly, escalating tensions and constraints related to international trade have also started to raise further questions regarding the potential vulnerabilities of globalization and the structure of current global supply chains.

At present, the level of sustained economic impact related to this “exogenous shock” to the world and Canadian economies is still largely unknown. Notwithstanding this uncertainty, it is generally clear that the longer COVID-19 persists on an international scale, the greater the severity of the current global recession. In its latest World



Economic Outlook, the International Monetary Fund (I.M.F.) baseline scenario estimated the global economy contracted by -4.4% in 2020, which represented a much more significant economic contraction than what was experienced during height of the 2008/2009 financial crisis. For advanced economies, the I.M.F. estimated -5.8% growth in 2020, while emerging markets and developing economies were projected to experience negative growth of -3.3%.

As previously noted, it is important to recognize that there is a great deal of uncertainty around the duration and intensity of the pandemic as well as the effectiveness of policy responses. As such, more or less adverse scenarios are a possibility.¹ The World Trade Organization (W.T.O.) forecast in October 2020 that the volume of world merchandise trade would decline by -9.2% in 2020 and rebound by 7.2% in 2021. This expected 2020 decline was less than the drop previously projected in April 2020, which forecast a 12.9% decrease even under an “optimistic scenario.”² This global economic recovery may lose momentum, however, as COVID-19 infections across the globe surge again.

For Canada’s largest trading partner, the United States (U.S.), real G.D.P. (gross domestic product) was forecast to contract by -5.9% in 2020 and rebound by 3.9% in 2021.³ The recovery of the U.S. economy will largely depend on the U.S. administration’s response in dealing with the virus domestically, in conjunction with their approach to on-going international trade and protectionist policies.^{4,5}

The trade war between the U.S. and China, which began in 2018, has been a steady source of volatility for global markets and has negatively impacted global investment

¹ World Economic Outlook. International Monetary Fund. Chapter 1 The Great Lockdown. October 2020.

² <https://sdg.iisd.org/news/wto-identifies-early-signs-of-covid-19-rebound-revises-trade-growth-projections/#:~:text=The%20World%20Trade%20Organization%20forecasts,was%20last%20forecast%20at%202021.3%25>.

³ World Economic Outlook. International Monetary Fund. Chapter 1 The Great Lockdown. October 2020.

⁴ Ibid.

⁵ U.S. coronavirus stimulus checks: are you eligible and how much will you get? The Guardian. April 2020.



growth.⁶ Potential trade tensions between the U.S. and China, the world's two largest economies, continues to add risk to global economic growth and further add to trade disruption as well as near-term market volatility.^{7,8}

3.2 National and Provincial Economic Outlook

3.2.1 Ontario Economic Outlook within the Canadian Context

The Ontario economy is facing significant structural changes. Over the past several decades, the provincial economic base, as measured by G.D.P. output, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to the services-producing sector. This has largely been driven by G.D.P. declines in the manufacturing sector which were accelerated as a result of the 2008/2009 global economic downturn. It noted that these G.D.P. declines in the manufacturing sector had started to show signs of stabilization over the past several years, prior to the recent global recession of 2020.

Over the past decade, the Ontario economy experienced a steady rebound in economic activity since the 2008/2009 downturn; however, this recovery was relatively slow to materialize with levels sharply rebounding from 2013 to 2018, as illustrated in Figure 3-1. As previously mentioned, this economic rebound has been partially driven by a gradual recovery in the manufacturing sector, fueled by a lower-valued Canadian dollar (relative to the years directly following the 2008/2009 global financial crisis) and the gradual strengthening of the U.S. economy.⁹ Growth in 2019 eased to 1.6%, largely as a result of a tightening labour market and slowing global economic growth.¹⁰

While the recent performance of the Ontario economy has remained relatively strong over the past several years through to early 2020, the COVID-19 pandemic poses significant risks to the national and provincial economies that are important to

⁶ The Investment Cost of the U.S-China Trade War. Liberty Street Economics. May 28, 2020.

⁷ U.S. China Trade Tensions Are Back: Global Economy Week Ahead, Bloomberg, May 23, 2020.

⁸ A U.S.-China trade war is the last thing the world economy needs now, CNN Business, May 19, 2020.

⁹ Valued at approximately \$0.79 U.S. as of January 2021.

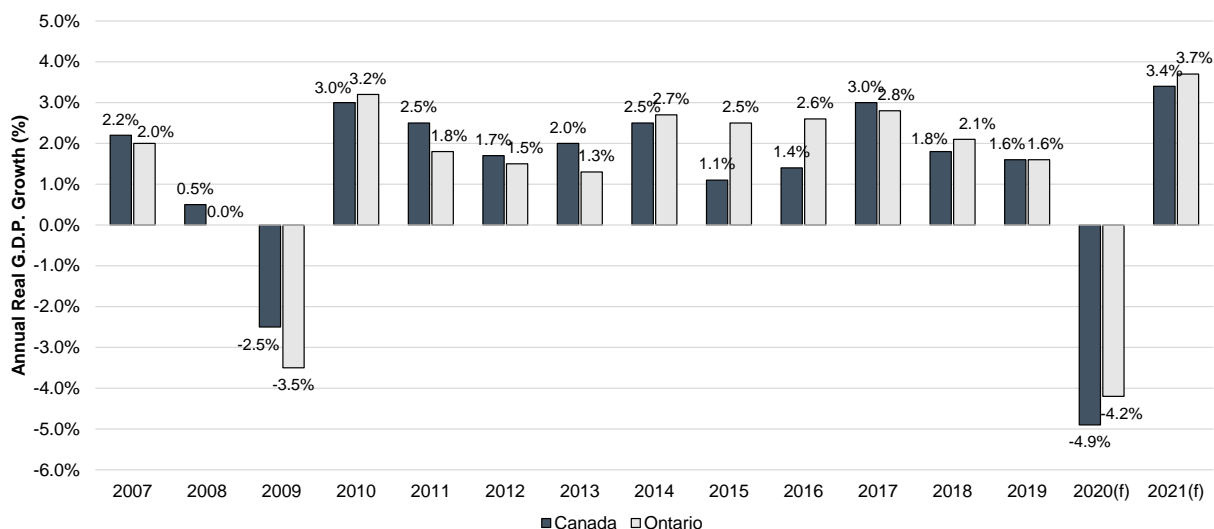
¹⁰ BMO Provincial Outlook, Spring 2019.



recognize. As illustrated in Figure 3-1, the Ontario economy is forecast to contract -4.2% in 2020 before growth rebounds 3.7% in 2021.¹¹

Domestically, the Ontario housing market also continues to pose a risk to the overall economy, which is important to recognize when considering forecast labour force and employment growth trends. The sharp rise in Ontario's housing prices, particularly in the Greater Toronto and Hamilton Area (G.T.H.A.), has contributed to record consumer debt loads and eroded housing affordability. Over the long term, the broader outlook for the Ontario housing market remains positive, but subject to significant variation at the regional level.

Figure 3-1
Annual Real G.D.P. Growth, Ontario and Canada
Historical (2007 to 2019), and Forecast (2020 to 2021)



Source: 2007 to 2018 derived from B.M.O. Capital Markets Economics, Provincial Economic Outlook, and 2019 to 2021 from RBC Economics Provincial Outlook - Update, April 2020, by Watson & Associates Economists Ltd.
Note: 2020 to 2021 are forecast by RBC Economics.

3.2.2 Emerging Industry Sector and Labour Force Trends

3.2.2.1 Ontario's Shifting Economic Structure

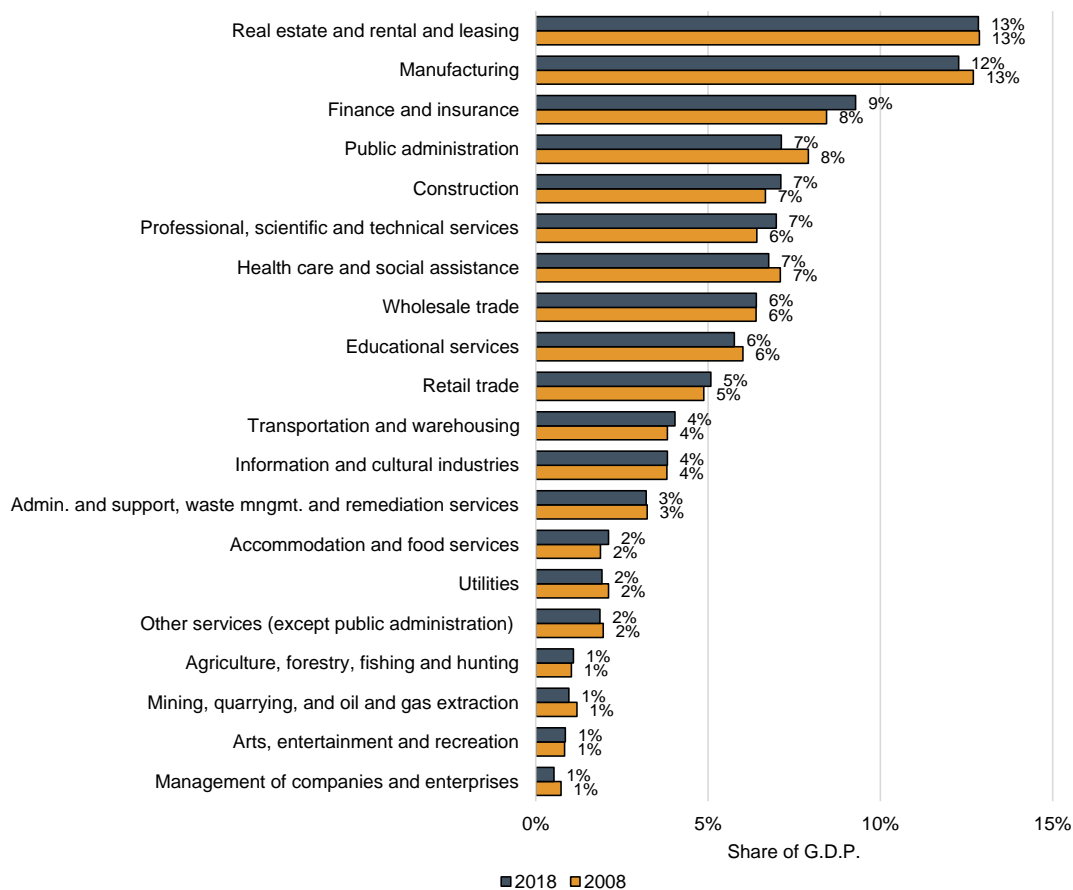
As previously mentioned, Ontario's economy is transitioning from goods to services production. The trend towards more knowledge-intensive and creative forms of

¹¹ COVID-19 Recession Deepens Fast from Coast to Coast. RBC Economics. April 13, 2020.



economic activity is evident across many sectors within both the broader national, provincial, and G.G.H. economies. Employment sectors that are anticipated to lead the Ontario economy with respect to economic output and employment growth include real estate and rental leasing, manufacturing, financial services, construction, professional, scientific and technical services, health care and social services, public administration, education, wholesale trade, transportation and warehousing, information and cultural industries, retail trade and accommodation and food services.

Figure 3-2
Province of Ontario G.D.P. Growth by Industry, 2011 and 2018



Source: Derived from Statistics Canada GDP by Industry (chained to 2012 dollars) data, CANSIM Table 36-10-0402-010 by Watson & Associates Economists Ltd., 2020.

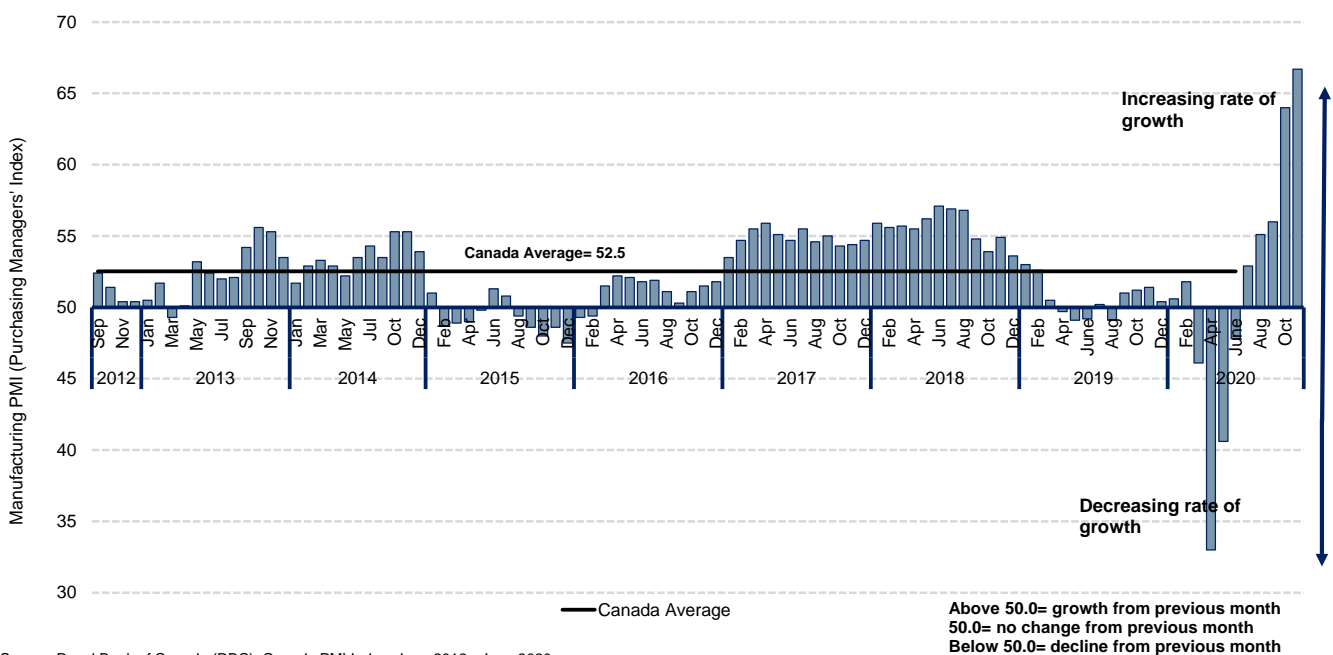
3.2.2.2 Outlook for the Manufacturing Sector

The Purchasing Managers' Index (P.M.I.) is a prevailing economic indicator for economic trends in the manufacturing and services sectors, which is based on



purchasing managers' market condition outlooks, and serves as a key measure of the direction of the manufacturing sector on a monthly basis. The P.M.I. index ranges between a number of 1 to 100. A P.M.I. value greater than 50 represents an expansion relative to the previous month, while a P.M.I. value less than 50 represents a contraction. Figure 3-3 summarizes the P.M.I. index for Canada between 2012 and 2020 (April). As illustrated in Figure 3-3, the P.M.I. index has largely exhibited moderate to strong expansion between 2012 and 2018 with the exception of 2015, as well as briefly in 2013, early 2016, and mid-2019. The P.M.I. index strongly contracted in March 2020 due to the negative effects of COVID-19 on the global economy, international trade, and the general demand for goods and services. These conditions worsened into April 2020; however, they showed signs of a moderate rebound in May and June and strong growth from August to November 2020.

Figure 3-3
Purchasing Managers' Index for Canada, 2001 to 2020 Y.T.D.



While manufacturing remains vitally important to the provincial economy with respect to jobs and economic output, this sector is not anticipated to generate significant labour-force growth across the Province over the coming decades. While there will continue to be a manufacturing focus in Ontario, industrial processes have become more capital/technology intensive and automated. The highly competitive nature of the



manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive. As a result of increased efficiencies in the manufacturing sector, G.D.P. has increased relative to generally flat labour force trends as G.D.P. output per employee has risen.

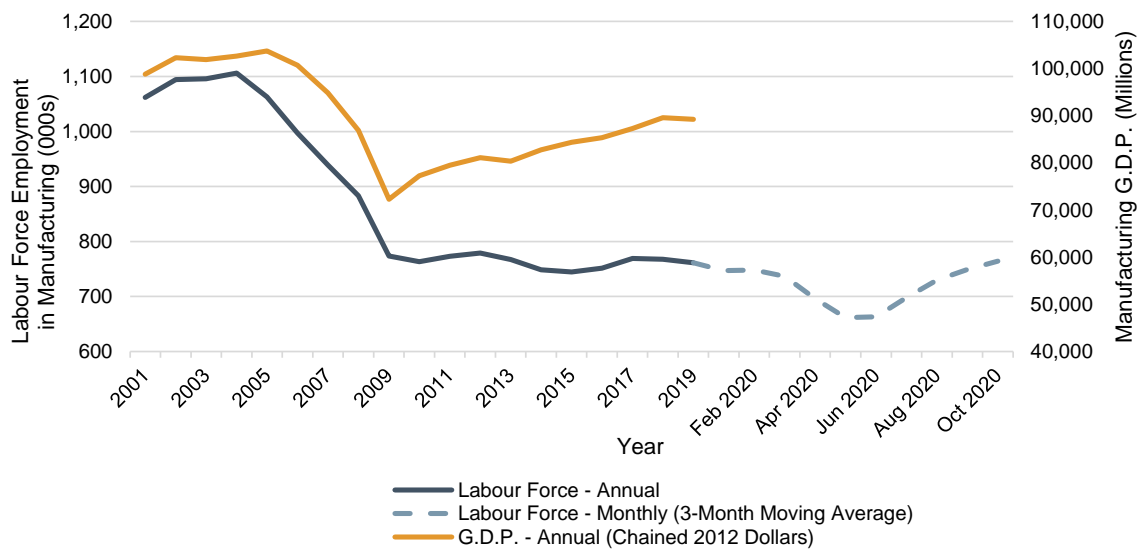
As summarized in Figure 3-4, the manufacturing sector in Ontario experienced significant declines between 2004 and 2009 with respect to labour force and G.D.P. Between 2009 and 2019, however, provincial labour force levels stabilized and G.D.P. output showed signs of recovery in the manufacturing sector. While showing modest growth since 2016, labour force levels in the manufacturing sector declined after February 2020 due to the impacts of COVID-19 but rebounded since June 2020 to October 2020.

In view of the potential impacts of the second wave of COVID -19, on December 21, 2020, the Provincial Government announced another provincewide shutdown effective as of Saturday, December 26, 2020.¹² At present, the economic impacts from this shutdown on the Ontario manufacturing sector and the broader economy are unclear.

¹² <https://www.ontario.ca/page/covid-19-provincewide-shutdown> Updated: January 7, 2021. Published: December 21, 2020



Figure 3-4
Manufacturing Labour Force Employment and G.D.P. in Ontario, 2001 to 2020 Y.T.D.



Source: Annual labour force data from Statistics Canada Labour Force Survey, Table 282-0125, and monthly data from Table 14-10-0091-01. Annual G.D.P. data from Statistics Canada Table 36-10-0402-01, by Watson & Associates Economists Ltd., 2020.

3.3 Regional Employment Trends

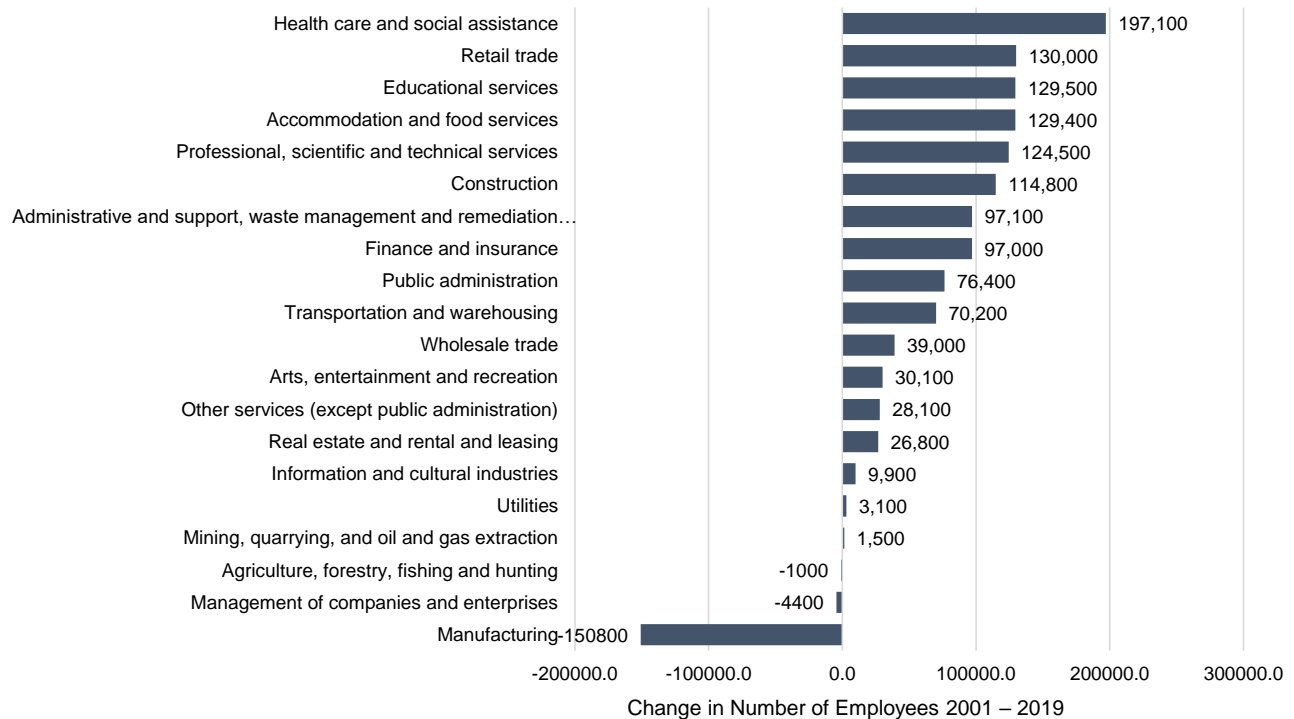
This section examines labour force trends over the past 20 years in the G.G.H. and Simcoe County. These trends are important to understand given the close relationship between regional labour force growth, net migration, and population growth.

3.3.1 Employment Trends in G.G.H

Total employment has grown by 35% within the G.G.H. from 2001 to 2019. While this region has experienced a large increase in service and knowledge-based sectors, manufacturing and primary sectors have shown a decrease in the number of jobs within this period. With respect to employment, the sectors with the highest growth have been health care and social assistance, education, accommodation and food services, and retail trade.



Figure 3-5
Greater Golden Horseshoe
Change in Employment, 2001 to 2019



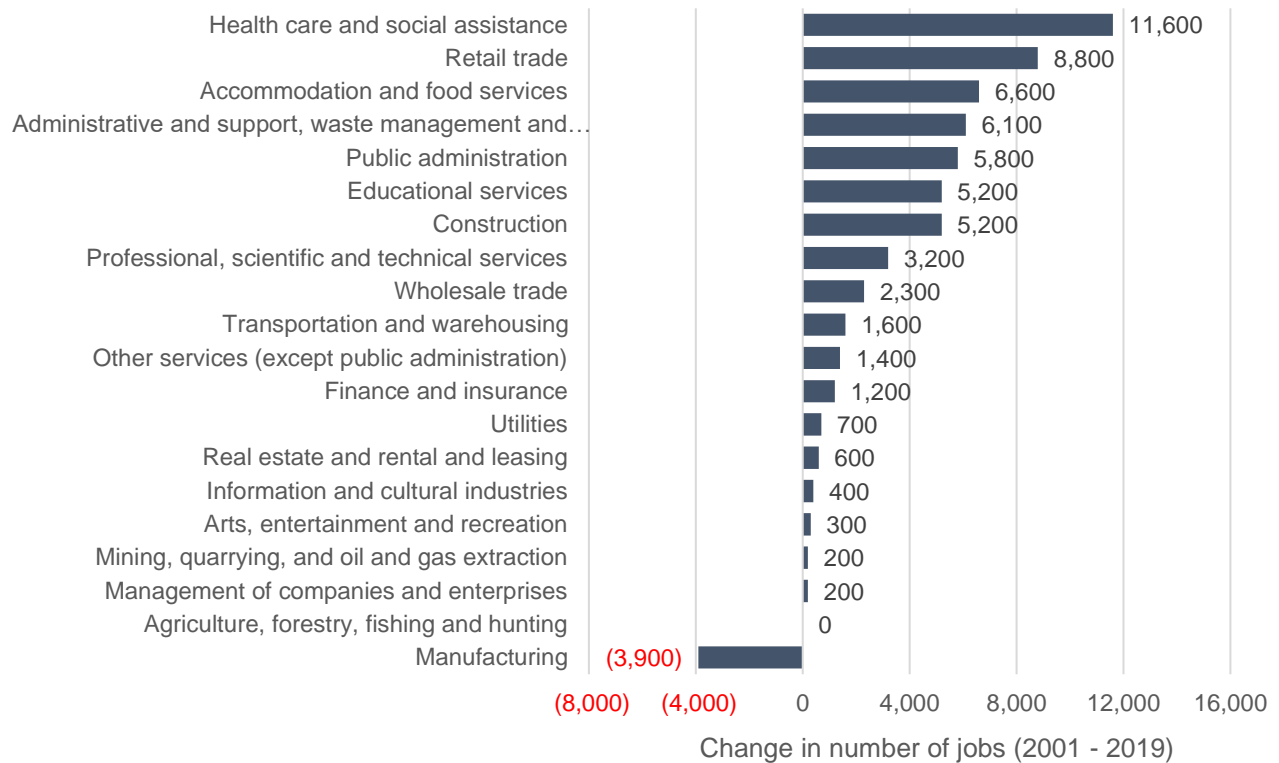
Source: Derived from EMSI data (employees only) by Watson & Associates Economists Ltd., 2020.

3.3.2 Simcoe County Employment Trends

In many respects, recent employment trends within Simcoe County have mirrored the broader trends experienced across the G.G.H. and the Province as a whole, as outlined in Figure 3-6. Strong population growth across the County has fueled steady growth in population-related and other service sectors including health care, educational services, professional, scientific and technical services, administrative support, retail, and accommodation and food services. Also, steady residential and non-residential development activity has supported strong employment growth in the construction sector. Similar to the G.G.H., Simcoe County has shown a decrease in jobs within the manufacturing sector.



Figure 3-6
Simcoe Area
Change in Employment, 2001 to 2019



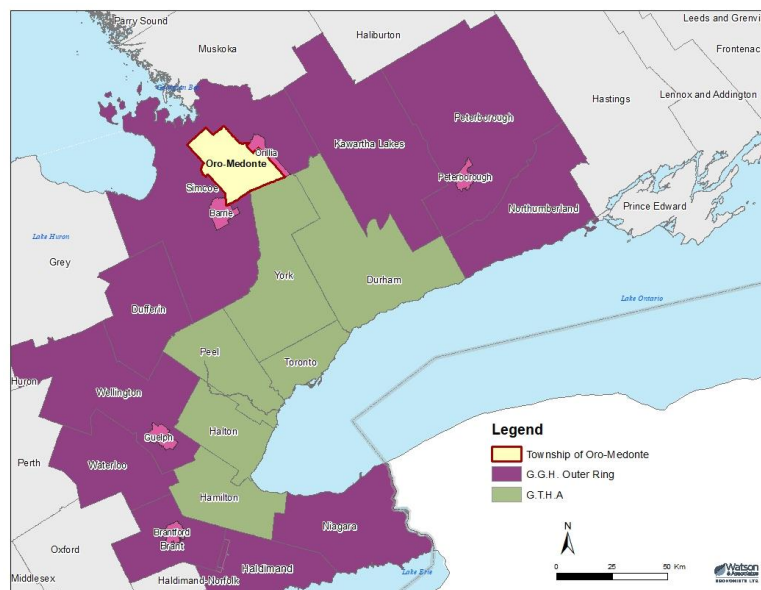
Source: Derived from EMSI data by Watson and Associates Economists Ltd. 2020



3.4 Regional Growth Context

The future economic growth potential of Simcoe County, including the Township of Oro-Medonte, is strongly correlated with the growth outlook and competitiveness of the broader regional G.G.H. economy. This region comprises the municipalities that make up the G.T.H.A., as well as the surrounding Regions/Counties within Central Ontario, known as the G.G.H. Outer Ring, which extends from Haldimand County in the southwest to Simcoe County in the north and Peterborough County in the northeast (refer to Figure 3-7).

Figure 3-7
Township of Oro-Medonte within the Context of the G.G.H.



Source: Compiled by Watson & Associates Economists Ltd. 2020

As identified in the Growth Plan, 2019 (as amended through Proposed Amendment 1), the long-term outlook for the G.G.H. is positive, characterized by strong population growth primarily through migration, fueled by economic growth that is increasingly concentrated in large urban centres. The population of the G.G.H. is forecast to increase from 9.5 million in 2016 to 14.9 million in 2051.¹³ This represents a population increase of 5.3 million people (153,000 annually), or 1.3% annually between 2016 and

¹³ As previously mentioned, proposed Amendment 1 to the Growth Plan extends the Schedule 3 forecast to 2051.



2051. With respect to the region's economic potential, the G.G.H. employment base is forecast to increase from 4.6 million in 2016 to 7 million in 2051. This represents an employment increase of 2.4 million jobs (69,000 annually), or 1.2% annually between 2016 and 2051. Currently, the G.G.H. represents the fourth largest and one of the fastest growing larger City/Regions in North America.

The G.G.H. represents the economic powerhouse of Ontario and the centre of a large portion of the economic activity in Canada. The G.G.H. is also economically diverse with most of the top 20 traded industry clusters throughout North America having a strong presence in this region. The G.G.H. industrial and office commercial real estate markets within this region are significant, having the third and sixth largest inventories, respectively, in North America.¹⁴

With a robust economy and diverse mix of export-based employment sectors, the G.G.H. is highly attractive on an international level to new businesses and investors. The G.G.H. also has a strong appeal given the area's regional infrastructure (i.e. Toronto Pearson International Airport (T.P.I.A.), other regional airports, provincial highways, inter-modal facilities), access to labour force, post-secondary institutions, and proximity to the U.S. border. In turn, this continues to support steady population and housing growth within this region, largely driven by international and inter-provincial net migration to this region.

Figure 3-8 through Figure 3-10 summarize the long-term population employment growth forecast for the G.G.H. between the G.T.H.A. and the G.G.H. Outer Ring. As summarized in Figure 3-8, the G.T.H.A. has historically experienced greater population and employment growth relative to the G.G.H. Outer Ring over the 2001 to 2016 period. Looking forward, forecast annual population and employment growth within the G.G.H. Outer Ring is anticipated to increase significantly, driven by continued outward growth pressure from the G.T.H.A. Comparatively, the City of Barrie and Simcoe County represent the fastest growing Outer Ring municipalities within the G.G.H. Outer Ring with respect to long-term population and employment growth.

¹⁴ Source: Derived from Cushman & Wakefield Toronto Industrial Market Beat and U.S. Industrial Market Beat Snapshot, Q3 2017 and Cushman & Wakefield Toronto Office Market Beat and U.S. Office Market Beat Snapshot, Q3 2017 by Watson & Associates Economists Ltd.



Figure 3-8
Greater Golden Horseshoe (G.G.H.)
Historical and Forecast Population Growth 2001 to 2051

| AREA | POPULATION | | | 2001 - 2016 | | | 2016 - 2051 | | |
|---------------------|------------------|------------------|-------------------|-------------------------|--------------------------|-------------------------------|-------------------------|--------------------------|-------------------------------|
| | 2001 | 2016 | 2051 | Total Population Growth | Annual Population Growth | Annual Population Growth Rate | Total Population Growth | Annual Population Growth | Annual Population Growth Rate |
| G.T.A.H. | 5,807,000 | 7,180,000 | 11,172,000 | 1,373,000 | 91,533 | 1.4% | 3,992,000 | 114,057 | 1.3% |
| G.G.H. OUTER RING | 1,971,000 | 2,289,000 | 3,703,000 | 318,000 | 21,200 | 0.9% | 1,414,000 | 40,400 | 1.3% |
| TOTAL G.G.H. | 7,778,000 | 9,469,000 | 14,875,000 | 1,691,000 | 112,733 | 1.3% | 5,406,000 | 154,457 | 1.3% |

Source: 2001 and 2016 derived from Statistics Canada Census Data, 2051 data derived from A Place to Grow : Growth Plan for the Greater Golden Horseshoe (2020). Figure by Watson & Associates Economists Ltd. , 2020

Note : Population includes the net Census undercount

Figure 3-9
Greater Golden Horseshoe (G.G.H.)
Historical and Forecast Employment Growth 2001 to 2051

| AREA | EMPLOYMENT | | | 2001 - 2016 | | | 2016 - 2051 | | |
|---------------------|------------------|------------------|------------------|-------------------------|--------------------------|-------------------------------|-------------------------|--------------------------|-------------------------------|
| | 2001 | 2016 | 2051 | Total Employment Growth | Annual Employment Growth | Annual Employment Growth Rate | Total Employment Growth | Annual Employment Growth | Annual Employment Growth Rate |
| G.T.A.H. | 2,938,000 | 3,564,000 | 5,360,000 | 626,000 | 41,733 | 1.3% | 1,796,000 | 51,314 | 1.2% |
| G.G.H. OUTER RING | 863,000 | 1,008,000 | 1,648,000 | 145,000 | 9,667 | 1.0% | 640,000 | 18,286 | 1.3% |
| TOTAL G.G.H. | 3,801,000 | 4,572,000 | 7,008,000 | 771,000 | 51,400 | 1.2% | 2,436,000 | 69,600 | 1.2% |

Source: 2001 and 2016 derived from Statistics Canada Census Data, 2051 data derived from A Place to Grow : Growth Plan for the Greater Golden Horseshoe (2020). Figure by Watson & Associates Economists Ltd. , 2020

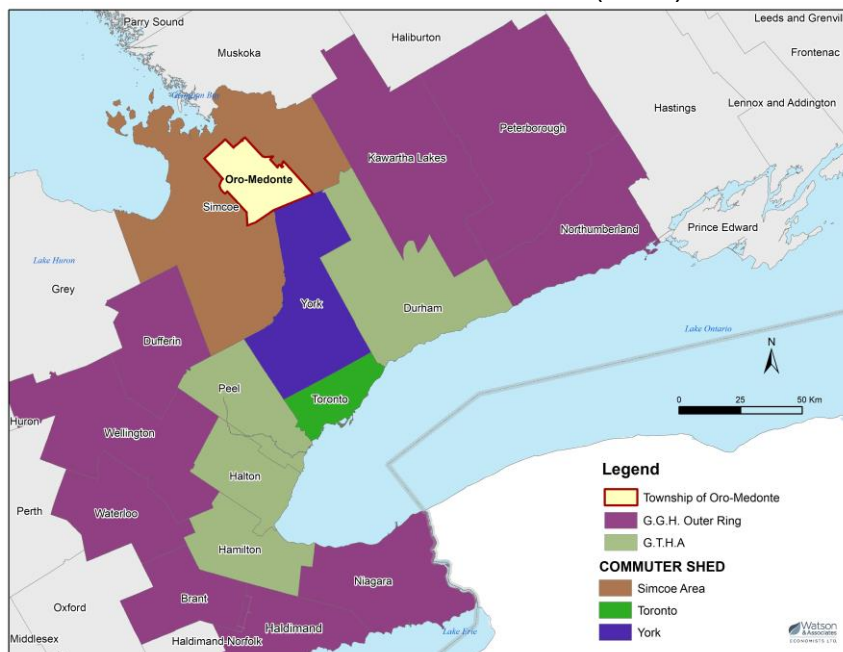


3.5 Outward G.T.H.A. Development Pressure will Continue to be a Key Growth Driver for Simcoe Area, Including the Township of Oro-Medonte

As the remaining greenfield areas in the more mature districts of the G.T.H.A. continue to build out and housing prices steadily rise, increasing outward growth pressure will be placed on the outlying municipalities of the G.G.H. Outer Ring, and beyond. The magnitude and distribution of anticipated growth throughout the G.G.H. is of key significance to the Township of Oro-Medonte regarding this growth pressure given its proximity to some of the fastest growing municipalities within broader regional market area or commuter-shed.

The economic growth potential of the G.G.H. economy also presents a key opportunity for the Township of Oro-Medonte and its residents seeking employment opportunities within the Township's commuter-shed, which primarily consists of the surrounding municipalities within the Simcoe Area (including the Cities of Barrie and Orillia). A more detailed analysis of the Township of Oro-Medonte's commuting patterns is provided in Chapter 4.

Figure 3-10
Township of Oro-Medonte
Commuter-Shed (2016)



Source: Compiled by Watson & Associates Economists Ltd. 2020



Between 2016 and 2051, the employment base of the Simcoe Area, the Township's primary commuter-shed, is forecast to grow by approximately 409,000 people and 223,000 jobs. As this surrounding commuter-shed grows, the Township of Oro-Medonte will continue to be a desirable location for these workers to live, leading to steady population growth in the Township. Over the next 30 years, the Township's local employment base is anticipated to benefit from regional economic expansion. As the Township's employment base grows it is also anticipated to diversify generating a range of new live/work opportunities within the Township. As such, raising the economic profile of Oro-Medonte by leveraging the economic opportunities and strengths of the Simcoe Area as well as the broader G.G.H. regional economy represents a key economic development strategy within the Township.

Quality of life is an increasingly important consideration in the corporate site selection process and is also a key factor influencing the residential location decisions of individuals and their families. Typically, quality of life encompasses several sub-factors such as employment opportunities, cost of living, housing affordability, crime levels, quality of schools, transportation, recreational opportunities, climate, arts and culture, entertainment, amenities, and population diversity. The importance of such factors, however, will vary considerably depending on life stage and individual preferences.

The Township of Oro-Medonte offers opportunities for rural living with proximity to urban amenities, as well as recreational opportunities within the rural countryside. The Township's rural character offers a high quality of life which continues to drive net migration from a broad range of demographic groups including the 55-74 age group (i.e. Baby Boomers and younger seniors/empty-nesters) as well as younger adults and their families.

It is important to recognize that the accommodation of skilled labour and the attraction of new businesses are inextricably linked and positively reinforce one another. Continued population growth within the Township and surrounding commuter-shed represents a key source of future skilled and unskilled labour which local industries within the Township will increasingly need to draw upon as the local employment base continues to grow and diversify.



3.6 Observations

Ontario's economic base, as measured through G.D.P. output and labour, has shifted from the goods-producing sector (i.e. manufacturing and primary resources) to services-producing sectors. Much of this shift has occurred during the past two decades, driven by G.D.P. declines in the manufacturing sector which were most significant immediately following the 2008/2009 global economic downturn. In contrast, most services-producing sectors have experienced significant increases over the past several years in terms of economic output and labour force growth.

While the manufacturing sector remains vital to the economy, the nature of manufacturing processes in North America has increasingly become more capital/technology intensive with the growing focus on automation with relatively lower labour requirements. Both globalization and technological advancement have driven this trend, leading to increased outsourcing of production to overseas manufacturers, particularly related to processes that are labour intensive. While there will continue to be a manufacturing focus in Ontario, and more specifically in the Simcoe Area, the highly competitive nature of the manufacturing sector will require production to be increasingly cost effective and value-added oriented, which bodes well for firms that are specialized and capital/technology intensive.

The COVID-19 pandemic has had a major impact on socio-economic conditions on a global scale. In addition to its local and broader impacts on the economy, COVID-19 is also anticipated to accelerate changes in work and commerce as a result of technological disruptions which were already in play prior to the pandemic. As such, enterprises will increasingly be required to rethink the way they conduct business with an increased emphasis on remote work enabled by technologies such as virtual private networks (V.P.N.s), virtual meetings, cloud technology and other remote work collaboration tools. These trends are anticipated to have a direct influence on commercial and industrial real estate needs over both the near and longer terms. In light of these anticipated trends, it is important that long-term employment forecasts adequately consider the manner in which these impacts are likely to impact the nature of employment by place of work as well as associated building space requirements and land needs by sector.



The future population and employment growth potential of the Simcoe Area, including the Township of Oro-Medonte is closely tied to the economic potential of the broader economic region. Regional economic growth and associated job creation represent key drivers of both local population and employment growth across the Township. As such, raising the economic profile of Oro-Medonte by leveraging the economic opportunities and strengths of the Simcoe Area as well as the broader G.G.H. regional economy represents a key economic development strategy within the Township.

As the population and employment base within the Township's commuter-shed grows, Oro-Medonte will become an increasingly desirable location for these workers to live, leading to steady population growth across the Township. Over the next 30 years, the Township's local employment base is also forecast to increase, generating a diversifying and growing range of employment opportunities for existing and new Township residents as well as in-commuters.



Chapter 4

Township of Oro-Medonte Employment Profile



4. Township of Oro-Medonte Employment Profile

4.1 Introduction

This chapter provides an in-depth discussion regarding local employment conditions and non-residential development trends within the Township of Oro-Medonte, with specific focus on the Township's established employment lands.

4.2 Employment Trends

Figure 4-1¹ summarizes total employment growth in the Township of Oro-Medonte between 2001 and 2016. During this time period, the Township experienced an increase of approximately 1,800 jobs resulting in an average annual employment increase of 2.5%, which is slightly higher than the growth rate experienced across Simcoe County. Jobs in Simcoe County increased by 29% (a net increase of approximately 45,200 jobs) representing an average annual increase of 1.9%.

Township's employment activity rate² slightly increased from 24% in 2001 to 29% 2016, indicating that the local employment base is increasing at a faster rate than the local population base. As of 2016, the Township's employment activity rate was below that of the Simcoe County average.³

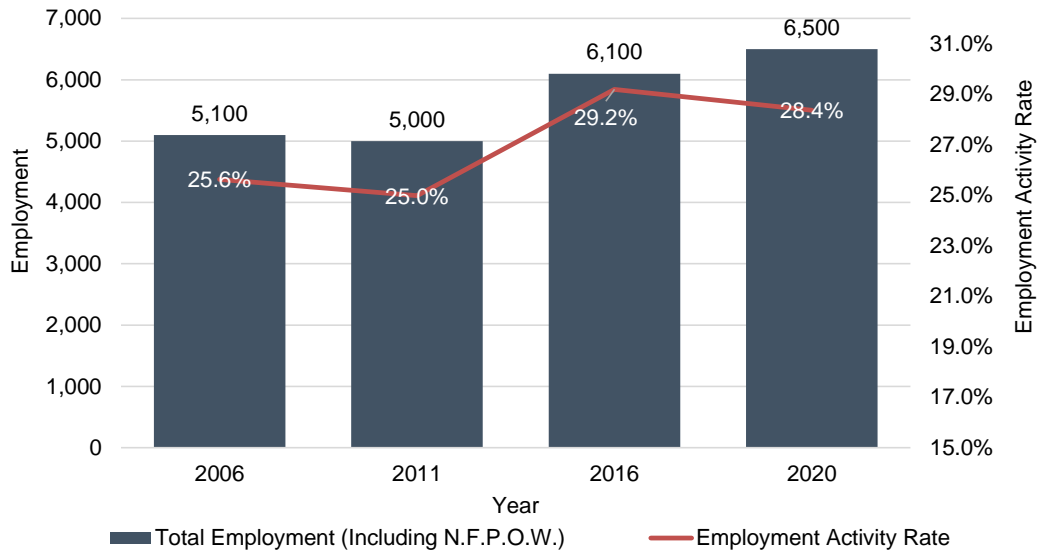
¹ No fixed place of work employment represents persons who do not go from home to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.

² An employment activity rate is defined as the number of local jobs in a municipality divided by the resident population.

³ Simcoe County's employment activity rate was 35% in 2016, derived from Statistics Canada Labour Force data and custom order Statistics Canada Place of Work data.



Figure 4-1
Township of Oro-Medonte
Employment Growth 2001 to 2016



Source - 2006 to 2016 derived from Statistics Canada Census Data and EMSI Data, 2020 estimated by Watson & Associates Economists Ltd. , 2020

Figure 4-2 summarizes the Township's employment base by sector as of 2019. Employment represents the number of jobs located within the Township of Oro-Medonte. This includes the live/work labour force, including work at home employees, as well as in-commuters. While the Township's economic base is relatively small, it is diverse, spanning a range of employment sectors from manufacturing, construction, accommodation and food services, administrative, professional, scientific and technical services, to transportation and warehousing. The largest sector in the Township is manufacturing, accounting for 17% of the total employment base.



Figure 4-2
Township of Oro-Medonte
Employment Base by Sector, 2019

| Employment Sector | Share |
|---|-------|
| Agriculture, forestry, fishing and hunting | 2% |
| Mining, quarrying, and oil and gas extraction | 0% |
| Utilities | 1% |
| Construction | 9% |
| Manufacturing | 17% |
| Wholesale trade | 9% |
| Retail trade | 8% |
| Transportation and warehousing | 4% |
| Information and cultural industries | 1% |
| Finance and insurance | 1% |
| Real estate and rental and leasing | 1% |
| Professional, scientific and technical services | 4% |
| Administrative and support, waste management and remediation services | 5% |
| Educational services | 4% |
| Health care and social assistance | 5% |
| Arts, entertainment and recreation | 5% |
| Accommodation and food services | 9% |
| Other services (except public administration) | 4% |
| Public administration | 12% |

Source: Derived from EMSI data (employees only) by Watson & Associates Economists Ltd., 2020.

Public administration, wholesale trade, retail trade, manufacturing, and construction were among the highest growing sectors between 2001 and 2019, while sectors such as agriculture, forestry, fishing and hunting; mining, quarrying, oil and gas extraction; and arts, entertainment and recreation have seen a decline in employment.

Despite the recent employment decline in manufacturing at the Provincial and County-wide level, this sector continues to be a growing component of the Township's industrial base. Looking forward, opportunities exist mainly for smaller firms that would benefit from the proximity of Oro-Medonte to the large and growing labour force pool within the surrounding Simcoe Area municipalities. A portion of employment growth in the manufacturing sector is anticipated to be driven from relocations of existing small-scale industrial establishments currently located in larger urban centres throughout the G.G.H., as well as through the expansion of existing manufacturing businesses that currently operate within the Township. Given the relatively lower price of industrial land

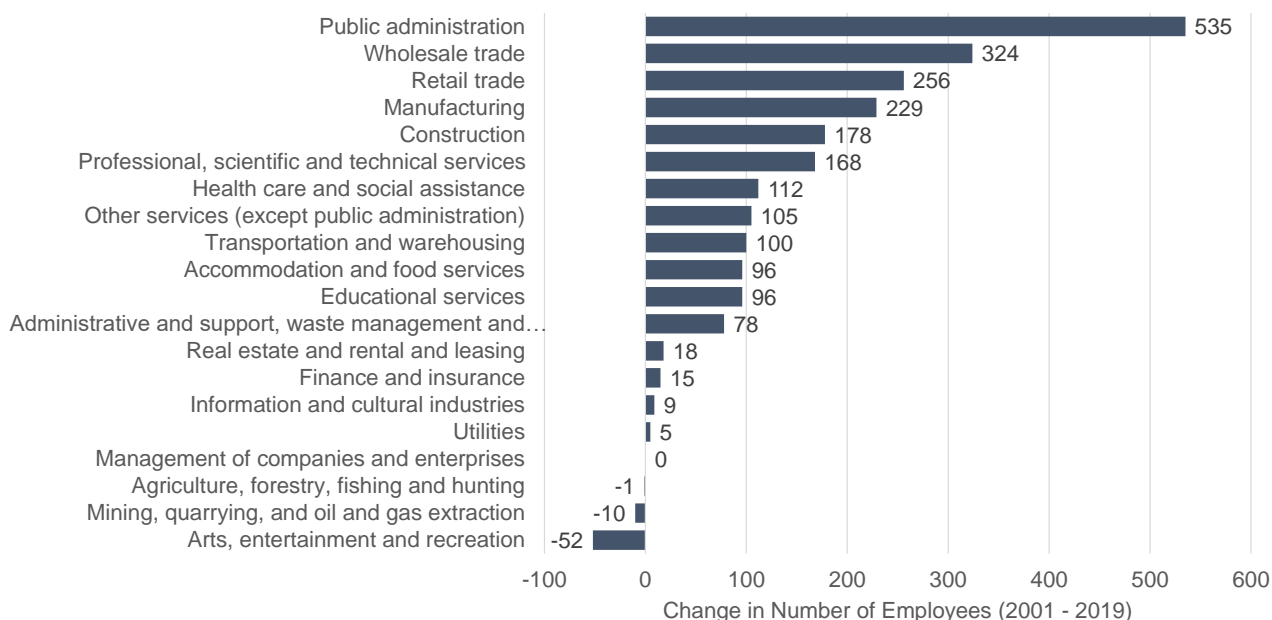


within the Township of Oro-Medonte compared to the surrounding market area, demand exists for small- to medium-scale manufacturing operations within the Township's rural employment lands.

Structural changes occurring in the global economy, combined with technological disruption, are also influencing demand for new consolidated, land-extensive warehousing facilities to store and manage the distribution of goods produced locally as well as goods imported from abroad. This continues to drive demand for increasingly larger, more land-extensive warehousing facilities, generally located in greenfield employment lands. Across North America, the logistics sector or "Goods Movement" sector is evolving at a rapid pace. For the Township of Oro-Medonte, a competitive cost environment (i.e. competitive non-residential property tax rates, utility costs and industrial land values), Highway 11 access, and proximity to the G.T.H.A. make this area a competitive location for the warehousing and distribution sector. E-commerce and technological improvements represent the biggest drivers of change in the Goods Movement industry, driven by the rapid growth and advancements in mobile technology, automation, and autonomous trucking.



Figure 4-3
Township of Oro-Medonte
Employment Growth by Sector, 2001 to 2019⁴



Source: Compiled from EMSI data by Watson & Associates Economists Ltd., 2020

4.2.1 Location Quotient Analysis

To assess the relative strength of business growth within the Township of Oro-Medonte, Figure 4-4 examines employment growth by industry sector over the 2001 to 2019 period in the Township, relative to Ontario. This comparative share analysis is helpful in identifying how much faster or slower employment is growing in the Township of Oro-Medonte relative to Ontario as a whole, by sector. Industry sectors that generate a strong positive value indicate employment clusters where the Township potentially has a competitive advantage relative to the surrounding market with respect to business growth. On the other hand, industry sectors that exhibit a negative value, suggest areas where the Township may be at a competitive disadvantage to other select municipalities or the Province.

As illustrated in Figure 4-4 and as previously identified in Figure 4-3, the Township experienced positive employment growth in almost all employment sectors over the past

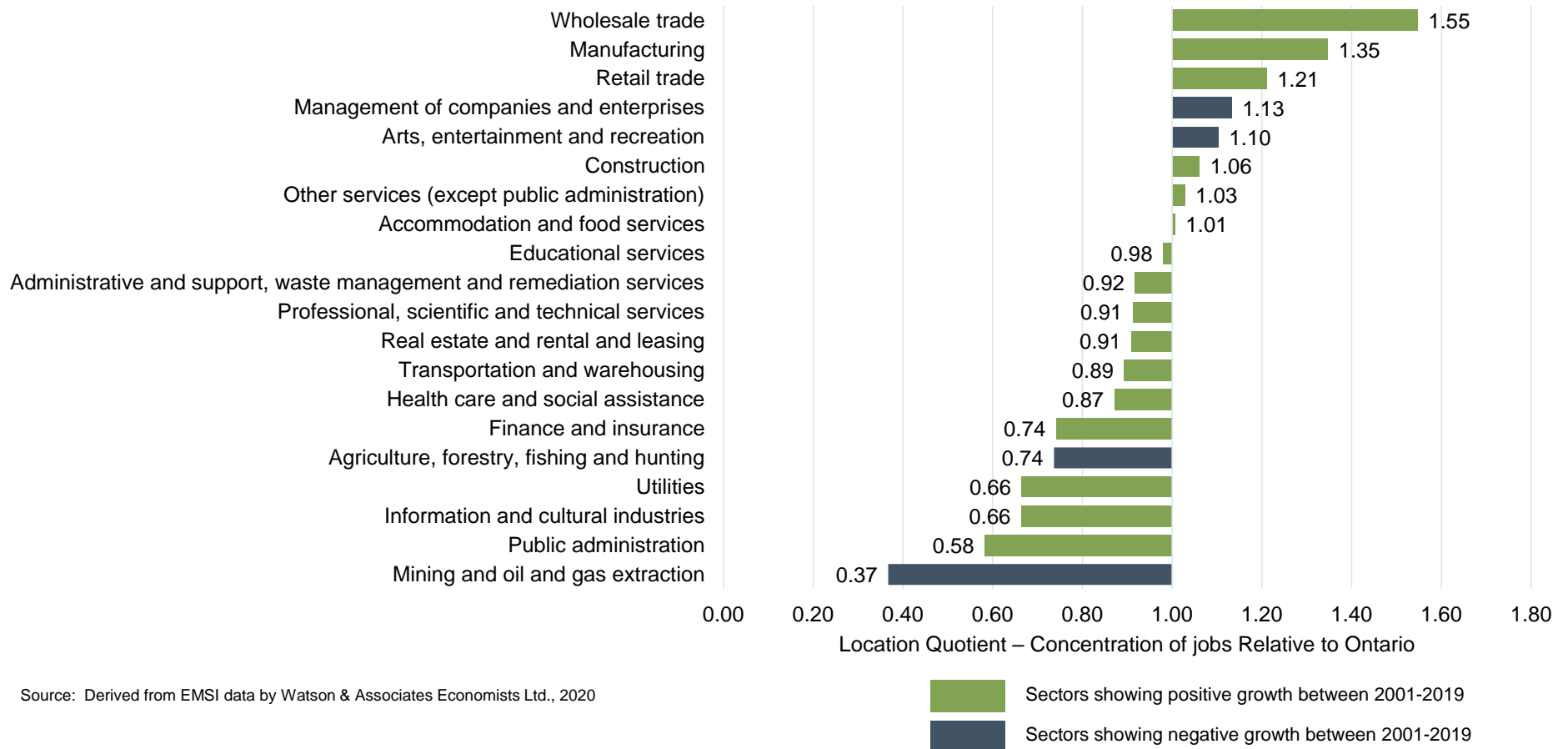
⁴ Figure 4-3 has been compiled from EMSI 2001 – 2019 and corroborated from other data sources such as Statistics Canada 2001 – 2016 Census data. Based on further review of all data sources Watson has confirmed that the employment growth estimates for the Public Administration sector appear to be well in excess of actual employment growth trends experienced in this sector during this time period.



two decades. Of the employment sectors within the Township that experienced positive employment growth between 2001 and 2019, three sectors, including wholesale trade, retail trade, and manufacturing, currently exhibit significantly higher employment concentrations relative to the Province, indicating the presence of an employment cluster and high potential within these sectors. Within the Township, a number of growing employment sectors, such as construction, other services, education, and accommodation and food, have comparable employment concentrations to the provincial average. The Township also has a number of emerging, growing employment sectors, largely geared to knowledge-based or “creative” industries, as well as other industrial sectors, which are anticipated to contribute to future employment growth across the Township over the next several decades.



Figure 4-4
Township of Oro-Medonte
Location Quotient Relative to Ontario
2001 to 2019



Source: Derived from EMSI data by Watson & Associates Economists Ltd., 2020

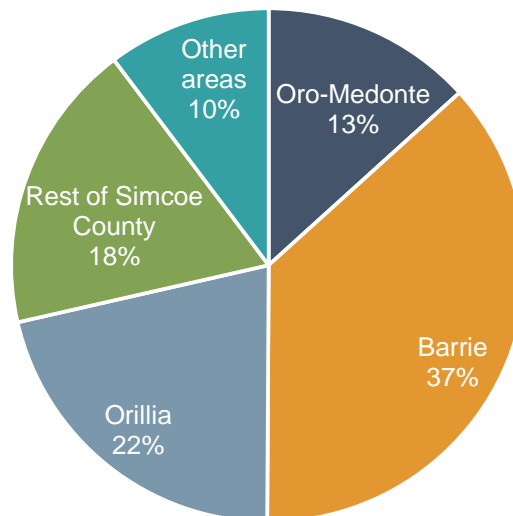


4.3 Commuting Trends

As previously identified in section 3.4, the Township's commuter-shed is largely represented by municipalities that make up the Simcoe Area. Figures 4-5 through 4-7 summarize in-commuting, out-commuting and live/work statistics for the Township of Oro-Medonte based on 2016 Census data. Key observations include:

- Employed residents of Oro-Medonte primarily work in the City of Barrie (37%) and the City of Orillia (22%);
- Of the total jobs identified in Oro-Medonte as of 2016, the largest share was held by Township residents (37%); and
- Oro-Medonte's live/work employment ratio is moderately lower than the surrounding Towns and Townships surveyed within Simcoe County, and well below the live/work ratios identified for the City of Barrie and the City of Orillia.

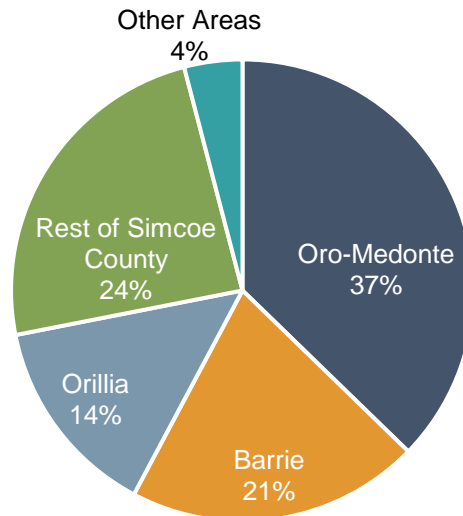
Figure 4-5
Where Residents of Oro-Medonte Commute for Work, 2016



Source: Derived from Statistics Canada Census 2016 Data by Watson & Associates Economists Ltd., 2020

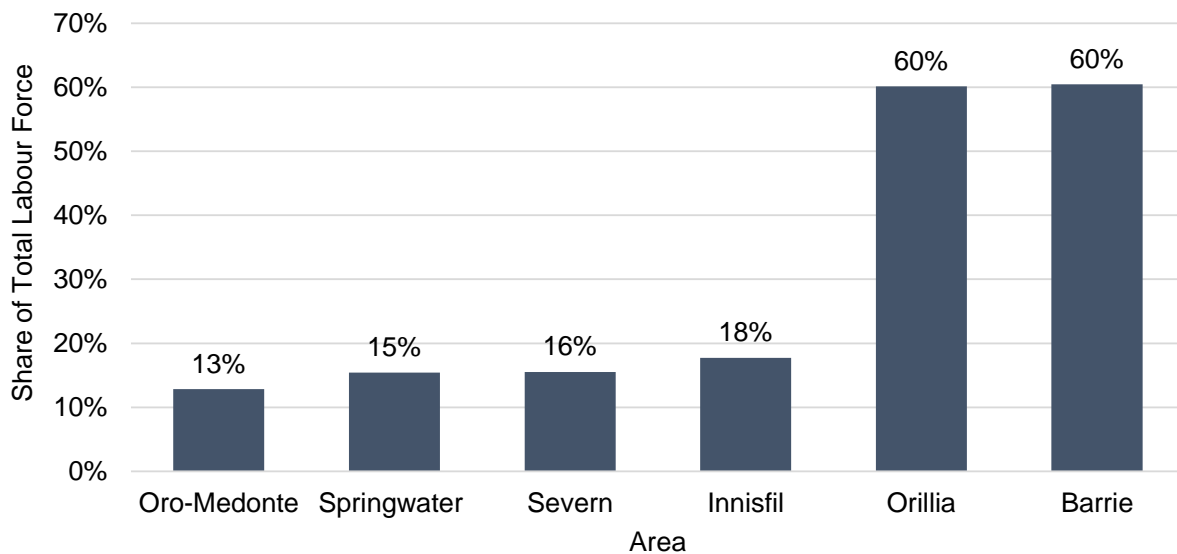


Figure 4-6
Where Employees of Oro-Medonte Commute from 2016



Source: Derived from Statistics Canada Census 2016 Data by Watson & Associates Economists Ltd., 2020

Figure 4-7
Simcoe Area Municipalities
Percentage of Labor Force that Live and Work in the Same Municipality



Source: Derived from Statistics Canada Census 2016 Data by Watson & Associates Economists Ltd., 2020



4.4 Non-Residential Development Trends

The Township has approximately 238 hectares (588 acres) of employment land that has been developed and occupied to date.¹ Employment land absorption levels² in industrial, commercial, and institutional (ICI) sectors within the Township of Oro-Medonte have averaged approximately 12 net ha (30 net acres) per year over the past decade. Approximately 25% of employment land absorption in the Township has occurred on employment lands.³

As summarized in Figure 4-8, non-residential development activity, as measured by gross floor area (G.F.A.), has been higher in 2010 – 2014 and has relatively lowered over the past five years. This has been most notable in the industrial sector, resulting in a decrease in average employment land absorption levels during this same time period. The difference in building permit activity can be attributed to some of the major developments that took place in the period 2010 – 2014 – including development of the Airport area, Warehousing for Napoleon Systems & Developments Ltd., etc. The period between 2015 - 2019 witnessed commercial and industrial development but not of the same magnitude.

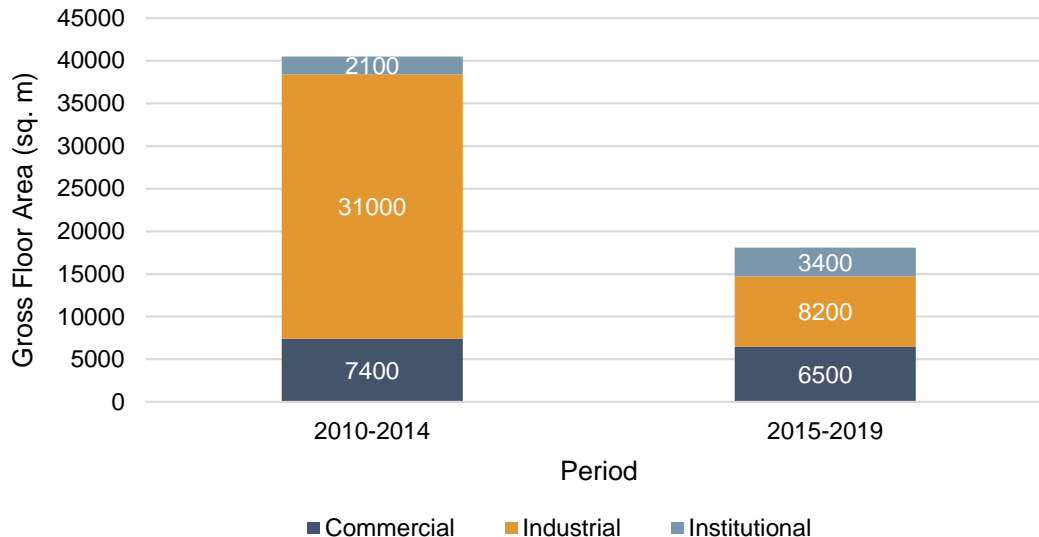
¹ Land supply details provided in Chapter 5.

² Land area associated with new construction based on non-residential building activity permits issued.

³ Employment lands as defined under Simcoe County Land Budget.



Figure 4-8
Township of Oro-Medonte
Non-Residential Building Permit Activity 2010 to 2019 (sq. m.)

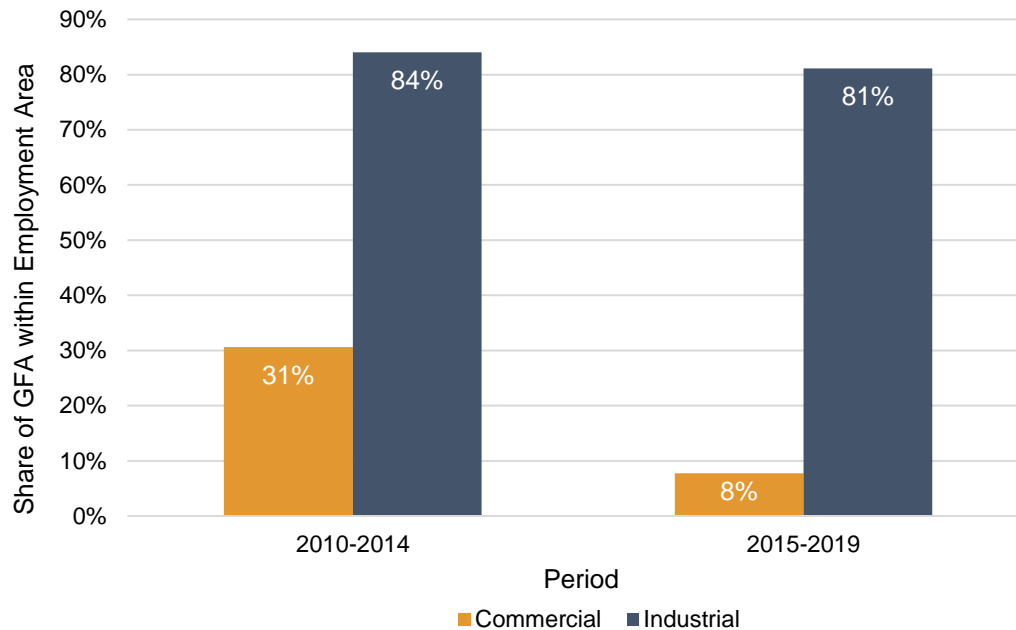


Source: Compiled from ICI Building Permit Data provided by the Township of Oro-Medonte by Watson & Associates Economists Ltd., 2020

Figure 4-9 summarizes the share of the total absorption within employment lands, as opposed to outside employment lands within the Township. About 80% of industrial G.F.A. has been developed within employment lands. The share of commercial development within employment lands declined from 31% between 2010 and 2014, to 8% between 2015 and 2019. This distribution of future industrial and commercial employment growth within and outside of employment lands across the Township is important to understand as it will have a direct impact on the need for designated employment lands over the long-term. Over the forecast period, it is anticipated that over 60% of industrial employment and between 10% and 15% of commercial employment within the Town will be accommodated on employment lands (refer to Chapter 6).



Figure 4-9
Township of Oro-Medonte
Share of Non-Residential Building Permits by Major Sector in Employment Lands



Source: Compiled from ICI Building Permit Data provided by the Township of Oro-Medonte by Watson & Associates Economists Ltd., 2020

4.5 Observations

As discussed in the previous chapter, the future population and employment growth potential of the Township of Oro-Medonte is closely tied to the economic potential of the broader economic region. This includes the Township's primary commuter-shed (Simcoe Area). Local and regional economic growth and associated job creation represent key drivers of population growth across the Township. The Township's economy is concentrated in a number of employment sectors related to manufacturing, public administration, education, retail, and construction. Looking forward, existing and emerging knowledge-based sectors such as professional, technical and scientific services, health care and social assistance, educational services, tourism, and value-added manufacturing and logistics sectors are expected to represent the fastest growing employment sectors of the Township.



For the Township of Oro-Medonte's local economic base to grow, effort will be required to continue to retain and attract skilled and unskilled working-age residents to the Township, largely within its rural settlement areas. As such, labour force attraction efforts must be linked to housing accommodation (both ownership and rental), urban amenities (e.g. retail, arts and culture, health care/wellness facilities), municipal services and other infrastructure (e.g. community recreation facilities, increased transportation connectivity, broadband internet services), as well as quality of life attributes that appeal to the younger mobile population, while not detracting from the Township's attractiveness to older population segments.



Chapter 5

Employment Lands Supply



5. Employment Lands Supply

5.1 Township of Oro-Medonte Employment Land Inventory and Site Attributes

The Township has 633 ha of land designated for employment uses, located in the southern portion of the Township (see Map 5-1). Designated employment lands are clustered from the eastern-most edge to the western-most edge of the Township, with a large portion surrounding the Lake Simcoe Regional Airport as well as along Highway 11. ¹ Most clusters of designated employment lands have a mix of occupied and vacant lands. Table 5-1 summarizes the total vacant and occupied lands within the Township. Of the 633 ha of land designated for employment uses, 20% (or 130 ha) is vacant, and the remaining 80% is occupied. Of the occupied land, the Township has identified 27% (or 133 ha) as underutilized², 26% (or 131 ha) as development constrained³, and the remaining 47% (237 ha) is occupied and unlikely to accommodate additional development. As discussed in Chapter 2, designated employment lands consist of two land-use designations in accordance with the Township's O.P. (Industrial and Airport) and two land use designations from the Oro-Centre Secondary Plan (Oro-Centre Office/Industrial and Oro-Centre Limited Service Industrial). Table 5-1 below highlights the total, vacant and occupied gross land area under each designation.

¹ The term employment land and Employment Area is used interchangeably throughout this report.

² Medium or large parcels (2 ha and larger) have been classified as underutilized based on the following criteria:

- Site is used as a construction laydown yard or for trailer parking. May include a small building for storage. Site is generally used to support off-site employment.
- Site has the opportunity for expansion or for a severance, as a large portion of the site is vacant. There could be plans for phased development or future expansion that the Township is aware of.
- Site is developed, but the building on the site is not being used (vacant building). Opportunity for redevelopment.

³ constrained lands are those which have environmental, ownership and/or access constraints that make (re)development unlikely in the short and medium time periods.



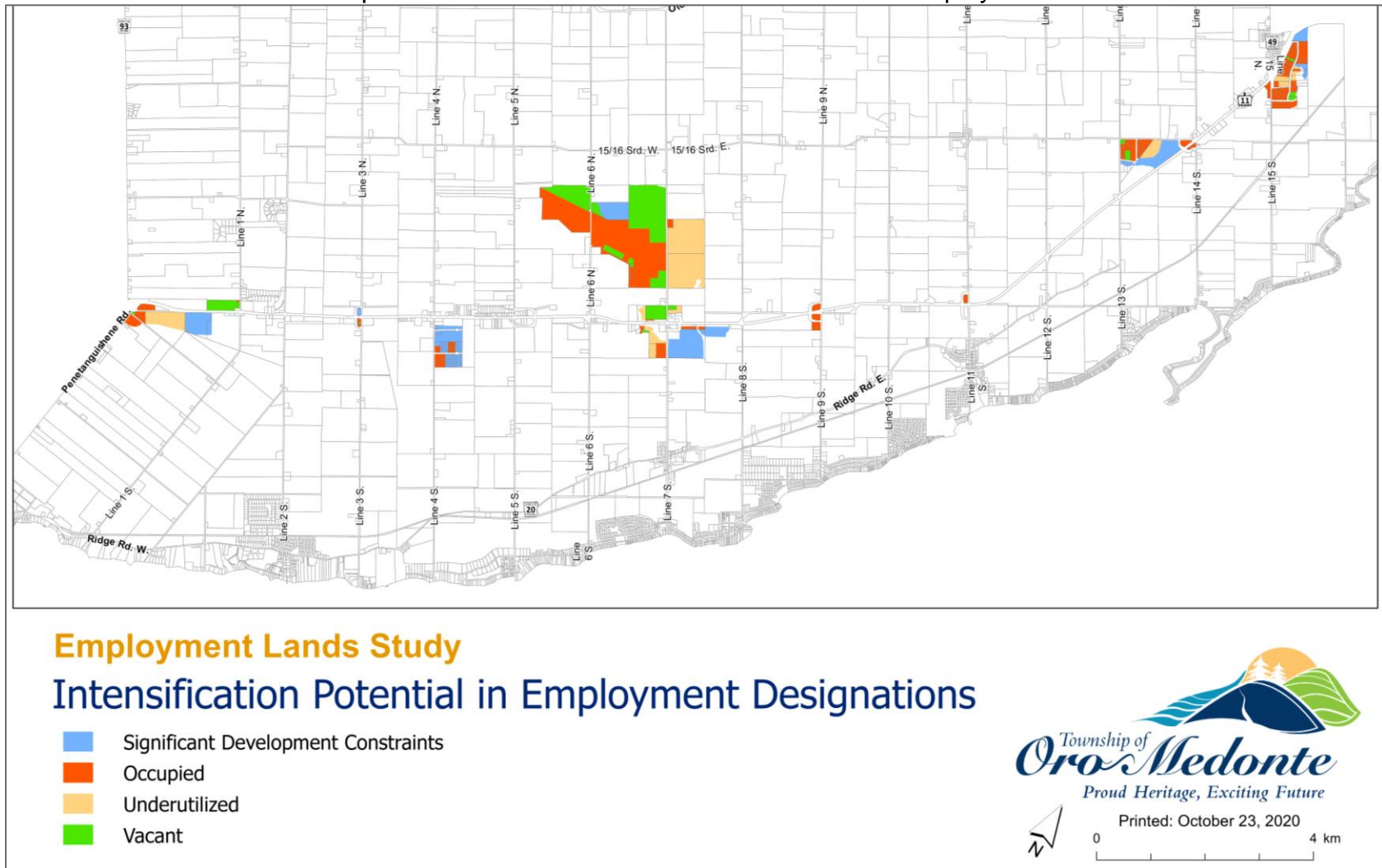
Table 5-1
Township of Oro-Medonte
Designated Employment Lands by Status

| Official Plan Employment Land Designations | Total Area (ha) | Vacant Land (ha) | Occupied Land (ha) | | | % of Land Area | | |
|--|-----------------|---------------------|--------------------|-------------|-----------------------|----------------|-------------|---------------|
| | | | Underutilized | Constrained | Remaining Occupied | Total Area | Vacant Land | Occupied Land |
| Industrial | 297 | 17 | 119 | 77 | 83 | 47% | 13% | 56% |
| Airport | 265 | 102 | 0 | 17 | 146 | 42% | 78% | 32% |
| Oro-Centre Office/Industrial | 39 | 11 | 7 | 14 | 7 | 6% | 9% | 5% |
| Oro-Centre Limited Service Industrial | 34 | 1 | 8 | 24 | 2 | 5% | 0% | 7% |
| Total | 633 | 131 | 133 | 132 | 238 | 100% | 100% | 100% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020



Map 5-1 Township of Oro-Medonte - Intensification Potential on Employment Lands



Source: Derived from mapping data provided by the Township of Oro-Medonte, 2020.



5.1.1 Vacant Employment Lands

Table 5-2 summarizes the Township's vacant employment land supply by employment designation. Currently, the Township has a total of approximately 130 ha of vacant employment land. A large portion of these vacant lands surround the Lake Simcoe Regional Airport, with smaller vacant parcels scattered east and west of the airport, and along Highway 11. The largest area of vacant employment land is designated Airport (102 ha) and is generally flat, with some historical agricultural uses. Only 17 ha of vacant land are designated as Industrial.

Some vacant parcels, due to small size, fragmentation, odd configuration, access issues, etc., will likely not develop. A further description of the Township's employment land inventory by parcel size is provided below.

Table 5-2
Township of Oro-Medonte
Vacant Employment Land Supply

| Official Plan Employment Land Designations | Total Vacant Land Hectares (ha) | Percentage of Total Vacant Land |
|--|---------------------------------|---------------------------------|
| Industrial | 17 | 13% |
| Airport | 102 | 78% |
| Oro-Centre Office/Industrial | 11 | 9% |
| Oro-Centre Limited Service Industrial | 1 | 0% |
| Total | 131 | 100% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020

Table 5-3 summarizes the Township's vacant employment lands by number of parcels by size. The Township has a total of 16 vacant land parcels that are designated for employment, of which, the majority are small in size ranging from 0 to .99 ha. Many of the small parcels under 1 ha in size are development constrained and should be removed from the overall supply inventory. Notably, there are four larger-sized parcels that are over 3 ha in size which are primarily located around the Airport, Oro-Center area and north of Highway 11 on Line 1N. These larger parcels may offer greater opportunity for future employment growth and development based on their ability to accommodate larger, growing businesses.



Table 5-3
Township of Oro-Medonte
Vacant Employment Land Supply by Parcel Size

| Vacant Parcel Size (ha) | Number of Parcels | Total Area (ha) |
|-------------------------|-------------------|-----------------|
| 0-0.99 | 9 | 3.83 |
| 1-2.99 | 3 | 4.04 |
| 3-4.99 | 1 | 3.4 |
| 5-9.99 | 1 | 9.94 |
| 10+* | 2 | 109.44 |
| Total | 16 | 130.65 |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020

*Note: 1 parcel accounts for 98.3 ha

5.1.2 Occupied Employment Lands

Table 5-4 summarizes the Township's total occupied land by employment land-use designation. Occupied employment lands represent approximately 80% of designated employment lands within the Township. The occupied lands are broken down into three sub-categories of underutilized, constrained, and currently occupied (unlikely to accommodate additional development). Of the occupied employment lands, 133 ha are underutilized,¹ 131 ha are constrained, and 237 ha are currently occupied. The underutilized portions of these lands are located near the Oro-Centre Secondary Plan lands and scattered along Highway 11, with some clustering near Line 1 and Line 9. A majority of occupied employment lands are located near the Lake Simcoe Regional Airport. Another large portion of lands is designated as Industrial, which is known as the Forest Home area located on the eastern edge of the Township. Additionally, there is a small industrial park between Line 13 and Line 14 north of Highway 11. These two areas are mostly built out / constrained, with limited opportunity to accommodate additional development. Other occupied Industrial lands are located along Highway 11 at Line 9 and Highway 11 at Penetanguishene Road. A small portion (4%) of occupied lands are designated within the Oro-Centre Secondary Plan.

¹ The underutilized lands include approximately 80 ha (located along Line 7 North across from the airport) subject to a Minister's Zoning Order that was approved November 1, 2019 for an Automotive Innovation Park.



Table 5-4
Township of Oro-Medonte
Occupied Employment Land Analysis

| Official Plan Employment Designations | Total Occupied Land Hectares (ha) | Percentage of Occupied Land |
|--|-----------------------------------|-----------------------------|
| Industrial | 83 | 35% |
| Airport | 146 | 61% |
| Oro-Centre Office/Industrial | 7 | 3% |
| Oro-Centre Limited Service Industrial | 1 | 1% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020

5.2 Intensification Potential on Employment Lands

Intensification on employment lands can take a number of forms, including development of underutilized lots (infill), expansion (horizontal or vertical) of existing buildings, and redevelopment of sites. Intensification offers the potential to accommodate future employment growth and achieve improved land utilization resulting in higher employment density on occupied employment lands. Higher land utilization on existing employment lands can also lead to more effective use of existing infrastructure (e.g. roads, water/sewer servicing), resulting in communities that are more functional and complete.

All the lands within the Township are located outside settlement areas and classified as rural lands. The Township's employment lands are predominately privately serviced, with some sites partially serviced with water. These sites can accommodate dry-industrial development, as water servicing capacity is limited to the daily usage of employees. Given that the potential for full-municipal services, is not likely in the near future, servicing has not been used as a key variable to determine the readiness of sites for development and intensification.

5.2.1 Underutilized Employment Land

Table 5-5 summarizes the Township's underutilized employment land by employment land use designation. In total, the Township has identified 133 ha (328 acres) of Oro-Medonte's employment lands as underutilized. The Township has identified any



medium or large parcels (2 ha and larger) that are underutilized based on the following criteria:

- Site is used as a construction laydown yard or for trailer parking. It may include a small building for storage. The site is generally used to support off-site employment.
- Site has the opportunity for expansion or for a severance, as a large portion of the site is vacant. There could be plans for phased development or future expansion of which the Township is aware.
- Site is developed, but the building on the site is not being used (vacant building). There is opportunity for redevelopment.

These underutilized parcels account for 21% of the total employment lands in Oro-Medonte. The largest cluster of underutilized employment land is designated Industrial, directly east and adjacent to the Airport lands. A total of 119 ha of employment land is underutilized and designated Industrial. The remaining share is designated Oro-Centre Office/Industrial and Oro-Centre Limited Service Industrial.

Table 5-5
Township of Oro-Medonte
Underutilized Employment Land Analysis

| Official Plan Employment Designations | Total Underutilized Land (ha) | Percentage of Total Underutilized Land |
|--|-------------------------------|--|
| Industrial | 119 | 90% |
| Airport | 0 | 0% |
| Oro-Centre Office/Industrial | 7 | 5% |
| Oro-Centre Limited Service Industrial | 7 | 6% |
| Total | 133 | 100% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020

5.2.2 Significantly Constrained Employment Lands

As summarized in Table 5-6, the Township has provided an assessment of employment lands considered constrained and unlikely to accommodate additional development. Lands categorized as Significantly Constrained are those with environmental, ownership, and/or access constraints that limit the ability to accommodate development



over the short- to medium-term. Constrained lands are found throughout the employment designated lands; the majority of Significantly Constrained employment lands are located south of Highway 11.

Table 5-6
Township of Oro-Medonte
Constrained Employment Land Analysis

| Official Plan Employment Designations | Total Significantly Constrained Land (ha) | Percentage of Constrained Land |
|--|---|--------------------------------|
| Industrial | 77 | 58% |
| Airport | 17 | 13% |
| Oro-Centre Office/Industrial | 14 | 11% |
| Oro-Centre Limited Service Industrial | 24 | 18% |
| Total | 132 | 100% |

Source: Derived from mapping data provided by the Township of Oro-Medonte by Dillon Consulting Limited., 2020

5.3 Summary

The following provides an overview of the Township's employment land supply:

- Within the Township of Oro-Medonte, there is a total of 130 ha of vacant employment land and 503 ha of occupied employment land. Of the occupied land, 133 ha are underutilized, 131 ha are constrained for development, and 237 ha are currently occupied.
- Several (9 out of 16) of the Township's vacant employment land parcels are small in size (less than 1 ha in size). Many of these small parcels are development constrained and should be removed from the overall supply inventory.
- Within the underutilized employment land category, 80 ha are subject to a Minister's Zoning Order (M.Z.O.) that was approved November 1, 2019 for an Automotive Innovation Park. These lands have not been included in the employment land inventory as they have been approved for specific uses (automotive innovation).



- There is a second M.Z.O. for a Medical Innovation Park on lands near the airport and adjacent to the Automotive Innovation Park that has been considered as employment outside of employment lands in the supply analysis as the subject lands are not designated Employment in the O.P.
- In regard to the Township's underutilized lands, lot size and current lot coverage were assessed based on aerial imagery to better understand what portion of these lands could be redeveloped or have future infill potential.
- Redevelopment activity has been limited and the majority of the recent activity has been related to expansion of existing businesses in the Township. Infill and redevelopment may continue to increase in the future, driven by land value and development costs, as partial servicing is expanded or future plans for full-municipal servicing area made.
- Based on available servicing capacity, the redevelopment of underutilized lands is anticipated to be in the form of dry-industrial uses.
- It is estimated that 15% of underutilized employment lands could accommodate employment growth. This percentage of land is based on the assessment of the current built form, lot coverage, industry type and general employment growth trends.
- This results in a net supply of 135 ha of employment land available to accommodate development.



Chapter 6

Forecast Employment Growth and Employment Land Needs



6. Forecast Employment Growth and Employment Land Needs

6.1 Township-Wide Employment Forecast, 2020 to 2051

Building on the regional and local economic growth trends analysis provided in Chapters 3 and 4, a long-term employment forecast to 2051 by land-use category has been provided herein for the Township of Oro-Medonte. Also provided is a commentary with respect to key industry sub-sectors that are anticipated to drive market demand for non-residential lands over the 2020 to 2051 planning horizon.

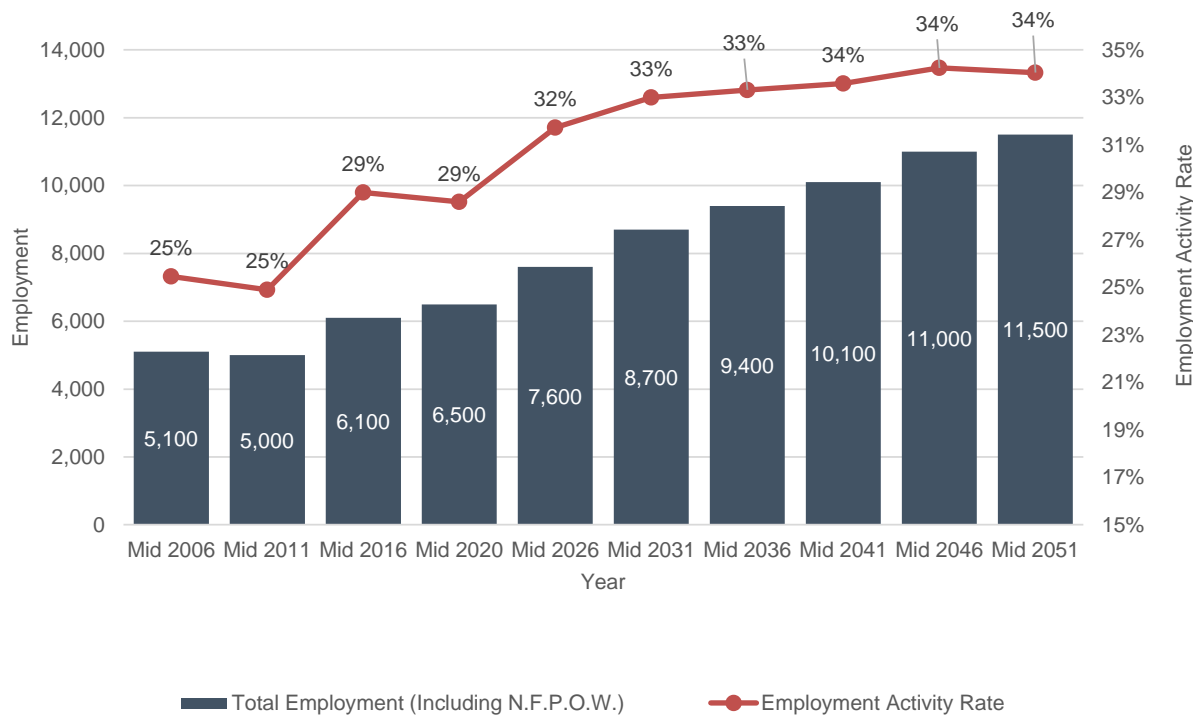
Figure 6-1 summarizes the long-term employment forecast for the Township of Oro-Medonte by total employment and employment activity rate¹ in comparison to recent historical trends. Key observations are provided below:

- By 2051, the Township's employment base is forecast to reach approximately 11,500. This equates to an increase of approximately 5,400 jobs from 2016, which represents an annual employment growth rate of 2.4%.
- Since 2006, the Township's employment activity rate (ratio of local employees to population) has increased from 25% to 29% as of 2020, indicating that the local employment base is increasing at a faster rate than the local population base. By 2051, the Township's employment activity rate is forecast to increase to 34%. During the post-2041 period, the Township's employment activity rate is forecast to stabilize largely due to the aging of the population and labour force base.

¹ Ratio of jobs to population.



Figure 6-1
Township of Oro-Medonte
Employment Forecast, 2020 to 2051



Source: 2006 to 2016 derived from Statistics Canada Census Data; 2020 to 2051 forecast by Watson & Associates Economists Ltd., 2020.

6.2 Township-Wide Employment Forecast by Employment Sector, 2020 to 2051

The following provides a summary with respect to the long-term outlook of forecast employment trends by major employment sector and land-use type (employment land employment, population-related and rural employment) for the Township from 2020 to 2051.

6.2.1.1 Population-Related Employment

- Population-related employment (P.R.E.) includes employment in institutional and commercial sectors, primarily within settlement areas, including retail, personal services, accommodation and food, health and social services, and education and other service sectors.



- P.R.E. is concentrated in Community Areas such as urban settlement cores, neighborhood plazas, schools, and standalone institutional and retail buildings. This employment category generally serves the local population base by providing convenient locations to local residents and visitors. Typically, as the population grows, the demand for this employment also increases to serve the needs of the Township.
- P.R.E. growth over the 2021 to 2051 period is expected to total 2,090 employees (67 employees annually), representing 49% of overall employment growth in the Township.
- Population-related employment includes work at home employment, which is discussed further in section 6.2.1.5.

6.2.1.2 *Employment Lands Employment*

- Employment lands employment (E.L.E.) represents jobs accommodated in industrial-type buildings typically accommodated on land designated for employment land use. This includes largely industrial-sector employment including manufacturing, wholesale trade, transportation and warehousing, construction, and utilities, as well as a limited amount of employment associated with commercial- and employment-supportive uses.
- Knowledge-based industry clusters, including information technology, environmental services, business services, health care, education and knowledge creation are expected to experience steady employment growth across the Township between 2021 and 2051. A portion of the knowledge-based employment growth in Oro-Medonte is anticipated to be accommodated on employment lands.
- It is important to note that not all E.L.E. within the Township of Oro-Medonte is located on employment lands. As summarized in Figure 6-2, approximately 60% of E.L.E. is located on employment lands, while the remaining 40% is located on rural sites designated for other uses or employment associated with usual place of work (no fixed place of work). A more detailed discussion regarding no fixed place of work employment is provided below in section 6.2.1.5.
- Employment lands in the Township of Oro-Medonte are comprised of 95% employment from the industrial sector, while the remaining 5% is comprised of employment in the commercial/population-related and institutional sectors.



- As previously identified, the manufacturing sector represents a large share of the employment base within the Township, which has experienced steady growth over the past two decades.
- The Township has also experienced steady growth in industrial sector jobs on employment lands over the past two decades in sectors related to construction, wholesale trade, and transportation/warehousing.
- Looking forward over the next several decades, the Township is anticipated to accommodate steady industrial and commercial employment growth on its employment lands, particularly in sectors related to manufacturing, construction, transportation and warehousing, research and development, as well as education and training. Employment growth opportunities on employment lands throughout the Township are anticipated to be concentrated along Highway 11 as well as around the L.S.R.A.
- As previously identified, the development of a new provincially approved 80+ ha (200+ acre) Automotive Innovation Park, located adjacent to the L.S.R.A, is anticipated to represent a large component of job growth in the Township's employment lands over the next decade and beyond. The Automotive Innovation Park is designed to accommodate over 700,000 sq.ft. of industrial space used for mechanical and performance shops, research and development labs, training and research, as well as other private commercial uses. This multi-use automotive designation will also be designed to include a multi-configuration 4.2 km track for use in performance testing, training, and research.²
- The facility is expected to ultimately create more than 700 full-time jobs and 1,800 construction jobs. Construction of the Automotive Innovation Park is anticipated to begin in 2021.³
- Located adjacent to the Automotive Innovation Park, a 33 ha (82 acre) parcel is also planned as a Medical Innovation Park, which will accommodate advanced manufacturing facilities focused on medical and personal protective

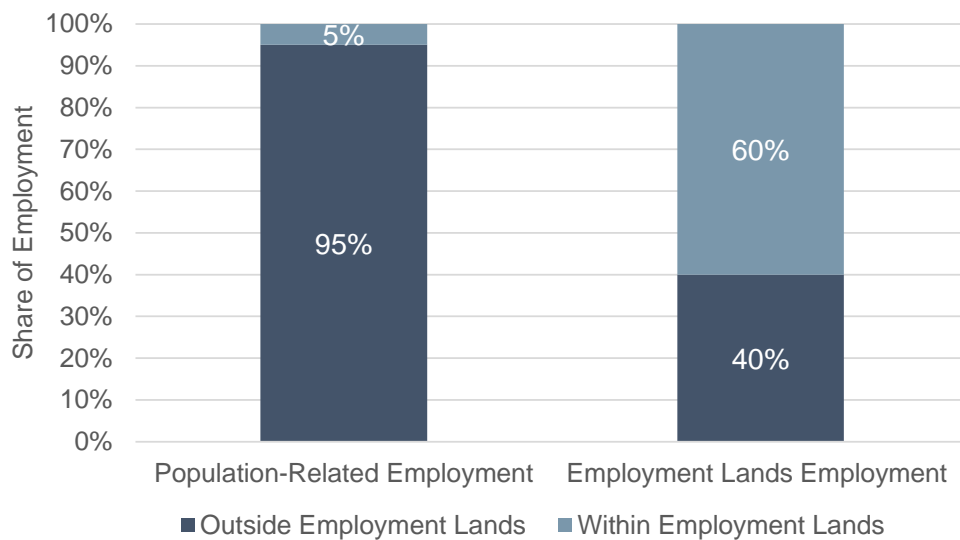
² Ground breaking for Oro Station Track and Automotive Innovation Park. Oro Station. August, 2020.

³ Ibid.



- equipment.⁴ In addition to manufacturing, the park is also proposed to include research laboratories and distribution/warehousing facilities.
- It is noted that the Medical Innovation Park is not located in an Employment Area, and therefore represents a portion of future E.L.E. located outside Employment Areas in the Township.
 - Over the forecast period, E.L.E. is anticipated to accommodate approximately 60% of the Township's employment growth, or 96 employees annually.

Figure 6-2
Township of Oro-Medonte
Distribution of Employment by Type and Share on Employment Lands, 2020



Source - Estimated from Township of Oro-Medonte and Simcoe County GIS Data by Watson & Associates Economists Ltd. 2020

6.2.1.3 Rural-Based Employment

Rural-based employment, employment primarily consisting of primary sectors (such as agriculture, fisheries) represents about 1% of the Township's employment base as of 2020. It is anticipated that by 2051, rural-based employment will represent approximately the same share of the Township's employment.

⁴ Medical Innovation Park gets Oro-Medonte Council Support for MZO. July 18, 2020. OrilliaMatters.com



6.2.1.4 Trends in Work at Home and Off-Site Employment

- As noted above, work at home employment is included in P.R.E., while off-site employment or employees with no fixed place of work is included across all employment land-use types summarized above.
- Statistics Canada defines no fixed place of work employees as “persons who do not go to the same workplace location at the beginning of each shift. Such persons include building and landscape contractors, travelling salespersons, independent truck drivers, etc.”
- A large component of the construction and transportation sector is associated with employees who have no usual place of work (no fixed place of work).
- Construction sub-sectors involved in large-scale construction projects typically require land to store equipment and machinery in proximity to major roads and highways. Over the forecast period, a portion of industrial employment growth is anticipated to be generated from construction employment, driven by both residential and non-residential development activity within the Township and the surrounding area. This includes employment associated with construction of buildings, heavy and civil engineering, construction, and specialty trade contractors.
- The agricultural sector value-added on-farm diversified uses also represents a key component of the local and region economy and a growing component of the Township’s work at home and off-site employment base.
- Technological innovation and improved broadband regional telecommunications have been, and will continue to be, key drivers of economic expansion in knowledge-based sectors as well as the steady rise of the gig economy.⁵ Looking forward, continued advances in technology and telecommunications is anticipated to further enable remote work patterns and ultimately increase the relative share of off-site employees over the long term across the Township. It is noted that in December 2020 Southwestern Integrated Fibre Technology (SWIFT) has awarded \$41.1 million in funding to support six fibre-to-the-home (FTTH) projects across Simcoe County.⁶ The

⁵ The gig economy is characterized by flexible, temporary, or freelance jobs, often involving connecting with clients or customers through an online platform.

⁶ [https://www.simcoe.ca/CorporateCommunications/Pages/simcoe-county-to-receive-\\$41-million-in-broadband-upgrades.aspx](https://www.simcoe.ca/CorporateCommunications/Pages/simcoe-county-to-receive-$41-million-in-broadband-upgrades.aspx)



Township of Oro-Medonte is a part of the project awarded to Bell Canada intended to develop fibre-to-home projects within the 12 area municipalities in the County by mid-2022.

- Demographics and socio-economics also play roles in the future demand for off-site and work at home employment within an increasingly knowledge- and technology-driven economy. It is anticipated that many working residents in Oro-Medonte, particularly younger adults as well as older adults (i.e. Baby Boomers) approaching retirement or semi-retirement will utilize technology to allow them to supplement their income in more flexible ways in contrast to traditional work patterns.
- Over the coming decades, work at home and no fixed place of work employment in Oro-Medonte is expected to steadily increase as a result of these trends outlined above.

6.3 Employment Land Density

Employment lands within Oro-Medonte are characterized by land expansive industrial development located throughout the Township. As identified in Chapter 5, a large portion of the Township's designated Employment Areas are identified as underutilized lands and are unlikely to accommodate development. The existing employment density on designated employment lands, at present, is estimated at approximately 4 jobs/net ha (approximately 2 jobs/net acre).

There are several macro-economic trends that are influencing average density levels on employment lands. Generally, average density levels on employment lands are declining in the manufacturing sector, as domestic manufacturers focus efforts on increased efficiency and competitiveness through automation. This trend is coupled with increasing demand for large, land-extensive warehousing and logistics facilities to support distribution and transportation of goods throughout the expanding urban population base.

The evolving form of industrial and non-industrial development on employment lands is also influencing average density levels on employment lands. Increasingly, major employers accommodated on employment lands are integrating industrial, office, and training facilities on-site. These sites also provide significant land area to accommodate surface parking and, in some areas, future expansion potential. On average,



employment density levels for integrated office/distribution and training facilities are much lower than standalone major office developments.

On the other hand, modest demand within the multi-tenant office sector in the Township in Oro-Medonte is anticipated to have an upward influence on average employment densities on employment lands over the long term. Industrial and office employment on employment lands also generates demand for on-site and off-site employment amenities that also tend to have an upward influence on average employment density on employment lands.

Over the forecast period, it is anticipated that employment growth on employment lands over the 2020 to 2051 period will average 7 jobs/net ha (3 jobs/net acre). It is assumed that average employment densities in the Township will gradually increase, driven by increasing land-use diversification in the primary industries and employment-supportive uses mentioned herein.

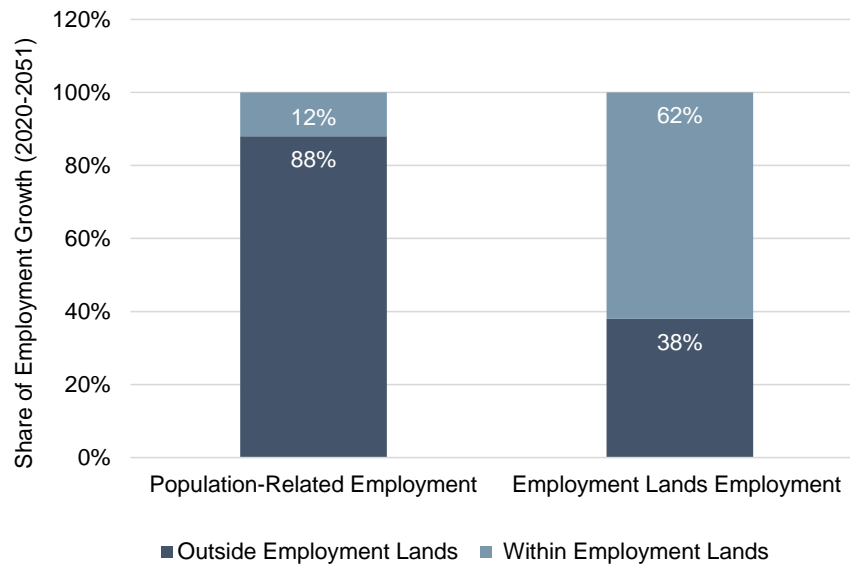
6.4 Employment Land Demand to 2051

Over the 2020 to 2051 forecast period, the Township is anticipated to accommodate approximately 2,100 jobs on employment lands. A portion of these jobs, approximately 700 jobs, are expected to be accommodated within the Automotive Innovation Park, currently identified as underutilized employment lands. As discussed in Chapter 5, about 15% of the Township's remaining underutilized employment lands are anticipated to accommodate job growth through intensification. This results in approximately 50 additional jobs that are anticipated to be accommodated through intensification of existing employment lands. Adjusted for additional intensification, approximately 750 jobs are anticipated to be accommodated on the Township's underutilized employment lands.⁷

⁷ Employment growth associated with the Medical Innovation Park has been categorized as employment land employment (employment in industrial type buildings). Currently, the Medical Innovation Park does not form a part of the vacant employment land inventory, as the site is located outside a designated Employment Area.



Figure 6-3
Township of Oro-Medonte
Share of Employment within Employment Lands, 2020 to 2051



Source : Estimated by Watson & Associates Economists Ltd., 2020

Figure 6-4 summarizes forecast employment land needs to 2051. Key observations include the following:

- As previously discussed, an employment density of 7 jobs per gross ha (3 jobs per gross acre) is targeted which is slightly higher than the current estimated employment land density of 4 jobs per gross ha.
- Within the 2020 to 2051 forecast period, the Township is anticipated to require an additional 193 gross ha (477 gross acres) of employment lands to accommodate forecast employment growth. This amounts to an annual average of approximately 6 ha (15 acres) per year.
- As discussed in Chapter 5, the Township has a vacant designated employment land supply of 130 gross ha (321 gross acres).
- Some of the Township's vacant employment land parcels will likely not develop over the planning horizon, due to small size, fragmentation, odd configuration, access issues, inactivity/land banking, etc., which may tie up potentially vacant and developable lands.
- Long-term land vacancy is a common characteristic that is broadly experienced on employment lands in Ontario and beyond. For the purpose of



this analysis, an estimate of 15% long-term land vacancy has been applied to the net developable vacant employment land inventory. Adjusted for land vacancy, the Township's net developable vacant industrial land supply is 110 net ha (271 net acres).

- As summarized in Figure 6-4, the demand for employment lands over the next three decades exceeds the supply of vacant designated employment lands. It is forecast that to accommodate employment growth on employment lands to the year 2051, approximately 83 gross ha (205 gross acres) of additional designated employment lands will be required.

Figure 6-4
Township of Oro-Medonte
Employment Land Needs to 2051

| | | |
|--|-------------------|-----------|
| Employment Growth on Employment Lands | A | 2,100 |
| Growth Accommodated through Intensification | B | 750 |
| Employment Growth Adjusted for Intensification | $C = A - B$ | 1,350 |
| Density Assumption (jobs/gross ha) | d | 7 |
| Land Required (ha) (C/d) | (1) | 193 |
| Gross Vacant Employment Land (ha) - Gross | (2) | 130 |
| Land Vacancy Adjustment (15% of Gross Vacant Land) | (3) | 20 |
| Gross Vacant Employment Land Adjusted for Land Vacancy (ha) | | 110 |
| Vacant Employment Land Need, Gross ha (Deficit) | $(1) - (2) + (3)$ | 83 |



Chapter 7

Target Sector Needs and Requirements Analysis



7. Target Sector Needs and Requirements Analysis

7.1 Results of Stakeholder Interviews

Key stakeholders were interviewed to better understand the current state of the Township's employment lands, in terms of their market supply potential, relative strengths and weaknesses by geographic location and overall market competitiveness. These interviews also provided the ground insight in developing a cohesive vision related to the Township's employment lands and, more broadly, future local economic opportunities.

The Consultant Team worked with the Township to develop an interview guide, with the goal being to obtain a cross-section of stakeholders across different industry sectors and organizations that would provide local insight into the Township's existing economy and emerging industries. Key stakeholders interviewed include Township staff and departments, business owners, developers, L.S.R.A., brokers, etc. Over a dozen stakeholders were contacted by the Township and invited to participate in virtual interviews. Eighteen stakeholders (eleven business surveys and seven stakeholder surveys) were interviewed using the Interview Questionnaires provided in Appendix A.

The key takeaways from these interviews are as follows:

- **There was overall agreement that the Township is well-positioned to attract economic activity and improve its competitiveness in the long term; however, it was expressed that improvements are needed to the market supply of Employment lands, including ensuring effective zoning.**

Stakeholders expressed that the Township is well-positioned to capitalize on the economic activity and opportunities due to its location, access, competitive land prices.

In order to capitalize on the above characteristics and avoid missed opportunities in attracting businesses and emerging industries, there is a consistent need for varied types of employment lands (e.g. size, location, configuration, amenities, etc.), but more specifically there is a need for large, zoned, serviced, and developable employment lands.



- **Land-use designations and permissions of some employment lands need to be revisited given increasingly protective environmental policies and designations, and therefore development constraints, and the changing nature of employment.** It was shared that some of the zoning for employment lands was prepared in the 1990s and is not up to date, and many areas that have potential for industrial development are not zoned. Further, there are discrepancy/incompatibility issues between employment designations and zones.
- **Existing approval procedures:** Many of the stakeholders pointed out that current processes for getting approvals for setting up businesses are cumbersome.
- **Focus on development of infrastructure, including broadband services:** It is recognized by most of the stakeholders that servicing was important, especially in the present context. Some of the services that were pointed out by the stakeholders include internet/broadband, sewage treatment facility, and natural gas supply.
- **The cluster of post-secondary institutions in the region and their growing research and development efforts:** The nearby major education institutions in Barrie and Orillia provide opportunities for the Township to plan for the changing nature of employment and improve labour force attraction and retention.

The following is a brief strengths, weaknesses, opportunities and challenges (SWOC) analysis for the Township derived from the stakeholder and business surveys:

Strengths

- **Proximity to the G.T.A. and the Cities of Barrie and Orillia –** Geographically, the Township is well positioned to provide location-based benefits due to its proximity to the G.T.A. and cities like Barrie and Orillia.
- **Access to Highways 11, 12, and 400 –** The Township has access to various highways, particularly Highway 11, that facilitate access and goods movement.
- **Comparably lower land prices –** Relative to Barrie, Orillia, and the G.T.A. municipalities, the land prices in Oro-Medonte are relatively lower.



- **Proximity of Lake Simcoe Regional Airport** – Lake Simcoe Regional Airport provides for both an enhancement of connectivity as well as a number of industrial and commercial opportunities in its vicinity. The airport has been identified as an economic Employment District in the Growth Plan 2020.
- **Presence of recreational facilities (Gateway to cottage country)** – In addition to being close to major urban centres in the region, the Township is also rich in recreational facilities and attractions and is considered the gateway to Cottage Country. The Township is en route to Lake Muskoka from the G.T.A. and this offers further potential to the Township in terms of enhanced commercial and tourism development.

Weakness

- **Lack of zoned industrial land** – There is a vast expanse of vacant lands within the Township that have potential for industrial development; however, a very small portion of this area is zoned and ready for sale. Furthermore, a considerable portion of the Township's zoned industrial lands have identified environmental constraints.
- **Administrative processes and approvals** – As per the stakeholder surveys, one of the major issues businesses face is the presence of too much red tape and processes including multiple layers of approval encompassing internal and external processes.
- **Availability of serviced lands** – At present, the Township does not have a supply of serviced and market-ready employment land. Most of the stakeholders pointed out that the majority of the lands are un-serviced and developers have to bear the cost of servicing.
- **Limited Broadband Connectivity** – As discussed in the previous chapters, technological innovation and improved broadband regional telecommunications are key drivers of economic expansion in knowledge-based sectors. A key issue pointed out in the stakeholder surveys was that the Township presently faces a limitation in broadband connectivity.
- **Limited availability of Affordable Housing** – As per the Stakeholder surveys and discussions, housing prices are higher in the Township as compared to surrounding Municipality. This may create a challenge for the Township with respect to affordable housing and attracting labour force.



Opportunities

- Large scale projects such as the Oro Station Automotive Park and the Medical Innovation Park can attract more businesses within the Township.
- **Simcoe Linx Transportation Network** – The Simcoe Linx provided the opportunity to connect labour force with parts of the Township. At present, there are multiple routes that connect Oro-Medonte with other areas in Simcoe.
- **Agri-Business** – The Township's proximity to agriculture lands within the Simcoe Area, along with its strength in manufacturing, presents opportunities to support value-added/ancillary uses in agri-business and food processing sectors.
- **Workforce Development** – Focusing on workforce development is a key component of economic development; focus on attracting skilled workforce capable of participating in the technology-based economy, as well as semi-skilled and low-skilled workforce to service industries.

Challenges

- **Environmental features/constraints** – The Township has many environmental features that need to be considered while planning for employment lands. Such constraints may reduce the net developable industrial / employment land, however, need to be considered for ensuring balanced development.
- **Access Constraints from Highway 11** – There are certain points that are constrained in availing access from Highway 11. These may be due to traffic planning and engineering, environmental considerations, etc. and should be considered.
- **COVID-19** – One of the largest short-term constraints facing businesses within the entire region is COVID-19. The forced closure of businesses nationwide for an extended period has devastated the economy, particularly vulnerable sectors such as tourism and retail. While it is hard to predict the long-term implications of the pandemic on business performance, the current limits on travel and the closure of the U.S. border suggest that local businesses face a long road to recovery.



- **Climate Change** – While not an immediate threat, climate change poses issues to regional agricultural manufacturers as it relates to food security and farming practices which have direct implications to the food and beverage processing industries. Implications on employment land planning are also important as the frequency of severe weather events (e.g. fire, storm, floods) is more likely to occur.

7.2 Target Sector Requirements

Based on the feedback received from the stakeholders and looking at the local potential and type of enquiries being received from within the Township, some of the target sectors have been identified. At both the regional and local levels, location requirements of industry can vary considerably depending on the nature of the employment sector/use. Employment sectors typically situated in industrial areas have varying site-specific requirements. To be successful in attracting a broad range of employment sectors, it is recommended that the Township's employment lands provide the following corresponding attributes, as summarized in Figure 7-1.

Figure 7-1
Employment Sector Requirements

| Employment Sector/Land Use | Requirements |
|--|---|
| Manufacturing and Advanced Manufacturing | <ul style="list-style-type: none">• Access to 400-series/ controlled access highways (Highway 11)• Access to skilled and unskilled labour.• Proximity to markets and related industries.• Competitive land prices.• Parcel size: 1-4+ ha.• Buffers from surrounding non-industrial uses.• General or prestige setting.• Expansion potential. |
| Distribution and Logistics | <ul style="list-style-type: none">• Access to 400-series/controlled access highways.• Excellent access/traffic circulation for heavy truck traffic.• Truck access, loading/unloading requirements. |



| Employment Sector/Land Use | Requirements |
|--|---|
| | <ul style="list-style-type: none"> • Competitive land prices. • Parcel size: 5-20 ha. • Flexibility in parcel configuration to accommodate large-scale users. • Possible need for open storage. • Compatible surrounding land uses/buffers from surrounding non-industrial uses. • Expansion potential. |
| Research and Development/ “Knowledge-based” Sectors | <ul style="list-style-type: none"> • Access to skilled labour force. • Proximity to related industry cluster (companies and public institutions such as universities). • Prestige “campus-like” setting. • Parcel size: 1-2 ha for standalone building or facility space within multi-tenant incubator/accelerator type building. • Flexible leasing options. • Access to on-site amenities and proximity to off-site services. |
| Corporate/ Government Office; Professional, Scientific, and Technical Services/Business Services | <ul style="list-style-type: none"> • Prestige setting. • Access to skilled labour force. • Access and exposure to 400-series/limited access highway or major arterials. • Access to on-site amenities and proximity to off-site services. • Parcel size: 1-2 ha. • Flexible leasing structures and market choice (multi-tenant vs. freestanding office and multi-tenant industrial condominiums). |
| Construction | <ul style="list-style-type: none"> • Access to skilled and semi-skilled labour force. • Competitive land prices. • Proximity to customer base. • Range of size of development sites. • Need for open storage. |
| Agri Processing | <ul style="list-style-type: none"> • Access to agricultural land and market. • Proximity to storage/warehousing. • Access and transportation. • Proximity to other Employment Areas/lands. • Proximity to downstream industries. • Competitive land prices. |



Chapter 8

Policy Recommendations



8. Policy Recommendations

8.1 Policy Recommendations and Strategic Directions

The following policy recommendations are informed by the employment land supply and demand analysis provided in this report.

- 1) An update to the zoning by-law is recommended to align with O.P. mapping and policies. Specifically, the lands zoned for employment should align with those lands designated for employment in the Township's O.P. It is also recommended to align the Natural Heritage and Environmental land-use designations and zones to provide consistent policy application and regulation. This work may require engagement of the appropriate conservation authorities to complete an update to the existing mapping.
- 2) The lands subject to the Minister Zoning Order for the Medical Innovation Park should be designated in the O.P. as an Employment Area.
- 3) Building on the directions of the L.S.R.A. Strategic Plan,¹ the current and long-term future use of the L.S.R.A. airport lands, including surrounding lands, should be examined. This analysis should consider the overall economic benefit of the L.S.R.A. to the County and the Township, and the role of the airport as a significant asset to enhance regional economic development potential. Employment lands located in the periphery of airports tend to develop synergies with airport activities, capitalizing on the attractiveness of proximity to air transport connectivity, which can enhance business efficiency and optimize business operations. The strength and nature of this relationship is largely dependent on the size and type of direct airport activities, in terms of the number of passengers and amount and type of cargo handled.
- 4) The benefits of continuing to develop contiguous but distinct Employment Areas of critical mass surrounding the L.S.R.A. should be a consideration when exploring location options for future employment lands expansion in the Township.

¹ <https://simcoe.civicweb.net/document/47845>



- 5) The Township should continue to work closely with the County and Province to coordinate plans for the Economic Employment District Lands and the surrounding lands.
- 6) It is recommended that the Township be proactive in ensuring that its employment land supply is sufficient to accommodate both near-term and longer-term demand. The Township should establish a monitoring system to track the status of employment lands development on an annual basis, and provide a comprehensive update of this Employment Land Strategy every five years.
- 7) It is noted that in Chapter 6, herein, that a long-term employment land vacancy rate of 15% has been applied to the net developable vacant employment land inventory, to recognize that not all of the Township's vacant employment lands may be available (i.e. for sale) in the near-term. It is recommended that the Township continue to annually monitor its supply of available employment lands by development status (i.e. for sale/lease). The results of this monitoring effort should be used to determine if a higher employment land vacancy rate factor should be used in subsequent updates to the Township's long-term employment land needs.
- 8) The Township may consider a range of promotional tools to inform prospective industries about Oro-Medonte and its communities. These could include social media campaigns or directed marketing campaigns to speak with existing and interested businesses, and real estate network connections.
- 9) The Township may consider improving the marketability and feasibility of developing vacant employment lands by undertaking necessary pre-screening studies and assessments at the expense of the Township. These may include but are not limited to: servicing strategies, environmental studies, water protection requirements, or archaeological assessment studies. The Township may make use of provincial programs such as the Investment Ready Certified Site Designation and Rural Economic Development Program (R.E.D.) for achieving this.
- 10) The agricultural base represents a significant component of Oro-Medonte's local economy. Agriculture and the agri-food system encompass several industries including the farm input and service supplier industries, primary agriculture, food and beverage processing, food distribution, retail, wholesale, and food service industries. The Township should continue to recognize opportunities for agricultural-related industrial and commercial uses, which



are permitted in agricultural areas subject to O.P. policies and, where applicable, the Guidelines on Permitted Uses in Ontario's Prime Agricultural Areas.

8.2 Implementation Tools for Intensification

Given the current employment lands average density of 4 jobs per hectare (as per section 6.4), there are a number of opportunities to promote intensification through infill development and redevelopment of underutilized sites. The supply analysis in section 5.2.1 identified 133 hectares (328 acres) of the employment lands that are currently underutilized and could accommodate some employment growth. The following measures are recommended to promote intensification and support utilization of the Township's existing employment lands:

- Create a program with adequate resources that allows for:
 - scheduled check-ins (e.g. annually) with landowners of current large parcels (e.g. over 5 ha) within and surrounding existing Employment Areas to assess interest in developing the lands and assessing feasibility of development or redevelopment;
 - explore opportunities for infill and redevelopment in mature industrial areas;
 - undertake marketing calls with interested developers or employers to discuss opportunities following the conversations with existing landowners. This is intended to allow the municipality to understand the current and future needs of industries and offer up to date information;
 - explore opportunities to establish incubator facilities to promote and encourage the development of start-up industries, particularly related to knowledge-based sectors and other export-based emerging industry clusters; and
 - within the check-in program, explore public-private partnerships which would encourage intensification and infill development opportunities within employment lands.
- Consider municipal financial incentives to promote intensification of employment lands, if feasible. An example of this could be the development of a community improvement plan (C.I.P.) within particular geographic areas of the Township.



8.3 Framework for Identifying Employment Land Expansion

In accordance with the long-term employment land demand forecast provided in Chapter 6 and existing developable employment supply opportunities identified in Chapter 5, there is a need to consider employment land expansion opportunities across the Township. The framework used to consider potential new employment lands includes the following:

- The potential new Employment Area is large enough in size to accommodate the forecast need of approximately 80+ gross ha (200+ gross acres), as per section 6.5;¹
- Larger parcels are favoured to avoid the need for consolidations and allow for maximum market choice of development by business sector/type and size;
- The parcels should consider access from Highway 11 and the accessibility of the parcel, with priority for those with two-way access from Highway 11 (although it is noted this may trigger the requirement for a Ministry of Transportation permit);
- Preferably, the parcels should have visibility from Highway 11; however, this is not necessarily a core requirement in the selection of the preferred site;
- The area should be contiguous with other employment designated lands and have potential to expand to surroundings lands in the future; as such, lands with abutting natural heritage features or stable residential would be less favourable;
- Prime agricultural lands are avoided where possible. Where not possible, lower priority agricultural lands should be considered based on current land use, amount of capital investment into agricultural infrastructure, and proximity to adjacent urban and rural settlement areas. Impacts to existing agricultural operations are minimized;
- Land-use compatibility with existing surrounding uses can be managed and the proposed uses should comply with minimum distance separation requirements; and

¹ Gross land area requirements exclude non-developable natural environmental features.



- Employment development can be setback appropriately and impacts limited to existing natural heritage features.

8.4 Preliminary Recommendation for New Employment Lands

A number of potential new Employment Areas adjacent to and along Highway 11 within the Township of Oro-Medonte were considered and evaluated in the analysis. This includes areas located north and south of Highway 11, and adjacent to the existing Employment Areas. Given the framework outlined above, two potential Employment Area expansion locations have been recommended as the best suited for the Township to prioritize. All Employment Area expansion locations will be further reviewed during the Township's Official Plan Review process. Through this process, any prime agricultural lands would be closely considered and evaluated in accordance with the Provincial Policy Statement Employment Area expansion criteria (ref. section 1.1.3.8 of the P.P.S 2020).

Highway 11 between Lines 6 and 7:

- Proximity and connection to L.S.R.A. Economic Employment District, proposed innovation parks and Oro-Centre Office/Industrial lands. The proposed location option supports provincial, County, and Township land-use policies and broader economic development objectives.
- The proposed lands are contiguous with existing designated employment lands in the Township's O.P.
- Access from Line 6, with a right turn lane in/out from Highway 11. Access would likely be constrained from Line 7 due to natural heritage features.
- The majority of the parcels have good visibility from Highway 11.
- Natural heritage features limit total available land and would require setbacks.
- There are opportunities for these lands to be comprehensively developed in a manner that is respectful of the existing businesses and agricultural uses within this area.



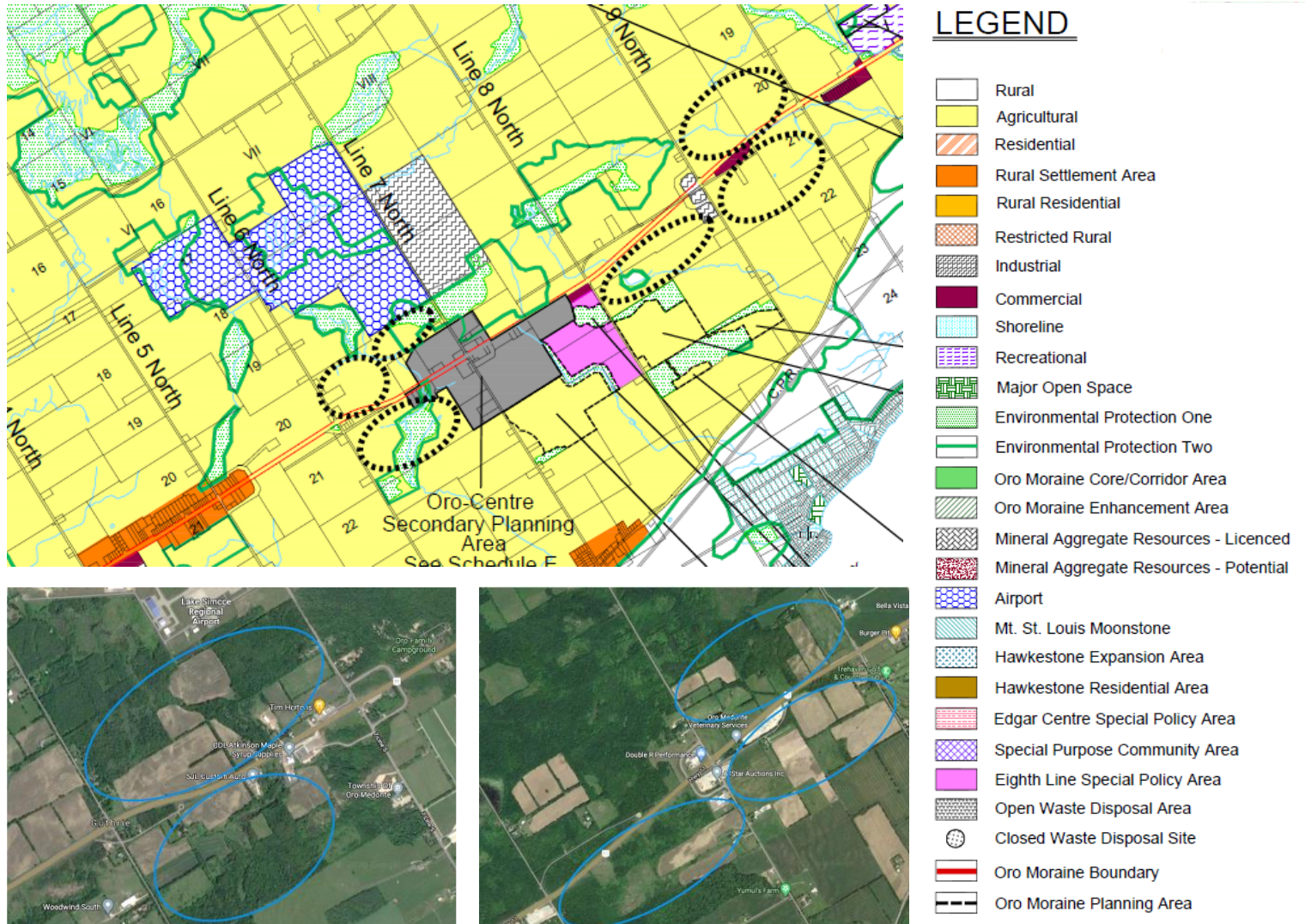
Highway 11 at Line 9:

- The area includes large parcels that are contiguous to one another and is surrounded by other lands that could accommodate future Employment Area expansion.
- The lands are contiguous with existing Industrial designated lands to the west and surround commercial lands to the south-east within the Township's O.P.
- The lands are located approximately 3 km from the Oro-Centre Secondary Plan area and L.S.R.A.
- The lands within this area are currently accessed via a flyover from Highway 11 at Line 9 which allows for both north and south directional travel from Highway 11.
- The majority of the parcels have good visibility from Highway 11.
- There are opportunities for these lands to be comprehensively developed in a manner that is respectful of the existing businesses and agricultural uses.

Figure 8-1 shows the conceptual locations for potential employment land expansion options, to be considered through the Town's Official Plan Amendment process.



Figure 8-1: Township of Oro-Medonte
Conceptual Location Options for New Employment Lands





Appendices



Appendix A

Interview Guide for Stakeholder Interview - Employment Lands Strategy 2020



Appendix A: Interview Guide for Stakeholder Interview

Employment Lands Strategy 2020

The Township of Oro-Medonte is developing an Employment Lands Strategy. The objective of this Strategy will be to provide a comprehensive review of the Township's designated employment lands and future regional/local economic and development trends.

This interview guide will be used to lead the stakeholder interviews. They are not meant to be prescriptive and are to give you an idea of the different topics we will cover.

It is encouraged that you share additional feedback that may not be covered on this interview guide or the interview discussion.

If you have any questions, please feel free to reach out to _____

Trends and Competitiveness

- What are the key physical and economic attributes that employment land developers generally desire in employment lands in the Township and/or the County? (e.g. industrial/business park land, commercial, retail development)
- In your opinion, what are the strengths and weaknesses of the Township in terms of attracting and retaining employment?
 - What do you see as some of the Township's opportunities and challenges?
- In comparison to other municipalities within the County and surrounding area, how competitive do you feel the Township is for industrial, office, and/or commercial development? (consider factors like location and transportation access, available serviced industrial lands, industrial land prices, access to amenities, property taxes, development impact fees/charges, water/sewer rates/other utilities, access to skilled labour)
- In your observations, what role have you noticed surrounding municipalities and those within the County play in attracting employment and associated employment land development? And what has the Township's traditional role been in that?



Market Demand and Supply

- What is your perspective on the short-term and medium-term market (i.e. 0 to 12 months and 1 to 3 years) for industrial and office development in the Township?
- In your opinion, has interest for industrial, office, and/or commercial development increased or decreased in the last few years? Please specify expanding/contracting sectors.
- In your opinion, do you think the employment land supply in the Township is well aligned with demand in terms of quantity, site characteristics (e.g. parcel size, access to highways, etc.), and location?

Township Context

- In your opinion, are there specific planning policies and/or zoning by-law regulations that enhance or impede the Township's competitiveness and ability to develop its vacant employment lands, or the redevelopment of its occupied/underutilized Employment Areas?
- What role can and should the Township play in attracting new industry? What industries should the Township pursue?



Appendix B

Business Questionnaire Format



Appendix B: Business Questionnaire Format

Identification:

- Please identify the name of your business (note that the business name will not be released in the study), type of business operation, and years of operation within the Township of Oro-Medonte.

Employment/Labour Force:

- Approximately how many employees work at your current operation within Oro-Medonte? (include full-time and part-time employees)
- Where do you draw most of your employment base (approximate percentage)?
 - ___ % Oro-Medonte
 - ___ % Barrie/Orillia and Other Simcoe County
 - ___ % Greater Toronto Area
 - ___ % Other
- Do you find it a challenge to find qualified candidates within the local area? If so, please elaborate.
- In your opinion what are the strengths of the Township of Oro-Medonte in terms of attracting and retaining employment?
- Over the next five years, do you anticipate any changes in staffing requirements?
 - Increase in staffing?
 - Decrease in staffing?
 - No change in staffing?
 - Unknown?
- If you anticipate an increase in staffing over the next five years, please elaborate on the approximate increase.

Business Operation:

- Does your business also have operations outside Oro-Medonte? If so, please describe.
- What are some of the key benefits and challenges of operating a business within Oro-Medonte?
- Are there any local issues or constraints that will directly influence the operation of your business over the short and medium term (e.g., labour availability, acquiring land for expansion, business climate, etc.)?
- Besides the general business climate and trade conditions, which of the following operational issues is a challenge for your organization for future growth (select if any are applicable):
 - Finding new employees?
 - Transportation access?
 - Operating costs?
 - Facility upgrades and expansion requirements?



- Acquiring land for expansion?
- Other? Please specify.
- None.
- Does your business have plans to expand its operation in the next five years? If so, please elaborate.