

The Town of East Gwillimbury

10 Year Economic Development Strategy – Part II Appendices

November, 2011



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1 Economic Base Analysis

1.1 Demographic and Economic Analysis

This section examines the following Town of East Gwillimbury community characteristics in comparison to the Region of York and Province of Ontario.

- Demographics
- Labour force and employment
- Agricultural profile
- Regional tourism activity
- Industry sectors
- Land use and physical infrastructure
- Human infrastructure

The profile includes Statistics Canada data from 2001 and 2006, but also includes updated 2011 demographic data from Manifold Data Mining Inc., which has been used to supplement the Census data where appropriate. Additionally, material has been drawn from relevant regional, provincial and federal government sources to provide a more comprehensive understanding of the Town of East Gwillimbury.

1.1.1 Demographic Characteristics

1.1.1.1 Population Growth

The Town of East Gwillimbury has experienced modest population growth in the last 15 years, though it lags significantly behind the rest of York Region in which it is situated (see Figure 1). Between the Census years of 1996 and 2006, the Town added 1,299 residents for just a 6.6% growth rate during that period; in comparison, York Region added over half its population (50.7%) during the same time period. The provincial population also grew at nearly twice the rate of the Town's over the same period (13.1%).



FIGURE 1: COMPARATIVE POPULATION GROWTH, 1996-2011

Population	1996	2001	2006	2011	1996 - 2006 % Change	1996 - 2006 (10 Year Net Increase)	2001 - 2006 % Change	2001 - 2006 (5 Years) Net Increase	2006 - 2011 % Change	2006 - 2011 (4 Years) Net Increase
East Gwillimbury	19,770	20,555	21,069	22,165	6.6%	1,299	2.5%	514	5.2%	1,096
Region of York	592,445	729,254	892,712	1,035,640	50.7%	300,267	22.4%	163,458	16.0%	142,928
Ontario	10,753,573	11,410,046	12,160,282	--	13.1%	1,406,709	6.6%	750,236	--	--

Source(s): Statistics Canada, Census of Population (1996, 2001, 2006); York Region Planning and Services Department and CMHC Housing Completion Data 2010, Manifold Data Mining Inc., 2011.

Since 2006, the Town's population is estimated to have grown at a slightly faster pace, adding 1,096 residents (5.2% rate) to a total of 22,165. York Region's population grew by 16.0% over the same period.

Despite the relatively slow rate of growth experienced in the Town in the previous 10 to 15 years, it is slated for rapid expansion in the years and decades to come. The Province of Ontario in 2006 released *Places to Grow: A Growth Plan for the Greater Golden Horseshoe*, which set regional and municipal targets for population and employment throughout the GTA. The Town's population is projected to grow to 88,000 people by 2031 – an increase of between 62,000 and 66,000 people, depending on the 2011 estimate used. This represents an increase of between 235% and 297%. While the Region as a whole is also expected to experience significant growth of over 430,000 people, this represents growth of just over 40%. For the Town's population to grow very strongly over the next 20 years requires significant investment in infrastructure and community services. This will have significant implications for all aspects of municipal service delivery, management and economic growth in the coming years.

FIGURE 2: FORECASTED POPULATION GROWTH, 2011-2031

	2011	2016	2021	2026	2031
East Gwillimbury	26,300	34,700	48,300	66,800	88,000
Region of York	1,071,100	1,200,100	1,314,700	1,415,200	1,507,400

Source(s): 2011 to 2031 forecasts provided by York Region Planning and Development Services Department, 2008.

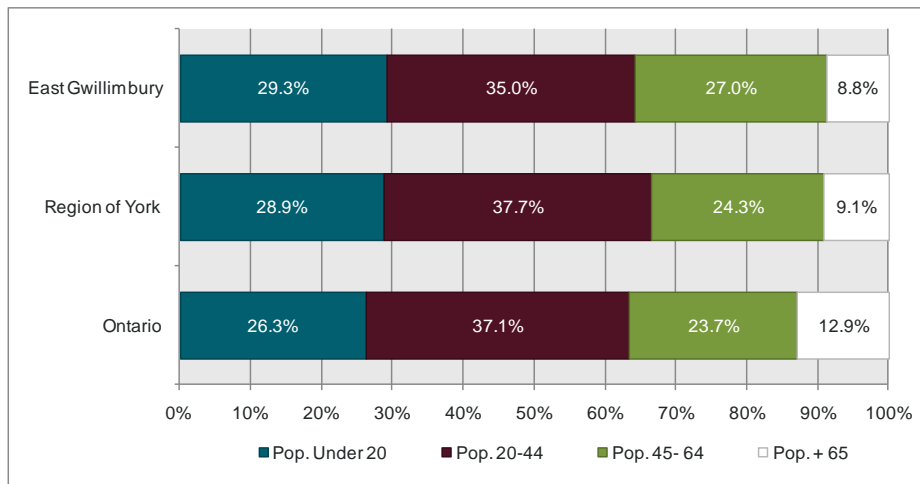
Note: Figures have been rounded to the nearest hundred.



1.1.1.2 Population by Age Structure

Figure 3 and 4 indicate the age structure of the population in the Town, Region and Province. In 2001, the Town has a comparatively high youth (under 20) population (29.3%), and a comparatively low senior (65+) population (8.8%) – especially compared to the province as a whole. However, the population aged between 45 and 64 was the highest among the three regions examined, at 27.0%.

FIGURE 3: COMPARATIVE POPULATION BY AGE, 2001

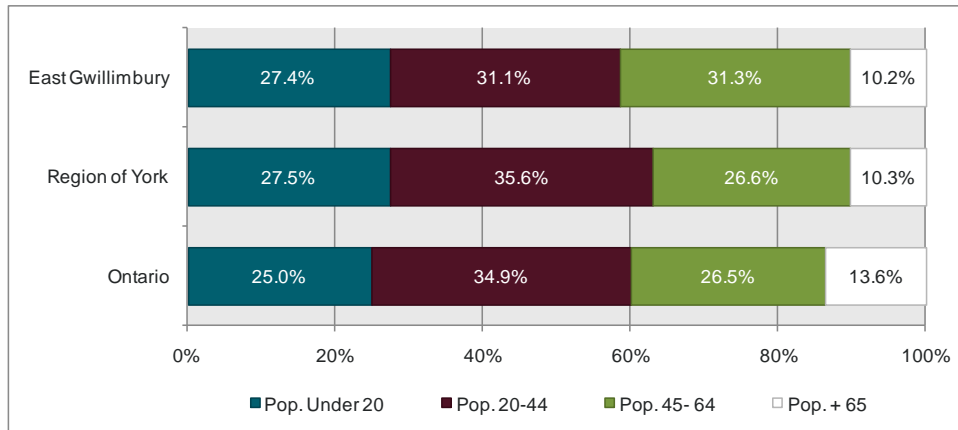


Source: Derived from Statistics Canada, Census of Population (2001) by Millier Dickinson Blais Inc.

Moving forward 5 years (Figure 4), it becomes clear that East Gwillimbury will increasingly have to confront the demands of an aging population. Though its senior population remains lower than the province, the 45-64 age group has ballooned to 31.3% and has become a larger share of the population than the 20-44 age group (at 31.1%). This trend can be attributed to the aging of the baby boomer cohort. The total share of the Town's population over 45 is also higher than in both the Region and the Province. This aging trend, and the potential pressures it will place on the Town in terms of service delivery and access, is common to many communities in Ontario and Canada.



FIGURE 4: COMPARATIVE POPULATION BY AGE, 2006



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

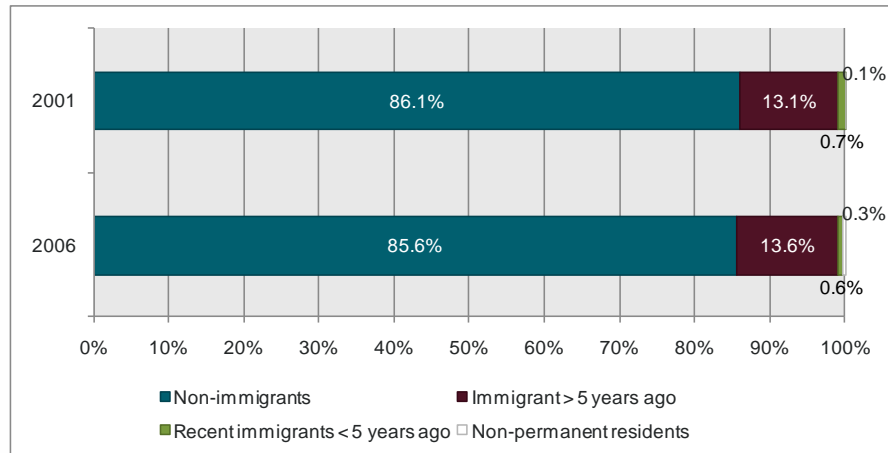
1.1.1.3 Growth/Change in Immigrant Population

It is clear that the population of both Ontario and Canada is becoming increasingly multicultural. The influx of immigrants, in addition to adding to the cultural and ethnic diversity of the population, is also becoming increasingly critical for driving population and employment growth in the country; Statistics Canada has estimated that all *net* labour force growth for the country will be attributable to immigration as of *this year*.

Figure 5 and 6 compare the immigrant status for the Town and Province's population. Immigrants accounted for only 14.5% of the Town's population in 2006 – up modestly from 13.9% in 2001. On the other hand, Ontario had 29.2% of the population foreign-born in 2006, which was proportionately more than double the Town's share.

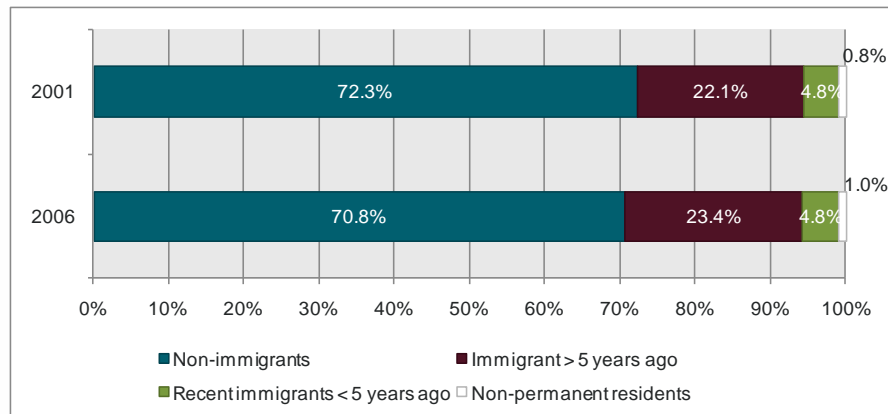


FIGURE 5: POPULATION BY IMMIGRANT STATUS, TOWN OF EAST GWILLIMBURY, 2001-2006



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

FIGURE 6: POPULATION BY IMMIGRANT STATUS, PROVINCE OF ONTARIO, 2001-2006



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

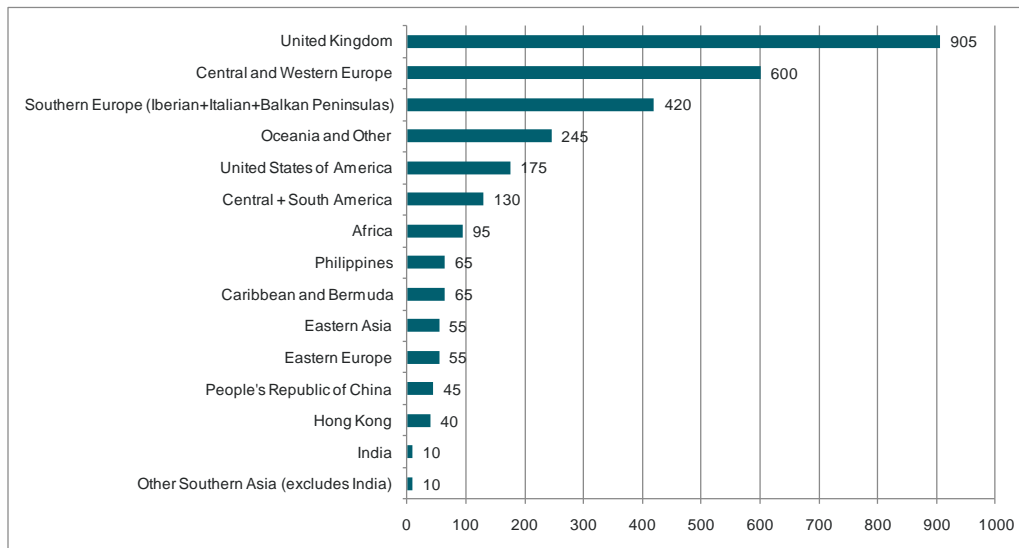
If the Town's population is to grow at the expected rate discussed earlier, it is clear that much of this growth will be derived from immigrants. It will be useful for the Town to consider the impacts of this demographic shift with respect to its



efforts to attract commercial and industrial investment and development. As the immigrant population increases, it is likely that consumer and market preferences will change as well.

Figure 7 reflects the composition of the Town's immigrant population as of 2006. It is clear that much of this segment of the population is from 'traditional' sources, specifically the United Kingdom, Western Europe, Southern Europe and the U.S. The collective immigrant population from Asia amounted to only 225 people. This is also likely to change based on the rapid growth in South and East Asian populations elsewhere in the Region and the Province overall.

FIGURE 7: TOTAL IMMIGRANTS BY PLACE OF BIRTH, TOWN OF EAST GWILLIMBURY, 2006



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

1.1.1.4 Ethnic Diversity

Trends in the Town's visible minority population largely mirror those of the immigrant population. In 2006, only 725 residents were of a visible minority group, which was proportionately small compared to the Region and Province. This visible minority population grew significantly (23.9%) between 2001 and 2006, compared to growth of only 1.8% among the population that is not a visible minority. This growth was concentrated particularly among the Filipino, Japanese, and Southeast Asian populations. Though this visible minority growth still lags that of the Region (52.2%) and the Province (27.5%), it is likely that these growth trends will continue to accelerate in the coming years.



This trend will be an important consideration for the Town's growth planning since there have been a number of recent efforts to demonstrate and quantify the value of cultural diversity to social and economic cohesion and the prosperity in communities. To the extent that the Town can provide services and opportunities for its immigrant and minority populations, it will signal an 'open for business' attitude that could improve its competitive position in attracting talent and business investment.

FIGURE 8: VISIBLE MINORITY POPULATION, TOWN OF EAST GWILLIMBURY, 2001-2006

	East Gwillimbury			York Region			Ontario		
	2006	2001	%Change	2006	2001	%Change	2006	2001	%Change
Total visible minority population	725	585	23.9%	329,955	216,130	52.7%	2,745,200	2,153,045	27.5%
Chinese	95	175	-45.7%	138,575	100,710	37.6%	576,980	481,510	19.8%
South Asian	95	35	171.4%	80,595	47,350	70.2%	794,170	554,870	43.1%
Black	95	65	46.2%	20,765	16,150	28.6%	473,760	411,095	15.2%
Filipino	85	10	750.0%	17,150	10,370	65.4%	203,220	156,515	29.8%
Latin American	40	15	166.7%	8,560	4,720	81.4%	147,135	106,835	37.7%
Southeast Asian	70	20	250.0%	10,110	5,170	95.6%	110,045	86,410	27.4%
Arab	15	20	-25.0%	7,400	4,935	49.9%	111,405	88,545	25.8%
West Asian	10	60	-83.3%	20,860	8,550	144.0%	96,615	67,105	44.0%
Korean	20	95	-78.9%	10,855	5,905	83.8%	69,540	53,955	28.9%
Japanese	80	10	700.0%	2,365	1,905	24.1%	28,080	24,925	12.7%
Visible minority, n.i.e.	55	50	10.0%	3,695	5,910	-37.5%	56,845	78,915	-28.0%
Multiple visible minority	55	35	57.1%	9,015	4,455	102.4%	77,400	42,375	82.7%
Not a visible minority	19,965	19,610	1.8%	557,390	509,540	9.4%	9,283,690	9,132,500	1.7%

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

1.1.1.5 Educational Attainment

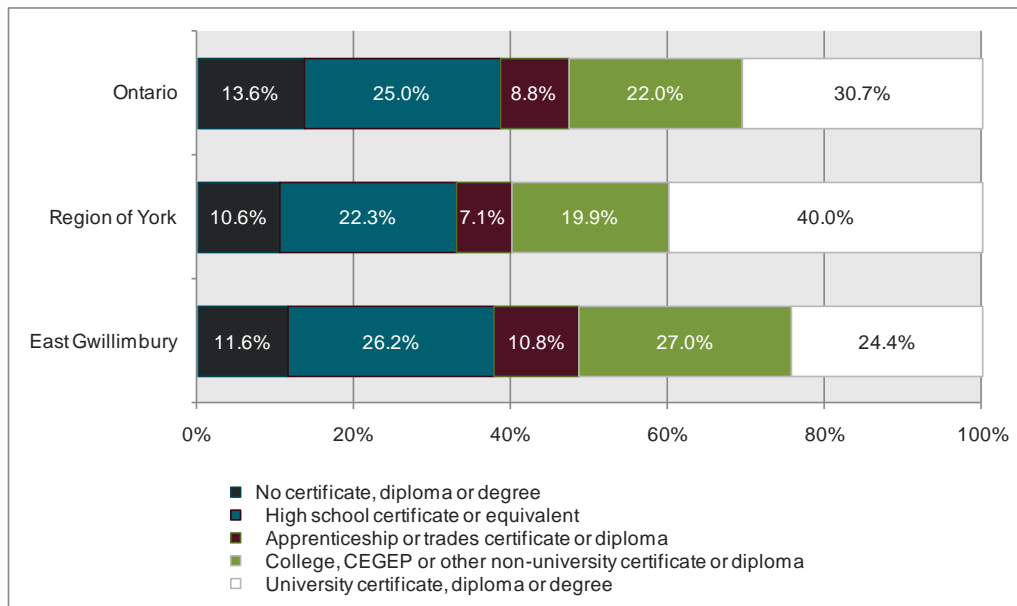
Educational attainment is one of the most important socio-economic indicators to consider in evaluating a community's economic growth potential, as it speaks directly to its ability to staff new and existing local businesses. This has taken on increasing importance in recent years, as the goods-producing segment of the economy has begun to recede in favour of a knowledge-based economy, where an increasing share of work depends on the skills and creativity of a talented



workforce. While a goods-producing economy and a knowledge-base economy are not exclusive categories, what is clear is that a university education is an increasing requirement in the workforce.

Figure 9 demonstrates that just 24.4% of the Town's 'working age' (25 to 64) population have a university degree, which significantly lags both the Region (40.0%) and the Province (30.7%). Notably, the Town does have a *higher* share of its population with college or apprenticeship degrees, providing it with a strong labour force base for industries such as construction, manufacturing and retail trade. However, as the number of jobs in some of these industries decline and the Town looks to become competitive on the basis of knowledge-based industries – for example, in professional services and health care – it needs to explore mechanisms to increase the educational attainment of its population. While this can be done through the attraction of talented workers, the Town's efforts to attract a post-secondary institution will also be critical to improving its overall educational capacity and thus make it more attractive to those companies that rely on a talented labour pool for their operations.

FIGURE 9: COMPARATIVE EDUCATIONAL ATTAINMENT, POPULATION AGED 25 TO 64, 2006

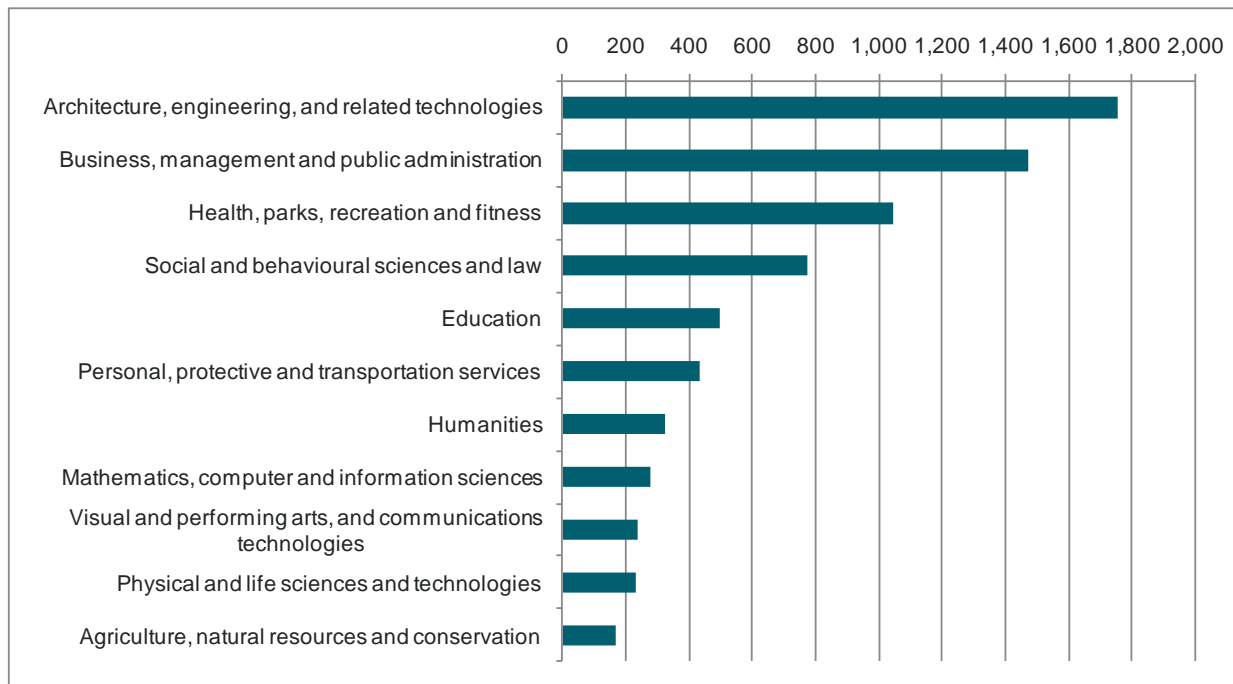


Source: Derived from Statistics Canada, Census of Population (2006) by Millier Dickinson Blais Inc.



Figure 10 builds upon this information by indicating the predominant field of study among educated residents in the Town. Engineering and technology is followed by business management and administration as the most common fields of study in the local labour force. Again, this trend addresses the strong local skill base for construction and manufacturing-related operations and enterprises. However, there also appear to be a diversity of educational backgrounds, ranging from health to education. Many of these residents may be utilizing their skills in other jobs or work outside of the Town. These dynamics will be explored in greater detail in the following sub-section.

FIGURE 10: EDUCATION BY FIELD OF STUDY, TOWN OF EAST GWILLIMBURY, 2006



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

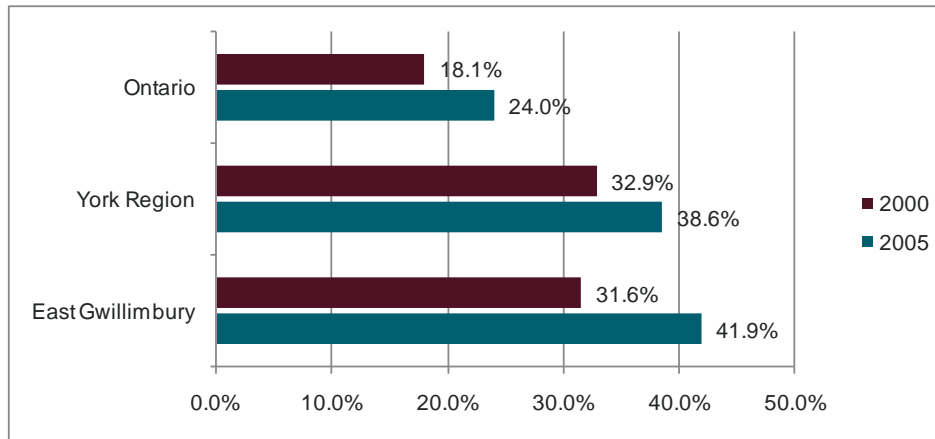
1.1.1.6 Household Income

The household incomes in a community can serve as a useful proxy for its overall socio-economic composition. Figure 11 indicates the percentage of all households in the Town, Region and Province that earn over \$100,000. In the Town, this share was 31.6%, slightly behind the regional share but well ahead of the province. As of 2006, this share of households



in the Town had risen to 41.9%, surpassing the regional share at 38.6%. This suggests that the Town's population had become significantly more affluent in the early part of the decade.

FIGURE 11: COMPARATIVE SHARE OF HOUSEHOLDS EARNING OVER \$100,000, 2000 & 2005

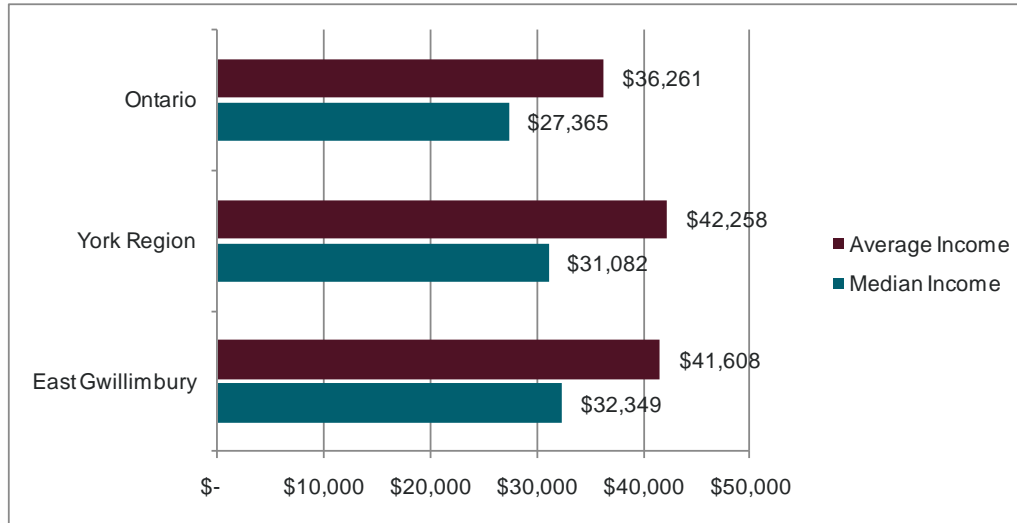


Source: Derived from Statistics Canada, Census of Population (2001, 2006) by Millier Dickinson Blais Inc.

Figure 12 places income in further context by comparing the average and median incomes of the three comparator regions. As of 2005, the Town's average income was \$41,608 - \$650 less than the regional average. However, its median income of \$32,349 was over \$1,200 higher than the Region's. This smaller gap between median and average income suggests that the population in the Town is slightly less polarized, in terms of income distribution, than the Region or the Province.



FIGURE 12: COMPARATIVE AVERAGE AND MEDIAN INCOME, 2005



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

1.1.2 Labour Force and Employment Characteristics

The following section focuses on an important element of the Town's overall economic position and prospects for future growth and sustainability. It provides an assessment of the Town's labour force and employment (i.e. job) composition and growth by industry and occupation, as well as the places of work and commuting patterns of the local labour force.

1.1.2.1 Labour Force by Industry

Between 2001 and 2011, the Town of East Gwillimbury's labour force grew from 12,085 to 13,582, an increase of 12.4%. This outpaces the population growth over the same time period of 7.8%, suggesting that a disproportionate share of the Town's new population is within the labour force, which is a positive trend for the Town.

As seen in Figure 13, the areas of greatest concentration for the Town's labour force (as of 2011) are:

- Manufacturing (1,727 persons or 12.7% of the resident labour force)
- Retail trade (1,530 persons or 11.3%)
- Health care and social assistance (1,382 persons or 10.2%)



- Construction (1,259 persons or 9.3%)

FIGURE 13: LABOUR FORCE BY INDUSTRY, TOWN OF EAST GWILLIMBURY, 2001, 2006 & 2011

	2011		2006		2001	
	Number	% of total labour force	Number	% of total labour force	Number	% of total labour force
All industries - NAICS Industry	13,582	100.0%	12,335	100.0%	12,085	100.0%
11 Agriculture, forestry, fishing and hunting	261	1.9%	225	1.8%	225	1.9%
21 Mining and oil and gas extraction	39	0.3%	50	0.4%	10	0.1%
22 Utilities	178	1.3%	120	1.0%	165	1.4%
23 Construction	1,259	9.3%	1,120	9.1%	1,030	8.5%
31-33 Manufacturing	1,727	12.7%	1,540	12.5%	1,705	14.1%
41 Wholesale trade	1,046	7.7%	870	7.1%	795	6.6%
44-45 Retail trade	1,530	11.3%	1,365	11.1%	1,590	13.2%
48-49 Transportation and warehousing	465	3.4%	500	4.1%	625	5.2%
51 Information and cultural industries	345	2.5%	370	3.0%	425	3.5%
52 Finance and insurance	501	3.7%	450	3.6%	460	3.8%
53 Real estate and rental and leasing	286	2.1%	235	1.9%	215	1.8%
54 Professional, scientific and technical services	953	7.0%	880	7.1%	785	6.5%
55 Management of companies and enterprises	22	0.2%	20	0.2%	0	0.0%
56 Administrative and support, waste management and remediation services	618	4.5%	575	4.7%	505	4.2%
61 Educational services	815	6.0%	760	6.2%	755	6.2%
62 Health care and social assistance	1,382	10.2%	1,190	9.6%	990	8.2%
71 Arts, entertainment and recreation	325	2.4%	345	2.8%	380	3.1%
72 Accommodation and food services	549	4.0%	515	4.2%	385	3.2%
81 Other services (except public administration)	544	4.0%	545	4.4%	500	4.1%
91 Public administration	739	5.4%	665	5.4%	540	4.5%

Source: Statistics Canada Census Population (2001 & 2006) and Manifold Data Mining (2011) by Millier Dickinson Blais Inc.

These industries have employed the largest shares of the Town's labour force since 2001. However, as indicated in Figure 14, the growth trends among these and other industries tell a different story about the trajectory and future composition of the Town's labour force. Of the four industries cited above that are collectively responsible for 43.5% of the Town's labour force, only construction and health care and social assistance have shown consistent growth between 2001-2006 and 2006-2011. Manufacturing and retail trade industries, while showing some improvement between 2006 and 2011, have nevertheless seen their overall share of the labour force decline since 2001.

Instead, growth has occurred in a number of other industries – many of which are more knowledge-intensive than those that have been traditional drivers of local labour force growth. Industries (excluding health care and construction) that have shown consecutive 5-year periods of growth, as shown in Figure 14, include:

- Real estate and rental and leasing (9.3% from 2001-2006, 21.5% from 2006-2011)



- Professional, scientific and technical services (12.1% and 8.3%)
- Wholesale trade (9.4% and 20.2%)
- Administrative and support, waste management and remediation services (13.9% and 7.4%)
- Educational services (0.7% and 7.2%)
- Accommodation and food services (33.8% and 6.7%)
- Public administration (23.1% and 11.1%)

FIGURE 14: CHANGE IN LABOUR FORCE BY INDUSTRY, TOWN OF EAST GWILLIMBURY, 2001-2011

	%change, %change,	
	2001- 2006	2006- 2011
All industries - NAICS Industry	2.1%	10.1%
11 Agriculture, forestry, fishing and hunting	0.0%	15.8%
21 Mining and oil and gas extraction	400.0%	-22.7%
22 Utilities	-27.3%	48.1%
23 Construction	8.7%	12.4%
31-33 Manufacturing	-9.7%	12.2%
41 Wholesale trade	9.4%	20.2%
44-45 Retail trade	-14.2%	12.1%
48-49 Transportation and warehousing	-20.0%	-7.1%
51 Information and cultural industries	-12.9%	-6.7%
52 Finance and insurance	-2.2%	11.2%
53 Real estate and rental and leasing	9.3%	21.5%
54 Professional, scientific and technical services	12.1%	8.3%
55 Management of companies and enterprises	--	10.8%
56 Administrative and support, waste management and remediation services	13.9%	7.4%
61 Educational services	0.7%	7.2%
62 Health care and social assistance	20.2%	16.2%
71 Arts, entertainment and recreation	-9.2%	-5.9%
72 Accommodation and food services	33.8%	6.7%
81 Other services (except public administration)	9.0%	-0.2%
91 Public administration	23.1%	11.1%

Source: Derived from Statistics Canada, Census of Population (2001 & 2006) and Manifold Data Mining (2011) by Millier Dickinson Blais Inc.

Figure 15 places these findings into broader context by comparing the labour force concentration of the Town to the Region and the Province. Data from the year 2006 is used to ensure comparability. In this year manufacturing, retail trade and health care were the three most dominant industries in York Region and Ontario, much like in East Gwillimbury. However, health care and construction account for notably larger shares of the Town's work force than in either of the comparator regions. In York Region, professional, scientific and technical services (10.2%) and finance and insurance



(7.2%) compose much larger shares than in the Town, suggesting that the rest of the Region has made greater progress in attracting skilled, knowledge-based workers. The Province has a much more similar labour force composition to the Town.

FIGURE 15: COMPARATIVE LABOUR FORCE BY INDUSTRY, 2006

	% of total labour force, 2006		
	East Gwillimbury	York Region	Ontario
All industries - NAICS Industry	100.0%	100.0%	100.0%
11 Agriculture, forestry, fishing and hunting	1.8%	0.5%	1.8%
21 Mining and oil and gas extraction	0.4%	0.2%	0.4%
22 Utilities	1.0%	0.7%	0.8%
23 Construction	9.1%	6.6%	5.9%
31-33 Manufacturing	12.5%	13.3%	13.9%
41 Wholesale trade	7.1%	6.7%	4.7%
44-45 Retail trade	11.1%	11.6%	11.1%
48-49 Transportation and warehousing	4.1%	3.4%	4.7%
51 Information and cultural industries	3.0%	3.1%	2.7%
52 Finance and insurance	3.6%	7.2%	4.9%
53 Real estate and rental and leasing	1.9%	2.5%	2.0%
54 Professional, scientific and technical services	7.1%	10.2%	7.3%
55 Management of companies and enterprises	0.2%	0.2%	0.1%
56 Administrative and support, waste management and remediation	4.7%	4.2%	4.9%
61 Educational services	6.2%	6.8%	6.7%
62 Health care and social assistance	9.6%	7.5%	9.4%
71 Arts, entertainment and recreation	2.8%	2.1%	2.2%
72 Accommodation and food services	4.2%	5.2%	6.4%
81 Other services (except public administration)	4.4%	4.6%	4.7%
91 Public administration	5.4%	3.4%	5.4%

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

1.1.2.2 Labour Force by Occupation

As useful complement to the above examination of the Town's labour force from an industrial perspective is an assessment of its occupational composition. By looking at the occupations in which the labour force works, a better understanding can be gained of the actual work that people do and the skills of the labour force at large, as opposed to just the industries in which they work.

Figure 16 shows the occupational composition of the labour force in East Gwillimbury for 2001, 2006 and 2011. The occupational categories employing the largest shares of the Town's residents (as of 2011) are:

- Sales and service (3,095 residents or 22.7% of the labour force)



- Business, finance and administration (2,564 residents or 18.8%)
- Trades, transport and equipment operators (2,135 residents or 15.7%)
- Management (2,091 residents or 15.4%)

These concentrations largely align with the industry findings above, such that sales and service and trades-related occupations are most highly concentrated in retail trade and manufacturing & construction industries, respectively. However, the high concentration of business and management-related occupations naturally suggests that the Town is home to a significant number of workers that have higher-order business or management skills, which could be employed across a wide range of industries.

FIGURE 16: LABOUR FORCE BY OCCUPATION, TOWN OF EAST GWILLIMBURY, 2001, 2006 & 2011

Occupations (NOC-S)	2011		2006		2001	
	Number	% of total labour force	Number	% of total labour force	Number	% of total labour force
All occupations*	13,618	100.0%	12,335	100.0%	12,085	100.0%
Management occupations	2,091	15.4%	1,870	15.2%	1,810	15.0%
Business, finance and administration occupations	2,564	18.8%	2,335	18.9%	2,270	18.8%
Natural and applied sciences and related occupations	730	5.4%	695	5.6%	720	6.0%
Health occupations	676	5.0%	585	4.7%	540	4.5%
Occupations in social science, education, government service and religion	914	6.7%	825	6.7%	825	6.8%
Occupations in art, culture, recreation and sport	437	3.2%	370	3.0%	405	3.4%
Sales and service occupations	3,095	22.7%	2,780	22.5%	2,525	20.9%
Trades, transport and equipment operators and related occupations	2,135	15.7%	1,945	15.8%	1,910	15.8%
Occupations unique to primary industry	421	3.1%	395	3.2%	405	3.4%
Occupations unique to processing, manufacturing and utilities	555	4.1%	525	4.3%	680	5.6%

Source: Derived from Statistics Canada, Census of Population (2001 & 2006) and Manifold Data Mining (2011) by Millier Dickinson Blais Inc.

Figure 17 indicates the growth in these occupational categories between 2001-2006 and 2006-2011. Perhaps not surprisingly, the four industries with the highest occupations also showed growth in both time periods. The only other occupational group that also showed growth in both time periods was health occupations, which grew by 8.3% between 2001 & 2006 and 15.5% between 2006 & 2011.



FIGURE 17: CHANGE IN LABOUR FORCE BY OCCUPATION, TOWN OF EAST GWILLIMBURY, 2001-2011

Occupations (NOC-S)	% change, % change,	
	2001-2006	2006-2011
All occupations*	2.1%	10.4%
Management occupations	3.3%	11.8%
Business, finance and administration occupations	2.9%	9.8%
Natural and applied sciences and related occupations	-3.5%	5.0%
Health occupations	8.3%	15.5%
Occupations in social science, education, government service and religion	0.0%	10.8%
Occupations in art, culture, recreation and sport	-8.6%	18.1%
Sales and service occupations	10.1%	11.3%
Trades, transport and equipment operators and related occupations	1.8%	9.8%
Occupations unique to primary industry	-2.5%	6.6%
Occupations unique to processing, manufacturing and utilities	-22.8%	5.8%

Source: Derived from Statistics Canada, Census of Population (2001 & 2006) and Manifold Data Mining (2011) by Millier Dickinson Blais Inc.

Figure 18 compares East Gwillimbury's occupation classifications to trends in York Region and Ontario, using 2006 as a reference year. While the overall occupational concentrations are largely similar across the comparator regions, there are some interesting findings to note. First, the share of management occupations among the labour force is higher in the Town than in the Region or Province, again reconfirming the high concentration of management-level workers in the Town. Additionally the Town has a higher share of trades-based and primary industry occupations than the Region or Province, indicating a continued focus on construction and manufacturing as discussed above. This dichotomy suggests that the Town is home to a wide range of skill sets and is not overwhelmingly represented by one 'class' or group of worker. This proposition is tested in the following figures.



FIGURE 18: COMPARATIVE LABOUR FORCE BY OCCUPATION, 2006

Occupations (NOC-S)	% of total labour force, 2006		
	East Gwillimbury	York Region	Ontario
All occupations*	100.0%	100.0%	100.0%
Management occupations	15.2%	14.2%	10.3%
Business, finance and administration occupations	18.9%	21.8%	18.6%
Natural and applied sciences and related occupations	5.6%	9.2%	7.0%
Health occupations	4.7%	4.3%	5.3%
Occupations in social science, education, government service and religion	6.7%	6.2%	7.0%
Occupations in art, culture, recreation and sport	3.0%	3.0%	3.1%
Sales and service occupations	22.5%	21.7%	23.5%
Trades, transport and equipment operators and related occupations	15.8%	10.9%	14.1%
Occupations unique to primary industry	3.2%	1.4%	2.6%
Occupations unique to processing, manufacturing and utilities	4.3%	5.4%	7.2%

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

Though the above analysis has evaluated the composition of the labour force according to specific industrial and occupational categories, there has been much recent discussion on ways to capture the emergence of a ‘creative economy’ in communities across Ontario and Canada. Made most popular by the work of Richard Florida, the notion of a ‘creative class’ refers broadly to those people who employ a high level of analytical, social and reasoning skills in the conduct of their work. With the ongoing structural changes in the economy that have accelerated in the recent recession, it is clear that this kind of work is taking a larger role in developed economies while employment and output in ‘traditional’ resource-based and manufacturing industries is waning. The jobs and workers that compose the emerging ‘creative class’ have been demonstrated to have higher levels of education and higher wages than the rest of the workforce, and are critical in maintaining a talent pool that will be attractive to companies in knowledge-based industries.

As such, we have used detailed occupational data to examine the labour force of East Gwillimbury, York Region and Ontario by ‘classes’ of worker. These classes have been adapted from work done by Richard Florida in his 2002 book ‘The Rise of the Creative Class’ and later in the 2009 report *Ontario in the Creative Age*’ commissioned by the Government of Ontario. These classes are:

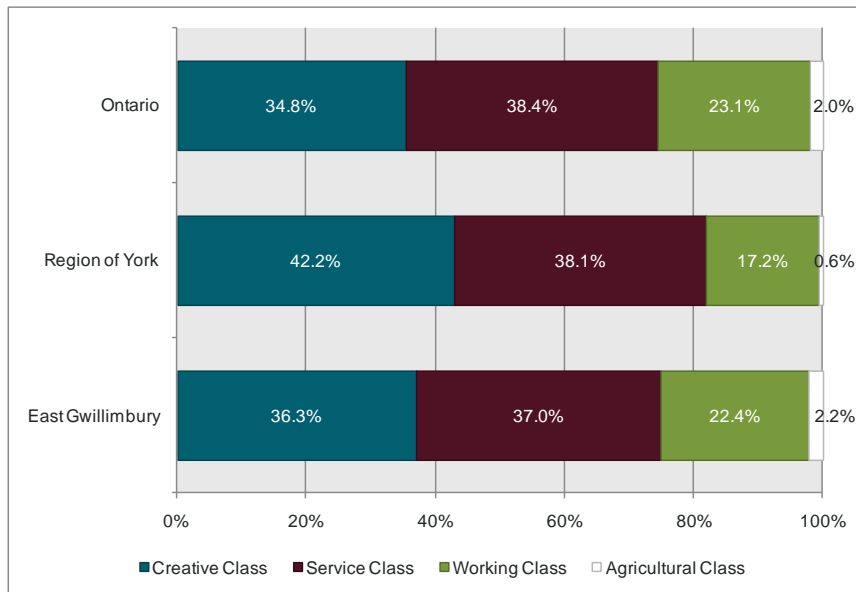
- **Creative class**, those workers that are ‘paid to think’ including scientists and technologists, artists and entertainers and managers and analysts.
- **Service class**, where work involves limited autonomy and is service-oriented, and includes (for example) clerks and food-service workers;



- **Working class**, consisting of people who use physical skills to do routine tasks, such as mechanics, tradespersons and machine operators, and;
- **Farming, fishing and forestry**, which includes the remainder of the labour force still engaged in resource extraction-based industries.

Figure 19 breaks down the labour force by the occupational classes for the Town, Region and Province. As of 2001, the Town's creative class accounted for 36.3% of its labour force, slightly higher than the provincial average (34.8%). Yet overall, the Town mirrored the Province much more than it did the Region. The Region's creative class in 2001 had a nearly 6% greater share of its labour force than the Town, and it also had a larger service class (38.1% vs. 37.0%). As a result, the Town had a notably higher working and resource (agricultural) class share (24.6%) than the Region (17.8%).

FIGURE 19: COMPARATIVE LABOUR FORCE BY OCCUPATIONAL CLASS, 2001



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

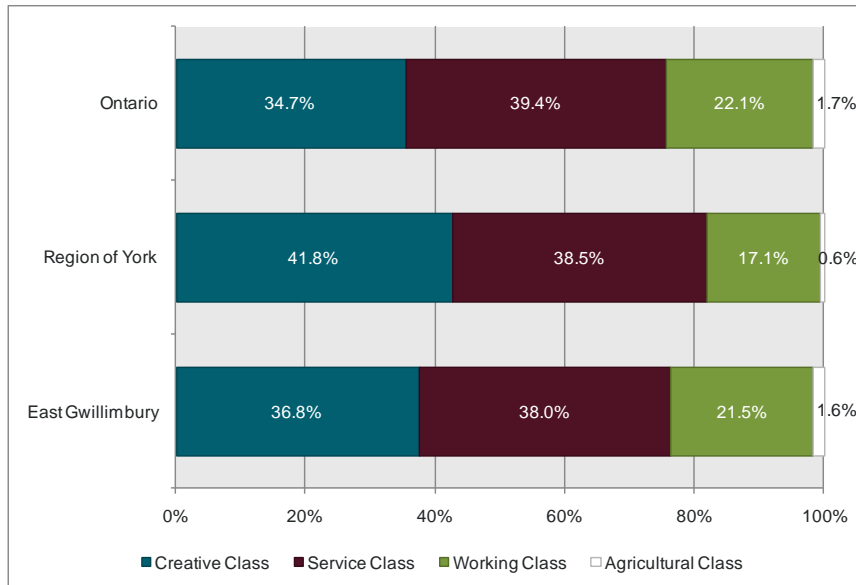
By 2006, these overall trends had not changed substantially (see Figure 20). The Town's creative class as a share of its overall labour force grew by 0.5% to 36.8%, and its service class share grew from 37.0% to 38.0%, with similarly slight declines in the working (0.9%) and agricultural (0.6%) classes. York Region only experienced growth of 0.5% in the



service class between 2001 and 2006, while the Province saw zero growth in the creative class and a 1% increase in the service class.

Overall, these trends suggest that the creative and service classes are likely to comprise an increasing share of the East Gwillimbury labour force in the coming years, particularly in light of the industrial labour force trends showing growth in 'creative' industries such as professional services, and 'service' industries such as food services. While the latter will likely to continue to grow to serve the needs of the expanding Town population, the Town will need to be proactive in attracting creative class professionals that have the skills and expertise to staff knowledge-based industries that are important for future economic growth.

FIGURE 20: COMPARATIVE LABOUR FORCE BY OCCUPATIONAL CLASS, 2006



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

The number of people engaged in creative occupations was examined for the Town. People engaged in creative occupations currently comprise nearly 5,000 workers, an increase of 13.7% since 2001. (Figure 21). In addition, the largest proportions of these workers are in management occupations (42.0%). In terms of percentage growth, professional occupations in health, business and finance experienced the largest percentage increases of approximately 75% between 2001 and 2011.



Given the generally higher wages, specialized skills and innovative capacities of these individuals, the growth of this class of worker has substantial implications for the Town's economic development strategy in terms of the skills sets of the people who reside in the community, but commonly work outside of the community. This labour force flow trend will be examined in the following section.

FIGURE 21: COMPARATIVE LABOUR FORCE BY CREATIVE OCCUPATIONAL CLASS, 2001-2011

Occupations (NOC-S)	2011	2006	2001
Total Creative Occupations	4,984	4,535	4,385
A Management occupations	2,091	1,875	1,810
A0 Senior management occupations	414	365	320
A1 Specialist managers	598	540	570
A2 Managers in retail trade, food and accommodation services	481	420	395
A3 Other managers, n.e.c.	598	550	525
B Business, finance and administration occupations	504	505	415
B0 Professional occupations in business and finance	367	335	215
B1 Finance and insurance administration occupations	137	170	200
C Natural and applied sciences and related occupations	730	695	715
C0 Professional occupations in natural and applied sciences	436	400	335
C1 Technical occupations related to natural and applied sciences	293	295	380
D Health occupations	590	500	460
D0 Professional occupations in health	151	120	85
D1 Nurse supervisors and registered nurses	223	220	145
D2 Technical and related occupations in health	216	160	230
E Occupations in social science, education, government service and religion	633	590	585
E0 Judges, lawyers, psychologists, social workers, ministers of religion, and policy and program officers	202	190	200
E1 Teachers and professors	430	400	385
F Occupations in art, culture, recreation and sport	437	370	400
F0 Professional occupations in art and culture	99	95	135
F1 Technical occupations in art, culture, recreation and sport	338	275	265

Source: Derived from Statistics Canada, Census of Population (2001 & 2006) and Manifold Data Mining (2011) by Millier Dickinson Blais Inc.



1.1.2.3 Labour Force Flow Analysis

A valuable element of this demographic and labour force analysis for the Town of East Gwillimbury is its labour force flow. More specifically, while the preceding section focused on the industries and occupations in which the Town's *local residents* worked, this section will also examine the *jobs within the Town* itself.

Figure 21 displays both the labour force employment¹ and local jobs by industry for the Town. As of 2006, there were an estimated 5,015 jobs in the Town. By far, the industries that have the greatest share of local jobs are manufacturing, which accounts for 815 jobs (16.3%) and retail trade, which accounts for 665 jobs (13.3%). These two industries collectively account for a greater *share* of local jobs than their *share* of the local labour force. However, in absolute terms, the Town still exports (on a net basis) 700 manufacturing workers and 655 retail trade workers, who work outside the Town on a daily basis. This is perhaps not surprising, given the concentration of large employers in these industries in surrounding municipalities, such as Newmarket and Markham. However, it should still be of some concern, as there are *no* major industry groups in which East Gwillimbury is a net importer of labour, and it collectively exports 6,915 workers to other locations each day.

Indeed, there are other industries that, despite housing a large share of the local labour force, also see the highest number of workers employed outside the Town, including:

- Construction (9.1% labour force share; exports 815 jobs)
- Health care and social assistance (9.6% share; exports 700 jobs)
- Wholesale trade (7.0% share; exports 625 jobs)
- Professional, scientific and technical services (7.0% share; exports 430 jobs)

In comparison to 2001 (Figure 22), the Town has seen improvement in some areas; for example, the net loss of workers in retail trade has dropped substantially (from 1,190 workers to 655), as has manufacturing (from 845 workers to 700). As a result, the total number of exported workers fell from 7,525 in 2001 to 6,915 in 2006. However, East Gwillimbury exported *more* workers in 2006 in health care (700) than it did in 2001 (630).

¹ Note that the total labour force reported in Figure 3.21 differs slightly from that reported in previous sections owing to differences in rounding, Census undercounts, and that the data on labour force and jobs is drawn from the Ontario Ministry of Agriculture, Food and Rural Affairs' REDDI analysis of Statistics Canada data.



FIGURE 21: LABOUR FORCE AND JOBS BY INDUSTRY, TOWN OF EAST GWILLIMBURY, 2006

	Jobs		Labour Force		Net imp (+) / exp (-) of labour
	Number	%share	Number	%share	
All industries - NAICS Industry	5,015	100.0%	11,930	100.0%	-6,915
11 Agriculture, forestry, fishing and hunting	195	3.9%	210	1.8%	-15
21 Mining and oil and gas extraction	20	0.4%	55	0.5%	-35
22 Utilities	10	0.2%	110	0.9%	-100
23 Construction	275	5.5%	1,090	9.1%	-815
31-33 Manufacturing	815	16.3%	1,515	12.7%	-700
41 Wholesale trade	205	4.1%	830	7.0%	-625
44-45 Retail trade	665	13.3%	1,320	11.1%	-655
48-49 Transportation and warehousing	350	7.0%	490	4.1%	-140
51 Information and cultural industries	95	1.9%	355	3.0%	-260
52 Finance and insurance	65	1.3%	430	3.6%	-365
53 Real estate and rental and leasing	70	1.4%	235	2.0%	-165
54 Professional, scientific and technical services	405	8.1%	835	7.0%	-430
55 Management of companies and enterprises	0	0.0%	20	0.2%	-20
56 Administrative and support, waste management and remediation services	255	5.1%	540	4.5%	-285
61 Educational services	270	5.4%	745	6.2%	-475
62 Health care and social assistance	450	9.0%	1,150	9.6%	-700
71 Arts, entertainment and recreation	195	3.9%	320	2.7%	-125
72 Accommodation and food services	275	5.5%	485	4.1%	-210
81 Other services (except public administration)	250	5.0%	540	4.5%	-290
91 Public administration	150	3.0%	655	5.5%	-505

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



FIGURE 22: LABOUR FORCE AND JOBS BY INDUSTRY, TOWN OF EAST GWILLIMBURY, 2001

	Jobs		Labour Force		Net imp (+) / exp (-) of labour
	Number	%share	Number	%share	
All industries - NAICS Industry	4,215	100.0%	11,740	100.0%	-7,525
11 Agriculture, forestry, fishing and hunting	285	6.8%	225	1.9%	60
21 Mining and oil and gas extraction	30	0.7%	10	0.1%	20
22 Utilities	0	0.0%	165	1.4%	-165
23 Construction	245	5.8%	1,020	8.7%	-775
31-33 Manufacturing	780	18.5%	1,625	13.8%	-845
41 Wholesale trade	225	5.3%	780	6.6%	-555
44-45 Retail trade	360	8.5%	1,550	13.2%	-1,190
48-49 Transportation and warehousing	265	6.3%	620	5.3%	-355
51 Information and cultural industries	180	4.3%	415	3.5%	-235
52 Finance and insurance	70	1.7%	445	3.8%	-375
53 Real estate and rental and leasing	45	1.1%	210	1.8%	-165
54 Professional, scientific and technical services	305	7.2%	775	6.6%	-470
55 Management of companies and enterprises	0	0.0%	0	0.0%	0
56 Administrative and support, waste management and remediation services	170	4.0%	450	3.8%	-280
61 Educational services	275	6.5%	750	6.4%	-475
62 Health care and social assistance	335	7.9%	965	8.2%	-630
71 Arts, entertainment and recreation	215	5.1%	365	3.1%	-150
72 Accommodation and food services	110	2.6%	350	3.0%	-240
81 Other services (except public administration)	210	5.0%	485	4.1%	-275
91 Public administration	110	2.6%	535	4.6%	-425

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

These findings indicate that the Town of East Gwillimbury is ‘bleeding’ skilled labour in both advanced knowledge-based and service industries, as well as goods-producing industries, to other municipalities. While other larger municipalities act as regional centres for health care, or have seen more rapid growth which drives construction and trade industries, this should still be of some concern. The Town’s economic development strategy – and indeed, its future growth management and planning framework – should be geared around creating more live-work opportunities for local employment to mitigate these trends.

1.1.2.4 Commuting Flows by Place of Work

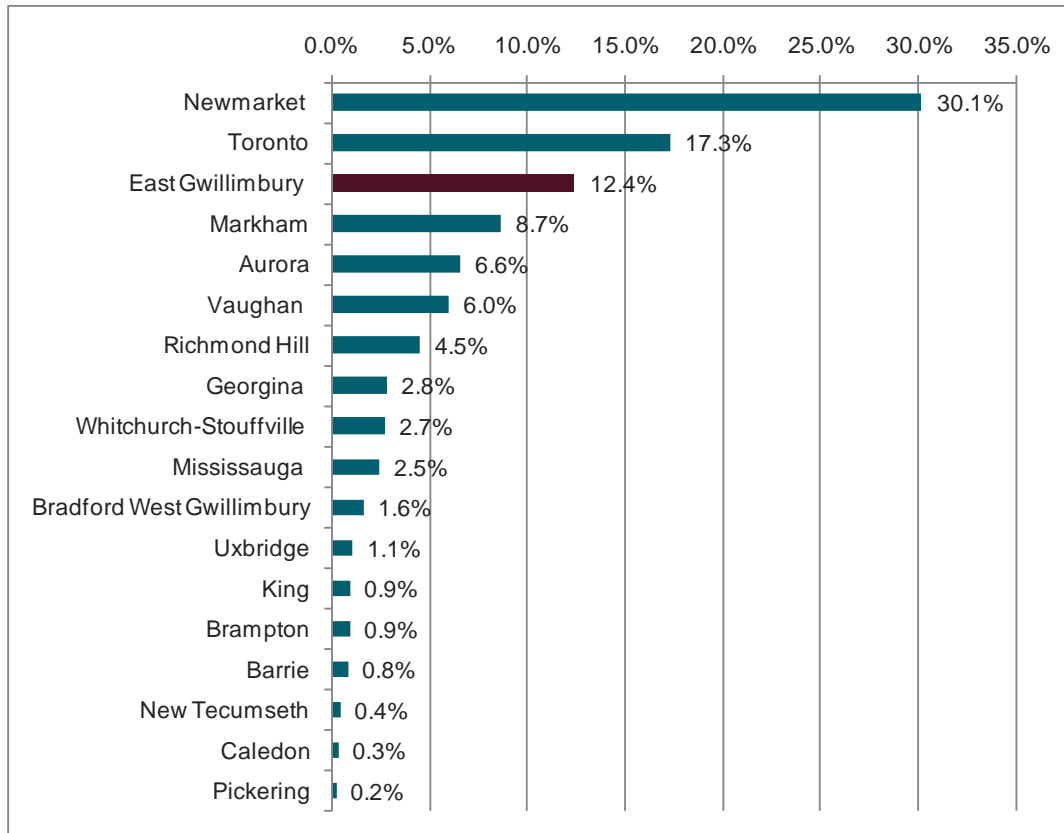
Figures 23 and 24 give greater context to the above discussion by examining the specific locations in which the East Gwillimbury labour force goes to work (and, conversely, the locations from which the Town is able to draw labour). First, Figure 23 shows the primary places of work for the East Gwillimbury labour force, represented as a percentage of the total commuting labour force (i.e. excluding those who work from home). Newmarket and Toronto represent the primary



destinations for the Town's commuting labour force, accounting for 30.1% and 17.3% respectively. Given regional concentrations in health care (e.g. Southlake Regional Health Centre) and retail trade (such as Upper Canada Mall) in Newmarket, and major professional service employers in Toronto, this trend is perhaps not surprising, and explains much of the 'export loss' in these industries.

The Town itself only has 12.4% of its commuting labour force stay local to work. An additional 25.8% of the commuting labour force works in four other larger regional centres to the south of the Town (Markham, Aurora, Vaughan and Richmond Hill).

FIGURE 23: % OF EAST GWILLIMBURY COMMUTING LABOUR FORCE BY PLACE OF WORK, 2006

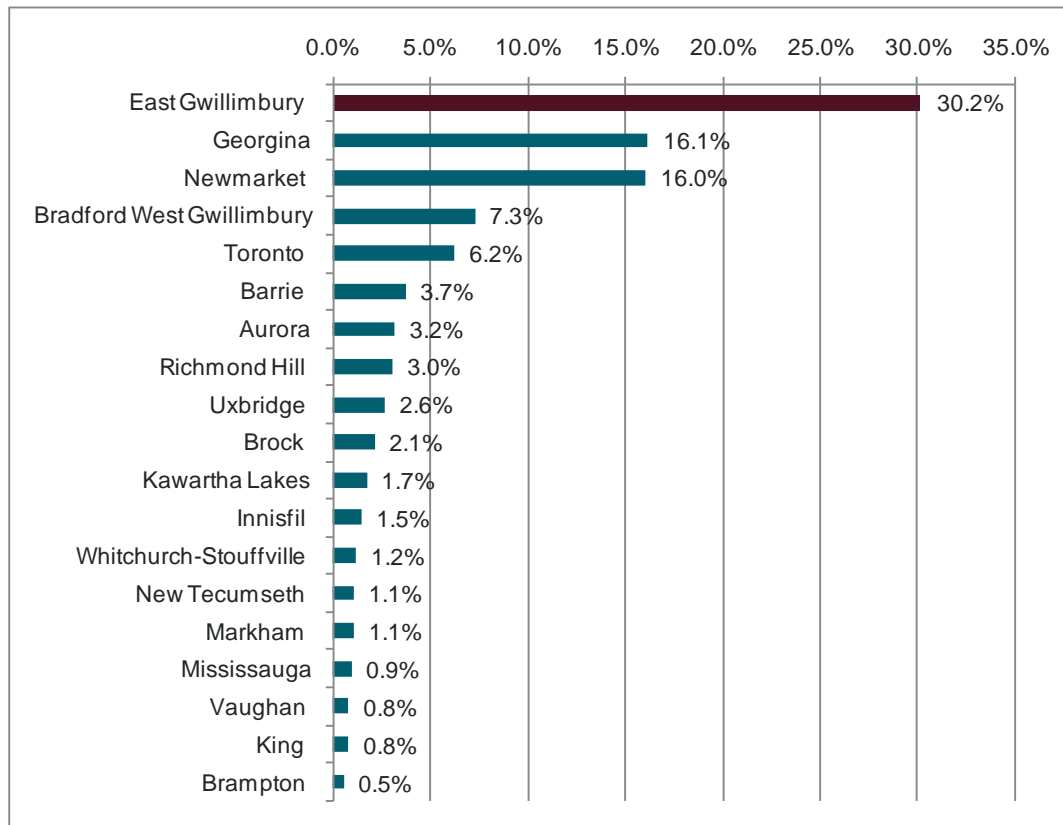


Source: Derived from Statistics Canada, Census of Population (2006) by Millier Dickinson Blais Inc.



Figure 24 represents the reverse of the previous figure – the place of residence of those who hold jobs in (i.e., that work in) East Gwillimbury. Not surprisingly, 30.2% of all local jobs are held by local residents. However, it also fills approximately 16% of its jobs with workers from each of the neighbouring communities of Newmarket and Georgina, indicating a degree of two-way labour flow between these municipalities. Interestingly, Toronto accounts for 6.2% of the Town's jobs; in addition to some representation from Barrie (3.7%) and Richmond Hill (3.0%). This trend suggests that there are some job opportunities in the Town that are attractive on a larger regional scale, and not just to those in immediately adjacent communities.

FIGURE 24: % OF EAST GWILLIMBURY JOBS BY PLACE OF RESIDENCE, 2006



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



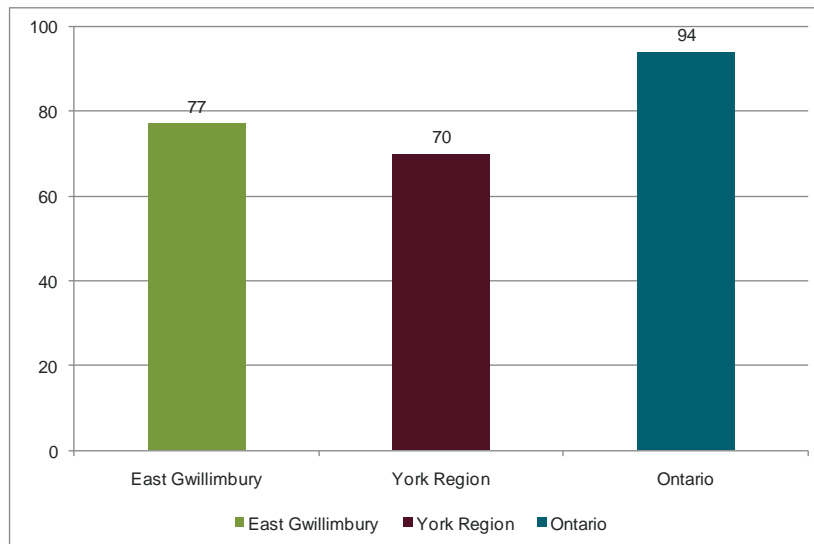
1.1.3 Agricultural Profile

The agricultural profile examines the Town's farming operations and farm capital and revenues.

1.1.3.1 Operational Profile

East Gwillimbury has an average farm size of 77 hectares (190 acres). (Figure 25). This average size is higher compared to York Region's average size of 70 hectares (173 acres), but lower than the Provincial average of 94 hectares (232 acres). The mechanization of the industry has driven the size of farming operations upward as more acres of agricultural products can be grown by fewer farm labourers.

FIGURE 25: AVERAGE FARM SIZE (HECTARES), 2006



Source: Statistics Canada, Census of Agriculture, 2006.

The following figure provides a breakdown of farming operations in East Gwillimbury as compared to York Region and Ontario. Based on 2006 agricultural census information, East Gwillimbury's largest proportions of farms operate in horse and other equine production (32 farms or 22.4% of total farms), hay farming (22 farms or 15.4% of total farms) and beef cattle ranching (20 farms or 14.0% of total farms). For York Region, horse and equine production is also high (182 farms



or 18.7% of total farms), but other vegetables (except potato) and melon farming is higher than East Gwillimbury (7.7%) and Ontario's (2.7%) proportions.

Horse farming and equine production is a large agricultural niche industry in East Gwillimbury. The popularity of horse farming in countryside communities such as East Gwillimbury, but also in Caledon and King Township, has risen and attracted significant investment from an affluent segment of the population.

The high percentages of farms in East Gwillimbury and York Region that operate in other vegetables (except potato) and melon farming and, to a lesser extent, floriculture production represent opportunities for collaborative marketing. The urban growth of the Greater Toronto Area has also driven up the value of the agricultural land and created a large consumer market for locally grown products.

FIGURE 26: FARMS CLASSIFIED BY INDUSTRY, 2006

Farming Type	East Gwillimbury		York Region		Ontario	
	Number	% of Total	Number	% of Total	Number	% of Total
Total farms - industry	143	100.0%	972	100.0%	57,211	100.0%
Horse and other equine production	32	22.4%	182	18.7%	4,297	7.5%
Hay farming	22	15.4%	88	9.1%	5,917	10.3%
Beef cattle ranching and farming, including feedlots	20	14.0%	104	10.7%	11,052	19.3%
Other vegetables (except potato) and melon farming	11	7.7%	117	12.0%	1,526	2.7%
Soybean farming	8	5.6%	41	4.2%	5,812	10.2%
Dairy cattle and milk production	6	4.2%	43	4.4%	4,937	8.6%
Floriculture production	6	4.2%	39	4.0%	968	1.7%
Nursery and tree production	6	4.2%	83	8.5%	1,474	2.6%
Other grain farming	6	4.2%	40	4.1%	4,420	7.7%
All other farming	26	18.2%	235	24.2%	16,808	29.4%

Note: Farm types of fewer than six were not included in East Gwillimbury's sector summary. Source: Statistics Canada, Census of Agriculture, 2006.



Another method for understanding the impact of farm operations in the Town is through the calculation of location quotients. While typically used in a more traditional industrial application, the results suggest that East Gwillimbury has a competitive edge over other regions of Ontario.

When compared to Ontario, East Gwillimbury has a high concentration of farms in the following areas of production:

- Horse and other equine production (2.98)
- Other vegetables (except potato) and melon farming (2.88)
- Floriculture production (2.48)
- Nursery and tree production (1.63) and
- Hay farming (1.49).

These farm operation results suggest opportunities for the Town to expand and promote horse and other equine industries, foster growth in the agri-tourism market to serve the Greater Toronto Area consumer interest in buying locally grown produce and further attract investment in greenhouse and nursery operations. Further efforts are required to identify local development opportunities, as well as potential entrepreneurs in these areas of expertise. This may result in more attention being given to pursuing local value-added production opportunities that serve a regional population.

FIGURE 27: FARMS CLASSIFIED BY INDUSTRY, LOCATION QUOTIENTS, 2006

Farming Type	Location Quotient	Classification
Horse and other equine production	2.98	High
Other vegetables (except potato) and melon farming	2.88	High
Floriculture production	2.48	High
Nursery and tree production	1.63	High
Hay farming	1.49	High
Beef cattle ranching and farming, including feedlots	0.72	Low
All other farming	0.62	Low
Soybean farming	0.55	Low
Other grain farming	0.54	Low
Dairy cattle and milk production	0.49	Low

Note: Farm types of fewer than six were not included in East Gwillimbury's sector summary.

Source: Statistics Canada, Census of Agriculture, 2006.



1.1.3.2 Farm Capital and Revenues

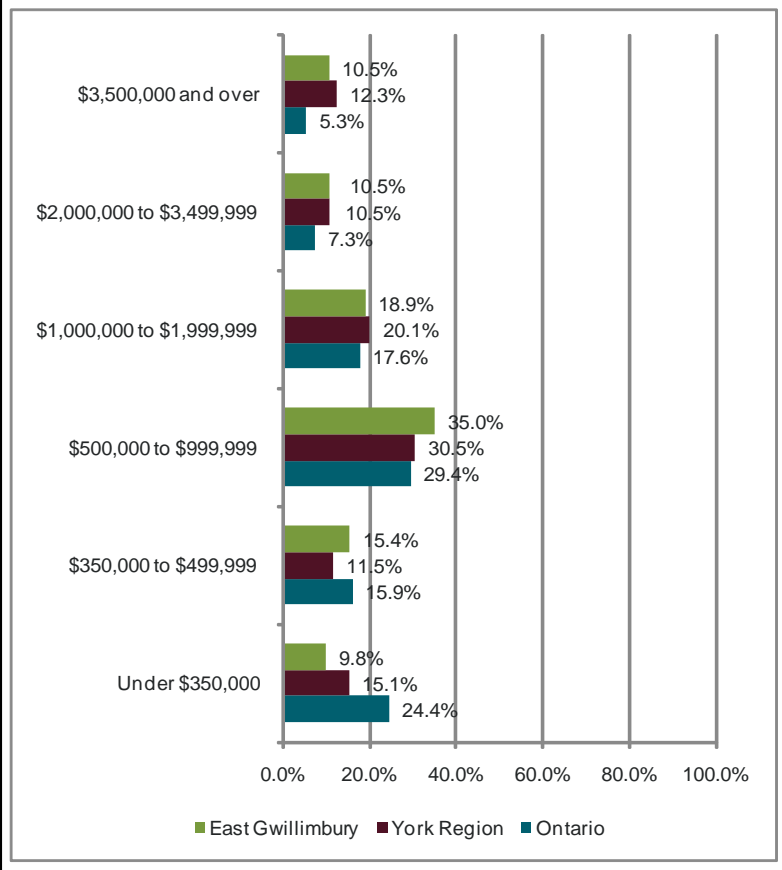
The following figure provides an indication of farm capital levels for the Town, York Region and Province of Ontario. According to the 2006 Agricultural Census, the majority of farms (50.4%) in East Gwillimbury operate with a capital budget of between \$350,000 to \$1,000,000 million, which is higher than both York Region (42.0%) and Ontario (45.3%). There is a very small percentage (9.8%) of farms in East Gwillimbury that operate with less than \$350,000 in capital. The percentages are higher in York Region (15.1%) and the Province (24.4%) for those farmers operating with less than \$350,000 in capital, which is a reflection of the value of agricultural lands in the Town and a barrier for entry into the agriculture or agri-tourism industry.

There is also a significant percentage of farms in the Town with capital between \$2,000,000 and \$3,500,000 (10.5%) and in excess of \$3,500,000 (10.5%). The proportion of farms in Ontario in these two categories was 7.3% and 5.4% respectively.



FIGURE 28: FARM CAPITAL, 2006

Total Farm Capital	East Gwillimbury	York Region	Ontario
Total number of farms	143	972	57,211
Under \$350,000	14	147	13,962
\$350,000 to \$499,999	22	112	9,122
\$500,000 to \$999,999	50	296	16,803
\$1,000,000 to \$1,999,999	27	195	10,070
\$2,000,000 to \$3,499,999	15	102	4,196
\$3,500,000 and over	15	120	3,058



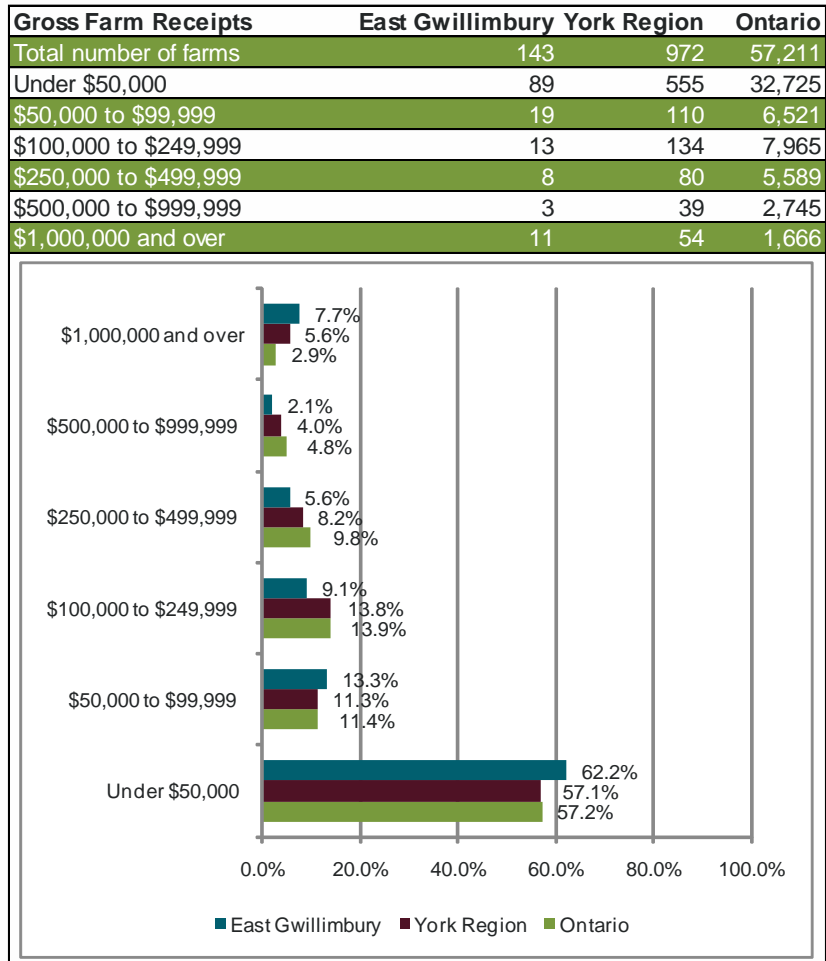
Source: Statistics Canada, Census of Agriculture, 2006.



The gross farm receipts are dominated by farms earning less than \$50,000 (89 farms or 62.2% of total farms). There is a similar trend in York Region (57.1% of total farms) and Ontario (57.2% of total farms). The high percentage of these farms earning less than \$50,000 suggests that farm receipts are not the only source of income by these farm operators. They are likely benefitting from the proximity to the Greater Toronto consumer market and the demand for local grown products and the revenues serve to supplement the farmer's household income. There are 11 farms (7.7% of total farms) reporting income in excess of \$1,000,000, which proportionally is higher than York Region (5.6%) and significantly higher than Ontario (2.9%). This higher proportion in East Gwillimbury may be a reflection of the large horse and equine agricultural community.



FIGURE 29: GROSS FARM RECEIPTS



Source: Statistics Canada, Census of Agriculture, 2006.



1.1.4 Regional Tourism Activity

This sub-section examines the regional tourism activity that has a direct economic benefit for the Town of East Gwillimbury's labour force and business community. The review examines the number of person visits, most common place of residence among visitors, main purpose of visitor trips, tourism activities and visitor spending.

Much of the visitor activity for York Region was for same day visits, which totaled over two million in 2008. (Figure 30). Overnight visits in York Region were less than one million. The visitors to York Region were dominated by Ontario residents (over 2.7 million). There were 159,000 visitors from the United States and 123,000 visitors from overseas, a large majority of these visitors stayed overnight. York Region is part of Regional Tourism Organization 6 (RTO 6), which includes the Hills of the Headwaters communities and Durham Region. There were over seven million visitors to RTO 6, over 2.2 million were overnight visitors and 4.8 million were same-day visitors. In terms of the total visits for Ontario, there were 101.0 million, which RTO 6 accounted for 7.0% of all Ontario visits and York Region accounted for an even smaller 3.0% of all Ontario visits.

FIGURE 30: TOTAL VISITATION, 2008

	York Region			RTO 6			Ontario		
	Total Visits	Overnight Visits	Same-day Visits	Total Visits	Overnight Visits	Same-day Visits	Total Visits	Overnight Visits	Same-day Visits
Total	3,070	975	2,095	7,066	2,234	4,832	100,998	42,295	58,703
Ontario	2,758	722	2,036	6,509	1,778	4,731	81,426	31,032	50,394
Other									
Canada	29	24	6	66	60	6	4,241	3,121	1,120
U.S	159	132	27	290	233	58	13,165	6,190	6,974
Overseas	123	97	26	201	163	37	2,167	1,952	215

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

The most common place of residence for visitors to York Region was from the City of Toronto where there were 665,000 visitors (Figure 31). The following three most common places of residence for visitors to York Region was York Region (379,000 people visiting within their own Region), Peel Region (376,000), and Simcoe County (332,000). These four regions were also the most common place of residence for visitors to RTO 6. Another interesting finding was that a large majority of the visitors to York Region and RTO 6 were same day visitors with 1.8 million and 4.0 million respectively. These findings indicate the importance of the domestic and more specifically the Greater Golden Horseshoe tourism market in sustaining this sector of the economy.



FIGURE 31: PERSON VISITS ('000S), PLACE OF RESIDENCE (TOP 10 PLACES), 2008

Place of Residence	Total Visits (000s)		Overnight Visits (000s)		Same Day Visits (000s)	
	York Region	RTO 6	York Region	RTO 6	York Region	RTO 6
Durham Region	181	411	23	67	158	344
Halton Region	78	185	8	48	70	137
City of Hamilton	164	243	6	48	158	195
Peel Region	376	879	117	298	259	581
Simcoe County	332	526	93	146	240	380
City of Toronto	665	1,597	128	308	537	1,289
Waterloo Region	87	206	24	59	63	147
York Region	379	700	105	153	274	547
Other*	161	518	46	102	113	416
Total	2,423	5,265	550	1,229	1,872	4,036

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

*The Other category for York Region includes the Niagara Region and for the RTO 6 includes the City of Peterborough.

The majority of visitors to York Region and RTO 6 indicated that their main purpose of the trip was to visit friends and/or relatives followed in a distant second by pleasure. (Figure 32). In terms of the total visits in Ontario, York Region has approximately 3.0% of the Ontario tourism market. RTO 6 has approximately 7.0% of the Ontario tourism market. The key driver of the visitor trips to York Region and RTO 6 is the visiting friends and/or relatives market. RTO 6 has captured nearly 10.0% of this Ontario market. Underperforming visitor markets that could be developed are the pleasure and business markets in York Region and RTO 6.



FIGURE 32: PERSON VISITS ('000S), MAIN PURPOSE OF TRIP, 2008

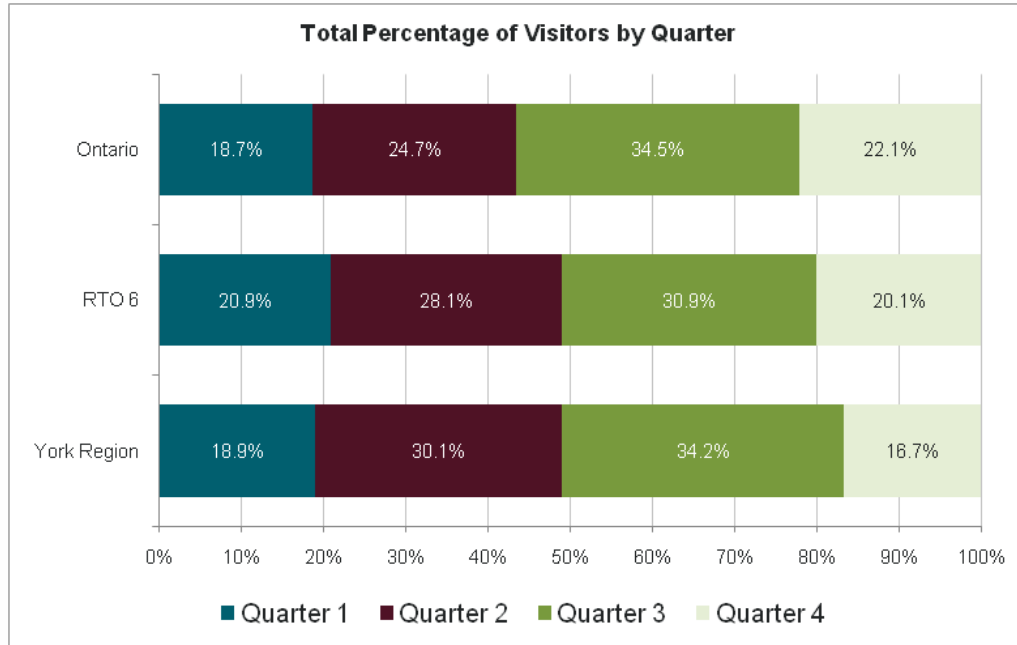
Purpose of Trip	York Region		RTO 6		Ontario
	Total Visits (000s)	% of Ontario Market	Total Visits (000s)	% of Ontario Market	Total Visits (000s)
Pleasure	899	2.1%	2,239	5.2%	43,217
Visiting Friends and/or Relatives	1,827	4.3%	4,125	9.6%	42,975
Business	233	3.6%	385	6.0%	6,434
Personal	111	1.3%	318	3.8%	8,372
Total	3,070	3.0%	7,067	7.0%	100,998

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

In terms of the percentage of visitors by quarter, both RTO 6 and York Region have larger proportions than Ontario in the first quarter (January to March) and second quarter (April to June). There is a sizably larger proportion of visitors in the second quarter in York Region (30.1%) than Ontario (24.7%). This could be attributed to post-secondary students returning home to relatives for the months of May to August since the visiting friends and relatives market accounts for a majority of the visitor market. The third quarter (July to September) remains the largest visitor market for RTO 6 (30.9%) and York Region (34.2%), which is similar to Ontario (34.5%).



FIGURE 33: PERCENTAGE OF VISITORS BY QUARTER, 2008



Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

The leading activities for visitors to York Region are theme parks (330,000), any outdoor/sports activity (330,000) and sports events (126,000). The high number of theme park visitors is driven by the presence of Canada's Wonderland in Vaughan. York Region is in a strong competitive position as a location for sports events with the large number and high quality recreational centres throughout the region. A few examples of these centres in York Region include the NCI Vaughan IcePlex, Magna Centre (Newmarket) and YMCA Complex (Markham). The leading activities for visitors to RTO 6 are also the generic any outdoor/ sports activity (1.1 million), theme parks (359,000) and sports events (341,000).

The three largest visitor market shares for RTO 6 are theme parks (20.0%), festivals/ fairs (11.0%) and sports events (10.3%). Again, the high theme park market share is driven by Canada's Wonderland, but the other two provide opportunities for further growth.



FIGURE 34: PERSON VISITS ('000S), ACTIVITY PARTICIPATION, 2008

	York Region		RTO 6		Ontario
	Total Visits ('000s)	% of Ontario Market	Total Visits ('000s)	% of Ontario Market	Total Visits ('000s)
Festivals/Fairs	36	1.4%	276	11.0%	2,510
Cultural Performances	108	2.4%	180	3.9%	4,560
Museums/Art Galleries	94	2.6%	132	3.6%	3,651
Zoos/Aquariums	41	2.9%	97	6.8%	1,420
Sports Events	126	3.8%	341	10.3%	3,324
Casinos	17	0.6%	60	2.1%	2,920
Theme Parks	330	18.4%	359	20.0%	1,795
Natl/Prov. Nature Parks	79	1.5%	227	4.4%	5,178
Historic Sites	63	1.4%	157	3.5%	4,449
Any Outdoor/ Sports Activity	330	1.6%	1,067	5.1%	21,128
Boating	14	0.2%	76	1.2%	6,220
Golfing	93	3.7%	183	7.2%	2,530
Fishing	5	0.1%	52	1.2%	4,420
Hunting	0	0.0%	4	1.0%	394
Downhill Skiing/ Snowboarding	3	0.2%	80	6.5%	1,235

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

There was \$336.8 million and \$631.8 million in total visitor spending in York Region and RTO 6 respectively in 2008. Approximately two-thirds of this spending is from Ontario residents, the remaining spending (from largest to smallest) comes from overseas visitors, American visitors and visitors from other parts of Canada. Collectively, RTO 6 captures 3.6% of Ontario's visitor spending market. York Region captures 1.9% of this market. There is room to capture more visitor spending in RTO 6 since the tourism region already captures 7.0% of visitors.



FIGURE 35: TOTAL VISITOR SPENDING ('000S), 2008

Origin	York Region		RTO 6		Ontario
	Total Visitor Spending (000s)	% of Ontario Market	Total Visitor Spending (000s)	% of Ontario Market	Total Visitor Spending (000s)
Total	\$336,794	1.9%	\$631,847	3.6%	\$17,628,560
Ontario	\$220,490	2.2%	\$443,954	4.4%	\$10,080,253
Other Canada	\$16,425	1.0%	\$26,033	1.6%	\$1,608,109
U.S.	\$41,210	1.3%	\$67,630	2.1%	\$3,271,310
Overseas	\$58,670	2.2%	\$94,231	3.5%	\$2,668,888

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

The largest portion of visitor spending in York Region is directed to retail stores at \$105.6 million followed by food & beverage stores and restaurants at \$90.2 million in 2008. Visitor spending in RTO 6 is slightly different where food & beverage stores and restaurants accounted for the largest portion of spending at \$186.2 million and retail accounted for \$168.6 million. The results indicate that York Region spending is more directed towards retail stores, which is likely a result of two large regional shopping centres: Vaughan Mills Shopping Centre and Upper Canada Mall (Newmarket). Accommodations spending is noticeably lower in RTO 6 and York Region, but this finding is not surprising since a large portion are same-day visitors.



FIGURE 36: TOTAL VISITOR SPENDING BY CATEGORY ('000S), 2008

	York Region		RTO 6	% of Ontario Total Visitor Market	Ontario Total
	Total (\$'000s)	% of Ontario Total Visitor Market	Total (\$'000s)	% of Ontario Total Visitor Market	Total (\$'000s)
Accommodation	\$33,150	1.0%	\$62,885	2.0%	\$3,209,822
Food & Beverage (Stores/ Restaurants)	\$90,154	2.0%	\$186,235	4.1%	\$4,557,615
Recreation/Entertainment	\$28,283	1.8%	\$56,083	3.6%	\$1,564,132
Retail (Clothing/Other)	\$105,561	3.9%	\$168,570	6.3%	\$2,681,835
Transportation (Public/ Local/ Vehicle Rental/ Operations)	\$79,647	1.4%	\$158,075	2.8%	\$5,615,157
Total	\$336,795	1.9%	\$631,848	3.6%	\$17,628,561

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

Not surprisingly, since retail accounts for the largest amount of visitor spending the largest portion of tourism-related establishments are retail businesses (5,968). (Figure 37). Nearly half (2,899) of these businesses are classified as indeterminate. An additional 2,714 have 1 to 19 employees. The next largest concentration of tourism related businesses are food & beverage (3,061) and other services (3,004)². The small business sector of the economy is a significant part of the tourism economy.

In terms of the businesses employing over 100 people, the largest numbers of businesses are also in retail (74) and food and beverage establishments (42). There are 28 businesses in the arts, entertainment and recreation sector (i.e. golf courses and country clubs) and only eight businesses in the accommodations sector.

² Other services include beauty salons and other personal care services.



FIGURE 37: TOTAL YORK REGION TOURISM-RELATED ESTABLISHMENTS, 2008

	Number of Establishments by Size of Employment					
	Total	Indeterminate*	1 to 19	20 to 49	50 to 99	100+
Accommodation	155	84	39	17	7	8
Arts, Entertainment and Recreation	742	395	239	54	26	28
Food and Beverage	3,061	1,102	1,582	228	107	42
Transportation	652	515	122	11	0	4
Travel Services	301	153	140	6	1	1
Retail	5,968	2,899	2,714	201	80	74
Other Services	3,004	1,490	1,388	117	8	1
Total	13,883	6,638	6,224	634	229	158

Source: Derived from Statistics Canada, Travel Survey of Residents of Canada (TSRC) and International Travel Survey (ITS), 2008 by Millier Dickinson Blais

*The "Indeterminate" category include the self-employed, i.e. those who do not maintain an employee payroll, but may have a workforce which consists of contracted workers, family members or business owners. However, the Business Register does not have this information available, and has therefore assigned the establishments to an "Indeterminate" category. This category also includes employers who did not have employees in the last 12 months.

1.1.5 Industry Sector Analysis

1.1.5.1 Location Quotients

In order to determine the level and degree of business and industrial specialization, thus the economic diversity that may be developing in the Town of East Gwillimbury, location quotients (LQs) have been calculated to identify and measure the concentration of industry activity by major sector and/or sub-sectors.

Location quotients are a commonly used tool in local/regional economic analysis. They assess the concentration of economic activities within a smaller area relative to the overarching region in which it resides. For the purposes of this study, location quotients compare the Town of East Gwillimbury's industry sector employment concentration relative to the Province of Ontario. Location quotients have also been calculated for the Region of York.

A location quotient greater than 1.0 for a given sector indicates a local concentration of economic activity as compared to the overarching region (either Ontario or any other region) and may be an indication of competitive advantage with respect to the attraction of that industry sector. Location quotients equal to 1.0 for a given sector suggest that the study



area has the same concentration of economic activity as the overarching region. Finally, a location quotient of less than 1.0 suggests that the community does not have a strong competitive advantage in that sector.

In theory, an industrial or business concentration that is greater than the overarching regional average may also represent the export base of the participating municipality (both in terms of products or services). Businesses that make up this export base may have chosen to locate in the community due to certain local or regional competitive advantages. These advantages can be used to attract additional investment in the same or complementary industries.

The industry concentration in the Town of East Gwillimbury relative to Ontario reveals the highest concentration of labour in the following sectors in 2006:

- Construction (LQ 1.56)
- Wholesale trade (LQ 1.45)
- Management of companies and enterprises (LQ 1.28)
- Arts, entertainment and recreation (LQ 1.27)

All of these industries exhibited LQs within the high range, with values in excess of 1.25. (Figure 38). The high LQ in construction is being driven by the high numbers of residents who are specialty trade contractors and the high LQ in wholesale trade is being driven by residents who work in machinery, equipment and building materials distributors. The Arts, Entertainment and Recreation industry includes golf courses and country clubs, which are commonly located in the Greater Toronto Countryside communities like East Gwillimbury.

The highest employment LQs in 2006 were in the following sectors:

- Agriculture (LQ 2.18)
- Arts, entertainment and recreation (LQ 1.86)
- Construction (LQ 1.74)
- Transportation and warehousing (LQ 1.73)
- Administrative and support, waste management and remediation services (LQ 1.30)

These high employment LQs are being driven by local jobs on farms, on golf and country clubs, as specialty trade contractors, in truck transportation industries and in building services industries.

From a tourism perspective, LQs tend to be average for retail trade and accommodation and food services, but high for arts, entertainment and recreation (i.e. golf and country clubs). The results suggest outside of the golf and country clubs, East Gwillimbury is at a competitive disadvantage as a tourism location.



The results of the manufacturing industry suggest the community has no export orientation; however, there are high employment concentrations in cement and concrete product and office furniture manufacturing. However, given the general trend toward a declining workforce and more niche-based manufacturing activity these subsectors may have shifted since the 2006 Census.

FIGURE 38: LOCATION QUOTIENTS FOR 2-DIGIT NAICS INDUSTRIES, TOWN OF EAST GWILLIMBURY, 2006

Industry (NAICS)	Labour Force		Employment	
	LQ	Classification	LQ	Classification
11 Agriculture, forestry, fishing and hunting	1.00	Average	2.18	High
21 Mining and oil and gas extraction	1.17	Average	1.04	Average
22 Utilities	1.17	Average	0.25	Low
23 Construction	1.56	High	1.74	High
31-33 Manufacturing	0.92	Average	1.10	Average
41 Wholesale trade	1.45	High	0.84	Average
44-45 Retail trade	1.01	Average	1.13	Average
48-49 Transportation and warehousing	0.85	Average	1.73	High
51 Information and cultural industries	1.12	Average	0.70	Low
52 Finance and insurance	0.72	Low	0.24	Low
53 Real estate and rental and leasing	0.99	Average	0.68	Low
54 Professional, scientific and technical services	0.95	Average	1.09	Average
55 Management of companies and enterprises	1.28	High	0.00	Low
56 Administrative and support, waste management and remediation services	0.97	Average	1.30	High
61 Educational services	0.93	Average	0.78	Average
62 Health care and social assistance	1.00	Average	0.89	Average
71 Arts, entertainment and recreation	1.27	High	1.86	High
72 Accommodation and food services	0.66	Low	0.84	Average
81 Other services (except public administration)	0.97	Average	1.05	Average
91 Public administration	1.00	Average	0.50	Low

Source: Statistics Canada, 2006 Census of Population using the Ontario Ministry of Agriculture, Food and Rural Affairs REDDI Labour Flow Analysis Tool.

Figure 39 provides further regional economic analysis for the performance of the Region of York. The LQ results for the resident labour force differ from East Gwillimbury. The high LQs are in the following sectors:



- Management of companies and enterprises (LQ 1.65)
- Finance and insurance (LQ 1.46)
- Wholesale trade (LQ 1.42)
- Professional, scientific and technical services (LQ 1.39)
- Real estate and rental and leasing (LQ 1.28)

Communities in south York Region (i.e. Richmond Hill and Markham) have large proportions of residents employed in finance and insurance and professional, scientific and technical services industries and are contributing to the high LQs.

The highest employment LQs are in the following four industries:

- Wholesale trade (LQ 1.88)
- Construction (LQ 1.53)
- Manufacturing (LQ 1.36)
- Professional, scientific and technical services (1.32)

The LQs indicate comparatively high local employment concentrations and a competitive advantage in these industries. The high LQs in nearly every construction sub industry category and a wide range of wholesale trade industries indicates sector diversity. The leading manufacturing industries driving up the high LQ were motor vehicle parts, fabricated metal, plastic products, printing activities, computer and electronic components, semiconductor components and household furniture manufacturers.

In the professional, scientific and technical services industry, the sub-industries driving up the LQ were computer systems design, architecture and engineering services.

These regional results confirm that knowledge based industries and advanced manufacturers are large employment industries for the York Region economy and that wholesale trade, although traditionally not a large employment generator on a density basis, has a substantial presence in the region.



FIGURE 39: LOCATION QUOTIENTS FOR 2-DIGIT NAICS INDUSTRIES, REGION OF YORK, 2006

Industry (NAICS)	Labour Force		Employment	
	LQ	Classification	LQ	Classification
11 Agriculture, forestry, fishing and hunting	0.26	Low	0.34	Low
21 Mining and oil and gas extraction	0.41	Low	0.25	Low
22 Utilities	0.85	Average	0.47	Low
23 Construction	1.13	Average	1.53	High
31-33 Manufacturing	0.96	Average	1.36	High
41 Wholesale trade	1.42	High	1.88	High
44-45 Retail trade	1.04	Average	1.04	Average
48-49 Transportation and warehousing	0.72	Low	0.82	Average
51 Information and cultural industries	1.14	Average	0.87	Average
52 Finance and insurance	1.46	High	0.8	Average
53 Real estate and rental and leasing	1.28	High	1.17	Average
54 Professional, scientific and technical services	1.39	High	1.32	High
55 Management of companies and enterprises	1.65	High	1.04	Average
56 Administrative and support, waste management and remediation services	0.89	Average	0.88	Average
61 Educational services	1.01	Average	0.78	Average
62 Health care and social assistance	0.79	Average	0.63	Low
71 Arts, entertainment and recreation	0.97	Average	1.10	Average
72 Accommodation and food services	0.81	Average	0.84	Average
81 Other services (except public administration)	0.99	Average	0.98	Average
91 Public administration	0.62	Low	0.36	Low

Source: Statistics Canada, 2006 Census of Population using the Ontario Ministry of Agriculture, Food and Rural Affairs REDDI Labour Flow Analysis Tool.

1.1.5.2 Business Patterns Characteristics

A detailed review of the business patterns data for the period between December 2007 and December 2010 for the Town of East Gwillimbury provides an understanding of the growth or decline of businesses over the three time period and the key characteristics that define East Gwillimbury's business community. When combined with the broader industry sector



analysis discussed previously, the business patterns information will assist in understanding any sector opportunities for the Town.

Understanding the trends in business growth in the community provides valuable insight into the shape that future growth and investment in the Town might take. As well, it provides an indication of where the priorities of the Town should lie, especially with regards to economic development programs.

In December 2010, there were a total of 1,685 businesses in the Town. (Figure 40). In terms of concentration, the following sectors exhibit the highest proportion of business establishments:

- Construction (304 businesses, 18.0% of total)
- Professional, scientific and technical services (275 businesses, 16.3%)
- Real estate and rental and leasing (153 businesses, 9.1%)
- Administrative and support, waste management and remediation services (114 businesses, 6.8%).
- Retail trade (111 businesses, 6.6%)

The construction and professional, scientific and technical services industries remained the two largest industries in terms of business concentrations during the three years.

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

- Construction (112 businesses, 19.4% of subtotal)
- Professional, scientific and technical services (81 businesses, 14.0% of subtotal)
- Other services (61 businesses, 10.6% of subtotal)
- Administrative and support, waste management and remediation services (49 businesses, 8.5% of subtotal)
- Retail trade (47 businesses, 8.1% of subtotal)

These five industries remained consistently the largest industries in terms of business concentrations over the previous three years.



FIGURE 40; NUMBER OF BUSINESS ESTABLISHMENTS BY INDUSTRY, TOWN OF EAST GWILLIMBURY, DECEMBER 2007 AND DECEMBER 2010

Industry (NAICS)	December 2007			December 2010		
	Total	Indeterminate	Subtotal	Total	Indeterminate	Subtotal
All Industries	1,345	910	435	1,685	1,107	578
11 Agriculture, forestry, fishing and hunting	56	43	13	80	58	22
21 Mining and oil and gas extraction	4	1	3	3	2	1
22 Utilities	1	1	0	1	1	0
23 Construction	234	160	74	304	192	112
31-33 Manufacturing	57	35	22	54	33	21
41 Wholesale trade	78	50	28	83	45	38
44-45 Retail trade	103	59	44	111	64	47
48-49 Transportation and warehousing	58	43	15	73	53	20
51 Information and cultural industries	20	12	8	28	18	10
52 Finance and insurance	73	62	11	89	71	18
53 Real estate and rental and leasing	97	88	9	153	137	16
54 Professional, scientific and technical services	204	147	57	275	194	81
55 Management of companies and enterprises	54	52	2	77	69	8
56 Administrative and support, waste management and remediation services	104	67	37	114	65	49
61 Educational services	10	5	5	16	11	5
62 Health care and social assistance	36	9	27	52	18	34
71 Arts, entertainment and recreation	22	15	7	29	19	10
72 Accommodation and food services	39	16	23	34	10	24
81 Other services (except public administration)	94	45	49	108	47	61
91 Public administration	1	0	1	1	0	1

Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2007 & 2010) by Millier Dickinson Blais Inc.



It is also valuable to examine the change in business concentration by industry, so as to better understand areas of emerging opportunity and importance to the local economy. The following figure provides an indication of the concentration of business establishments by two digit NAICS codes from December 2007 and 2010. The two categories that have experienced the largest concentration increases among businesses with employees include:

- Construction (17.0% of all business establishments to 19.4%, +2.4%)
- Professional, scientific and technical services (13.1% to 14.0%, +0.9%).

This trend indicates the growing presence of construction and knowledge based services firms.

FIGURE 41: BUSINESSES WITH EMPLOYEES, PERCENTAGE OF SUBTOTAL, DECEMBER 2007 TO DECEMBER 2010.

Industry (NAICS)	December 2007	December 2010	Difference
11 Agriculture, forestry, fishing and hunting	3.0%	3.8%	0.8%
21 Mining and oil and gas extraction	0.7%	0.2%	-0.5%
22 Utilities	0.0%	0.0%	0.0%
23 Construction	17.0%	19.4%	2.4%
31-33 Manufacturing	5.1%	3.6%	-1.4%
41 Wholesale trade	6.4%	6.6%	0.1%
44-45 Retail trade	10.1%	8.1%	-2.0%
48-49 Transportation and warehousing	3.4%	3.5%	0.0%
51 Information and cultural industries	1.8%	1.7%	-0.1%
52 Finance and insurance	2.5%	3.1%	0.6%
53 Real estate and rental and leasing	2.1%	2.8%	0.7%
54 Professional, scientific and technical services	13.1%	14.0%	0.9%
55 Management of companies and enterprises	0.5%	1.4%	0.9%
56 Administrative and support, waste management and remediation services	8.5%	8.5%	0.0%
61 Educational services	1.1%	0.9%	-0.3%
62 Health care and social assistance	6.2%	5.9%	-0.3%
71 Arts, entertainment and recreation	1.6%	1.7%	0.1%
72 Accommodation and food services	5.3%	4.2%	-1.1%
81 Other services (except public administration)	11.3%	10.6%	-0.7%
91 Public administration	0.2%	0.2%	-0.1%

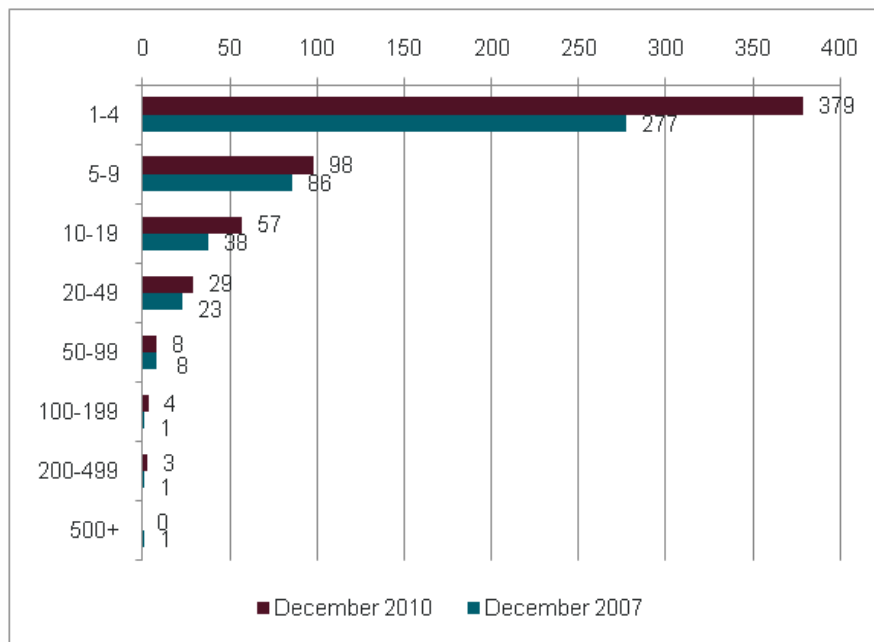
Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2007 & 2010) by Millier Dickinson Blais Inc.



Business establishments in East Gwillimbury are dominated by companies and enterprises that employ less than 10 people. (Figure 42). Nearly two-thirds of businesses employ 1-4 employees (277 businesses in December 2007 and 379 businesses in December 2010). The next largest firm size is the 5-9 employees (86 businesses in December 2007 and 98 businesses in December 2010).

In supporting future growth and investment in the Town, it is essential to understand and support the business needs of the small business sector of the local economy. This is particularly relevant in light of research that suggests that an overwhelming percentage of new investment is driven from companies already located in a community.

FIGURE 42: BUSINESS ESTABLISHMENTS BY SIZE, TOWN OF EAST GWILLIMBURY, DECEMBER 2007 & DECEMBER 2010



Source: Derived from Statistics Canada (Canadian Business Patterns Data, 2007 & 2010) by Millier Dickinson Blais Inc.

Three important attributes for establishing a framework for assessing and analyzing the impact of the creative economy include:

- A focus on enterprises (the number of businesses rather than the size of its labour force);



- The number of innovative and culturally based enterprises (arts and culture as well as engineering firms);
- The number of enterprises engaged in direct creative activities (cottage industries as well as small business).³

Creative industries and businesses include:

- Advertising
- Architecture
- Artists
- Business Consulting
- Design
- Education
- Engineering
- Film
- Games
- Heritage
- Marketing
- Museums
- Music
- Performing Arts
- Photographic Services
- Public Relations
- Publishing
- Radio + Television
- Web + Software

The number of creative businesses in East Gwillimbury increased from 177 in December 2007 to 235 in December 2010 (32.8% growth over three years). The largest number of creative businesses are in the following industries:

- Business consulting (69 businesses or 29.4% of the total)
- Web and software (54 businesses or 23.0% of the total)
- Engineering (43 businesses or 18.3% of the total)

All other types of creative businesses have fewer than 20 business establishment counts. The highest rate of business growth among the top three creative business types was in engineering (65.4%).

³ ConsultEcon, Inc. North Shore Creative Economy Market Analysis and Action Plan, April 2008.



FIGURE 43: CREATIVE BUSINESS ESTABLISHMENTS, TOWN OF EAST GWILLIMBURY, DECEMBER 2007 & DECEMBER 2010

Source:	2007	2010	% change	2007	2010
Total	177	235	32.8%	100.0%	100.0%
Advertising	12	12	0.0%	6.8%	5.1%
Architecture	4	2	-50.0%	2.3%	0.9%
Artists	0	4	N/A	0.0%	1.7%
Business Consulting	56	69	23.2%	31.6%	29.4%
Design	10	18	80.0%	5.6%	7.7%
Education	0	1	N/A	0.0%	0.4%
Engineering	26	43	65.4%	14.7%	18.3%
Film	13	13	0.0%	7.3%	5.5%
Games	0	0	N/A	0.0%	0.0%
Heritage	1	0	-100.0%	0.6%	0.0%
Marketing	2	2	0.0%	1.1%	0.9%
Museums	0	0	0.0%	0.0%	0.0%
Music	1	1	0.0%	0.6%	0.4%
Performing Arts	4	7	75.0%	2.3%	3.0%
Photographic Services	0	1	N/A	0.0%	0.4%
Public Relations	1	1	0.0%	0.6%	0.4%
Publishing	2	5	150.0%	1.1%	2.1%
Radio & Television	1	2	100.0%	0.6%	0.9%
Web & Software	44	54	22.7%	24.9%	23.0%

Derived from Statistics Canada (Canadian Business Patterns Data, 2007 & 2010) by Millier Dickinson Blais Inc.

1.1.6 Land Use & Physical Infrastructure Assessment

Land Use – The Town of East Gwillimbury has undertaken a great deal of research regarding employment lands with the *Town of East Gwillimbury Future Employment Lands Economic Review, Industrial Employment Lands Inventory* and other



municipal planning exercises. There are 232 net developable hectares (573 net developable acres) in five employment corridors. The strategic economic corridors and areas of opportunity include:

- Yonge Street North (designated – 31 net acres, Whitebelt – 200 acres)
- Green Lane (designated – 49 net acres, Whitebelt – 350 acres)
- Highway 404 (designated – 427 net acres, Whitebelt – 614 net acres)
- Highway 400 to Highway 404 extension (designated – 0 net acres, Whitebelt - 633 net acres) and
- East Gwillimbury University (designated – 65 net acres, Whitebelt – 0 net acres)

There are an additional 78 hectares (193 net acres) in the designated lands within Holland Landing, Mt. Albert and Bales Drive and the remaining 159 hectares (392 net acres) are Whitebelt lands. The Employment Land Real Estate discussion paper accompanying this report highlights the planned functions of the employment areas, along with the strengths, weaknesses and opportunities for each area.

Water & Wastewater Services - The *York Region Water and Wastewater Master Plan* lays out the requirements to meet increased demand for water and wastewater services. A number of water and wastewater projects have been identified to service future growth in East Gwillimbury and throughout the Region. The Plan anticipates that the growth in Holland Landing, Queensville and Sharon will result in wastewater demands that exceed existing capacity and additional wastewater treatment or capacity is required. Future growth will require infrastructure projects to collect wastewater from the expanded services. The Plan recommends that a new trunk sewer will be needed to serve East Gwillimbury.

This Plan also lays out that additional demand in the East Gwillimbury communities of Holland Landing, Queensville and Sharon will be supplied from the Georgina Water System, which currently supplies the communities of Keswick and Sutton. This Plan identifies six strategic water projects for the Town of East Gwillimbury to supply the additional residential and non-residential users. Details of these water projects are outlined in Part 2: Background Research - Research Summaries. Mount Albert also requires a new well to meet increased water demand from future growth, which is expected to be in operation over the next year.

Transportation – Construction of the Highway 404 extension from Green Lane to Ravenshoe Road is expected to be completed in December 2012. At an average annual daily traffic (AADT) volume of 24,400 vehicles at Green Lane and Highway 404, there is already a sufficient amount of traffic on this stretch of Highway 404.⁴ Over the longer term horizon both Highways 404 and 400 will be linked north of Queensville Sideroad.

⁴ 2007 Provincial Highways Annual Average Daily Traffic (AADT) Volumes, Ministry of Transportation, p.41



The land use and physical infrastructure assessment indicates that these necessary services for East Gwillimbury are being developed or are in future plans for development.

1.1.7 Human Infrastructure Assessment

The Town of East Gwillimbury is fortunate to be located in proximity to employment and training resources. The major resources include Seneca College and York University.

Seneca College is Canada's largest college with over 17,000 full-time students, 90,000 part-time students, a wide range of program offerings and eight campuses spread across the Greater Toronto Area.⁵ Its regional campuses include Newmarket, King City and Markham. Each regional campus provides its own specific programming. For example, the Markham regional campus' list of programs includes business administration, advertising, and tourism and travel; whereas, the Newmarket campus provides academic upgrading and job skills programs.

York University is Canada's third largest university with nearly 50,000 students across ten faculties.⁶ York offers a wide range of post-secondary programs in the Faculties of Science & Engineering, Health, Environmental Studies, Education and Liberal Arts & Professional Studies and the professional schools, which include Osgoode Hall Law School and Schulich School of Business. York also has nearly 30 research centres and institutes, which range from research on vision science to sustainability to health research. A great deal of academic research is being undertaken at this institute. Historically, their research strength areas are in vision science, space science, history and refugee studies.⁷

These post-secondary educational institutions all represent potential collaborators when moving the regional and local economic development agenda forward.

⁵ Ontario Colleges.ca, <http://www.ontariocolleges.ca/portal/page/portal/ONTCOL/Plan/Seneca>, viewed on April 14th, 2011.

⁶ Association of Universities and Colleges of Canada, http://www.aucc.ca/can_uni/our_universities/york_e.html, viewed on April 14th, 2011, last modified March 28th, 2011.

⁷ Ibid.



2 Background Documents Review

- **Town of East Gwillimbury Official Plan**
- **Town of East Gwillimbury Business Retention and Expansion Program**
- **Community Parks, Recreation and Cultural Strategic Master Plan**
- **Town of East Gwillimbury Strategic Plan**
- **York Region Water and Wastewater Master Plan**
- **GTA Mayor's Countryside Alliance Reports**
- **RTO6 Current Documentations**
- **Tomorrow's Opportunities and Priorities Report**
- **Telecommunications Gap Analysis**
- **Town of East Gwillimbury Future Employment Lands Economic Review**
- **Employment and Industry Report**
- **East Gwillimbury Transportation Master Plan**
- **York Region Vacant Employment Land Inventory**



Town of East Gwillimbury Official Plan

Author: Town of East Gwillimbury

Date of Plan: June 2010

Purpose:

The purpose of this Official Plan is to provide direction and a policy framework for managing growth and land use decisions over the planning period to 2031. The policy framework ensures appropriate growth toward a sustainable community. Collectively, the policies of this Plan set a vision for East Gwillimbury in 2031 and guide the achievement of that vision over time. This Plan also provides for long term protection of the Town's environmental areas, cultural heritage features, historic community identity and rural countryside.

Summary of Key Findings:

- The Town of East Gwillimbury will grow to a resident population of 86, 400 and jobs will grow to over 34,000.
- The overall guiding vision for the Town is based on the following objectives:
 - To promote community development in a manner that is respectful of the environment and sustainable for present and future generations;
 - To create cohesive, vibrant, connected urban neighbourhoods which are sensitive to the Town's rich cultural heritage and history;
 - To ensure a high quality of life for the present and future residents of the community with respect to security, health, safety, jobs, convenience and general economic welfare;
 - To foster a vibrant agricultural and rural community through support for farming, appropriate secondary uses within the countryside and rural recreational uses including eco-tourism.
- The long-term vision for the Town is supported by the following key elements:
 - The Protected Countryside, which includes the Oak Ridges Moraine and Greenbelt Plan representing approximately 75% of the Town's land area;
 - Permanent protection of a connected Natural Heritage System and environmental corridors throughout the Town;
 - Protection of planned and future employment areas and strategic economic corridors along the Highway 404 and Highway 400-404 Link;



- Recognition of the various historic settlement areas consisting of villages and hamlets in both the Urban and Rural areas of the Town;
 - A series of pedestrian and transit-oriented Centres and Corridors, providing focal points for the highest intensity of urban land uses and activities with strong connections to the historical Settlement Areas of the Town.
- A sustainable economic future for the Town will be made possible by achieving employment targets, while ensuring a stable and sound fiscal position for the Town to support programs and services for residents. The economic sustainability objectives are to:
- Protect strategic lands for long term employment uses and prevent conversion of employment lands to other uses;
 - Pursue a ratio of one job for every two residents to achieve a balanced live/work relationship in the community;
 - Establish a post-secondary institution for the Town and regional population;
 - Promote and enhance the Town's village cores as centres for local commerce;
 - Protect agricultural and rural lands and the associated rural economy, including agri-businesses, value-added agricultural products and local food production;
 - Expand and promote the tourism industry with an emphasis on rural recreation, eco-tourism and other attractions in the Town;
 - Achieve a sound fiscal position for the Town through the collection of Development Charges and other financial tools to ensure that growth pays for complete community growth.
- The growth management strategy of this Plan is based on the following objectives:
- Manage growth through effective phasing policies to guide the Town's long term urban structure;
 - Enhance quality of life by promoting a mix of uses and providing opportunities within the Town to live, work, play and learn;
 - Locate the most intense built form and variety of activity in Centres and Corridors to promote transit and a mix of uses, with an initial focus of development within Centres;
 - Ensure balanced growth by requiring employment and other non residential uses to be provided concurrently with residential growth;
 - Support residents' everyday needs by providing retail and commercial uses within the commercial core of the Queensville Centre and Village Core Areas (Local Centres);



- Require excellence in the design of the built environment through strong urban design policies and guidelines;
 - Promote sustainable forms of growth by requiring development proponents to provide sustainability assessments that address the sustainability policies and objectives of this Plan including the application of the Town's Sustainable Development Evaluation System.
- Lands designated Post-Secondary Institution are intended to develop as a major educational institution in a campus format. The objectives of this designation are to:
 - Provide a skilled workforce to meet progressive employment needs;
 - Promote and secure a post-secondary institution;
 - Explore a potential partnership with an existing post-secondary institution as part of an established Economic Development Strategy.
 - Promote and encourage innovative telecommunications systems within the Town to serve local businesses and residents and future development.
 - The Town recognizes the importance of rail infrastructure, as it will continue to play a key role in the long term economic growth of the Town with respect to public transit and commuter service, as well as goods movement.
 - The Town recognizes the Prime Agricultural and Holland Marsh Specialty Crop Areas as important natural resources that help support the economic vitality of agriculture.
 - Prior to or concurrent with the completion of the Environmental Assessment for the Upper York Sewer Solution by the Region of York, and prior to the approval of additional residential development, Council shall undertake a comprehensive review of the Town's Economic Development Strategy in the context of achieved employment and non residential development during the near-term growth period to evaluate the achievement of the objectives outlined in 3.4.4.1 and the fiscal position of the Town and future employment growth projections.
 - 3.4.4.1 - Subject to the specific policies of this Section, it is the policy of this Plan that prior to the release of any residential Subdivision Plan for registration or prior to entering into a site plan control agreement for medium and high density residential development, the landowner/developer must have constructed or have under construction, 56 square metres (600 square feet) of employment or commercial floor space within the Town for every residential dwelling unit that is proposed as part of the development application. Non assessment related buildings, such as municipal and other institutional buildings will not be considered employment-related development under this policy.



Report of the Business Retention and Expansion Program

Author: Town of East Gwillimbury

Date of Study: 2006

Purpose:

The objectives of the program were to actively demonstrate the community's pro-business attitude; to help existing businesses solve problems; to assist businesses in using existing programs aimed at helping them become more competitive; to create a forum in which sensitive information on the needs and complaints of businesses can be addressed effectively, yet confidentially; and to collect data on our community's strengths and weaknesses as a place to do business.

Summary of Key Findings:

- Community leaders throughout East Gwillimbury were invited to join a Business Retention & Expansion Task Force to conduct a survey of local businesses after participating in a comprehensive training session.
 - One of the key aspects that significantly contributed to the success of the program is the response by the Coordinator to what had been termed "Red Flag Issues."
 - The criterion used to identify red flags were:
 - Business closing or downsizing;
 - Business relocating;
 - Business expanding; and
 - Request for information.
- Over 86% of the seventy-one businesses surveyed were provided with additional information concerning the "Red Flag Issues" that the BR+E Coordinator provided.
 - The most common "Red Flag" information requests were regarding:
 - Succession planning
 - Energy efficiency
 - Financial information and financial sourcing
 - Business planning
 - Employee retention
 - Marketing strategies
 - Waste product recovery



- The survey concluded that approximately 56% of the businesses have been in operation for more than ten years in East Gwillimbury. The survey stated that 25% of the businesses had been in the community for more than twenty-five years. Most of the respondents (90%) were involved in the business on a day-to-day basis. Additionally, East Gwillimbury was the sole location for most of the businesses (81%). The businesses served local, Canadian domestic and international markets. Sixteen companies export their products to the U.S.A. and eleven internationally.
- Six action items that the BR+E program identified were:
 - Communication of Accurate Business Information
 - The objectives of this program are to develop educational/information products to ensure businesses better understand the scope of the restrictions (legal, provincial/federal responsibility or regulation) and government financial constraints. Two goals of the program are:
 - To develop and deliver comprehensive, coordinated community and government information to provide up-to-date information on the support, tools, and resources available to businesses.
 - To encourage more open dialogue between all levels (municipal, regional, provincial and federal) of government, business organizations, school boards, business community, and residents to ensure accurate exchange of information regarding areas of responsibility, regulations, business support tools and resources.
 - Human Resource Recruitment, Business and Human Resource Education and Training
 - The objective of this program is to increase local business' awareness of educational/training opportunities and cost effective recruitment strategies. The goals of the program are:
 - To provide up-to-date research on current and future local area labour force requirements, trends, and availability.
 - To provide East Gwillimbury businesses with effective, low cost business education and training opportunities such as apprenticeship programs for skilled trades, health and safety, waste product and productivity improvement (lean manufacturing) strategies.
 - To increase businesses awareness of effective, low cost human resource recruitment strategies.
 - Broadband Infrastructure
 - The objective of this program is to improve telecommunications infrastructure to enable access to wireless high-speed internet access. The goal of the program is to provide the East Gwillimbury business community and residents with reliable wireless broadband services.
 - Energy Conservation and Efficiency



- The objective of this program is to increase energy conservation and efficiency to ensure the ability of existing and new businesses to expand and maintain or increase productivity. The two goals of the program are:
 - To provide local businesses with the educational/information materials needed to seek advice with regards to energy conservation and efficiency.
 - To provide innovative energy solutions for East Gwillimbury businesses.
- Retail District Beautification and Identity
 - The objective of this program is to create identifiable commercial districts that portray a safe, pleasurable, shopping environment. The two goals of the program are:
 - To identify creative strategies that create downtown areas which the community can be proud.
 - To support the retail sector and its role in anchoring downtown cores.
- Business Development
 - The objective of this program is to ensure East Gwillimbury businesses have the necessary tools, resources, and supports required to maintain or expand their enterprise. The two goals of the program are:
 - To increase awareness of existing supports to local businesses.
 - To develop on-going communication strategies between service providers and businesses to ensure resources, tools, and supports are available to meet business needs in a timely manner.



Community Parks, Recreation and Cultural Strategic Master Plan

Author: Monteith-Brown Planning Consultants in association with Tucker-Reid & Associates, Cosburn-Giberson Landscape Architects

Date of Study: March 2009

Purpose:

The Community Park, Recreation & Culture Strategic Master Plan has been developed as a tool to assist decision-makers, stakeholders and the general public in determining needs and priorities related to services and facilities encompassing the parks, recreation and cultural demands of East Gwillimbury. The Master Plan provides an action plan that directs the development of future municipal facilities and services in a fiscally responsible manner. The Plan includes a Town role in providing services and facilities pertaining to parks, recreation, arts, and culture and heritage entities through to the year 2018.

Summary of Key Findings:

- The Strategic Master Plan has identified the need for major facilities, namely two new ice rinks (as the population reaches 35,000) and an indoor aquatics facility (as the population reaches 40,000).
- To receive the benefits that a vibrant arts and cultural community brings, the Town should work with such groups wherever possible to maximize their internal capacity through a community development approach. Many needs of the arts and culture sector can be addressed by designing multi-purpose spaces within facilities that consider the needs of these groups.
- A number of sports fields will be required to address future growth-related needs, including six soccer fields and three ball diamonds. These types of facilities require large tracts of land and it is preferred that multiple sports fields are located at the same site, wherever possible, to maximize operational efficiencies and create opportunities for tournament play.
- Walking or hiking is the most favoured leisure activity. In fact, the top activities are unstructured, unprogrammed pursuits. This is likely indicative of a time-pressed populace looking to casually participate in leisure activities during periods of free time.
- Public interest was expressed in the development of a multi-use community centre.
- A total of eight community centres are distributed across East Gwillimbury.
- The Master Plan recommends a number of new facilities to be developed by the year 2018 (assuming the population reaches the expected 50,000 threshold), many of which should be considered to be located in new or existing community centres.



- One new multiuse community centre will be required once the population reaches between 35,000 and 40,000 residents, depending on the facility development strategy chosen by the Town.
- The Town of East Gwillimbury provides over 174 hectares (430 acres) of parks across thirty-five park sites
 - Town-wide Parkland – provided as required to meet special Town-wide needs and serving a Town-wide function such as a fairgrounds or major indoor and outdoor recreation complex.
 - Community Parkland – provided at a rate of 1.2 hectares per 1,000 residents and generally ranging in size between 2 to 8 hectares. These parks may provide indoor and/or outdoor passive or active recreational facilities.
 - Neighbourhood Parks – provided at a rate of 1.0 hectares per 1,000 residents and generally are a minimum of 1.6 hectares in size. The parks provide for both passive and active outdoor recreational facilities, as well as limited indoor facilities.
- The mission statement for parks, recreation and cultural services is:
 - East Gwillimbury provides parks, recreation and cultural services to offer the residents choices in their leisure time, promote community pride and spirit and to encourage healthy and active lifestyles
- The current program and service delivery model for parks, recreation and cultural services are provided in two approaches.
 - The primary parks, recreation and cultural programs and services are provided by the Community Programs and Infrastructure department staff at East Gwillimbury.
 - Other programs, services, sports and leisure opportunities are provided through community groups, non profit organizations and the private sector.
- The goal of the two approaches is to ensure a diverse and accessible menu of programs and/or opportunities for all ages, genders regardless of background.
- A service delivery review tool for leisure service providers present a number of key result areas and subsequent success factors to describe high performing service delivery for the Community Programs and Infrastructure Department. The Key Success Factors for service delivery include:
 - Service Focus of the Department
 - The service focus of the department allows for the organization to allocate time and resources to developing elements and tools that will guide decision-making, policy development and operating policies.



- Effective Leadership Practices
 - Effective leadership practices allow for management to make certain that the organization is strategically sound, adapts well to change and is capable of facilitating the exchange of ideas and information between staff and stakeholders.
- Program and Service Delivery
 - Programs and service delivery allows the Town to respond to the needs and interests of all community members while meeting the quality and service delivery standards set out by the Town. The organization's vision, mission and values are also to be clearly visible in the manner in which programs and services are designed, delivered and evaluated.
- Partners and Stakeholders
 - Effective parks, recreation and cultural organizations consider partners and stakeholders as an important part of the service planning and delivery process. The organization should treat partners and stakeholders in a fashion consistent with the manner in which it deals with its professional staff. The organization's goals in the areas of child and youth development, lifelong health and wellness for all and environmental stewardship are seen as mutually beneficial to partners and stakeholders. For clarity, the organization considers that a partnership exists when two or more persons or groups recognize that working together towards a common goal is more productive than working independently. Volunteers are considered partners.



Town of East Gwillimbury Strategic Plan

Author: Town of East Gwillimbury

Date of Study: November 2005

Purpose:

The Town of East Gwillimbury Strategic Plan establishes the framework for all projects and plans to be undertaken by the Town's departments.

Summary of Key Findings:

- The Town of East Gwillimbury's Strategic Plan is comprised of five main elements;
 - The community vision outlines that the town is known for their strong community values and invigorating mix of residential, employment, recreational, agricultural and natural environment areas and will work together for to plan for a thriving community today and tomorrow.
 - The core purpose of the Town is to provide quality cost-effective services and to lead the community in the planning and delivery of a sustainable future.
 - The corporate value of the Town is reflected throughout the members of Council, the Advisory Committees and the organization. These values embrace a character community that values optimism, integrity, respect, responsibility, perseverance, initiative, inclusiveness, courage, compassion and honesty.
 - The Plan's strategic directions are linked to the core purpose of the municipality through pillars which further define and support the Plan. They are the ways in which the Town will contribute to making the Plan successful. The following are the strategic pillars:
 - **Protecting and Enhancing the Environment** - To protect and enhance the natural environment and work towards cleaner air, water and land by:
 - Developing strategies to ensure that the Town of East Gwillimbury is a model community for environmental stewardship (greening initiatives, energy conservation management)
 - Working directly with key environmental partners (such as the Lake Simcoe Conservation Authority) to ensure the watershed environment continues to be enhanced
 - Reviewing and consolidating the Town's natural heritage system as part of the Greenbelt Initiative Promote Innovative Energy Practices



- Continuing to implement energy conservation in municipal buildings and infrastructure and seek out utility partners to ensure that growth is accommodated with innovative and environmentally sustainable 'leading practices'.
- **Providing and Advocating for Quality Programs and Services to the Community - To** provide quality cost effective programs and services to residents and the business community by:
 - Preparing annual business plans and supporting budgets indicating key work initiatives and allocating resource requirements (dollars, employees, etc.)
 - Developing key business unit indicators (program cost, outcome, customer satisfaction, employee performance) to monitor business unit effectiveness
 - Establishing employee development plans that align with annual business plans and the Town's Strategic Plan
 - Providing accessible cultural/recreation programs and services to residents.
 - Collaborating with other service provider sectors (education, health care, Region, Province and Federal Governments) to ensure programs and services are made available to the community in a balanced and effective manner.
 - Regularly meeting with School Boards, community colleges, universities, trade schools to ensure excellent facilities/programs for our residents
- **Investing in Municipal Infrastructure – To** develop plans to maintain, replace and upgrade our infrastructure including roads, sidewalks, facilities, recreation complexes, and information technology and communications systems by:
 - Developing multi-year Town capital plans for all existing key infrastructure areas including roads, parks, sidewalks, facilities, water and sewer systems, emergency services, information technology, library and other service areas
 - Ensuring green lands, transportation, water and sewer, infrastructure, natural heritage, utilities and community facilities are integrated to accommodate growth
 - Preparing a long term 20 (plus) year assessment for full capital cost replacement for major facilities and major municipal infrastructure and establishing and building replacement reserves to equalize funding requirements.
- **Managing Growth to Ensure a Sustainable Community - To** manage growth in an efficient, balanced, well planned manner and to ensure growth occurs in a way that benefits the Town and its residents by:
 - Developing short and long term growth management projections that link future residential growth to employment growth on a Town-wide basis



- Undertaking mid and long term financial forecasts to ensure that growth costs are paid by growth and that future tax rates are maintained within the level of inflationary pressures and require all major new growth areas to be supported by detailed fiscal impact analysis
- Establishing a Town of East Gwillimbury Development Group and initiating regular dialogue on growth related issues.
- Supporting a Municipal Organization Focused on Excellence – To maintain strong, accountable municipal government by:
 - Undertaking Town-wide surveys to obtain input on satisfaction with Town services and investigate opportunities for improvements through consolidated customer services
 - Reviewing resident-friendly methods of direct communication with customers and initiating regular consultation with the community on issues of importance
 - Conducting detailed organizational assessment to ensure that the Corporation is properly resourced/aligned for the future including human resources and information technology
 - Developing multi-year plans by business unit to ensure programs and services are effectively resourced and delivered and update and develop master plans for key programs and service areas
- The last element looks at the actions in which the Town will partake in to support the strategic directions. The activities outlined are:
 - The continued monitoring and reporting of the progress of the Strategic Plan each year (2006-2007-2008) through the annual Business Plan and Budget Process.
 - The endorsement of the Strategic Plan by Council and support and direction to focus on a longer term perspective of program and service planning, delivery and evaluation.
 - The continued involvement from Town employees, residents, businesses and key stakeholder groups to ensure that the Town of East Gwillimbury remains a leader in program and service provision.
 - That the administration will incorporate a section in future staff reports that link the report to the Strategic Plan Pillars.



Town of East Gwillimbury Community Energy Plan

Author: Garforth International

Date of Study: November 2005

Purpose:

The Town of East Gwillimbury Community Energy Plan is intended to establish energy conversation targets and objectives, ultimately provide the Town with direction for greater security of energy supply to residents and businesses. and provide the necessary tools to ensure that the Town's growth is sustainable and progressive.

Summary of Key Findings:

The CEP states that by 2031 the Town's target is to have the carbon footprint of each inhabitant to average six metric tonnes, which is substantially less than the 13.0 metric tonnes under a "business-as-usual" scenario. CEP recommendations are summarized as follows:

- Implement efficient building standards expanding on the Town's current green building policies for new development
- Create energy efficiencies through more compact, mixed use neighbourhoods and more opportunities for local employment
- Implement a district energy system to serve the majority of growth in the Town's Central Growth Area through a community controlled Energy Services Company utility
- Promote alternative forms of energy supply, by installing significant renewable energy sources, including solar and wind
- Increase transportation efficiency through the provision of public transit, the promotion of alternative forms of transportation, improving vehicle efficiency and development a live/work community
- Register the Town's greenhouse gas baselines and continuously track ongoing performance to capture monetization opportunities.

The Town will need to commit to implementing the CEP and monitor progress in terms of attracting investment, creating jobs, increasing energy efficiency and reducing greenhouse gas emissions.



York Region Water and Wastewater Master Plan

Author: York Region, Genivar and XCG consultants

Date of Study: November 2009

Purpose:

The need for York Region to plan for long term water and wastewater servicing is urgent. York Region is the fastest growing region in the Greater Toronto Area and one of the fastest growing municipalities in all of Canada. The provincial government has forecasted that York Region's population will grow to 1.5 million by 2031. Other forecasts have indicated a population of as much as 1.8 million by 2051. Economic growth is expected to double over the same period – increasing from 462,000 jobs in 2006 to 799,000 jobs by 2031, and potentially reaching over 950,000 jobs by 2051.

The result of the expected rapid growth in population and employment will mean increased demand for water and wastewater services. The Master Plan was undertaken to provide long-term water and wastewater services that are safe, well-managed, and sustainable.

Summary of Key Findings:

- East Gwillimbury's 2009 population is 21,900 and it is expected to grow to 88,000 by 2031, an 11% share of the Region's growth for 2031.
- The new water and wastewater projects that have been identified through the Master Plan Update are needed to service future growth in north Vaughan, north Markham, and East Gwillimbury.
- The Plan outlines the current service of wastewater and water infrastructure in East Gwillimbury.
 - Holland Landing is presently serviced by seasonal retention lagoons.
 - Sharon and Queensville are presently served by private systems.
 - Mount Albert has a stand alone water pollution control plant.
- The Plan anticipates that the growth in Holland Landing, Queensville and Sharon will result in wastewater demands that exceed the lagoon capacity and additional wastewater treatment or capacity is required. The growth will also require infrastructure projects to collect wastewater from the expanded service areas.
- The Plan outlines that alternative solutions for wastewater servicing in Holland Landing, Queensville and Sharon will be examined in greater detail through the Upper York Servicing System (UYSS) Individual EA project.
- The Plan recommends that a new trunk sewer infrastructure will be needed to serve East Gwillimbury.



- There is a recommendation to investigate and implement operational changes in water supply to Aurora, Newmarket and East Gwillimbury to reduce the dependency on groundwater from the Yonge Street Aquifer.
- The Plan lays out that additional demand in the East Gwillimbury communities of Holland Landing, Queensville, and Sharon will be supplied from the Georgina Water System, which currently supplies the communities of Keswick and Sutton.
- The Plan includes an implementation section that recommends Wastewater and Water Projects that will be required to meet the demand of the expected growth by 2031. The Plan refers to these projects as Strategic Water Projects. The following are those that apply to the Town of East Gwillimbury.
 - New watermains are required in Holland Landing Central to supply the increased demands in East Gwillimbury.
 - An expansion is required at the Kirby pumping station to meet the increased demands in Newmarket West and East Gwillimbury.
 - New watermains in Newmarket East are required to meet increased demands in Newmarket East and East Gwillimbury.
 - The existing Davis Drive pumping station is currently not in operation as the Sharon Queensville wells supply Newmarket East. As demands increase in East Gwillimbury and the Queensville well supply is needed to meet the demands in Sharon Queensville, a new pumping station from Newmarket Central will be required.
 - New watermains are required in Queensville-Sharon East to meet the increased demands in East Gwillimbury.
 - A new pumping station located on Queensville Sideroad immediately to the west of future Hwy 404 including new forcemain along Queensville Sideroad and Second Concession discharging to Second Concession gravity sewer. This station will be required between 2016 and 2021 to service growth in the northeast portion of East Gwillimbury.
- Mount Albert is not a part of the York Water System but rather serviced by an individual system. The residents and businesses in Mount Albert are supplied by groundwater and currently the water demand exceeds the capacity of the well. A need for a new well was identified in the 2004 Water Master Plan Update and was expected to be in operation by 2011. The Master Plan states that the expected increase in water demand from the additional population growth will require additional water supply by 2031.



GTA Mayor's Countryside Alliance Economic Analysis Report

Author: Millier Dickinson Blais Inc in association with Watson & Associates Economists Ltd

Date of Study: September 2010

Purpose:

The Greater Toronto Countryside Mayors Alliance is confronted with unique economic and fiscal challenges. The Alliance, which comprises 14 member municipalities, is fortunate to have natural assets such as the Oak Ridges Moraine, Niagara Escarpment and agricultural lands; however, provincial planning frameworks ensure that these assets remain protected and largely undeveloped. The large geographic area that the legislation affects coupled with the Growth Plan for the Greater Golden Horseshoe which directs population and employment growth to urban areas is impacting the collective individual municipality's ability to stimulate economic development, support sustainable new growth and generate revenue for needed municipal services.

Summary of Key Findings:

- The Greater Toronto Area (GTA) has experienced significant and sustained growth that has underpinned the expansion of economic output in the broader region and the Province of Ontario for many years. The Toronto region is estimated to generate a fifth of Canada's Gross Domestic Product (GDP) and 45% of Ontario's GDP.
- There is little indication that the goods-producing sectors will regain the level of employment or output they held in the regional economy in previous decades, owing to continuing cost challenges, labour-saving technological improvements, weakened demand from the United States and competition from developing markets.
- The service-producing segment of the economy has assumed greater prominence in the region. Service-based employment is forecasted to comprise 82% of all employment in the Toronto region by 2014, up from 79% in 2007; this proportion is higher than that of the province and the country as a whole.
- Employment in the Alliance area is still heavily concentrated in goods-producing industries than in the rest of the region, specifically in the manufacturing and agriculture industries. Employment in these industries are more heavily concentrated in these municipalities than the resident labour force, which suggests a high degree of intra-regional commuting flows occurring on a daily basis.
- The Countryside is home to an estimated 695,735 people as of 2010 accounting for 11.2% of the GTA's population.
- Small businesses comprise 78.1% of all of the businesses reporting employees as of 2009. The industries with the highest concentrations of small businesses (1-9 employees) are professional, scientific and technical services, construction, other services, retail trade and health care – largely service-based industries that are also showing high levels of growth.



- Countryside municipalities are also in high competition for investment, talent and growth in a wider range of industries due to forces of suburbanization that has expanded the residential and industrial base of the Countryside. Although, owing to the geographic area of the Countryside, these opportunities are distributed unevenly, as member municipalities have differing assets from which to derive strategic advantages.
- The Countryside municipalities have experienced a higher rate of growth of new firms, specifically in the healthcare and social assistance and transportation and warehousing sectors. Conversely, there has been contraction in agriculture and manufacturing firms.
- Not all communities in the Countryside have experienced growth in the number of businesses, specifically Uxbridge and East Gwillimbury which had fewer firms reporting employees.
- The supply of vacant employment lands is limited or approaching build out in several Countryside municipalities. For many of these municipalities there are no available areas in which to expand within their respective municipal boundaries.
- Opportunity for development on designated Greenfield areas exist in some Countryside municipalities. East Gwillimbury has a relatively large amount of designated Greenfield lands available for development.
- Three-quarters of the land area in East Gwillimbury, Georgina, Whitchurch-Stouffville, King, Clarington, Scugog and Uxbridge is classified by environmentally protected lands.
- Whitebelt lands are planned to accommodate longer term future growth in municipalities such as Caledon, Clarington, East Gwillimbury, Halton Hills, Milton and Whitchurch-Stouffville.
- The key to generating employment land and office assessment is to make available quantities of serviced land at locations that are well-served by freeways and other strategic transportation services. Regional investment is required in the servicing of the land and Provincial assistance is required in providing the necessary higher-order transportation linkages. Critical to the success of future employment areas in several of the northern and eastern Countryside municipalities such as East Gwillimbury is the extension of existing 400 series highway infrastructure in 2012.
- Given the projected growth, the potential shift in the form and density of future development and the current shortfalls in capital funding through DCs, a number of potential risks fall onto municipalities when financing future development across the Countryside. Some of the potential risks are outlined:
 - A portion of capital expenditures required to support future development which complies with Growth Plan policies will need to be funded by local and Regional municipalities.
 - Related operating and maintenance expenditures in anticipation of growth which may or may not occur in the amount, time or built form expected.



- Revenues from property taxes, water rates and development charges may be below forecast levels, with the risk being enhanced by the current economic downturn as well as by any market uncertainties which may be associated with higher-density housing forms within built up areas.
- The report addresses the restrictions on municipal revenue streams. Municipal resources across the Countryside have increased at an average annual rate of nearly 6% since 2000. Expenditures have also grown at nearly double the rate of the other 905 GTAH municipalities as a result of the need to service the rapid growth. In East Gwillimbury, 79% of the assessment base is residential, which is significantly higher than the 61% of the assessment base in the 905 GTAH municipalities outside of the Countryside. These trends place many Countryside municipalities in a difficult fiscal position. The legislative and fiscal development-related tools available to these municipalities (ex. Development Charges) are limited in their ability to extract revenues from capital investment in the community that are suitable to finance the ongoing operating expenditures that new development will demand.
- The fiscal impact assessment reveals that as a result of both the recession and the perceived low return to investment in many Countryside communities, securing financial support from the private sector to drive major, high-density industrial development projects has proven infeasible.
- The key conclusions emerging from the report concerning both population and employment growth were:
 - The provincial planning and development frameworks are complicating the achievement of balanced growth that can sustain the economies of the Countryside municipalities.
 - Small business and knowledge-based and serviced based sectors are driving employment growth in the Countryside municipalities. Small businesses represent low density employment and knowledge-based sectors have much lower numbers of local employment positions than qualified resident workers.
 - There is limited available land for development since 80% of Countryside lands are provincially designated protected areas. East Gwillimbury has available whitebelt lands to accommodate future employment land demand beyond currently designated areas within the 2031 planning horizon and beyond.



RTO6 Current Documentation

Author: Regional Tourism Organization Zone 6

Date of Study: Ongoing

Purpose:

To create new marketing opportunities for the tourism industry through the cooperation of Durham Region Tourism, York Region Tourism the Hills of Headwaters Tourism boards.

Summary of Key Findings:

- A board of directors for RTO6 has been elected based upon their tourism and professional knowledge, plus skills and other attributes, thereby ensuring that the Board reflects a diversity of experience in order to provide effective strategic direction to RTO6.
- The Board is comprised of 13 private sector tourism industry representatives, plus maintains tourism management personnel from each of the Regions in an ex-officio capacity. York Region is well represented with four members from some of the Region's key tourism operations.
- The RTO6 board is working with the Ontario Ministry of Tourism and Culture, who are providing initial funding to the new RTO in excess of \$2 million per annum in the period from April 2010-March 2012.
- The RTO6 board has begun to craft a Sport and Major Events strategy for the zone. The strategy looks to incorporate each of the respective municipalities' policies and frameworks in place pertaining to hosting, bidding and capacity building from the sport, cultural and event perspectives.



Tomorrow's Opportunities and Priorities Report

Author: Workforce Planning Board of York Region & Bradford West Gwillimbury

Date of Study: April 2010

Purpose:

This annual report includes a snapshot of the local labour market information, significant changes that have occurred in the past and the current trends and issues affecting the local labour market.

Summary of Key Findings:

- The report overview outlines some of the key observations and directions that York Region is facing. Some of those observations and directions are:
 - York Region has over 38,000 small and medium sized employers in all main stream industries, employing approximately 500,000 people.
 - Since 2006, York Region has grown by 108,000 people and 35,000 jobs.
 - Most of the employment growth will occur in strategic locations along the 400 series of highways.
 - 88% of the Region's growth of major office employment is within current built-up areas.
 - Retail trade is projected to grow as additional population is anticipated.
 - Unemployment as of December 2009 was estimated at 7.7% or about 2% below the GTA.
- The manufacturing profile in the report states that East Gwillimbury's manufacturing sector accounts for about 12.5% of the workforce in the municipality. The report also documents that there is a flurry of activity to create manufacturing facilities to service the considerable needs of the proposed "energy farms". The report outlines that the green energy sector is one of the fastest growing markets in North America and that the interest for investment in the sector is strong.
- The professional, scientific and technical services profile in the report states that 60.3% of firms are self-employed businesses, with 30.3% of firms employing less than 10 people. It is expected to continue as a major growth sector for the Region and is also the most significant small and medium-sized company sector within the Region.
- The specialty trade contractors profile in the report states that in 2009 there were 6,868 businesses operating in the Region with 81% of the businesses either single-person enterprises or employing less than five people. The sector has faced constant skilled worker shortages in the Region for decades and despite the recent impacts of the recession in the construction sector, the latest projections from the industry indicate that the demand is still increasing for these skilled workers.



- The administrative and support profile in the report states that in 2009 there were 4,370 businesses operating in the Region with 80% of these businesses either single-person enterprises or employing less than five people. This sector is currently experience a high level of employment creation and is expected to continue.
- The health care and social assistance profile in the report states that the level of job creation is currently high and is expected to continue with the assistance of Provincial health care funding and the increase of university enrolment to programs that support this sector.
- The food services and drinking places profile in the report states that 59% of all businesses in the sector are either single-person enterprises or employing less than five people. The level of job creation is low compared to other sectors in the Region. The challenges associated with the sector are encouraging people to enter this industry when the rate of pay is lower and work is seasonal compared to other sectors.
- Six strategic priorities have been identified during the process of the report. They are aligned with the economic development activities and priorities of the Region and are expected to have a future impact on employment retention and growth of the communities. The priorities are:
 - The opportunity of a changing manufacturing sector.
 - The growth of the creative class and subsequent decline of manufacturing will create an increase demand for skilled workers in this sector. The action that the board is taking is to continue with the development of job profiles of an additional four sectors/industries. The expected results from this action are the distribution of additional profiles to the educational community and service providers and career agencies.
 - The growing hospitality industry and lack of professional service personnel.
 - As the Region grows there will be a large need for service workers in the food, retail and hospitality sectors. The need includes the ability to attract, retrain and retain workers and demonstrate a viable career path along with available training requirements. The action that the board in conjunction with the Regional Economic Development Group proposes is to provide career profiles for both youth and other job seekers to assist in making informed career decisions based on the local opportunities of this employment sector.
 - Providing resources and support for the Development of SME's.
 - Newcomers to the area who have strong entrepreneur skills and aspirations lack the necessary information and support services to ensure the successful launch of a variety of new enterprises in both the service sector and the technical or specialized operations. The action that the board proposes is to research and document on the barriers/issues and the support services available for newcomers starting new businesses.



- Professional healthcare shortage.
 - With the aging population of York Region, healthcare professionals offering a variety of services will be required to meet the needs of the growing population in occupations in and outside of the hospital environment. The action the board proposes is an interactive healthcare expo that is promoted to students, people in career transition and the general public and provides awareness of the many occupations that exist in this growing sector.
- Job seekers with disabilities face barriers to employment.
 - Many small and medium sized employers are not aware of the financial benefits to hiring a person with a disability. Increased productivity, dedication and an increased customer base, all effect an employer's bottom line in a positive way. Two actions are proposed by the board:
 - Implementation of Phase II of the One Voice Network project which includes the distribution of an information guide, written for small and medium sized business in York Region. Construction of a One Voice website that will become a centralized place for information relating to employment as it pertains to disabilities.
 - Development and launch of a media campaign to promote the One Voice Network website as an information resource, service providers and the benefits of considering hiring qualified applicants who have a disability.



Telecommunications Gap Analysis

Author: Actionable Intelligence Inc.

Date of Study: June, 2010

Purpose:

The town requested a report which would provide information related to broadband technology gaps within the Town and future directions towards improving and eliminating the gaps.

Summary of Key Findings:

- To encourage and support economic and business development within a municipality, robust telecommunication networks (both wired and wireless) are necessary. The stakeholders in the Town of East Gwillimbury need to identify existing and potential opportunities.
- High speed communications services/applications are a foundation for businesses of all sizes.
- Computing has created an environment where all businesses require interactions and connections with customers and suppliers. The benefits of high speed communication for businesses are the ability to compete in a national and global market and the provision of new opportunities.
- The key conclusions from the report were that there are several areas in the Town where services are not adequately available, especially from a resident and business perspective. Areas where there are pockets of dense population, the services are present especially wired options. There are several other options throughout the Town, including fixed wireless, mobile wireless and satellite.
- The study included a business survey. Many of the respondents stated that their only option was dial up services, which are inadequate for delivering online services and applications in a competing market.
- The urban areas surrounding the Town have reasonably good service, but the gap between the rural and urban areas is widening in terms of speeds and pricing. Without new capital investment in networks, the rural areas will continue to be under served and remain without many options.
- The report presents recommendations addressing dense/urban East Gwillimbury and rural East Gwillimbury.
 - Dense/Urban Recommendations – these areas are the targets for potential fibre deployments. Areas where there is an existing population or where there are planned developments are opportunities to have more or even new fibre placed. New businesses often are looking for fibre connections when they are reviewing areas for land/development for new offices/facilities. The Town should consider the following actions:



- The telecommunications gap analysis recommends that Town planners work with developers/industry to identify areas where businesses/users are looking for more advanced services/higher speeds than they have today.
- Town Planners should ensure that all future development (commercial and residential) incorporate fibre distribution services. This can be incorporated as a policy of the Town. The Town may need to develop a list of service requirements and descriptions to indicate their expectations to appropriate developers.
- Formulate a policy to place conduit whenever road work or sewer/water work is completed on major transportation routes within the Town. The incremental cost of the conduit pipe is insignificant compared to the cost of the overall work and can be placed in segments (Sometimes referred to as joint trenching policy).
- Rural Recommendations – these areas consist of scattered population and business locations. Many businesses are in fact located on or next to residential premises. These areas are difficult for service providers to justify high expenses for delivery. The Town could implement the following:
 - Collaborate with service providers to identify priority areas according to the gap analysis. Service providers often indicate they need funding assistance. The Town may have to collaborate with CFDCs or other potential funding sources for assistance.
 - Consider applying for funding opportunities such as Ontario’s Rural Connections program which offers municipalities up to one-third funding for eligible costs to extend networks and bring high speed to citizens.
 - Collaborate with neighbouring Towns and Region to develop a plan for their rural/urban areas. The process should include the Provincial government, institutions, local businesses, and developers with intent to understand what the current needs are relative to services, infrastructure requirements are for developing businesses and skills are for short term and long term business success.



Town of East Gwillimbury Future Employment Lands Economic Review

Author: Watson & Associates Economists LTD. in association with WCM Consulting LTD

Date of Study: October 2006

Purpose:

The purpose of the review is to provide direction for the supply and demand of all forms of employment, institutional, and commercial lands within the Town, relative to planned residential growth over the long term. The study focuses on several key strategic economic corridors and areas of opportunity.

Summary of Key Findings:

- The Province forecasts that York Region will receive the largest share of employment growth in the Greater Golden Horseshoe from 2001 to 2031. With respect to employment rates, York Region employment is forecasted to increase by 2.3% annually.
- There is considerable pressure on developing York Region's remaining developable lands, of which 2,955 net acres have been identified in East Gwillimbury. Collectively, the identified net developable non-residential land is forecast to yield 57,800 new employees and 36.9 million sq.ft. of gross floor area (GFA) at build out. It is noted that these identified lands would occur well beyond the 2031 planning horizon.
- The Town has identified five strategic economic employment corridors. The strategic economic employment corridors were identified in the strategic plan process. The five corridors are:
 - Yonge St. North
 - The corridor employs approximately 448 employees and contributes \$223,800 in local annual taxes and \$1.35 million annually in local/regional and education taxes. The most predominant employment sector in the corridor is retail. It is anticipated in the future that employment uses will continue to be retail, service commercial and food services.
 - At build out, the corridor is expected to bring in \$1.2 million annually in local property tax revenues, and \$7.1 million annually when including potential local, regional and educational tax revenues.
 - Green Lane
 - The corridor is forecast to yield a total of 9,790 employees, and 4.6 million sq.ft. of GFA on 399 net developable acres of vacant lands potentially available for commercial development.



- At build out the corridor is forecast to contribute \$2.1 million annually in local property tax revenues, and \$12.6 million annually when including potential local, regional and educational tax revenues.
- The Green Lane South corridor should be considered as a focus for future residential intensification, primarily along the existing Green Lane GO station.
- Highway 404
 - At build out, the highway 404 corridor is forecast to yield a total of 17,270 employees, and 13.8 million sq.ft. of GFA over 1,041 net developable acres of vacant land, which has been identified as potentially available for employment lands development.
 - At build out, the corridor is forecast to contribute \$4.2 million annually in local property tax revenues, and \$24.9 million annually when including potential local, regional and educational tax revenues.
- Highway 400/404 Extension
 - At build out, the highway 400/404 extension are forecast to yield a total of 10,770 employees, and 8.6 million sq.ft. of GFA on 633 net developable acres of vacant land.
 - At build out, the corridor is forecast to contribute \$2.6 million annually in local property tax revenues, and \$15.5 million annually when including potential local, regional and educational tax revenues.
- The East Gwillimbury University
 - The review also looked at economic impacts of the proposed East Gwillimbury University. The direct impact is in the creation of new employment opportunities for local residents, the expenditures made by the new institution in the local area, the one-time construction costs spent locally and in the subsequent spending by the faculty, support staff and students.
 - A total yield of 2,075 employees, and 726,300 million sq.ft. of GFA has been identified within East Gwillimbury University lands on 32 net developable acres of vacant lands potentially available for commercial development. At build out, this corridor is forecast to contribute \$401,900 annually in local property tax revenues, and \$2.4 million annually when including potential local, regional and educational tax revenues.
 - Opportunities and challenges for the East Gwillimbury University are the forecast university participation rates, government initiatives, tuition costs, reputation, and potential inter-provincial and international student demand.
- The total build out employment forecast has been increased by 5% to account for employment intensification opportunities over the long-term. At build out, the Town of East Gwillimbury is anticipated to reach approximately



79,700 employees. Based on York Region's build out population forecast for the Town of 146,700 to 156,100 this represents a total employment activity rate of 51% to 54%.

- A survey of Greater Golden Horseshoe municipalities explored the following economic and fiscal indicators.
 - Employment activity rates – municipalities with smaller population bases (less than 25,000) were generally found to have a lower employment activity rate.
 - Live/work opportunities – The Town of East Gwillimbury has a high percentage of local residents who commute to areas outside of the Town for employment.
 - Residential vs. non-residential tax revenues – Ninety-one percent (91%) of the Town's tax revenues come from residential property owners in the Town, which was the second highest reliance for the 12 surveyed municipalities. For the Town to obtain 70-80% of tax revenues from residents would be a more desirable target.
 - Industrial and commercial tax assessment per capita – Municipalities with lower population bases were generally found to have lower industrial and commercial tax assessment per capita.



Employment and Industry Report

Author: York Region

Date of Study: 2010

Purpose:

The Employment and Industry Report 2010 provides an analysis of the information gathered in the 2010 York Region Employment Survey. The analysis supports the Regional Official Plan's goal of economic vitality to "create a competitive and flexible economic environment that encourages investment and diversity of employment opportunities". Specifically, it speaks to policy 4.1.9 which states that it is the responsibility of the Council to "research and analyze the Region's economy, including conducting an annual comprehensive survey of York Region businesses in partnership with local municipalities".

Summary of Key Findings:

- York Region gained 8,000 jobs from 2009 to 2010.
- Between 2001 and 2010, York Region employment grew by nearly 100,000 jobs an average annual rate of 2.7%. The growth rate has outpaced Canada's, Ontario's and the GTA's growth rates of 1.5%, 1.2%, and 1.5% respectively.
- With the job gain of 8,000 jobs, the Regional employment total is approximately 501,000 jobs.
- Service oriented jobs account for approximately 77% of total employment in York Region, an increase from 68% in 2001. The existence of a highly skilled workforce able to respond to complex business needs may be attributed to the increasingly high proportion of service oriented employment.
- Two of the three fastest-growing services-producing industries between 2009 and 2010 were also in the top three for the 2001 to 2010 period. Health care and social assistance (+10%) and education (+8%) were the two fastest growing sectors over the past year, while transportation and warehousing (+7%) was third.
- Business services and personal services have grown to rival manufacturing as the largest sectoral groupings in York Region, each accounting for approximately 16% of total employment. Retail trade is another service producing sector that is a high share of regional employment at 13%.
- Manufacturing remains the largest employment sector at 16.3% of total employment (72,300 jobs); however it has been decreasing at an annual average rate of -1.5% since 2001. Most of the job losses were the result of existing manufacturers downsizing and the closure of a relatively small number of businesses in the sector.



- Small businesses are most prevalent in York Region. The majority (84.1%) of firms in the Region employ less than 20 employees. This prevalence of small firms emphasizes the importance of small business and entrepreneurship in the regional economy.
- Larger firms have grown significantly since 2001 at an increase of 35% (200+ firms). This finding indicates successful expansion of existing firms and the overall attractiveness of York Region as a place to do business.
- Markham and Vaughan account for 68% of the Region's total employment. East Gwillimbury has the lowest representation of total employment.
- The report includes a profile of East Gwillimbury's employment and industry. Key findings are as follows:
 - The total share of the Regional employment is 1%.
 - The 2009-2010 employment growth was 0.4%.
 - The 2009-2010 businesses growth was 2.1%.
 - Since 2001-2010 the average annual employment growth rate was 5.1%.
 - Since 2001-2010 the average annual business growth rate was -1.5%.
 - The largest employment sector in 2010 was retail trade at 30.5% of total employment in East Gwillimbury.
 - The fastest growing employment sector in 2009-2010 was transportation and warehousing at a growth rate of 32.5% of the total new employment in East Gwillimbury.
 - The fastest growing employment sector since 2001 is retail trade, growing at an average annual rate of 17.3%.
 - The total employment in East Gwillimbury has grown to an estimated 5,400 jobs; an increase of 58.8% from the 3,400 jobs in 2001.
 - The leading services-producing sectors, which include retail trade and personal services, account for a combined 52.7% of total employment. Among goods-producing industries, manufacturing is the largest employment industry comprising 16.1% of all jobs.
 - There is a strong small business base within the Town, where small businesses account for 84.1% of all businesses. Large sized firms grew from 2 firms in 2001 to 13 firms in 2010.



East Gwillimbury Transportation Master Plan

Author: Town of East Gwillimbury and MMM Group

Date of Study: June 2010

Purpose:

The Town of East Gwillimbury is projected to experience significant population and employment growth over the next 30 years. In response, the safe, efficient and reliable movement of people and goods will become increasingly important and challenging. The Town's transportation system will need to accommodate this growth. The Transportation Master Plan (TMP) provides direction for the Town of East Gwillimbury to manage growth in a responsible manner by engaging in sustainable transportation policies and initiatives that are compatible to those developed by York Region and the Province of Ontario.

Summary of Key Findings:

- The main element of the Master Plan is to ensure appropriate infrastructure and policies are in place to support additional transit service, cycling and pedestrian opportunities and other more efficient modes of travel as well as to leverage provincial investments for these enhancements; while maintaining and improving the health and safety of area residents; and preserving and expanding the Town's vibrant economy.
- Local road improvements that are required to meet projected 2031 population and employment levels were assessed to determine the future impact of local and regional traffic, the impact of the social and environmental surroundings, and the potential cost of the infrastructure improvements. Based on those assessments, the local road improvements recommended in the Master Plan include:
 - A North-South Collector Road that would provide an alternate connection between Doane Road and Green Lane;
 - An East-West Collector Road that would serve as an alternate to Green Lane while providing direct access to new developments along the corridor;
 - A northern extension of Harry Walker Parkway that would alleviate traffic at the Leslie Street/Green Lane intersection;
 - The Sharon East Employment Collector Road that would provide direct access to future Highway 404 employment and residential lands in Queensville;
 - An extension of Thompson Drive that would provide an alternate east-west connection to Doane Road and Mount Albert Road; and



- A new ring road that would provide direct access to future Queensville employment lands and a local university.
- The Town of East Gwillimbury Council strongly supports the construction of the Highway 400-404 Link, which is scheduled to be completed by 2021. The Town Council's justification for the highway 400-404 link are:
 - The unprecedented levels of traffic emanating from communities outside of East Gwillimbury between 2009 and 2051 will result in long delays along large portions of Green Lane, Yonge Street and Leslie Street.
 - The roads projected to experience traffic gridlock were never designed to handle the high volumes of traffic that they must accommodate now, or are projected to accommodate in the future.
 - The Town and Regional roads will be overburdened with the expected demand regardless of any addition of several local roadway improvements.
 - As part of their respective TMPs, York Region and the Town of East Gwillimbury are compelled to consider new infrastructure that will primarily carry regional traffic.
- The Master Plan provides recommendations for transit improvements. Transit services in East Gwillimbury are restricted to three local York Region Transit routes plus GO rail and bus service. Future population and employment growth in the Town will necessitate the need for additional transit service. The expansion of transit service should be planned and implemented well before the majority of the Town's new growth is in place to ensure residents and employers easily adapt to the enhanced services. Key elements of the transit services recommended in the Master Plan include:
 - Expanded bus service along Second Concession Road and Leslie Street, as well as adjacent roads where new residential and commercial growth is projected to occur.
 - Where YRT buses currently operate, more frequent service should be considered;
 - Develop peak period express shuttle service between the East Gwillimbury GO Station and new employment corridors. This service would provide direct access to employment centres for GO Transit patrons;
 - Expand existing Viva rapid transit service to the Green Lane GO Station;
 - Expand GO commuter rail service operating between Union Station and East Gwillimbury, including all-day service on weekdays and expand weekend train and/or train-bus service; and
 - Implement Transit-Oriented Development (TOD) features along major roads, especially Green Lane, to help implement transit-supportive development across the Town. Characteristics of this form of



development should be walkable, relatively dense, close to transit or “shaped by transit” and contain more than one use.

- The Town will initiate its own Pedestrian and Cycling Master Plan, which will expand on the improvements presented in the Trail Plan and Region’s Pedestrian and Cycling Master Plan.
- The Town recognizes that the proposed local road system is an important component of how residents will move around the Town. Significant transit infrastructure and services are essential to minimize reliance on automobiles. Similarly, infrastructure and policies that encourage cycling and walking are meant to promote healthier lifestyles and “complete communities”.



York Region Vacant Employment Land Inventory

Author: York Region (report to the Planning and Economic Development Committee)

Date of Study: September 2005

Purpose:

A comprehensive Vacant Employment Land Inventory allows for better supply management decisions and when fed directly into the Region's growth management system, allows for the closer monitoring of development within employment districts. The key objective of the vacant employment land inventory is to provide an inventory of the supply of vacant employment land, provide data on the rate of employment land consumption, provide a supply/demand analysis, identify the quality of vacant employment land, identify employment land development trends, provide a basis for reviewing policies and initiatives and attract investment to the Region.

Summary of Key Findings:

- From June 1, 2001 to January 1, 2005 the average annual absorption rate of employment lands built for employment uses was 119 net hectares (295 net acres) region wide.
- As of January 1, 2005 the total vacant employment land supply of designated lands amounted to 2,862 net hectares (7,073 net acres). This includes lands in registered, draft approved, and pending plans of subdivision as well as lands designated for employment uses in approved official plans where no application has yet been received.
- The total net supply of vacant employment land less the encumbered lands equals 1,966 net hectares (4,860 net acres). A further 212 net hectares (524 net acres) of vacant employment land is approved only for development on private services.
- Of the total inventory, 913 net hectares (2,255 net acres) are within half a kilometre of existing 400 Series Highways, representing 30% of the total supply. A total of 2,207 net hectares (5,454 net acres), or 77% of the total supply, are within 5.0 km of existing 400 Series Highways.
- It is recommend in the report that in order to continue to attract diverse and quality employers to the Region, it is important that the Region offers a diverse and quality selection of employment lands with a wide variety of size, location and accessibility. Uncertainties in short to medium term prospects for the economy indicate that the Region should provide a flexible and diverse supply of vacant lands in order to respond quickly to changing economic circumstances.
- One of the main determining factors when assessing the supply of vacant employment land is the provision of necessary infrastructure. Fully serviced parcels allow for more immediate development of a site whereas unserviced parcels present restrictions. Encumbered parcels are currently constrained from being developed in the near future.



Parcels of land that have been approved for Industries on Private Services (IPS) are not constrained from developing; however, the type of industry that is sustainable on these parcels is restrictive and provides less employment density than on regionally serviced parcels. The availability of lands for development can be broken down as follows:

- Of the total inventory, approximately 884 net hectares (2,184 net acres), or 31%, are presently fully serviced with water and wastewater facilities supplied by the Region. A further 871 net hectares (2,153 net acres), or 30% of the inventory are not currently serviced; however, it is the Region's intention to service them in the future.
 - Approximately one third of the total inventory has development constraints in the short to medium term. Approximately 682 net hectares (1,685 net acres) in west Vaughan are encumbered until the route of the Highway 427 extension is determined. Similarly, approximately 214 net hectares (528 net acres) in the Queensville Employment Area are encumbered pending the Highway 404 extension and the expansion of wastewater services. In total, 896 net hectares (2,213 net acres), or 28% are encumbered.
 - Approximately 7% of the inventory or 212 net hectares (524 net acres) have been approved for Industries on Private Services. These lands are located in the municipalities of East Gwillimbury, Georgina, King and Whitchurch-Stouffville.
- The 400 Series Highways are extremely important for employment lands from a strategic location and market accessibility point of view. The pressure to redesignate lands along these corridors to residential uses will continue to be great. Additionally, there is increasing pressure to redesignate these lands to allow for non employment uses such as large scale big box retail development. It is important to ensure these strategically located lands are preserved for employment uses in the long term. The report found that there is a limited supply of strategically located lands along the 400 Series Highways that need to be preserved over the long term for employment uses.
 - East Gwillimbury has 350 net hectares (865 net acres) of vacant employment lands. Of the total supply, 107 net hectares (265 net acres), or 31% are in registered or draft approved plans of subdivision. The average annual absorption from 2001 – 2005 has been 7.8 net hectares (19.4 net acres). This absorption rate is notably higher than what has historically been experienced and can be largely attributed to the development of a new York Region Operations Centre and Materials Recycling Facility in the Bales Drive Employment Area. Of the total supply of vacant employment lands approximately 11% are fully serviced. Two hundred and fourteen (214) net hectares (528 net acres), or 61% of the local inventory, are currently encumbered from development; awaiting the extension of Highway 404 and the expansion of the York/Durham Sewage System to the Queensville Employment area. East Gwillimbury has an adequate overall supply of vacant employment lands; however, the efficient utilization of the encumbered lands is dependent on the provision of infrastructure.



- The availability of greenfield sites that could potentially be redesignated for employment uses is limited due to the greenbelt and other environmental conditions within the Region. Some of the local municipalities such as Aurora, Newmarket and Richmond Hill are approaching complete build-out. As such, it is important that the current supply of vacant employment lands be maintained for employment uses and that redesignations to non-employment uses be discouraged. Additionally, intensification efforts that aim to achieve higher employment densities should also be encouraged.
- In order for the Region to continue to offer a wide variety of vacant employment lands to potential investors, it is essential that investments in transportation and servicing infrastructure are provided in a timely manner.



3 Research Summaries

The background research presented herein identifies the historical and emerging conditions impacting both the local and regional economy and provides a context for the development of the economic development strategy. This includes a detailed review of all relevant background materials and local and regional strategies and plans as identified by the Town.

In accordance with the direction received from the Town, research summaries have been compiled as follows:

- **Employment Lands Real Estate Overview**
- **Best Practices for Balancing Residential to Non-Residential Development**
- **Best Practices for Recruiting a Post Secondary Institution**

3.1 Employment Lands Real Estate Review

Employment land has traditionally referred to land in industrial areas. Today, employment land accommodates a much wider range of uses, including both traditional activities such as manufacturing, distribution and warehousing, as well as research and development activity, offices, service commercial uses, institutional uses and recreational facilities.

Employment land is important in the context of economic development primarily because of the role that it plays in accommodating a community's employment growth. In East Gwillimbury's situation, the provision of transportation and servicing infrastructure to employment areas is undoubtedly one of the more significant levers available to shape future urban form. The provision of employment land can also contribute to a better live-work relationship with fewer residents needing to commute to job opportunities outside the community, which is particularly relevant for East Gwillimbury residents. It can also provide a greater diversity in the land base, allowing flexibility in responding to economic change.

The role and importance of available, serviced and high quality employment land in East Gwillimbury therefore, makes it an essential consideration to the preparation of an economic development strategy, as it directly relates to the future economic prosperity and competitiveness of the community; its ability to continue to attract or provide high quality jobs and the generation of wealth and investment.

This review provides an historical context of regional and local employment lands, the current real estate market demand for industrial space, the future needs for more serviced employment lands in East Gwillimbury and the Town's efforts to link employment land development with residential growth. The review then assesses the quality of the employment land



locations in East Gwillimbury for business investment. The review concludes with a high level assessment of town owned employment areas and respective recommendations.

Quality of Northern and Eastern GTA Employment Area Product

Historical Context – In January, 2005 the total vacant employment land supply of designated lands in York Region amounted to 2,862 net hectares (7,073 net acres). This supply included lands in registered, draft approved and pending plans of subdivision as well as lands designated for employment uses in approved official plans where no application had yet been received. Over the previous four years (2001-2005) the average annual absorption rate of employment lands was 119 net hectares (295 net acres) region wide. The total net supply of vacant employment land less the encumbered lands equalled 1,966 net hectares (4,860 net acres). A further 212 net hectares of vacant employment land was approved only for development on private services.⁸

In 2005, the three key challenges facing the Region regarding employment lands were:

- The provision of transportation and water and wastewater services to encumbered lands;
- Long-term supply concerns in some local municipalities; and
- The preservation of strategically located vacant employment lands along the 400-series highways for employment uses.⁹

In East Gwillimbury there were 350 net hectares (865 net acres) of vacant employment lands. Of the total supply, 107 net hectares (265 net acres), or 31% were registered for draft approved plans of subdivision in 2005. During the prior four years, annual absorption averaged 7.8 net hectares (19.4 acres), which was high and could be largely attributed to the York Region Operations Centre and Materials Recycling Facility in the Bales Drive employment area. Of the total supply of vacant employment lands, approximately 11% were fully serviced (i.e. water, sewer, electricity). Two hundred and fourteen (214) net hectares (528 net acres), 61% of the local inventory, were encumbered from development and awaiting the extension of Highway 404 and the expansion of the York/Durham Sewage System to the Queensville employment area. It was stated in the York Region report that East Gwillimbury had an adequate overall supply of vacant employment lands; however, the sufficient utilization of the encumbered lands was dependent on the provision of infrastructure, as stated earlier.¹⁰

⁸ York Region Vacant Employment Land Inventory report to the Planning and Economic Development Committee, September 2005.

⁹ Ibid.

¹⁰ Ibid.



In 2006, the Town of East Gwillimbury completed a *Future Employment Lands Economic Review* to provide direction for the supply and demand of all forms of employment, institutional and commercial lands within the Town. This report stated that there were 232 net developable hectares (573 net developable acres) in the five employment corridors. There were an additional 728 net hectares (1,798 net acres) of *Whitebelt* lands that were intended for development past the 2031 planning horizon. The employment corridors were:

- Yonge Street North (Designated - 31 net acres, Whitebelt – 200 net acres)
- Green Lane (Designated - 49 net acres, Whitebelt – 350 net acres)
- Highway 404 (Designated - 427 net acres, Whitebelt – 614 net acres)
- Highway 400/404 Extension (Designated - 0 net acres, Whitebelt – 633 net acres) and
- East Gwillimbury University (Designated - 65 net acres, Whitebelt – 0 net acres).¹¹

There were an additional 78 hectares (193 net acres) in the designated lands within Holland Landing, Mt. Albert and Bales Drive and the remaining 159 hectares (392 net acres) were Whitebelt lands. East Gwillimbury land based employment growth potential totalled 1,196 net hectares (2,955 net acres).¹²

In 2010, the Town of East Gwillimbury completed an industrial employment lands inventory which comprised all existing industrial lands approved within the Town`s Official Plan and Zoning By-law. The report identified six employment areas. In relation to the employment corridors and other employment designated lands the results were as follows:

- Green Lane (94 net acres) – These lands were fully serviced with water and sewer systems and many of the properties were privately owned.
- Highway 404 (Queensville) (954 net acres) – These lands were not serviced with water and sewer systems and were privately owned.
- Holland Landing (377 net acres) – All of the lands in the South Business Park were not serviced with water and sewer systems and were privately owned. Lands in the North employment area were serviced with a water system, but not a sewer system. These lands were also privately owned.
- Mt. Albert (48 net acres) – Many of the parcels were not serviced with municipal water and sewer systems and were in private ownership.
- Bales Drive (262 net acres) – Many properties were serviced with a municipal water system, but were not serviced with a municipal sewer system. York Region was the largest landowner with over 100 acres, but the remaining properties were privately owned.¹³

¹¹ Town of East Gwillimbury Future Employment Lands Economic Review, completed by Watson & Associates Economists Ltd., October 2006.

¹² Ibid.



Although there are some occupied properties with businesses, a large majority of the employment areas are vacant and awaiting future development. The lack of businesses on employment areas in East Gwillimbury requires an examination of the real estate market in the larger vicinity. In the context of the economic development strategy process this will enable a better understanding of real estate demand, the potential for expansion into East Gwillimbury and the potential for municipally driven business park development.

Northern Greater Toronto Area (GTA) Real Estate Demand – Industrial space is relatively abundant in the northern GTA¹⁴. Demand for industrial space remains strong as absorption was positive through 2010, although the availability rate has remained at six percent, which translates into approximately 7 million square feet available for lease or sublease. The majority of the available space is in Vaughan with 4.5 million square feet on the market and an availability rate of seven percent. Newmarket has the least amount of space with an availability rate of one percent. Average asking net rent and availability rate trends have been heading downward since 2008. These rent and rates are forecast to remain stable over the short term at \$4.63 per sq.ft. and 5.9% respectively. There has been low numbers of new supply entering the real estate market since 2007. In comparison, the eastern GTA has experienced relatively flat average asking rent and an increasing availability rate.¹⁵ By the third quarter of 2010, average asking rent was \$4.91 per sq.ft. with an 8.8% availability rate. Over a million sq.ft. of new supply entered the real estate market in this area in 2008, but there was little activity around the new supply since 2005.¹⁶

Colliers International's real estate market publication states that the northern GTA has been resilient during the economic downturn, as it experienced a high level of positive absorption and earned high prices for rent. The market is largely full of user-owner occupied buildings and this trend is expected to continue in the short term. In addition, new construction is expected to begin in the form of build-to-suit developments, as many developers who previously built on speculation have yet to see the right market conditions to undertake new projects.¹⁷ Colliers International forecasts that the eastern GTA industrial real estate market is expected to remain relatively stable.

¹³ Town of East Gwillimbury, Industrial Employment Lands Inventory, April 2010.

¹⁴ The northern GTA includes Vaughan, Richmond Hill, Markham, Whitchurch-Stouffville, Aurora and Newmarket.

¹⁵ The eastern GTA includes Pickering, Ajax, Whitby and Oshawa.

¹⁶ Colliers International, Market Report & Forecast Greater Toronto Area, Q3 2010, Industrial, p.4.

¹⁷ Ibid., p.4.



A Cushman & Wakefield Ltd. report for the northern GTA suggests a higher net asking rent of \$5.14 per sq.ft. and similar vacancy rate of 6.1% and for the eastern GTA a lower net asking rent of \$4.29 per sq.ft. and similar vacancy rate of 10.0%.¹⁸

As options for new industrial building construction in the northern GTA communities become fewer and fewer and the real estate costs to locate and operate a business in these communities rise, the natural progression will be for new construction to occur in East Gwillimbury. The discussion that follows will explore the potential demand for employment land in East Gwillimbury.

Future Employment Land Needs – The GTA Countryside Alliance Communities completed an economic analysis in 2010. In this report, it identifies the total employment land needs for each of the Countryside municipalities from 2006 to 2031. The report states that East Gwillimbury is one of only four municipalities in the Countryside that have available whitebelt lands to accommodate future employment land demand beyond currently designated areas within the 2031 planning horizon. Other York Region municipalities which include Aurora, Georgina, King, Newmarket and Whitchurch-Stouffville do not require additional whitebelt lands to accommodate growth forecasts to 2031.¹⁹

This report identifies an employment land supply of 294 hectares (727 acres) and a demand of 361 hectares (893 acres) in East Gwillimbury. The net deficit of 87 hectares (215 acres) would be needed from the whitebelt lands to accommodate the forecasted employment growth to 2031.²⁰ Over the 25 year planning period, there would be an average demand of 14 hectares (36 acres) per year.

The following subsection will discuss each of the employment areas and the attractiveness as a location for business investment.

Employment Linkages to Residential Growth – The *Town of East Gwillimbury Official Plan* requires the development of employment and non-residential lands concurrent with residential growth in order to provide local employment opportunities for residents. The Plan states that the added assessment revenue generated from non-residential development will assist with the Town's fiscal position. The employment policy that is in place is that prior to the release of any residential Subdivision Plan for registration or prior to entering into a site plan control agreement for medium and high density residential development, the landowner/developer must construct or have under construction 56 square metres (600 square feet) of employment or commercial floor space within the Town for every residential dwelling unit that is proposed as part of the development application. The 56 square metres (600 square feet) is approximately equal to the

¹⁸ Cushman & Wakefield Ltd., Greater Toronto Industrial Report, MarketBeat, 4Q10.

¹⁹ Greater Toronto Countryside Mayor's Alliance Economic Analysis, completed by Millier Dickinson Blais Ind. And Watson & Associates Economists Ltd., September 2010, p.68-69.

²⁰ Ibid.



amount of space required for one employee. Assuming 29% lot coverage of the gross floor area of employment or commercial floor space, the net developable lands will equal 0.05 net acres.²¹ Therefore 20 residential units will yield one net acre of employment/ commercial land.

Quality of East Gwillimbury Employment Lands

In developing an understanding of how best to accommodate employment growth in the future, the consultants have assessed the current inventory of employment land based on a number of broad parameters that include:

- Physical and economic characteristics
- Transportation and access
- Amenities and aesthetics.

This assessment has also given consideration to development and redevelopment within the Town's employment areas based on the opportunities associated with the broad industry categories that are expected for growth both within East Gwillimbury and York Region. Figure 44 identifies the location of the Town's employment land corridors and other employment areas.

The Town of East Gwillimbury Official Plan provides four different employment designations within the employment areas. These designations and planned functions are as follows.

- *General Employment* – The Official Plan states that the purpose of this designation is to provide for a broad range of employment uses. Primarily, the lands are zoned to permit:
 - industrial uses such as assembling, manufacturing, fabricating, processing, warehousing, distribution, storage, repair activities, utilities, transportation, service trades and construction;
 - Office uses including research and development.²²
- *Prestige Employment* – The purpose of this designation is to provide locations that require good access and high visibility along major transportation routes. Primarily, these lands are zoned to permit:
 - Office uses including research and development;
 - Industrial uses contained in wholly enclosed buildings; and

²¹ The figures used were referenced from the *Town of East Gwillimbury Future Employment Lands Economic Review*, October 2006, completed by Watson & Associates Economists Ltd., p. 4-13.

²² Town of East Gwillimbury Official Plan, p.45.



- Hotels, conference and convention centres.²³
- *Rural Industrial* – Lands designated rural industrial are subject to the general employment policies in the Official Plan.²⁴
- *Commercial Mixed Use* – The Official Plan states that these areas will be developed primarily in Major Local Centres and may be permitted along regional corridors. The uses permitted in these areas should not be of a scale and function that is more appropriate for smaller commercial areas such as Queensville Centre. Lands designated commercial mixed use may be zoned to permit a wide variety of retail and service commercial uses, including major retail; supermarkets and grocery stores; financial institutions and services; offices; entertainment; recreation and community facilities; restaurants, hotel and convention centres; and medium and high density residential uses.²⁵

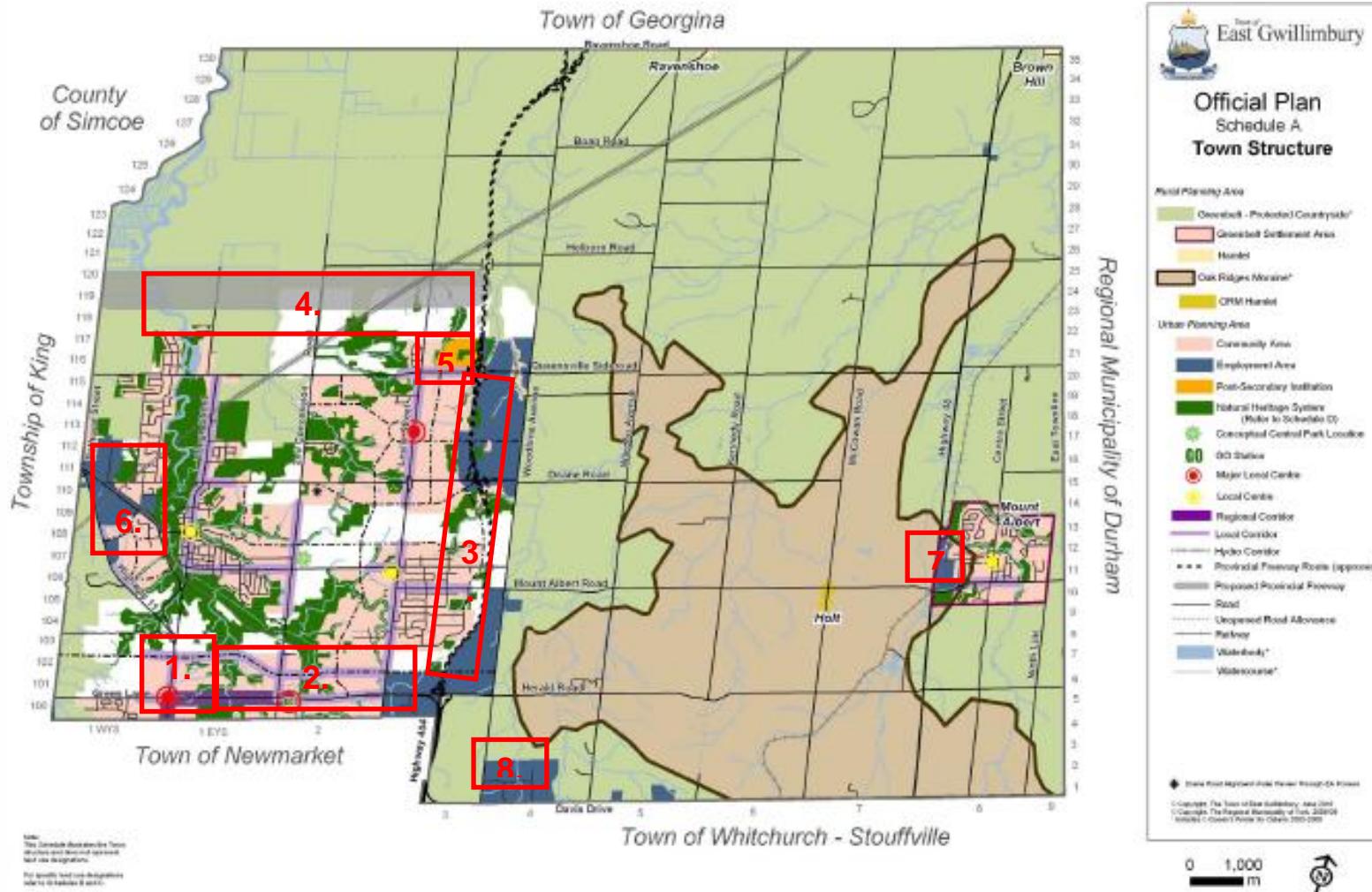
²³ Ibid.

²⁴ Ibid. p.46.

²⁵ Ibid. pp. 51-52.



FIGURE 44 – EAST GWILLIMBURY EMPLOYMENT CORRIDORS AND AREAS



Note: Identified corridors and employment areas are approximate.

Source: Town of East Gwillimbury, Official Plan, Schedule A Town Structure, 2010.



With a site assessment conducted by the project team, the Town's employment areas and respective strengths, weaknesses and opportunities are summarized as follows.

Strategic Employment Corridors

1. Yonge Street Corridor

Strengths – This corridor provides immediate proximity to regional transportation routes along Green Lane and south on Yonge Street. The corridor has municipal water and sewer and electrical services.

Weaknesses – The Official Plan designation limits employment uses under the commercial mixed use. Large industrial users would not be permitted in this location.

Opportunities - These lands are designated commercial mixed use which allows for a unique mixed development of office, commercial and residential. This corridor provides an opportunity for the Town to meet its intensification targets as mandated in the Province's *Growth Plan for the Greater Golden Horseshoe*. The location will also be attractive to small scale office development for professional service firms etc.

2. Green Lane Corridor

Strengths – The Green Lane Corridor provides immediate access to Highway 404 for companies that rely on the timely movement of goods and services. In addition, businesses adjacent to the highway have very good visibility. The employment area is serviced along Harry Walker Parkway to Leslie Street with water, sewer and electrical systems. Large industrial users are operating in this area, which lies adjacent to the Town of Newmarket's employment area.

This location is also seen as attractive for employees, given the excellent transportation access and presence of East Gwillimbury GO Station (pictured below).





The employment lands adjacent to Highway 404 are a special provision area, which allows for general employment uses.

Weaknesses - The corridor is part of a larger Secondary Plan Study Area that will allocate the vacant lands for residential, commercial and employment uses. A draft secondary plan for the area is underway. A further issue that may complicate the timely development of these lands is that much of the available employment land in the east end of the corridor is owned by one developer (i.e. Metrus). As has been the case in other communities, municipalities have been delayed in the development of designated employment land where landowners are not motivated to proceed with this form of development.

Opportunities – In light of the Town’s desire to attract a post secondary educational institution, lands in the Green Lane corridor may be more suited to the proposed Queensville University. Subject to the land requirements to facilitate the attraction of a post secondary institution, consideration should be given to exchanging lands in the Corridor with the Queensville University site along Queensville Sideroad. This would facilitate easier car and commuter access, proximity to a greater range of amenities and stronger linkages to the urban areas to the south and west.

3. Highway 404 Corridor

Strengths – When highway construction is completed in 2012 to Queensville Sideroad, these lands will have immediate access to Highway 404 for companies that rely on the movement of goods and services. Lands will also have very good visibility from the highway.

These lands also provide flexible employment uses as they are designated in the Official Plan as Prestige and General Employment.

Weaknesses – The Highway 404 extension to Queensville Sideroad remains under development over the short term. Any construction delays will result in missed employment opportunities. These lands are owned by private landowners and any future employment land development will be driven by market conditions.

Opportunities – The Town should seek to achieve a high quality of design and development standards in this corridor, as these lands represent the most strategic location for employment land development in the community. Consideration should be given to the Town purchasing some portion of the vacant employment land in order to ensure the timely development of these lands. This would also assist the Town with its employment targets as defined in the Province’s *Growth Plan for the Greater Golden Horseshoe*.



4. Highway 400/404 Extension Link Corridor

No plans to develop the Highway 400/404 extension link have been announced by the Province of Ontario. These lands are not likely to be serviced with water, sewer and electrical systems in the short to medium term planning horizon until there is a provincial commitment to pursue the highway link.

5. Queensville University

The designation of the Queensville University lands provides a unique opportunity for the Town of East Gwillimbury. Residents in the town and region would be provided an opportunity to live and pursue post-secondary studies in proximity to where they live instead of travelling to larger urban centres in the Greater Toronto Area, Hamilton or Waterloo. This opportunity is further explored in the Best Practices for Recruiting a Post-Secondary Institution discussion paper.

A critical weakness of the location is the poor accessibility for public transportation, as the location is currently removed from public transit routes and the lack of services and amenities available to students. Student housing would be essential to any development at this location.

Other Employment Areas

6. Holland Landing

Strengths - Employment areas south of Holland Landing Road to Highway 11 are designated in the Official Plan as Prestige Employment and employment areas north of Holland Landing Road are designated General Employment. There are large industrial users and vacant properties in the employment area.

Weaknesses - The employment areas are located in proximity to residential neighbourhoods. In addition, the lands south of Holland Landing Road do not have municipal water and sewer services.

Opportunities – Existing businesses in these employment areas have the capacity to expand onto adjacent vacant properties. Businesses looking to relocate from higher cost locations to the south may also be interested in this location. The availability of services to the area will be a key consideration in the attraction of business. In the event that private interests are not motivated to develop employment land in other parts of the Town, this area may represent an opportunity for a town-owned business park.



7. Mount Albert

Strengths – These employment lands are located adjacent to Highway 48 in the west end of Mount Albert. Designated General Employment, these lands allow for a broad range of industrial uses.

Weaknesses – Although the lands are adjacent to Highway 48, the access to the highway requires travelling through a residential neighbourhood. In addition, the lands are not serviced with municipal water and sewer systems despite the proximity to the residential neighbourhood.

The largest employment land parcel (close to 14 acres) requires investment for clearing and developing as it is overgrown with vegetation.

Opportunities – The Town could purchase vacant employment land and invest in the Mount Albert employment area in an attempt to infill this community.

8. Bales Drive Industrial Area

Strengths – A large number of industrial businesses operate in this industrial area, such as Miller Paving, Kasai Canada Inc., Northern Self Storage. York Region also is a large landowner in the area as they operate a household hazardous waste centre, transportation and works centre, and police fleet centre.

The industrial area is designated Rural Industrial, which allows for general employment uses. In addition, the area has municipal water and electricity services.



Bales Drive Industrial Buildings



Weaknesses – The area is nearing build out with limited properties available for development. The area is not serviced by public transit and therefore employees in the area are reliant on the automobile as their means of transportation.

Opportunities – The large industrial users in this area can be leveraged for business attraction and investment for the rest of the Town.

Conclusions

While consideration of the attributes that distinguish the Town's employment lands is an important factor in determining regional and by extension East Gwillimbury's competitiveness, the pattern of development in the region is also a factor particularly as it relates to the demand for and availability of serviced or shovel ready employment land. Based on information contained within the *Town of East Gwillimbury Future Employment Lands Economic Review, Industrial Employment Lands Inventory* and other municipal sources, the Town has a great deal of its employment lands capacity undeveloped.

While cities such as Vaughan, Markham, Richmond Hill have more development options in terms of shovel-ready land or vacant industrial properties, the Town has a relatively low amount of designated vacant employment land that is considered developable or 'shovel-ready'. Currently, the majority of un-serviced designated employment land in East Gwillimbury is along the Highway 404 Corridor, which will be available in the medium to longer term. When the corridor is developed, the cost to purchase employment land will be high as the options for shovel-ready lands become fewer and fewer. This constraint provides East Gwillimbury with a prime opportunity to capitalize on demand for more affordable employment land that smaller business owners may be interested in purchasing for expansion.

The issue of the Town's vacant employment lands being owned by a limited number of landowners needs to be addressed by the Town. The real estate market conditions in the Northern GTA are projected to remain stable. As population and employment continues to grow throughout York Region, it is reasonable to project stable real estate market expansion.

The Town's Official Plan policy to link employment development with residential growth is an innovative policy to ensure that employment areas develop. The Town will need to stand firm on this policy to ensure employment areas develop. Over the short-term, infilling of existing vacant employment areas in Holland Landing and Mount Albert or purchasing a portion of the vacant land along the Highway 404 Corridor may trigger employment land development.



Recommendations

Based on these findings, the following recommendations have been developed as it relates to the Town's employment areas. They will be given consideration throughout the economic development strategy process.

- Give consideration to the relocation of the Queensville University site to better capitalize on the transportation infrastructure and services already developed in the community. Consider the appropriate site requirements for a attracting a post secondary institution (50-80 acres).
- Establish a Steering Committee to develop a value proposition and business case for the attraction of an institution to the Town. This should include current land owners in the Green Lane and 404 corridors.
- Further influence the development of employment lands and business parks to ensure timely development of these lands.



3.2 Best Practices for Balancing Residential/ Non-Residential Assessment

The Town of East Gwillimbury is at a point in its development that requires a tremendous amount of foresight from municipal staff and local decision makers. Having been identified as a growth municipality in the Province's *Growth Plan for the Greater Golden Horseshoe* in 2006, the Town is estimated to grow from 26,300 in 2011 to 88,000 by 2031²⁶. In addition, the town's number of jobs is projected to grow to over 34,000 by 2031.²⁷ The Town requires the foresight to manage both population and employment growth while protecting the countryside, which includes the Oak Ridges Moraine and Greenbelt lands. Much of the future population and employment growth will be directed towards the urban areas in and around Sharon, Holland Landing and the Highway 404 corridor west of Woodbine Avenue. A lower amount of growth will be directed towards Mount Albert.

As East Gwillimbury continues to grow in the coming years, there is an immediate need to balance residential assessment and taxation revenues to non-residential assessment and taxation revenues. Watson & Associates Economists Ltd. recognized this need in their *Town of East Gwillimbury's Future Employment Lands Economic Review* report in 2006. In this report, it states that the Town had a residential to non-residential tax ratio of 91% to 9% in 2005. Municipalities with higher population levels such as Oakville, Milton and Barrie reported residential to non-residential tax ratios of approximately 70% to 80% which is viewed as a more desirable target for East Gwillimbury, subject to the nature of the non-residential development.²⁸

This discussion paper explores the residential to non-residential assessment and taxation revenues over time for East Gwillimbury, the three communities identified earlier along with two additional municipalities in Alberta: City of Airdrie and Rocky View County. These two municipalities are also experiencing population and employment growth pressures as a result of their proximity to the City of Calgary and the ease with which people can live in these communities and work in Calgary. Other communities outside of Canada have not been included in this review as they are not faced with the same fiscal and regulatory environment confronting Ontario municipalities. The paper also explores the relative tax

²⁶ 2011 to 2031 forecasts provided by York Region Planning and Development Services Department, 2008.

²⁷ Town of East Gwillimbury Official Plan, June 2010, p.16.

²⁸ Town of East Gwillimbury Future Employment Lands Economic Review, completed by Watson & Associates Economists Ltd. in association with WCM Consulting Ltd., October, 2006, pp., 6-3 to 6-4.



burden placed on the residential, commercial and industrial assessment base and fiscal tools that can be used to facilitate development so as to attain a better balance between residential and non-residential growth.

Residential to Non-Residential Taxable Assessment

A taxable assessment comparison was completed for East Gwillimbury over the period 2002 to 2009 to determine the assessment balance change over time. The comparison indicates a taxable assessment balance for East Gwillimbury of 87% to 13% in 2002 and 85% to 15% in 2009, which represents an improvement over the previous seven years. (Figure 45). The residential to non-residential assessment balance in 2002 was 84%/16% in Oakville, 75%/25% in Milton and 81%/19% in Barrie. The two Alberta communities of Airdrie and Rocky View had similar assessment balances in 2004 to the Ontario communities.

By 2009, the residential to non-residential taxable assessment balance only improved in East Gwillimbury. The other Ontario communities had higher percentages of residential taxable assessment at 86% for Oakville, 80% for Milton and 82% for Barrie. Airdrie and Rocky View also experienced higher percentages of residential assessment by 2008. This trend indicates that other best practice communities in Ontario and Alberta are also challenged by balancing residential to non-residential taxable assessment.

When the increase in residential to non-residential assessment is compared, all communities that were part of the review have experienced larger residential assessment increases than non-residential assessment. Out of the Ontario municipalities reviewed, Oakville had the largest residential assessment increase of over \$12.4 billion and Milton and Barrie had residential assessment increases of under \$5.0 billion. East Gwillimbury had an increase of \$1.0 billion. There were also significant residential assessment increases in Rocky View (\$6.5 billion) and Airdrie (\$3.6 billion) from 2004 to 2008.

Non-residential assessment increases were highest in Oakville (\$1.7 billion) and Milton (\$1.0 billion) from 2002 to 2009 and Rocky View (\$1.2 billion) from 2004 to 2008. However, the only community to have experienced a higher rate of non-residential assessment than residential assessment was East Gwillimbury at 102% versus the 71% for residential assessment.

The consulting team contacted representatives from Oakville and Milton to determine if these Towns used any fiscal or regulatory initiatives to ensure a balancing of residential to non-residential assessment growth. These initiatives could be full or partial development charge exemptions, discounts, phase-in policies, community improvement plan incentives (i.e. tax increment financing (TIF), tax-increment equivalent grants (TIEGs)). The general response was that **there were not any formal initiatives in place** and an appropriate residential to non-residential assessment balance varies by



municipality. For example, a community could have an 85/15 assessment balance and be considered balanced since a sizable proportion of the residential assessment does not place a strain on more municipal services.

The York Region Development Charges (DC) Background Study lays out the capital costs that will be required to build the residential/non-residential assessment base. The report provides an estimate of \$8.9 billion of infrastructure investment will be required to service growth within York Region to the year 2031 for roads (\$4.8 billion), sewer (\$2.3 billion) and water (\$1.8 billion). Based on the consulting team's discussions with the other communities, an effective local municipal effort is to advocate for the Region's infrastructure projects that affect East Gwillimbury. The Region's water and sewer projects are identified in the *York Region Water and Wastewater Master Plan* and the Region's transportation projects are identified in the *York Region Transportation Master Plan*. For the Town to have the capacity for future economic development requires strong advocacy on behalf of East Gwillimbury council and senior administrative staff.

FIGURE 45: RESIDENTIAL TO NON-RESIDENTIAL TAXABLE ASSESSMENT COMPARISON

Taxation Year	Residential		Non-Residential	
	Taxable Assessment	% of Taxable Assessment	Taxable Assessment	% of Taxable Assessment
2002				
East Gwillimbury	\$1,475,777,490	87%	\$216,448,136	13%
Oakville	\$12,529,556,077	84%	\$2,347,155,210	16%
Milton	\$2,443,086,257	75%	\$815,575,088	25%
Barrie	\$5,296,137,227	81%	\$1,280,635,262	19%
2004				
Airdrie	\$1,239,480,009	81%	\$285,860,814	19%
Rocky View	\$3,830,510,679	74%	\$1,316,093,597	26%
2009				
East Gwillimbury	\$2,521,131,467	85%	\$436,701,585	15%
Oakville	\$24,965,307,311	86%	\$4,031,187,989	14%
Milton	\$7,391,897,693	80%	\$1,845,473,444	20%
Barrie	\$10,167,339,812	82%	\$2,212,437,846	18%
2008				
Airdrie	\$4,885,563,246	86%	\$774,124,399	14%
Rocky View	\$10,308,716,870	81%	\$2,490,868,707	19%

Source: Ministry of Municipal Affairs, Province of Ontario, 2002 and 2009 Financial Information Returns for the Towns of East Gwillimbury, Oakville and Milton and City of Barrie, Schedule 22, Alberta Municipal Affairs, Assessment Profiles, 2004, 2009.



Note: Residential taxable assessment includes residential, residential/farm and multi-residential classifications. Non-residential taxable assessment includes all other classification not included in residential taxable assessment.

FIGURE 46: RESIDENTIAL TO NON-RESIDENTIAL ASSESSMENT INCREASE COMPARISON

	Residential		Non-Residential	
	Taxable Assessment Difference	% Taxable Assessment Increase	Taxable Assessment	% Taxable Assessment Increase
Taxation Year	2002 - 2009			
East Gwillimbury	\$1,045,353,977	71%	\$220,253,449	102%
Oakville	\$12,435,751,234	99%	\$1,684,032,779	72%
Milton	\$4,948,811,436	203%	\$1,029,898,356	126%
Barrie	\$4,871,202,585	92%	\$931,802,584	73%
Taxation Year	2004 - 2008			
Airdrie	\$3,646,083,237	294%	\$488,263,585	171%
Rocky View	\$6,478,206,191	169%	\$1,174,775,110	89%

Source: Ministry of Municipal Affairs, Province of Ontario, 2002 and 2009 Financial Information Returns for the Towns of East Gwillimbury, Oakville and Milton and City of Barrie, Schedule 22, Alberta Municipal Affairs, Assessment Profiles, 2004, 2009.

Note: Residential taxable assessment includes residential, residential/farm and multi-residential classifications. Non-residential taxable assessment includes all other classification not included in residential taxable assessment.

Residential to Non-Residential Tax Revenues

This section explores how the residential to non-residential assessment translates into taxation revenue for municipalities. The results indicate a continued challenged of balancing residential to non-residential taxation revenues across the Ontario and Alberta communities. In 2002, East Gwillimbury had an 85% residential to 15% non-residential taxation revenues balance. (Figure 47). The other communities of Oakville, Milton and Barrie were far less dependent on residential taxation with 67%, 55% and 64% of their revenues coming from the residential assessment base. In the two Alberta communities, approximately 75% of municipal taxation came from the residential assessment base in 2004. By 2009, East Gwillimbury's balance improved to 79% of taxation coming from the residential assessment base. The other Ontario communities received a greater proportion of taxation from residents. This trend was also true for Airdrie and Rocky View in 2008.



FIGURE 47: RESIDENTIAL TO NON-RESIDENTIAL TAXATION REVENUES COMPARISON

Taxation Year	Residential		Non-Residential	
	Revenues	% of Total	Revenues	% of Total
2002				
East Gwillimbury	\$19,843,755	85%	\$3,515,911	15%
Oakville	\$163,764,614	67%	\$82,136,978	33%
Milton	\$27,386,415	55%	\$22,504,243	45%
Barrie	\$81,631,782	64%	\$44,930,016	36%
2004				
Airdrie	\$14,078,172	75%	\$4,674,494	25%
Rocky View	\$28,691,384	73%	\$10,621,177	27%
2009				
East Gwillimbury	\$27,824,922	79%	\$7,244,439	21%
Oakville	\$261,017,730	72%	\$103,671,726	28%
Milton	\$65,230,726	62%	\$39,675,482	38%
Barrie	\$140,380,678	68%	\$66,468,848	32%
2008				
Airdrie	\$24,297,118	76%	\$7,644,942	24%
Rocky View	\$46,171,611	69%	\$21,122,305	31%

Source: Ministry of Municipal Affairs, Province of Ontario, 2002 and 2009 Financial Information Returns for the Towns of East Gwillimbury, Oakville and Milton and City of Barrie, Schedule 22, Alberta Municipal Affairs, Assessment Profiles, 2004, 2009.

Note: Residential taxation includes residential, residential/farm and multi-residential classifications. Non-residential taxation includes all other classification not included in residential taxation.

The GTA Countryside Alliance Communities' Economic Analysis report includes an assessment of residential to non-residential taxation revenues. The findings highlight that the 2008 composition of residential to non-residential tax revenue for East Gwillimbury was 79% to 21% (similar to 2009). It states that the 14 member Countryside had a 75% to



25% residential to non-residential tax revenue split. The remaining communities in the Greater Toronto Area (excluding Toronto) were at 61% to 39%. Oakville was at 68% to 32%, Milton was at 62% to 38% and Barrie was at 68% to 32%.²⁹ The report warns that municipal expenditures for the Countryside municipalities have increased at approximately double the rate of the other GTA municipalities (excluding Toronto). The report also concludes that to keep pace with rising municipal expenditures, municipal property taxes per household have increased at a greater rate for the Countryside municipalities from 2000 to 2008 when compared to the other GTA municipalities (excluding Toronto). This trend places a higher dependency on residential taxpayers.

Tax Burden

The *BMA 2009 Municipal Study* examines the relative municipal tax burden by assessment classification. Figure 48 provides a summary of the tax burden for East Gwillimbury and the best practice communities of Oakville, Milton and Barrie. East Gwillimbury's residential taxpayers are considered a 'mid' tax burden, whereas commercial taxpayers are considered 'low' and industrial taxpayers are considered 'mid to high'. Milton and Oakville are given a 'high' municipal tax burden and Barrie is given a 'low' tax burden for the industrial assessment base. Any new industrial assessment will increase property tax revenues and may potentially reduce the municipal tax burden.

FIGURE 48: MUNICIPAL TAX BURDEN COMPARISON

		Municipal Tax Burden				
		Low	Low-Mid	Mid	Mid-High	High
Assessment Classification	Residential	Milton	Barrie	East Gwillimbury	Oakville	
	Multi-Residential	Barrie, East Gwillimbury		Milton		Oakville
	Commercial (i.e. office, shopping)	East Gwillimbury	Milton		Oakville	Barrie
	Industrial	Barrie			East Gwillimbury	Milton, Oakville

Source: BMA 2009 Municipal Study.

²⁹ *GTA Countryside Alliance Communities Economic Analysis*, completed by Millier Dickinson Blais Inc. and Watson & Associates Economists Ltd., 2010, p.80 and the Ministry of Municipal Affairs and Housing 2008 Financial Information Return for the City of Barrie, Schedule 22.



The GTA Countryside Alliance Communities' *Economic Analysis* report states that one financial risk faced by Countryside municipalities, such as East Gwillimbury, is that a portion of capital expenditures required to support future development which complies with the Growth Plan policies will need to be funded by local and regional municipalities.³⁰ This report suggests a recommended approach to minimize the financial risk at the local level is to update the *Development Charges Act* to function effectively within the current provincial legislative environment, specifically the *Places to Grow Growth Plan for the Greater Golden Horseshoe*³¹. In addition, this report states that the key to generating employment land and office assessment is to make available quantities of serviced land at locations that are well-served by freeways and other strategic transportation services.³² An important consideration however, will be the degree to which an individual property owner is motivated to develop their land for employment uses in the time frame required by the municipality.

Fiscal Tools

The Countryside Alliance *Economic Analysis* report states that to encourage more 'complete' and compact development within existing settlement areas, Countryside Alliance communities need to decide whether to invest taxpayers' funds in infrastructure improvements not covered by development charges, development incentives, or a blend of the two.³³ Municipalities can encourage development via full or partial development charge exemptions, discounts and phase-in policies and other community improvement plan (CIP) financial incentives. These benefits will facilitate development and provide financial assistance to the developer and/or business owner.

The financial incentive tools will involve carrying out a cost-benefit analysis as part of building a business case for an investment in growth that supports the Growth Plan policies. In addition, the analysis will address broader economic and social impacts associated with the development. Four communities in Ontario that have developed innovative community improvement plans that address economic issues or market trends are the following:

- City of Hamilton – LEEDing the Way CIP provides a grant program that encourages property owners to certify their buildings to a LEED standard.
- City of Kitchener – Water Efficiency for Land and Buildings CIP supports water and energy conservation and stimulates the construction of buildings to a LEED standard through a Green Housing Incentive Program.

³⁰ GTA Countryside Alliance Communities *Economic Analysis*, completed by Millier Dickinson Blais Inc. and Watson & Associates Economists Ltd., 2010, p.90.

³¹ Ibid., p.91.

³² Ibid. p. 92.

³³ Ibid. p. 92.



- City of Kawartha Lakes – Green Hub CIP provides a number of financial incentive programs to encourage green investment. These programs include a green development tax increment-equivalent grant, green employment development charge exemption/reduction, brownfield tax assistance and green innovation grant.
- City of Windsor - Economic Revitalization CIP encourages development of eight growth sectors. The CIP provides a business development and a retention and expansion grant program.

Although, the CIPs for the four communities are not directly related to achieving the Places to Grow Growth Plan objectives, the communities demonstrate that CIPs can be innovative for and responsive to the provincial legislative environment (i.e. *Green Energy Act* for the first three communities). It is worth noting that these tools have been used on both brownfield and greenfield development, something not originally contemplated by the Planning Act. East Gwillimbury should give consideration to the use of a town-wide CIP that responds to the Province's Places to Grow growth objectives.

Conclusions

The discussion paper's exploration of residential to non-residential taxable assessment and tax revenues reveals that the communities in Ontario and Alberta that are considered 'best practices' are also experiencing the same balancing challenges as East Gwillimbury. In fact, the Town's non-residential assessment grew at a higher rate over the previous years than the residential assessment, the only community to achieve a higher growth rate. Added to the balancing challenge is that industrial taxes are considered a 'mid-high' burden in East Gwillimbury and a 'high' burden in Milton and Oakville.

Municipalities can encourage development via full or partial development charge exemptions, discounts and phase-in policies and other CIP financial incentives. Communities such as Hamilton, Kitchener, Kawartha Lakes and Windsor have developed CIPs that were innovative and responsive to the provincial legislative environment. Although the best practice communities had no formal fiscal or regulatory initiatives to spur non-residential assessment increases, local advocacy of major infrastructure projects that are decided at the regional government level will advance a local municipality's economic development agenda.

Recommendations

It must be stated that the attraction of non-residential development to the Town of East Gwillimbury will evolve over time. Market demand for employment land will be driven in part by local and regional population growth and available workforce. The increasing cost of land in the GTA may also motivate some business owners to look to communities like East Gwillimbury as viable alternatives for their operations.



With East Gwillimbury's large residential assessment base and large amount of municipal taxation revenues coming from residential taxpayers, the Town can be proactive in helping achieve the Province's Growth Plan objectives by advocating strongly to keep major regional infrastructure projects on schedule and offering incentives to developers and/or business owners that demonstrate complete and compact development within the urban settlement area. Consideration may also be given to a phased approach to growth, or instituting a ratio of population to employment growth.

In this instance consideration may also be given to introducing a town-wide Community Improvement Plan that includes provisions for attracting business investment to employment areas.

It is also recommended that the Town explore the use of tax increment financing (TIF) or tax increment equivalent grants (TIEG) for existing and future businesses as a way to spur intensification of employment areas.



3.3 Best Practices for Recruiting a Post-Secondary Institution

The Town of East Gwillimbury has identified the attraction of a post-secondary educational institution as a key strategic priority, as reflected in their Official Plan and forthcoming Economic Development Strategy. A post-secondary institution can drive significant economic growth for a community through the direct and indirect creation of jobs and businesses; a growth in the supply of skilled workers for local employers; and the stimulus of spinoff investment and development. The following research paper reviews the experience of other Ontario communities who have been successful in attracting a post-secondary institution, and provides insight into the process that the Town of East Gwillimbury must confront to be successful in realizing this vision.

Local and Provincial Context

Current Conditions

As reflected in both the Official Plan and a Future Employment Lands Economic Review conducted for the Town in 2006 by Watson and Associates Ltd., the Town currently possesses a 65 acre parcel of land on Queensville Sideroad, at the site of the future Highway 404 expansion, designated specifically for a post-secondary institution. These lands consist of 32 net developable acres potentially available for the development. The Town's Transportation Master Plan further identifies the future construction of a ring road to support traffic at the university site, and cites the Highway 404 expansion and oft-discussed Highway 400/404 link as initiatives that will spur growth in the Town and to the university site, specifically.

The Employment Lands Review conducted a further examination of the potential economic impact resulting from both one-time construction costs at the site and ongoing revenues from spinoff commercial development and job creation. The report forecasts that the Queensville University Corridor, at build-out, will contribute \$401,900 annually in local property tax revenues, and \$2.4 million annually when including potential local, regional and educational tax revenues, which does not include total direct and indirect spending effects throughout the Town and Region.³⁴ Thus, success in attracting a post-secondary institution would result in significant returns for the Town.

³⁴ Town of East Gwillimbury Future Employment Lands Economic Review, completed by Watson & Associates Economists Ltd., October 2006.



Provincial Context

The Town of East Gwillimbury's effort to attract a post-secondary institution comes at an appropriate time. The 2011 Province of Ontario Budget, announced in March of 2011, announced \$64-million to build 60,000 additional spaces at colleges and universities by 2015-16.³⁵

This funding is part of an effort to boost Ontario's postsecondary education attainment rate to 70 per cent from its current level of 63 per cent. The target was initially announced in 2010 as part of the province's 'Open Ontario' plan, which also includes measures to increase the quality and accessibility of post-secondary education and improve the post-secondary credit transfer system, among other efforts. This target is a continuation of previous efforts by the provincial government under the \$6.2 billion, five-year "Reaching Higher" plan. As of 2009, this resulted in:

- A 31 per cent increase in college & university enrolment over 2002-03;
- An increase in the degree completion rate, to 78 per cent from 73 per cent in 2002-03, for university students
- An increase in the degree completion rate, to 65 per cent from 57 per cent in 2002-03, for college students³⁶

This commitment to expanding post-secondary education should be a welcome sign to the Town's initiative. Indeed, a report released by the Higher Education Quality Council of Ontario in 2009 cited this proposed growth in undergraduate enrolment as a reason to pursue the creation of a teaching-focused liberal arts undergraduate university in the Greater Toronto Area, noting a lack of enrolment space at the City of Toronto's existing universities.³⁷

Given the local and provincial context for post-secondary expansion, the remainder of this report reviews the experience of five other Ontario municipalities in attracting post-secondary institutions.

Best Practice Review

In order to develop a thorough understanding of the process required to attract a post-secondary institution in Ontario, five municipalities that have undertaken successful efforts³⁸ to attract a university campus in recent years were reviewed. The review process included an interview with key economic development and/or administration staff at each municipality, as well as a review of relevant business plans, feasibility studies and economic impact assessments conducted for each project. The results are presented according to the key considerations for the Town of East Gwillimbury.

³⁵ http://www.fin.gov.on.ca/en/budget/ontariobudgets/2011/ch1a.html#c1_secA_postSecondary

³⁶ Ontario Ministry of Training, Colleges and Universities (MTCU). Published Results-Based Plan, 2010-2011. <http://www.tcu.gov.on.ca/eng/about/annualreport/>

³⁷ "No frills university urged in the GTA". <http://www.thestar.com/news/gta/article/586941>

³⁸ The Town of Milton has not yet begun construction on a campus for Wilfrid Laurier University but has signed an Memorandum of Understanding to that effect,



FIGURE 49: BEST PRACTICE COMMUNITIES FOR POST-SECONDARY ATTRACTION

Municipality	Campus / Facility	Location of Main Campus	Year of Establishment
Town of Bracebridge	Nipissing University, Muskoka Campus	City of North Bay	2008 (expansion)
City of Brantford	Wilfrid Laurier University, Brantford Campus	City of Waterloo	1999
City of Burlington	McMaster University, DeGroote School of Business	City of Hamilton	2010
Town of Milton	Wilfrid Laurier University / Milton Education Village	City of Waterloo	In progress
City of Orillia	Lakehead University, Orillia Campus	City of Thunder Bay	2006

Why do post-secondary institutions look to expand into a new location?

As noted above, the rise in student applications is putting pressures on post-secondary institutions to increase enrolment. However, not all institutions have the financial capacity or desire to grow. That said, certain schools – including many of the ones reviewed – have a strategic business need to access large or underserved population markets, particularly in the Greater Toronto Area, in order to continue to grow. Universities have internally established and/or provincially mandated enrolment and growth targets, to which a significant amount of external funding is attached (see Figure 50).

For example, by expanding into the City of Orillia and Simcoe County, Lakehead University estimated that they would be able to increase their undergraduate enrolment by 20%, thereby creating more space for graduate level enrolment at their home campus in Thunder Bay.³⁹

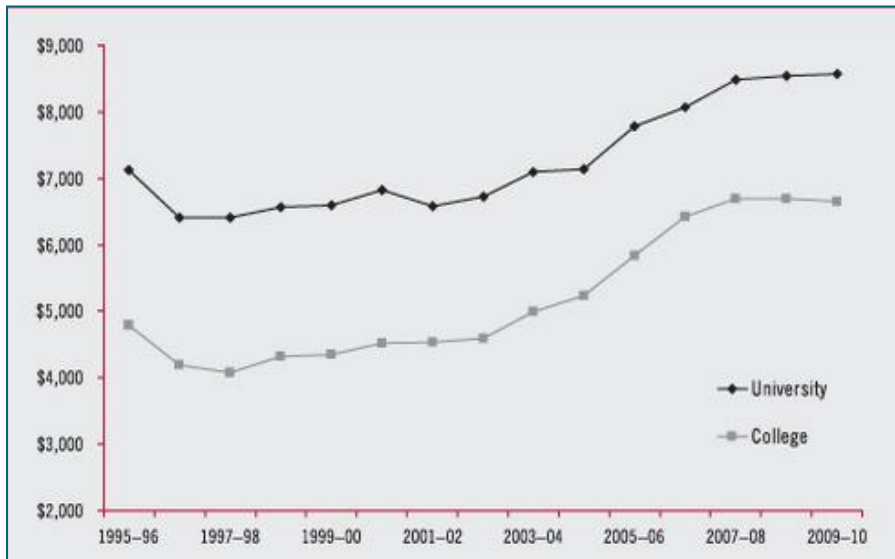
Similarly, locating in growing and established markets provides greater access to professional faculty, research, and other institutions (e.g. hospitals, institutes) that can support and enhance the profile, teaching and research capacity at the university. For example, by locating in Burlington and with immediate 400-series highway access, the DeGroote School of

³⁹ Lakehead University – Orillia Campus. 2006-2011 Business Plan. July 2006.



Business saw an opportunity to increase their ability to draw qualified executive instructors – and students for executive MBA programming – from the GTA market, even in comparison to their Hamilton location 25 kilometres further west.

FIGURE 50: PER-STUDENT FUNDING FOR UNIVERSITIES AND COLLEGES, ONTARIO



Source: Ontario Ministry of Training, Colleges and Universities

What did the town need to bring to the table to secure a post-secondary campus?

In almost all cases reviewed, the universities or colleges required a significant up-front commitment of **resources** from the jurisdiction to consider locating a campus there. In all cases, there was a requirement that an existing building or parcel of land be granted to the institution or delivered at very little cost, *in addition to* a sizeable financial contribution in some cases. In other words, the universities required that the town or city ‘put the resources in play’, as one economic developer put it, to consider a proposal to establish a new campus. To illustrate this, the following is a list of the commitments required from the municipalities reviewed in order to secure a campus/facility.

- Municipal contributions either confirmed or on offer include:
 - Contribution of 150 acres (50 of which are developable), planning work (environmental assessments, stormwater and transportation plans) and servicing



- \$5 million in land servicing costs and \$5 million in capital funding, and contribution of city-owned land parcel
- \$2 million in community-sourced funding and a city-owned building to house an initial campus
- Land transfer of 7-acre site (including private sector land donation), \$100,000 grant for site servicing, and provision of technology infrastructure
- \$5 million each from municipal and regional governments

Interviews with economic developers and administrative officers from the communities in Figure 1 also reflected the need for municipalities to be **proactive** in seeking out a facility. Though the universities in question may have internal expansion plans, in all cases reviewed the impetus for a new facility was originated and driven by the town/city itself.

For example, the Town of Milton prepared an offer sheet and marketing pitch that went to nearly every university and college in Canada profiling the community and showcasing parcels of land in an attempt to secure a campus. In the case of the Town of Bracebridge, the Town had to develop a proposal including 10 land options to meet Nipissing's expansion needs and ultimately develop a new facility - even though Nipissing University already delivered programming there. As such, municipalities must be willing to marshal extensive staff time and resources to prepare information on the community and available parcels, tour potential sites, and evaluate potential planning and servicing constraints. This reflects the fact that, despite increasing enrolment numbers, demand still outstrips supply when it comes to the attraction of new post-secondary campuses.

However, the review also revealed that communities need to be selective, both to identify an appropriate strategic fit with their community's strategic goals, and to devote resources towards universities with a higher likelihood of relocating to their community. One economic development officer noted that *proximity is key* – the best bet will be with the local university and local college. Additionally, universities and colleges located in small population centres looking to exploit an underserved and/or growing market should also be prioritized.

How did the process unfold?

As mentioned above, the successful attraction of a post-secondary campus originated with the destination municipality. Within each municipality, a committed “community champion” emerged to lead the attraction process and shepherd local support and marshal financial resources. As one economic developer remarked, universities and colleges are more willing to work with municipalities that can demonstrate that they will be a ‘willing community host’. Orillia received leadership from the economic development office; in Milton, the chief administrative officer and Mayor were strong advocates; in Brantford, the Community Futures Development Corporation and a regional citizens group drove the process to attract Wilfrid Laurier University (WLU).



Though, as discussed, there are many strategic reasons for universities to open secondary campuses or schools in other locations, it is the initiative demonstrated by the jurisdiction in question that ultimately leads to the creation of a business case and the closing of a deal. There needs to be an identification of community need in order to marshal political support – which in turn opens additional avenues of financial support – for any post-secondary attraction project.

The need for strong political, administrative and community based leadership is also necessary precisely because of the extremely long and complex processes involved in attracting post-secondary campuses (see the Milton example, sidebar at right). For example:

- Milton's process began in 1994-1995 with a strategic plan, updated in 2005-2006, that affirmed the need for a post-secondary campus.
- Orillia had a deal to allocate what was then Waterloo Lutheran University to the City in the 1960s, which was cancelled by the province.

This need not be a negative condition, and indeed the Town of East Gwillimbury has itself been through a lengthy process to attract a campus. It is clear in all cases reviewed that in order to marshal this leadership and support in the local community, the proposed post-secondary project needs to fit overall community goals, as established through community strategic plans, economic development strategies, and official plans. In all cases there was evidence of significant community support, which in some examples included the creation of citizen action groups and similar initiatives. Orillia had both a Citizens' Task Force and Mayor's Task Force to support the attraction of a post-secondary institution; in Brantford/Brant, the Grand Valley Educational Society (GVES), a community-owned charitable organization, grew out of an Education Committee formed at the impetus of the local CFDC. Similarly, the Burlington Economic Development Corporation established an educational taskforce that preceded a proposal and formal discussions with McMaster University.

The culmination of community support, site identification and preparation, and relationship-building between a municipality and a post-secondary institution is often a formal agreement or memorandum of understanding (MOU). MOUs established in advance of 'closing the deal' are put in place to establish a framework for development, land transfer/sale, and possibly construction of a site. It allows both sides to marshal additional support and undertake further planning efforts, site preparation and other considerations in advance of the deal. In multiple cases reviewed, an MOU or similar agreement was put into place including:

- Milton and WLU, currently in the midst of a 3-year MOU
- A declaration of intent between Brantford, GVES and WLU
- An MOU between Nipissing University and the Town of Bracebridge for site relocation and expansion.

The Town of Milton's path to an MOU with WLU demonstrates the complexity of the post-secondary attraction process

The Town of Milton had a 5 acre parcel of land in their downtown, ¼ mile to the GO station. A small portion was contaminated and so received little buyer interest. The Town purchased the land – at market value – but only because it needed to put an underpass in at one edge of the site.

It pitched this site to post-secondary campuses; only one university was interested. However, that party preferred a site in the order of 100 acres.

At the same time, urban boundary and expansion limits were being considered in the Halton Regional Plan. Sensing an opportunity, Milton approached a local developer who owned a 150 acre parcel, 100 acres of which was on undevelopable greenbelt land. They engineered a land trade – 50 developable acres and 100 undevelopable acres, for 5 downtown acres at equal value.

An MOU with WLU was signed a month later.



What other resources or funds were marshalled?

Though municipalities are generally required to bring land, money, or both to the table, the development of a post-secondary campus also requires support from senior levels of government. In particular, approval must be granted by the Ministry of Training Colleges and Universities (MTCU) under the Post-secondary Education Choice and Excellence Act of 2000. In relationships with MTCU, the university or college partner has to be the champion and lead agency in support of a new location or relocation. It is difficult for municipalities themselves to secure information or wield influence with MTCU, which re-emphasizes the importance of establishing a relationship with an institution as a 'willing partner', through a memorandum of understanding (MOU) or similar. This will help to navigate any approvals process.

External funding, if and when it is secured, is generally acquired after the establishment of an agreement and/or the opening of an initial site.

- Lakehead eventually secured \$13 million of federal money under the Knowledge Infrastructure Program towards a new \$43 million facility, secured as part of the Economic Action Plan funds. This was later matched by \$13 million in provincial funds.
- Brantford also received \$13 million from the federal government, later matched by the provincial government, towards a Research and Academic Centre at the Brantford Campus.
- Bracebridge & Nipissing secured a \$5.6 million grant from the Community Adjustment Fund towards the construction of a new residence.

What was the business case for the town (economic impact)?

While the specific economic impact for any town or city will change based on the nature and size of the post-secondary campus and the local economy in the municipality, the attraction of a post-secondary campus is shown to have demonstrated impacts in the following areas:

- Local direct employment and volunteer opportunities
- Local spending by faculty, staff and students
- Increased visitation and visitor spending
- Attracting guest speakers and lectures, and conferences
- Positive revenue impact to existing businesses
- Positive effect on community reputation
- Increased entrepreneurial activity, technology transfer and local business clusters
- Positive impact on urban growth and revitalization
- Increased ability to develop and retain talented workers locally



In some cases, economic impact studies have been conducted evaluating the effects of the campuses (reviewed above) on their local communities. Findings of these studies indicate a substantial economic benefit, both as a direct result of construction and operating costs, and an indirect result of spinoff employment and business growth. For example:

- In **Brantford and Brant County**, local government was estimated to collect \$5-\$17M in construction-related income and up to \$1M in construction-related fee, permit and licensing revenue between 2006 and 2010. Total average economic impact of Laurier Brantford is estimated at \$20-\$27M per year, including indirect impact on the restaurant, retail, housing and transportation industries between \$10 and \$13.5M.⁴⁰
- In **Burlington and Halton Region**, the DeGroot School of Business was estimated to generate construction-related income impact of \$21.3M. Total annual direct spending impacts are estimated at \$32.3M per year, and indirect spending impacts of \$9.99M per year.⁴¹

What may be some key challenges for East Gwillimbury?

Clearly the process of attracting a post-secondary campus is neither straightforward nor inexpensive, as the Town of East Gwillimbury knows well. However, this review has also revealed a number of less obvious challenges that the Town should consider as it continues its efforts to bring a university or college campus to the Town.

First, it is clear that towns and cities increasingly have to **demonstrate need** – to both potential institutions and the province – as to why a post-secondary campus should be located in their community. For example, in the case of Orillia (and to some extent, Bracebridge), the Simcoe County/Central Ontario region was effectively the largest catchment area in the province without ready university access, and the local post-secondary attainment rate in the population was over 10 points below the provincial average.⁴² In the case of Brantford, the City had an extremely high downtown vacancy rate and was able to demonstrate value to both WLU and the province from a downtown revitalization perspective. It may be difficult for East Gwillimbury to make a similar argument given the presence of UOIT and York, and its proximity to other successful large urban and suburban centres.

The interviews also revealed a perception that **MTCU will offer limited support** to the proliferation of satellite campuses. Despite provincial budget direction towards more post-secondary spaces, growth is preferred to occur by expansion at existing facilities, as it reduces pressure on MTCU capital budget (site budget figures). This was borne out by the communities surveyed, which received little administrative support or even capital expenditure towards the development

⁴⁰ Adventus Research Inc. Economic Impact and Benchmarking Analysis of Laurier Brantford and Mohawk College on the City of Brantford, Brant County and Other Local Regions. April 2005.

⁴¹ Deloitte. Economic Impact of the DeGroot School of Business' Centre for Advanced Management Studies. October 2008.

⁴² Lakehead University – Orillia Campus. Business Plan 2006-2011. July 2006.



of new campuses. In 2009-10, the Ministry spent \$528.3 million on capital expenditures – however, this only amounted to 7.3% of overall expenditures that year.

A capital planning report prepared for MTCU and the Ministry of Energy and Infrastructure makes a series of recommendations to reform the capital programs available for colleges and universities⁴³. In its 'Encouraging Growth' objective, the report notes the high growth that the GTA's post-secondary institutions will experience in the next twenty years, but nevertheless recommends increasing capacity at existing facilities as their 'highest priority' recommendation. The construction of satellite campuses is the 5th of 6 recommendations, and includes the following suggestions to the Ministry that the Town of East Gwillimbury should consider:

- Large satellites pose governance, policy, political, and financial challenges, and should be examined case-by-case; their potential is great, as are the attached costs and risks
- Satellite campuses should be supported in well-chosen, high-growth areas for mutual community and student benefit, especially as enablers of community revitalization
- No satellite campus should be supported if it is far from its 'home base'; the governance challenges within institutions can be exacerbated by geography itself

External market trends may also pose an issue for attracting a post-secondary campus. Though the Town itself is poised to grow and post-secondary enrolment overall will continue to increase, there is concern about related to demographic trends. The elderly's share of the population in Ontario will continue to increase over the next 20 years, which may shift provincial and federal funding priorities, and youth retention continues to be a challenge for smaller communities.

There is also concern about possible market erosion in the GTA as campuses continue to appear. There continues to be high competition for post-secondary institutions as part of community economic development and growth strategies.

The Town of East Gwillimbury should also be prepared to face community resistance and OMB hearings, even though it currently has lands designated for post-secondary use. The experience of other municipalities indicates that any community-university proposal must have a very strong planning framework behind it to address the inevitable reaction from some elements of the community, which again reflects the importance of demonstrating need and marshalling community support for any proposed project.

⁴³ Courtyard Group. MTCU/MEI Long-Term Capital Planning Project. Final Report, April 2009.



Conclusion and Recommendations

This review produced a number of findings that are important for the Town of East Gwillimbury to consider on their ongoing efforts to attract a post-secondary campus. Those issues that have been identified are of common concern, and/or those that have particular relevance to the East Gwillimbury context, are presented below as central recommendations for the Town.

- Leverage proximity and need
 - Begin explorations with institutions that are in relatively close proximity to East Gwillimbury and may be looking to explore satellite campuses, including:
 - University of Ontario Institute of Technology (Durham Region)
 - York University (Toronto)
 - Trent University (Peterborough)
- Explore alternative options
 - One other potential opportunity for the Town of East Gwillimbury that arose in consultations was to explore private universities. Although they have a very specific and difficult approvals process at the Ministry level (through the Private Career Colleges Act), they are more likely to invest and ultimately come to fruition.
- Demonstrate market need
 - Conduct research to understand current and emerging university-age population a) in the Town, and b) in York Region; the post-secondary attainment rates of current residents; and the number of students who commute outside the Town/Region to receive post-secondary education.
 - Explore the ways that a post-secondary campus proposal could assist underserved or high-need populations in the Town and Region.
- Demonstrate potential partnerships with local institutions
 - Consult with organizations such as the Southlake Regional Health Centre to identify potential educational programs and partnerships that could provide mutual benefit.
- Demonstrate support of local target growth sectors and business interests



- Work with local Chamber of Commerce and local business service organizations to identify how a post-secondary institution could support business growth and entrepreneurship.
- Identify potential programming that can support local economic strengths, such as agriculture and retail, and regional initiatives, such as the Markham Convergence Centre focused on information, communications, and biotechnology.
- Identify and support a 'community champion'
 - Conduct workshops with local community organizations and service clubs to explore potential support for a Post-Secondary Working Group.
- Explore other potential lands that may be more attractive to a potential post-secondary partner
 - Though the Town has a strategic advantage in the existing designation of post-secondary lands, the Queensville site is currently underserved by public transit and is somewhat north of high-volume traffic corridors. As seen in other jurisdictions, the Town may have a better opportunity to attract a post-secondary partner if it can arrange a land exchange for other vacant, privately-held employment lands.



4 Focus Group Results

The following is a summary of meeting proceedings from focus groups in the Town of East Gwillimbury held on May 25, 2011. The purpose of the sessions was to solicit input and advice from the broader community on economic development. The group explored the following questions:

9. What unique strengths/assets does the community have that will attract investment in the future?
10. What new opportunities are there to stimulate business development, and interest in the community?
11. Implementation: How do we make this happen?
12. What are the most important investments we need to make as a community?

The **top opportunities** (question 2) identified were:

Morning Group

- **Cultural and Heritage Tourism** with supporting infrastructure- restaurants, shops, eventual arts centre to develop a cultural core but at the same time protecting existing heritage.
- Development of a **knowledge based economy**: e. g. university / college placement...Tech development - software etc
- **Green economy** - many potential new niches to fill - strong local interest ...Interesting green technology a good fit with EG's plans for the future, green industries, green technology, green transportation
- **Hard infrastructure** (roads, sewers etc.): Building the pipe to service development; What's the time line?
- **"Breadbasket of GTA"**. we become the food source for all the region capitalizing on trends in agritourism, buy local, 100 mile diet, organics, permaculture

Afternoon Group

- Leverage new development **to fund growth in a sustainable way** (as people & business moves here, we need to ensure that we wisely leverage the new \$\$) ... we want growth but NOT density
- Expand **transportation systems**, both roads and public transit (internally and externally)
- Service and **designate land for employment uses** esp along the 404 and green lane corridors ...Bring forward the big pipe asap (hard infrastructure)
- **Arts, culture, & Recreation amenities**... new large recreation facility



- Encouragement of **more small business interests**/entrepreneurs
- **Post secondary / University Campus...**a small university

Editor's Notes:

- The notes in this Executive Summary provide a summary of the findings from each session. Given the variety in each focus group, the summary above should be considered directional in nature and is by no means a scientific comparison.
- The symbol // indicates that two similar ideas have been merged together.
- This document contains the meeting proceedings and is not intended as a "Final Report"



5 Online Survey Results

East Gwillimbury Economic Development Strategy Survey Results

- **Number of Responses: 34**

ARE YOU RESPONDING AS A:



East Gwillimbury Assets, Opportunities and Challenges

1. What distinctive assets or advantages does East Gwillimbury have on which to build a strong economy?
 - **Quality of Life:** High quality of life associated with substantial natural green space for leisure and a lower cost of living compared to the urbanized south.
 - **Highway 404 Planned Extension:** Leads to new economic development opportunities such as a post-secondary institution in Queensville, and development along the main corridors such as Green Lane. Allows for quicker access into the Newmarket/Toronto area.
 - **Labour Force:** The residents are poised for growth and are highly adaptable. The working population is young and ready to grow with a changing economy.
 - **Proximity to Healthcare Services:** Proximity to large employment hubs such as the Southlake Regional Healthcare Centre.



2. What opportunities are there to strengthen East Gwillimbury and the region's economy?
 - **Increase Interest in Developing Local and Home Businesses in the Area:** There is an abundant amount of skilled labour force in and around East Gwillimbury that are tired of travelling south every day for work. They have innovative ideas, skills and knowledge and the motivation to move their work closer to home. The town has to reach out and help them develop their businesses locally and ease the pressures that they face in starting up.
 - **Attract High-growth Industries:** In attracting high-growth industries such as IT, Healthcare, the town can increase its capacity for high skilled jobs which can adversely act as an asset in attracting new businesses.

3. What challenges will impact the growth of the local economy?
 - **Infrastructure Costs:** Without the appropriate infrastructure and servicing in place, businesses cannot develop and expand.
 - **The Economy:** Businesses will change depending on the type of economy they are operating in. Businesses need to be flexible and desirable to change with the economy.
 - **Transportation:** Limited transportation connectivity outside of Highway 404 and towards other parts of the GTA. There is a need to improve on alternative transportation methods to increase connectivity within the Town (i.e. Bike lanes, better public transit.).
 - **Resource Protection:** Find businesses that are sustainable in natural resource use and are willing to be leaders in the community in protecting these resources. Focus on attracting renewable resource businesses.
 - **Education Levels:** The average level of education completed in East Gwillimbury is lower than most of the GTA. Unless addressed, the more desirable, higher paying jobs will stay to the south.

Additional Comments

- **Education Institution Needed:** The community needs an educational institution to attract and develop higher skilled labour force to East Gwillimbury.
- **Lose the “Bedroom community” mentality:** The residents are tired of the endless traffic jams which result in hours away from families. East Gwillimbury is a place that is attractive and healthy but until it loses its notion as a bedroom community by growing businesses and attracting new industries it will not be a place to live, work and play.



- **Promote Business Events:** As a resident of East Gwillimbury, it is more common to hear of a business event in Newmarket than one in East Gwillimbury. By promoting business related events such as the Green Business Seminar that was hosted in 2009 by the Town, this will help get the information out about how to start and develop businesses within the Town.
- **Focus on Pedestrians for Community Design:** Avoid the typical car-dominant suburban network design and focus on promoting pedestrian walkways along with intensification. It will improve the quality of life in our children and town.



6 Stakeholder Consultation Summary

Introduction

In order to understand the perspective of local business and community leaders in the Town of East Gwillimbury, the Town's Economic Development Officer and a consultant from Millier Dickinson Blais, conducted a series of one-on-one in-person interviews with key stakeholders. These stakeholders were business and community leaders as identified by the Economic Development Officer. In all, 16 people were consulted through this process. The stakeholders interviewed included:

1. Paul Mayhew, Doane Road Storage
2. Linda Shaw, President, East Gwillimbury Chamber of Commerce
3. Karen Evans, TD Canada Trust
4. Lisa Bachhofer, MSVA
5. Nancy Mehi, Mehi Veterinary Mobile
6. Joe Falcone, Ontario Sawdust
7. George Lacy, Shawneeki Golf Club
8. Kim Mortson, Body Design
9. Peter Budreo, South Lake Community Futures
10. Doug Lindeblom, Director, Economic Strategy & Tourism, Region of York
11. Rick Hamilton, SouthLake Commercial Realty
12. Dave Woods, Tricap Properties
13. Fraser Nelson, Metrus Developments
14. Norma Rose, Rose Family Farm
15. Don Chapman, Chapman Farms
16. Gerald Kellington, York Federation of Agriculture

The following provides a summary of the responses received. All responses have been aggregated to preserve the anonymity of individual respondents.



1. What is your vision for the Town? What is it you want the Town to be known for?

The vision for the Town of East Gwillimbury is to become a community that maintains and preserves its high quality of life and rural assets while it grows. The vision for the Town is one that maintains its green space, trails, agricultural lands and the unique downtowns with their small, independent retailers.

It is generally accepted that both population and employment growth will occur in the Town. Respondents especially welcome future employment growth (i.e. higher value-added jobs) since it will help prevent the Town from becoming a bedroom community. However, respondents want the growth to occur in a planned and orderly fashion and they want to ensure that there is a good rural-urban balance.

2. What opportunities are there to stimulate employment growth or new business investment in the short term/longer term?

- **Good location** - The Town of East Gwillimbury is located between the large market of the Greater Toronto Area to the south and the fast-growing municipalities of Keswick and Barrie to the north.
- **Accessible transportation network** - The transportation links are an advantage for promoting economic growth and business development for the Town. Highway 404 extension to Ravenshoe Road will be an asset for the Town when completed in 2012. This extension will make the GTA and Southern Ontario more easily accessible.
- **Favourable business costs and regulatory environment** - The Town's business costs and regulatory environment are viewed favourably. Taxes are lower in East Gwillimbury versus Georgina and the Town's development charges are considered low. In addition, industrial land is less expensive in East Gwillimbury compared to municipalities to the south. The Town provides good customer service and staff are attentive to companies without encumbering them with red tape.
- **100 Mile Diet consumer trend** - Local farmers are close to a large GTA consumer food market.

3. What local or regional assets do we have to assist in this effort?

- Existing pockets of industrial development (Harry Walker Parkway/Davis Drive area) and retail development (Green Lane/ Yonge Street area)
- Availability of labour - There is an adequate supply of skilled and unskilled labour.
- Green space, parks and recreational areas - The Town provides for good recreational cycling (trail system), mountain biking (Brown Hill Regional Forest) and road cycling (many GTA cyclists cycle through town to the Lake Simcoe destinations).
- South Lake Community Futures funding for new business



- Cultural and tourism assets - Cultural and tourism assets include: Sharon Temple, green space (Rogers Conservation area), recreational opportunities (golf course, marinas on the river) and events (Farmer's Market and Concerts in the Park).
- Transportation Infrastructure – Highway 404 and extension to Ravenshoe Road

4. How do we make this happen? Suggest 1-2 things that could be done?

- Ensure a good business climate by keeping taxes low and keeping red tape to a minimum.
- Invest in infrastructure, especially broadband infrastructure.
- Apply good planning principles by supporting and maintaining agricultural land uses and green spaces.
- Ensure there is a range of housing.
- Market the community so that there is an awareness of the Town; business opportunities are recognized; and the story of what makes the Town unique is known.
- Economic development initiatives include: a downtown funding program; creation of a cultural events centre; development of small professional offices and the recruitment of a post-secondary institution.

5. What do you see as the key barriers to employment growth (short term/longer term) in East Gwillimbury and surrounding region?

The major barriers to future economic growth are:

- No available industrial lands in the short term and municipal infrastructure is developing slowly to service these lands.
- East Gwillimbury does not have a substantial industrial base with large companies. There is also a small retail base. Most small businesses are 'home-based' and they do not provide a 'face' to the community and are hidden so the population may not know what services are available.
- Barriers relating to the Town's rural nature include: little broadband fibre connectivity; lack of transit; and lack of amenities.
- Regional and provincial regulations for agricultural operations.
- Increased traffic congestion due to the proximity to growing communities.

6. How do we exploit the success of our community/region?

- Market the community to the GTA audience so that there is an awareness of the Town of East Gwillimbury. The marketing message should reflect the uniqueness of the Town (e.g. a place that



provides for a good work/life balance) and it should provide for the recognition that business, cultural and tourism opportunities exist.

- Recognize East Gwillimbury's full economic potential by collaborating with the private sector, the Chamber, the Region and with the Region's northern municipalities.

7. What are the key considerations for an economic development strategy?

- Ensure availability and timeliness of infrastructure (e.g, water, sewage, transportation and internet).for employment lands.
- Be "Open for Business"
 - Increase the marketing effort so that an external audience knows why East Gwillimbury is unique and what business, cultural and tourism opportunities exist.
 - Elected officials need to pull out the 'welcome mat'.
- Attract new investment
 - Identify key sectors for investment.
 - Recruit a post-secondary institution.
 - Provide incentives for new investment.
 - Encourage green building practices for new developments so that it reinforces the town as a green community.
- Support existing businesses
 - Consider a small business incubator and a new business mentoring program.
- Preserve rural elements.
 - Understand the needs of agricultural operators and protect the rights of the farming sector.
 - Preserve green space.
- Retain the Town's youth

Conclusions

The consultation process represented a cross section of business and community stakeholders. People that were included in the process represented business, municipal governments and the non-profit sector.

The Town of East Gwillimbury wants to preserve its rural atmosphere by preserving its downtown cores, open spaces and agricultural lands. The community generally accepts that population and employment growth will occur, but hopes that this growth will occur in a managed, orderly fashion and that the Town will not become another bedroom community. The key concerns are how and what types of public investments are need to facilitate and manage growth.



The Town is fortunate in having an advantageous location, major transportation link and a large supply of employment land. Having little present industrial and commercial development and with infrastructure being built, the Town has a great deal of economic potential. East Gwillimbury will need to minimize the negative impact of growth as many stakeholders want to preserve the rural elements of their Town.